

Cultural and Creative Industries



Missouri Industry Brief CREATIVE INDUSTRIES

Creative Industries: Employment and Wages

Creativity, according to the *Oxford Handbook on Creative Industries*, is “a process of generating something new by combining elements that already exist.” This description of creativity applies across many industries and professions; creative industries, however, are most often associated with the arts— and increasingly with digital media.

Creative industries represent 2.5 percent of total state employment. The industry is marked by small employers averaging 16 workers per establishment. The 2015 average annual wage was \$42,789: higher than in 2011 but less than the state’s average annual wage of \$45,600.

Nationally, creative industries paid an average \$73,420. This high wage is partly due to the influence of the California and New York economies and partly to the inclusion of *Software Publishing* industry in the creative sector.

Missouri Industry Facts

Creative Industry Employment
69,738

Creative Industry Establishments
5,804

Creative Industry Average Wage
\$42,789

What is a Creative Industry?

Firms and workers engaged in the production of goods and services that increase a region’s quality of life— through culture and innovation.

Several international, state, and nonprofit agencies have considered the question: What is a creative industry? Based on a review of that research, Missouri’s creative industries were grouped into six categories:

Category	Jobs
Printing & Publishing	23,526
Commercial Art & PR	13,289
Education Support	10,175
Film & Broadcasting	9,732
Design	7,928
Performing Arts	5,088
Creative Industries	69,738

Source: See Appendix

Commercial Art & Public Relations— the second largest group after Printing & Publishing — includes advertising, promotion, public relations, and photography industries. The group added 1,400 jobs between 2011 and 2015 compared to the nearly 6,400 jobs lost in Printing and Publishing. Printing and Publishing industries continue to restructure in the face of global and technological change.

CREATIVE INDUSTRIES

A third of all creative industry employment is in the Printing and Publishing group: 1,572 units or establishments employing 23,526 workers across 14 industries. Industries with high concentration are *Book Printing*, *Commercial Screen Printing*, and *Commercial Printing*. Of these three, *Commercial Screen Printing* gained jobs between 2011 and 2015. This industry's 2,500 workers are engaged in printing on apparel and textile products.

The inclusion of digital among creative industries has impacted wages. While the state does not specialize in *Software Publishing*, this industry is the ninth largest industry employer, among creative industries, by size—nearly 2,300 workers. Average annual wages in this industry: \$106,499.

Theater companies and Dinner Theaters are the fourth most concentrated creative industry in the state. A majority of employers in this industry are located in Branson. Jobs increased a mere half percent between 2011 and 2015. The industry's average annual wage was \$25,334.

Educational Support Institutions

The unusually high employment concentration in *Libraries and Archives* is due to the state's three U.S. National Archives and Records Administration research facilities in St. Louis, Kansas City and Lee's Summit

The *Zoo's and Botanical Gardens* industry has the second highest concentration in the state. The world famous Missouri Botanical Garden as well as employment in the metropolitan zoological district explains the high LQ.

Educational support institutions—such as libraries, museums, and zoological parks—play an important role in a region's quality of life. Workers at these institutions transform complex ideas into easy-to-understand sound bites and eye-catching displays.

LQ or Location Quotient refers to a measure of industry concentration. The LQ shows the relative distribution of industry employment in a region relative to that industry's employment in larger area such as the nation. For example an LQ of 2.0 means that that industry is twice as concentrated as the national average.

TOP 10 CREATIVE INDUSTRIES						
Ranked by Location Quotient and Jobs greater than 1,000						
NAICS	Industry Title	Units	Jobs	Average Annual Wage	LQ	Job Growth 2011 - 2015
519120	Libraries and Archives	286	5,596	\$26,191	8.74	-3.5%
712130	Zoos & Botanical Gardens	20	2,240	\$30,356	2.53	14.2%
323113	Commercial Screen Printing	159	2,517	\$29,345	1.77	8.7%
711110	Theater Companies & Dinner Theaters	85	2,069	\$25,334	1.66	0.5%
424920	Book, Periodical, Newspaper Merchant Whls	42	1,155	\$37,415	1.52	-24.5%
541890	Other Services Related to Advertising	170	2,481	\$30,910	1.37	53.3%
323111	Commercial Printing (not Screen and Books)	468	7,875	\$44,252	1.22	-7.0%
515112	Radio Stations	102	1,632	\$39,274	1.20	-6.8%
515210	Cable & Other Subscription Program.	20	1,425	\$59,157	1.19	10.0%
711310	Promoters of Performing Arts, Sports, and Similar Events w/ Facilities	70	2,210	\$26,014	1.13	1.7%

Creative Industries: Occupations

The latest Missouri Occupational Employment Statistics show 79,810 occupational jobs in the state. There are more occupational workers than industry jobs; this is because there are creative occupations in firms outside the creative sectors. Conversely, there are jobs in the creative sectors that are not associated with the creative process but are necessary for running a business – e.g., accountants and managers among others.

The largest creative occupation, by number, is *Software Application Developer*. There are 13,270 software developers in Missouri averaging \$92,660 in annual pay. *Non-farm Animal Caretakers* earn the least at \$21,680.

Floral designers—which number 1,780—had the highest LQ at 2.04 and average annual wages are in the mid \$20,000. Printing and Publishing occupations offer more moderate salaries: ranging from \$31,500 for *Print Binding and Finishing Workers* (LQ 1.65) to \$42,000 for *Prepress Technicians* (LQ 1.50). There are nearly 5,000 *Printing Press Operators* in the state earning an average \$37,500.

What is a Creative Occupation?

The New England Foundation for the Arts defined creative occupations as: Thinkers and doers trained in specific cultural, artistic and innovative skills who add value to leading industries. The U.S. Bureau of Labor Statistics offered a more concrete description. It identified those occupations in which the creative process is integral—occupations that include writers and authors, fashion designers, and musicians. Based on this work, Missouri's creative occupations were grouped into seven categories:

Category	Employment
Printing & Publishing	26,570
Education Support	16,590
Design	13,890
Commercial Art & PR	11,550
Artisans	4,560
Performing Arts	4,180
Film & Broadcasting	2,470
Creative Occupations	79,810

Source: See Appendix

TOP 10 CREATIVE OCCUPATIONS

Ranked by number of workers

SOC-Code	Occupation Title	Workers	Average Annual Wage	LQ	Education	Job-Training
15-1132	Software Developers	13,270	\$92,660	0.90	Bachelor's Degree	none
51-5112	Printing Press Operators	4,990	\$37,470	1.51	High School Diploma	Moderate-Term
27-3031	Public Relations Specialists	4,690	\$56,370	1.09	Bachelor's Degree	none
27-1024	Graphic Designers	4,210	\$47,900	1.05	Bachelor's Degree	none
27-2022	Coaches & Scouts	3,360	\$36,590	0.76	Bachelor's Degree	none
25-3021	Self-Enrichment Education Teachers	3,260	\$36,070	0.76	High School Diploma	none
39-2021	Non-Farm Animal Caretakers	3,110	\$21,660	0.91	none	Short-Term
25-4021	Librarians	2,700	\$52,130	1.05	Master's Degree	none
41-3011	Advertising Sales Agents	2,550	\$42,220	0.87	High School Diploma	Moderate Term
51-3011	Bakers	2,480	\$23,400	0.71	none	Long-Term

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Definition

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Note:

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MISSOURI ECONOMIC RESEARCH AND INFORMATION CENTER



APPENDIX

CREATIVE INDUSTRIES

Creative Industries

NAICS	Description	Category	2015 Establishments	2015 Employment	2015 Average Wage	2015 Employment Location Quotient	2011 -2015 Employment Change
323111	Commercial Printing (except Screen and Books)	Printing & Publishing	468	7,875	\$44,252	1.22	-7.0%
323113	Commercial Screen Printing	Printing & Publishing	159	2,517	\$29,345	1.77	8.7%
323117	Books Printing	Printing & Publishing	13	1,002	\$39,871	2.44	-31.5%
424920	Book, Periodical, Newspaper Merchant Whlsrs	Printing & Publishing	42	1,155	\$37,415	1.52	-24.5%
451211	Book Stores	Printing & Publishing	120	1,647	\$22,334	1.03	-19.5%
511110	Newspaper Publishers	Printing & Publishing	243	4,058	\$35,483	1.11	-20.7%
511120	Periodical Publishers	Printing & Publishing	135	1,383	\$58,283	0.72	-10.3%
511130	Book Publishers	Printing & Publishing	47	393	\$43,355	0.32	-26.8%
511191	Greeting Card Publishers	Printing & Publishing	7	165	\$70,397	1.73	-94.6%
511199	All Other Publishers	Printing & Publishing	26	288	\$44,520	1.42	-46.6%
511210	Software Publishers	Printing & Publishing	168	2,263	\$106,499	0.34	-13.7%
512230	Music Publishers	Printing & Publishing	6	20	\$44,510	0.26	-42.9%
519110	News Syndicates	Printing & Publishing	9	147	\$88,049	0.63	-16.9%
519130	Internet publishing and broadcasting	Printing & Publishing	129	613	\$60,612	0.16	32.7%
453920	Art Dealers	Performing Arts	59	209	\$25,799	0.62	41.2%
611610	Fine Arts Schools	Performing Arts	241	1,397	\$11,862	0.92	39.7%
711110	Theater Companies and Dinner Theaters	Performing Arts	85	2,069	\$25,334	1.66	0.5%
711120	Dance Companies	Performing Arts	8	182	\$21,981	1.00	29.1%
711130	Musical Groups and Artists	Performing Arts	59	567	\$47,098	0.91	-19.8%
711190	Other Performing Arts Companies	Performing Arts	12	122	\$10,192	0.78	-28.2%
711510	Independent Artists, Writers, and Performers	Performing Arts	225	542	\$30,725	0.53	-2.3%
512110	Motion Picture and Video Production	Film & Broadcasting	175	524	\$44,860	8.74	-6.3%
512120	Motion Picture and Video Distribution	Film & Broadcasting	nd	nd	nd	1.01	nd
512131	Motion Picture Theaters (except Drive-Ins)	Film & Broadcasting	104	2,881	\$12,014	0.86	5.4%
512132	Drive-In Motion Picture Theaters	Film & Broadcasting	nd	nd	nd	2.53	nd
512191	Teleproduction and Other Postproduction Services	Film & Broadcasting	15	41	\$54,131	0.12	-37.9%
512199	Other Motion Picture and Video Industries	Film & Broadcasting	nd	nd	nd	1.27	nd
512220	Integrated Record Production/Distribution	Film & Broadcasting	nd	nd	nd	1.09	nd
512240	Sound Recording Studios	Film & Broadcasting	17	48	\$38,081	0.38	26.3%
512290	Other Sound Recording Industries	Film & Broadcasting	nd	nd	nd	0.14	nd
515111	Radio Networks	Film & Broadcasting	26	841	\$34,036	0.02	-1.6%
515112	Radio Stations	Film & Broadcasting	102	1,632	\$39,274	0.05	-6.8%
515120	Television Broadcasting	Film & Broadcasting	48	2,129	\$59,137	0.53	0.5%
515210	Cable and Other Subscription Programming	Film & Broadcasting	20	1,425	\$59,157	0.20	10.0%
519120	Libraries and Archives	Education Support	286	5,596	\$26,191	2.35	-3.5%
712110	Museums	Education Support	80	2,033	\$31,356	1.20	-2.1%
712120	Historical Sites	Education Support	nd	nd	nd	0.84	nd
712130	Zoos and botanical gardens	Education Support	20	2,240	\$30,356	1.19	14.2%
332323	Ornamental and Architectural Metal Work Mfg.	Design	59	538	\$39,506	0.71	-7.1%
337212	Custom Architectural Woodwork and Millwork Mfg	Design	22	309	\$39,696	0.83	20.7%
339992	Musical Instrument Manufacturing	Design	14	60	\$28,905	0.28	93.5%
451140	Musical Instrument and Supplies Stores	Design	93	795	\$24,438	1.30	10.7%
541310	Architectural Services	Design	368	3,723	\$69,864	1.06	12.5%
541320	Landscape Architectural Services	Design	80	402	\$38,791	0.56	60.2%
541340	Drafting Services	Design	72	155	\$50,084	0.96	22.0%
541410	Interior Design Services	Design	151	459	\$39,672	0.61	37.0%
541420	Industrial Design Services	Design	19	62	\$42,268	0.19	14.8%
541430	Graphic Design Services	Design	305	1,335	\$56,660	1.09	26.3%
541490	Other Specialized Design Services	Design	25	90	\$50,379	0.31	-21.7%
541810	Advertising Agencies	Commercial Art & Public Relations	389	4,237	\$69,582	1.11	10.3%
541820	Public Relations Agencies	Commercial Art & Public Relations	152	1,002	\$83,825	0.89	3.5%
541830	Media Buying Agencies	Commercial Art & Public Relations	15	40	\$58,902	0.13	-11.1%
541840	Media Representatives	Commercial Art & Public Relations	59	310	\$46,851	0.63	31.4%
541850	Display Advertising	Commercial Art & Public Relations	75	461	\$48,775	0.64	-7.6%
541860	Direct Mail Advertising	Commercial Art & Public Relations	63	619	\$57,019	0.70	-6.2%
541890	Other Services Related to Advertising	Commercial Art & Public Relations	170	2,481	\$30,910	1.37	53.3%
541921	Photography Studios, Portrait	Commercial Art & Public Relations	226	1,025	\$22,669	1.16	-13.6%
541922	Commercial Photography	Commercial Art & Public Relations	77	204	\$41,931	1.08	-25.5%
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities	Commercial Art & Public Relations	70	2,210	\$26,014	1.13	1.7%
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities	Commercial Art & Public Relations	82	566	\$29,055	0.87	147.2%
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	Commercial Art & Public Relations	45	134	\$32,437	0.30	-14.6%
CREATIVE INDUSTRIES			5,785	69,221	\$42,789	1.01	-4.7%

Source: MERIC, QCEW

APPENDIX

CREATIVE INDUSTRIES

Creative Occupations

SOC CODE	OCCUPATION	CATEGORY	2015 Employment	2015 Average Wage	2015 Occupational Location Quotient
15-1132	Software Developers, Applications	Printing & Publishing	13,270	\$92,660	0.90
15-1134	Web Developers	Printing & Publishing	1,510	\$61,660	0.60
27-3022	Reporters & Correspondents	Printing & Publishing	590	\$36,210	0.73
27-3041	Editors	Printing & Publishing	1,370	\$56,980	0.72
27-3042	Technical Writers	Printing & Publishing	960	\$63,440	0.98
27-3043	Writers and Authors	Printing & Publishing	820	\$64,710	0.96
43-9031	Desktop Publishers	Printing & Publishing	320	\$34,150	1.25
51-5111	Prepress Technicians and Workers	Printing & Publishing	1,040	\$42,010	1.50
51-5112	Printing Press Operators	Printing & Publishing	4,990	\$37,470	1.51
51-5113	Print Binding and Finishing Workers	Printing & Publishing	1,700	\$31,570	1.65
27-1011	Art Directors	Performing Arts	1,020	\$106,230	1.50
27-1019	Artists and Related Workers, All Other	Performing Arts	920	\$68,100	6.09
27-2011	Actors	Performing Arts	1,110	ND	1.12
27-2031	Dancers	Performing Arts	190	ND	0.97
27-2041	Music Directors and Composers	Performing Arts	330	\$54,660	0.79
27-2042	Musicians and Singers	Performing Arts	540	ND	0.74
41-9012	Models	Performing Arts	70	\$32,210	0.84
25-9011	Audio-Visual and Multimedia Collections Specialists	Film & Broadcasting	40	\$43,210	0.22
27-1014	Multimedia Artists and Animators	Film & Broadcasting	380	\$59,490	0.65
27-3011	Radio and Television Announcers	Film & Broadcasting	990	\$36,080	1.65
27-4012	Broadcast Technicians	Film & Broadcasting	450	\$38,230	0.80
27-4014	Sound Engineering Technicians	Film & Broadcasting	180	\$57,290	0.67
27-4032	Film & Video Editors	Film & Broadcasting	430	\$52,200	0.79
13-1121	Meeting, Convention, and Event Planners	Educational Support	1,670	\$48,030	0.97
25-3021	Self-Enrichment Education Teachers	Educational Support	3,260	\$36,070	0.76
25-4011	Archivists	Educational Support	100	\$53,440	0.89
25-4012	Curators	Educational Support	150	\$58,590	0.63
25-4021	Librarians	Educational Support	2,700	\$52,130	1.05
25-4031	Library Technicians	Educational Support	1,880	\$36,130	1.02
29-1125	Recreational Therapists	Educational Support	430	\$41,380	1.23
39-2021	Nonfarm Animal Caretakers	Educational Support	3,110	\$21,680	0.91
39-7011	Tour Guides and Escorts	Educational Support	1,140	\$21,980	1.61
43-4121	Library Assistants, Clerical	Educational Support	2,150	\$23,720	1.09
27-1012	Craft Artists	Design - Visual Artist	100	\$26,020	0.93
27-1013	Fine Artists, Including Painters, Sculptors, and Illustrators	Design - Visual Artist	160	\$35,930	0.66
27-1021	Commercial and Industrial Designers	Design - Visual Artist	420	\$59,750	0.69
27-1022	Fashion Designers	Design - Visual Artist	110	\$71,030	0.28
27-1023	Floral Designers	Design - Visual Artist	1,780	\$24,550	2.04
27-1024	Graphic Designers	Design - Visual Artist	4,210	\$47,900	1.05
27-1025	Interior Designers	Design - Visual Artist	1,190	\$53,940	1.19
27-1027	Set & Exhibit Designers	Design - Visual Artist	200	\$53,070	0.84
27-1029	Designers, All Other	Design - Visual Artist	120	\$52,580	0.90
27-4021	Photographers	Design - Visual Artist	1,200	\$36,110	1.22
51-9194	Etchers and Engravers	Design - Visual Artist	290	\$32,150	1.54
17-1011	Architects, Except Landscape and Naval	Design - Applied Artist	1,810	\$79,030	0.98
17-1012	Landscape Architects	Design - Applied Artist	240	\$63,920	0.62
17-3011	Architectural and Civil Drafters	Design - Applied Artist	1,740	\$49,230	0.93
17-3019	Drafters, All Other	Design - Applied Artist	320	\$55,740	1.05
11-2031	Public Relations and Fundraising Managers	Commercial Art & Public Relations	790	\$111,300	0.67
13-1011	Agents/Business Managers of Artists, Performers, Athletes	Commercial Art & Public Relations	160	\$46,960	0.61
27-2022	Coaches & Scouts	Commercial Art & Public Relations	3,360	\$36,590	0.76
27-3031	Public Relations Specialists	Commercial Art & Public Relations	4,690	\$56,370	1.09
41-3011	Advertising Sales Agents	Commercial Art & Public Relations	2,550	\$42,220	0.87
35-1011	Chefs and Head Cooks	Artisan	1,810	\$43,710	0.71
51-3011	Bakers	Artisan	2,480	\$23,400	0.71
51-7099	Woodworkers, All Other	Artisan	270	\$27,520	2.00
CREATIVE OCCUPATIONS			79,810	\$48,882	1.07

Source: MERIC, OES