



# Exploring Structural Differences in the Creative Industries of Texas Metropolitan Areas

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# Economics Research Group

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# Outline

The purpose of the study is to examine the creative industries in Texas metropolitan areas.

- Economic structure of the metropolitan areas
- Creative economies and their subsectors
- Economic resiliency – Texas creative economies and the recession

# Selected Creative Economies 2015

<b>Region</b>	<b>Employment</b>	<b>Population</b>
New York-Newark-Jersey City	562,387	20,182,305
Los Angeles-Long Beach-Anaheim	435,871	13,340,068
Chicago-Naperville-Elgin	161,678	9,551,031
<b>Dallas-Ft. Worth-Arlington</b>	<b>98,639</b>	<b>7,102,796</b>
Atlanta-Sandy Springs-Roswell	93,851	5,710,795
Miami-Fort Lauderdale-West Palm Beach	90,443	6,012,331
Minneapolis-St. Paul-Bloomington	75,558	3,524,583
<b>Houston-The Woodlands-Sugar Land</b>	<b>62,349</b>	<b>6,656,947</b>
<b>Austin-Round Rock</b>	<b>40,755</b>	<b>2,000,860</b>
<b>San Antonio-New Braunfels</b>	<b>23,737</b>	<b>2,384,075</b>



Map data ©2016 Google, INEGI

# Basic Economic Structure

	<b>DFW</b>	<b>Austin</b>	<b>San Antonio</b>	<b>Houston</b>
Mining, Logging and construction	5.30%	6.06%	5.74%	10.29%
Manufacturing	6.72%	5.71%	4.61%	7.76%
Trade, Transportation and Utilities	20.19%	17.20%	17.38%	20.46%
Information	2.74%	2.75%	2.12%	1.06%
Financial Activities	9.23%	5.50%	8.34%	5.07%
Professional and Business Services	18.52%	16.76%	12.77%	15.34%
Education and Healthcare	12.08%	11.71%	15.54%	12.76%
Leisure and Hospitality	10.32%	12.27%	12.61%	10.59%
Other Services	3.35%	4.24%	3.85%	3.53%
Government	11.56%	17.80%	17.04%	13.14%
Total	100.00%	100.00%	100.00%	100.00%

# Data

- Firm employment data was taken from the Bureau of Labor Statistics' Quarterly Census of Employment via the Texas Workforce Commission.
- U.S. Census Nonemployer Statistics.
- By using both of these databases as sources, this study is able to capture employment at creative firms (the Texas Workforce Commission data) while also counting those who are self-employed and working on a contractual basis (the U.S. Census data).
- May be minimal double counting.

# Subsectors 2005-2015

**Table 3. Change in Regional and State Creative Economy Employment by Sector**

Sector	Austin		Dallas-Ft. Worth		Houston		San Antonio		Texas	
	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg
<b>Museums and Education</b>	115.3%	612	30.4%	794	37.1%	886	100.2%	591	46.1%	3,499
<b>Performing and Visual Arts</b>	74.0%	6,746	51.2%	12,749	25.8%	5,062	32.7%	2,310	38.5%	30,361
<b>Film, Radio, and TV</b>	59.4%	2,340	-21.3%	-3,969	-1.3%	-94	-12.8%	-551	-15.3%	-8,454
<b>Design and Publishing</b>	38.0%	4,813	-7.6%	-3,520	9.7%	2,413	-0.6%	-58	-0.1%	-88

Source: Bureau of Labor Statistics, U.S. Census, Texas Workforce Commission



# Museums and Education 2005-2015

	Austin		Dallas-Ft. Worth		Houston		San Antonio		Texas	
Sector	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg
<b>Museums and Education</b>										
<b>Museums</b>	27.0%	60	25.6%	354	24.0%	376	117.0%	365	32.5%	1,416
<b>Fine Arts Schools</b>	178.6%	552	35.8%	440	62.0%	510	81.3%	226	64.3%	2,083
<b>Total</b>	115.3%	612	30.4%	794	37.1%	886	100.2%	591	46.1%	3,499

# Performing and Visual Arts 2005-2015

Sector	Austin		Dallas-Ft. Worth		Houston		San Antonio		Texas	
	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg
<b>Performing and Visual Arts</b>										
<b>Independent artists, writers, and performers</b>	64.5%	3,566	36.5%	4,218	31.8%	2,702	23.2%	797	36.4%	13,495
<b>Art Dealers</b>	19.5%	38	-1.2%	-7	-30.5%	-173	-18.4%	-28	-17.6%	-363
<b>Performing arts companies</b>	157.4%	1,226	85.7%	2,057	85.0%	1,821	128.9%	584	92.8%	6,715
<b>Promoters of performing arts</b>	302.4%	889	151.3%	4,209	-33.3%	-988	71.5%	651	60.5%	5,177
<b>Sound recording industries</b>	-23.9%	-165	-1.7%	-15	24.8%	128	3.2%	5	-1.5%	-41
<b>Musical instrument manufacturing</b>	85.5%	53	N/A	-19	N/A	-51	N/A	0	N/A	24
<b>Musical Instrument and Supplies Stores</b>	-5.2%	-15	3.2%	27	17.7%	107	32.8%	94	9.7%	291
<b>Photographic services</b>	115.0%	1,076	55.8%	2,006	41.0%	1,126	51.4%	465	46.5%	5,291
<b>Ornamental and architectural metal work manufacturing</b>	-6.5%	-16	29.6%	327	29.9%	307	-66.2%	-409	-12.1%	-530
<b>Custom architecture woodwork and millwork</b>	95.9%	94	-5.2%	-54	17.7%	83	107.9%	151	12.7%	302
<b>Total</b>	74.0%	6,746	51.2%	12,749	25.8%	5,062	32.7%	2,310	38.5%	30,361

Source: Bureau of Labor Statistics, U.S. Census, Texas Workforce Commission

# Film, Radio, and TV 2005-2015

Sector	Austin		Dallas-Ft. Worth		Houston		San Antonio		Texas	
	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg
<b>Film, Radio, and TV</b>										
<b>Motion picture and video industries</b>	188.9%	3,222	24.5%	1,745	54.0%	1,480	40.8%	615	51.9%	8,683
<b>Radio and television broadcasting</b>	-20.7%	-322	-21.2%	-954	-24.3%	-864	-17.6%	-334	-17.6%	-3,270
<b>Cable and other subscription programming</b>	N/A	N/A	67.8%	793	N/A	31	N/A	0	N/A	-3,492
<b>Video tape and disc rental</b>	-83.1%	-560	-95.3%	-5,553	-78.1%	-741	-93.1%	-832	-91.1%	-10,375
<b>Total</b>	59.4%	2,340	-21.3%	-3,969	-1.3%	-94	-12.8%	-551	-15.3%	-8,454

Source: Bureau of Labor Statistics, U.S. Census, Texas Workforce Commission

# Design and Publishing 2005-2015

Sector	Austin		Dallas-Ft. Worth		Houston		San Antonio		Texas	
	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg	% Chg	Net Chg
<b>Design and Publishing</b>										
<b>Architectural services</b>	37.2%	627	7.1%	457	15.0%	657	13.8%	190	11.5%	1,811
<b>Specialized design services</b>	95.6%	1,859	31.2%	2,153	37.9%	1,760	19.8%	305	41.7%	7,272
<b>Sign Manufacturing</b>	16.5%	69	23.5%	368	24.7%	301	13.2%	65	14.5%	726
<b>Newspaper publishers</b>	-28.3%	-623	-48.4%	-3,361	-27.7%	-1,064	-41.5%	-789	-36.9%	-8,754
<b>Periodical publishers</b>	-37.0%	-200	-37.5%	-682	23.6%	331	-17.0%	-46	-17.3%	-898
<b>Book Publishers</b>	-15.5%	-141	-50.1%	-1,129	19.4%	44	N/A	858	N/A	-2,059
<b>Book, Periodical, and Music Stores</b>	-41.9%	-607	-46.5%	-1,878	-37.0%	-1,113	-47.6%	-574	-39.9%	-5,935
<b>Internet publishing and broadcasting and web search portals</b>	N/A	1,965	N/A	1,489	N/A	695	N/A	181	N/A	5,303
<b>Advertising, public relations, and related services</b>	53.0%	1,864	-5.7%	-937	13.1%	802	-9.1%	-248	7.0%	2,446
<b>Total</b>	38.0%	4,813	-7.6%	-3,520	9.7%	2,413	-0.6%	-58	-0.1%	-88

Source: Bureau of Labor Statistics, U.S. Census, Texas Workforce Commission

# Temporal Analysis

## Change in Regional, State, and National Creative Employment: 2005 – 2015

	% Chg 2005 - 2007	Net Chg 2005 - 2007	% Chg 2007 - 2009	Net Chg 2007 - 2009	% Chg 2009 - 2015	Net Chg 2009 - 2015	% Chg 2005 - 2015	Net Chg 2005 - 2015
<b>Austin Creative Emp</b>	15.1%	3,969	0.7%	208	34.0%	9,665	55.3%	14,511
<b>Austin Total Emp</b>	10.2%	83,171	-1.7%	-15,490	26.2%	231,589	36.7%	299,270
<b>DFW Creative Emp</b>	3.1%	2,942	-5.4%	-5,195	9.3%	8,188	6.5%	6,054
<b>DFW Total Emp</b>	6.8%	220,572	-3.2%	-108,831	18.0%	601,540	22.1%	713,281
<b>Houston Creative Emp</b>	9.2%	4,969	-0.4%	-210	6.0%	5,584	15.3%	8,267
<b>Houston Total Emp</b>	7.9%	218,672	-0.1%	-2,631	16.3%	483,590	24.4%	699,631
<b>San Antonio Creative Emp</b>	3.7%	797	-4.0%	-887	11.2%	2,524	10.7%	2,292
<b>San Antonio Total Emp</b>	7.0%	63,879	-0.3%	-3,211	16.7%	162,150	24.5%	222,818
<b>Texas Creative Emp</b>	5.9%	15,676	-4.2%	-11,824	8.0%	21,466	9.6%	25,318
<b>Texas Total Emp</b>	6.9%	785,903	-1.3%	-159,766	15.6%	1,880,756	21.9%	2,506,893
<b>Nation Creative Emp*</b>	6.4%	282,995	-7.3%	-345,794	4.2%	182,448	2.7%	119,649
<b>Nation Total Emp*</b>	3.4%	5,110,436	-4.3%	-6,770,457	6.8%	10,146,876	5.6%	8,486,855

Source: Bureau of Labor Statistics, U.S. Census, Texas Workforce Commission

\* National employment data for 2015 represents 2014 numbers

# Temporal Analysis

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# Thank You

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