

# Creative Cities

An overview of top creative cities in USA and Canada

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## 1. Introduction

### 1.1 Purpose and mandate

As part of the British Council's on-going mandate to connect Higher Education Institutions (HEIs) based in the U.K. with opportunities in the U.S. and Canada, the British Council (the BC) has contracted Nordicity to conduct an assessment of the state of the creative industries in the United States and Canada. In so doing, Nordicity has created a summary of the creative industries in the U.S. (Section 2), as well as "Industry Dashboards" summarising the best available data on each of the creative industries examined (Section 3).

Other than providing general economic information about a select group of creative industries in the USA and Canada, the objective of this research is to identify those American and Canadian jurisdictions that account for the largest share of creative industry activity (for those specific industry segments). In turn, this information may be used for targeted marketing and student recruitment.

### 1.2 Scope and data limitations

Nordicity has conducted research on seven creative industry segments as mandated by the British Council:

- Film and TV,
- Animation (incl. post-production),
- Software and Computer Services (i.e. Digital Media),
- Visual Art,
- Design and Fashion,
- Recorded Music, and
- Live Music and Performing Arts.

For each creative industry, Nordicity has collected the best publicly-available data. As such, the data presented for the national profile and individual dashboards has been collected from a variety of reputable sources - and so may not be perfectly comparable. Also, not all data is available for all target industries.

## 2. Defining the Creative Industries

The past decade has seen a great deal of attention shift toward the creative economy, as creativity is increasingly recognised as a key driver of economic and social growth. In line with this trend, the creative industries have become a priority to many governments and as such, the measurement of the size and growth of this high-potential sector is more important than ever before. But to measure a sector, one has to define it. Numerous attempts have been made to define the creative industries over the past few years, but there is no one overarching universal definition.

Three different approaches to defining the creative industries are outlined below.

### The Concentric Circles Model

The concentric circles model was initially proposed by Australian cultural economist David Thorsby and has since been adopted in various forms.<sup>1</sup> In this approach, the structure of the creative industries is represented as a series of radiating circles. These circles emanate from the core creative activity, such as visual and performing arts, with each subsequent concentric circle involving activities that are increasingly removed from that original artistic expression.

In 2012, the European Statistical System Network on Culture developed a variation of the concentric model, called the ESSnet Cultural Framework, which mapped creative activities according to ten domains (e.g., books and press, audiovisual, etc.) and six functions (e.g., creation, production, dissemination, trade, etc.).<sup>2</sup>

### The Copyright Model

Another approach to defining creative activity in the economy has been developed by the World Intellectual Property Organisation (WIPO). In contrast to the concentric circles model, which focuses on the creative *activity*, the copyright model emphasises the creative *product*. Therefore, the creative industries are defined by the level of intellectual property in their cultural output. Categories in the copyright model include: core copyright (e.g., music, film, software, photography, etc.), partial copyright (e.g., furniture, toys, apparel, textiles, etc.), interdependent industries and support industries.<sup>3</sup>

Despite the fact that the concentric circles and copyright models are the two most widely recognised approaches to defining the creative industries, their application has not been uniform across jurisdictions. In fact, many countries, regions and cities have developed their own definitions, often integrating aspects of these two approaches. While jurisdictions continue to allocate resources dedicated to measuring their respective creative industries, the variety of definitions in place limits their ability to compare or benchmark against comparable environments.

### The Creative Intensity Model

The most recently developed approach perhaps offers the most innovative and replicable method of defining the creative industries, and the creative economy as a whole.

The dynamic mapping approach was adopted by the U.K. Department for Culture, Media and Sport (DCMS) in 2014 as a revision to the existing DCMS definition that was originally developed in 1998

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<sup>1</sup> Thorsby, D. (2008), "Modelling the cultural industries," in *International Journal of Cultural Policy*, 14 (3), 217-23. An update in 2013 by the Work Foundation emphasises an activity's "expressive value," as cited in UNCTAD, *Creative Economy Report 2013*.

<sup>2</sup> ESSnet-Culture (2012). *European Statistical System Network on Culture, Final Report*.

<sup>3</sup> World Intellectual Property Organization (WIPO) (2013), *Guide to Surveying the Economic Contribution of the Copyright-Based Industries*.

and periodically updated. Rather than a static selection of what can and cannot be considered a creative industry, Dynamic Mapping assesses the *creative intensity* of an industry, based on the proportion of the total workforce in an industry that is creatively occupied. In short, a set of criteria is used to determine what occupations are creative, the prevalence of those occupations in each industry is then measured, and industries that surpass an established tipping point (in its current iteration, 30%) are defined as creative.<sup>4</sup>

The approach is innovative as it can be adapted to respond to changing conditions in industries that may make them more or less creative over time. It is also replicable as it provides a clearly-defined methodology for defining a creative occupation and a creative intensity threshold for defining a creative industry. It is useful because it allows a comparable and uniform measurement system that nonetheless allows for jurisdictional differences.

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<sup>4</sup> Nesta (2013). *A Dynamic Mapping of the U.K.'s Creative Industries*. Hasan Bakhshi, Alan Freeman and Peter Higgs.

### 3. U.S. National Summary

The following sections present a summary profile of national-level activity in the U.S. for the creative industries covered under the mandate of this report. The section includes an overview of the size, shape and structure of the various creative industry segments at a national level. It also provides a summary of the national-level or federal-level policy, regulatory and support ecosystem in which those industries operate.

#### 3.1 Creative industry employment

According to the National Endowment for the arts, the production of arts and cultural products and services by “copyright-intensive” industries employed roughly 1.6 million people in the United States in 2012.<sup>5</sup> However, that figure includes industries not covered under the scope of this report.

According to data collected by Nordicity, the six creative industry segments covered under the mandate of this report **generate just over 1 million jobs in the U.S. economy.**<sup>6</sup> The following chart provides a breakdown of which creative industry segments generate the most employment. The biggest employers are Design and Fashion, Film and TV (including post-production), and Performing Arts (including live music).

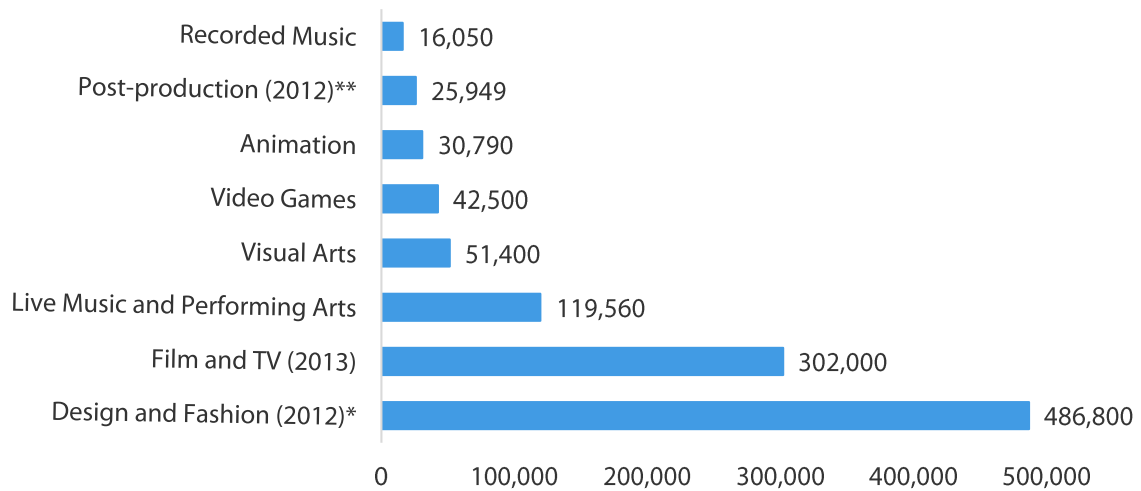
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<sup>5</sup> The NEA uses “copyright-intensive” industries as a proxy for measuring the creative industries, based on the U.S. Patent Office definition of “copyright-intensive” industries. The NEA definition of “copyright-intensive” industries includes: Broadcasting; Motion picture and video production; Performing arts and independent artists, writers and performers; Advertising agencies; Sound recording; Specialised design; Photographic services (including photo-processing services [except one-hour photo processing]); Computer system design, and Other information services (excluding translation services).

*Arts and Cultural Production Satellite Account Issue Brief #4: Arts and Cultural Contributions to the Creative Economy*, National Endowment for the Arts, 2015.

<sup>6</sup> The total employment figure presented here is an estimate based on existing publicly available data. The data used to calculate this estimate comes from a variety of sources and may be from different years. As such, this figure should not be taken as an exact figure of total employment but rather an estimate of the general level of employment created by these creative industries combined.

Exhibit 1 – Total National employment, by creative industry segment



\*Note, throughout the report, Design and Fashion sectors are treated collectively, reflecting available data from the Arts and Cultural Production Satellite Account (ACPSA) - via the U.S. Bureau of Economic Analysis - and the acknowledgement of the British Council's Architecture, Design and Fashion Department.

\*\* Employment from post-production is also counted under Film & TV and is therefore double-counted here. This segment has been included separately for illustrative purposes.

**Note:** Data originates from a variety of sources and different years. The respective date for each data point is provided in the axis label. This chart only serves as a general comparative illustration of the different levels of economic activity generated by the respective industries represented. In addition, the figures presented in this chart should not be taken to be cumulative or construed as comprising the total revenues generated by the collective creative industries.

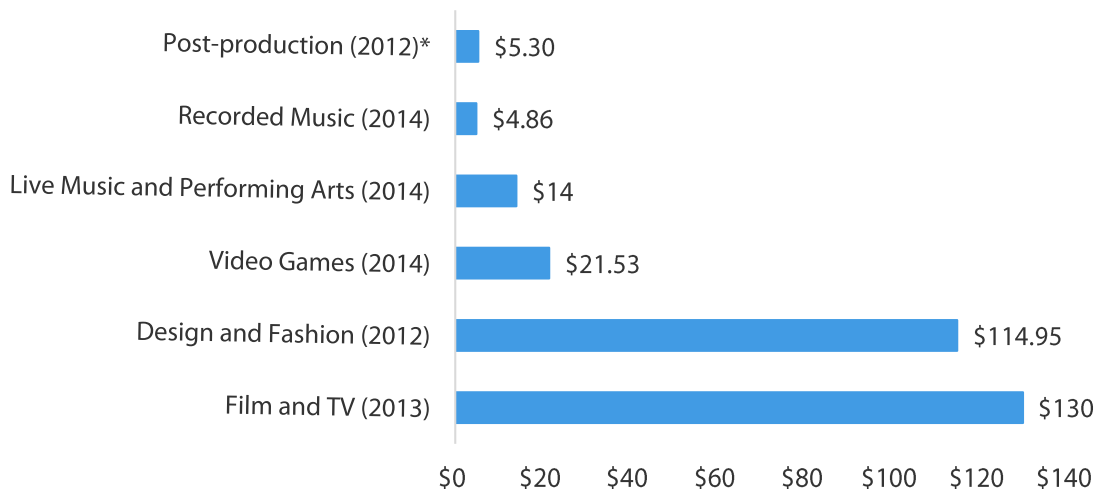
**Sources:** *The Economic Contribution of the Motion Picture & Television Industry to the United States*, Motion Picture Association of America (2015); *National Industry-Specific Occupational Employment and Wage Estimates*, U.S. Bureau of Labour Statistics (2014); *Arts and Cultural Production Satellite Account (ACPSA)*, U.S. Bureau of Economic Analysis & National Endowment for the Arts (2015); *Video Games in the 21st Century*, Entertainment Software Association (2014); *Economic Census*, U.S. Census Bureau (2012).

## 3.2 Economic activity in the creative industries

### Revenue and GDP contribution

According to a recent report by the National Endowment for the Arts, arts and cultural production from “copyright-intensive” industries contributed \$433.5 billion to the US economy.<sup>7</sup> The following charts show the revenues generated and the respective GDP contributions of individual creative industry segments, to the extent that data was publicly available. Film and TV (including post-production) and Design and Fashion make up the vast majority of economic activity in the creative industries.

Exhibit 2 - National revenues, by creative industry segment (\$ billions)



\*Revenue from post-production is also counted under Film & TV and is therefore double-counted here. This segment has been included separately for illustrative purposes.

**Note:** Data originates from a variety of sources and different years. The respective date for each data point is provided in the axis label. This chart only serves as a general comparative illustration of the different levels of economic activity generated by the respective industries represented. In addition, the figures presented in this chart should not be taken to be cumulative or construed as comprising the total revenues generated by the collective creative industries.

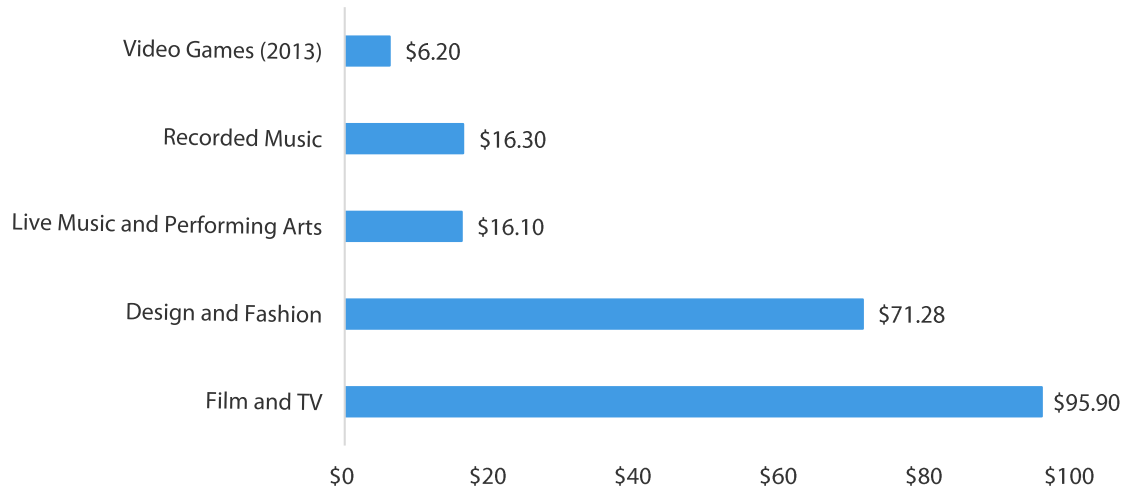
**Sources:** *The Economic Contribution of the Motion Picture & Television Industry to the United States*, Motion Picture Association of America (2015); *2013-2014 Year-End U.S. Music Shipment and Revenue Statistics*, Recording Industry Association of America (2014); *Arts and Cultural Production Satellite Account* (ACPSA), U.S. Bureau of Economic Analysis & National Endowment for the Arts (2015); *Essential Facts*, Entertainment Software Association (2014); *Economic Census*, U.S. Census Bureau (2012); *Performing Arts Companies in the U.S.*, Research and Markets (2014).

<sup>7</sup> The NEA uses “copyright-intensive” industries as a proxy for measuring the creative industries, based on the U.S. Patent Office definition of “copyright-intensive” industries. The NEA definition of “copyright-intensive” industries includes: Broadcasting; Motion picture and video production; Performing arts and independent artists, writers and performers; Advertising agencies; Sound recording; Specialised design; Photographic services (including photo-processing services [except one-hour photo processing]); Computer system design, and Other information services (excluding translation services).

*Arts and Cultural Production Satellite Account Issue Brief #4: Arts and Cultural Contributions to the Creative Economy*, National Endowment for the Arts, 2015.



Exhibit 3 - Contribution to US National GDP, by industry segment (\$ billions; 2012 unless otherwise specified)



\*GDP contribution from post-production is also counted under Film & TV and is therefore double-counted here. This segment has been included separately for illustrative purposes.

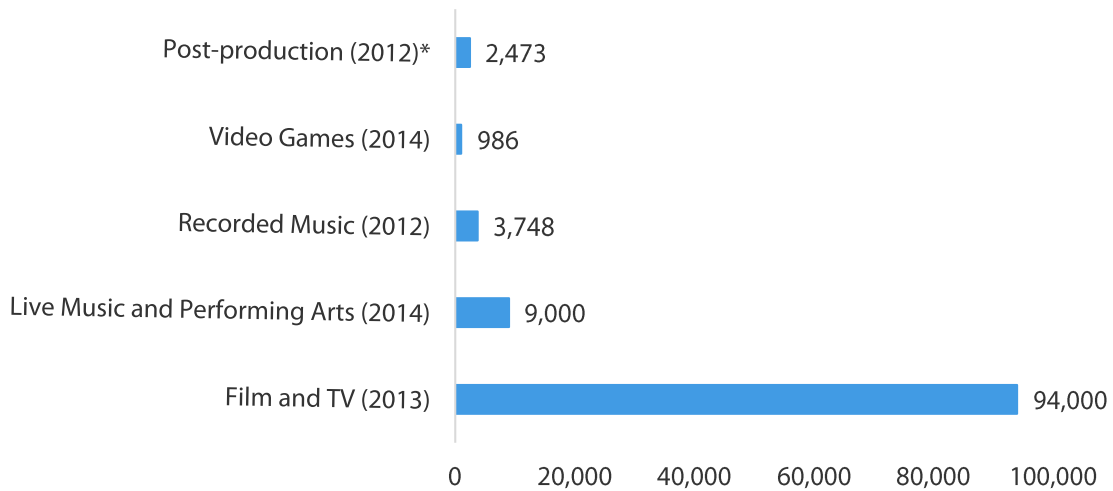
**Note:** All data presented in this chart is from 2012, except for Video Games which is from 2013. Data originates from a variety of sources and different years. This chart only serves as a general comparative illustration of the different levels of economic activity generated by the respective industries represented. In addition, the figures presented in this chart should not be taken to be cumulative or construed as comprising the total revenues generated by the collective creative industries.

**Sources:** *Arts and Cultural Production Satellite Account (ACPSA)*, U.S. Bureau of Economic Analysis & National Endowment for the Arts (2015); *The U.S. Media & Entertainment Industry*, SelectUSA (2014); *Video Games in the 21st Century*, Entertainment Software Association (2014); *Economic Census*, U.S. Census Bureau (2012).

### Size

The chart below illustrates the relative size of the four creative industry segments that comprise the entertainment industry. As is illustrated, the size (by number of companies) of Film and TV (including post-production) far outpaces, by an order of magnitude, the others.

Exhibit 4 - Industry size (number of companies), by creative industry segment (entertainment industries only)



**Note:** Data originates from a variety of sources and different years. The respective date for each data point is provided in the axis label. This chart only serves as a general comparative illustration of the different levels of economic activity generated by the respective industries represented. In addition, the figures presented in this chart should not be taken to be cumulative or construed as comprising the total revenues generated by the collective creative industries.

**Sources:** *The Economic Contribution of the Motion Picture & Television Industry to the United States*, Motion Picture Association of America (2015); *Performing Arts Companies in the US*, Research and Markets (2014); *Economic Census*, U.S. Census Bureau (2012); gamedevmap.com (data pulled June 5, 2014).

### 3.3 National regulatory environment and support ecosystem

There is no overarching regulatory body that governs the creative industries as a whole in the United States. The only exception is the Federal Communications Commission (FCC), an independent agency of the Federal Government that regulates all interstate and international communications by radio, television, wire, satellite and cable. The FCC is responsible for supervising and regulating communications across the United States in the public interest. It is also responsible for regulating, supporting and promoting technological innovation in communications and is the National authority on communications law. The FCC operates under the Communications Act of 1996.

In addition, the creative industries as defined in this report are part of what the National Endowment for the Arts calls the “copyright-intensive industries.” As such, these industries are largely governed by the U.S. Copyright Law under the Copyright Act, 2011.

Although there is no overarching regulatory body, the creative industries in the United States are collectively promoted and supported under the mandate of the National Endowment for the Arts (NEA). The NEA was established by the United States Congress in 1965 and is an independent agency of the U.S. Federal Government. The agency is governed by a presidentially-appointed Chairman and the National Council on the Arts (an advisory board). The NEA’s primary role is to provide funding for the arts through a series of grant and award programmes. The organisation also acts as the main voice for arts and culture in the country by creating and funding original research on the state, value and impact of arts and culture in the United States.

In addition, there are a number of industry associations and support organisations with a National mandate that focus on specific creative industries. The following table provides a summary snapshot

of the breadth of support organisations that exist at the national level to support the creative industries.

*Exhibit 5 - National support organisations, by creative industry segment*

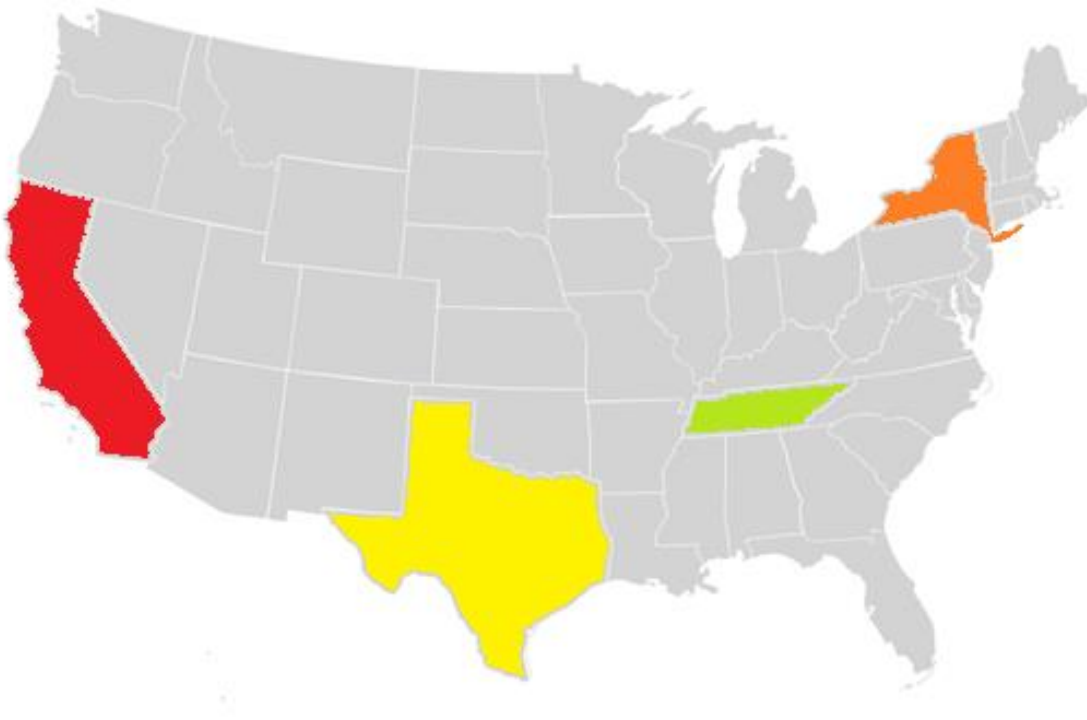
Industry	National support organisations
<b>Film and TV (including post-production)</b>	<ul style="list-style-type: none"> <li>▪ Independent Film &amp; Television Alliance</li> <li>▪ Motion Picture Association of America</li> </ul>
<b>Digital Media (i.e. Video Games)</b>	<ul style="list-style-type: none"> <li>▪ Entertainment Software Association</li> <li>▪ International Game Developers Association (various state-level chapters)</li> </ul>
<b>Recorded Music</b>	<ul style="list-style-type: none"> <li>▪ Music Publishers Association of the United States</li> <li>▪ Recording Industry Association of America</li> <li>▪ America Federation of Musicians</li> </ul>
<b>Live Music and Performing Arts</b>	<ul style="list-style-type: none"> <li>▪ Performing Arts Alliance</li> <li>▪ Association of Performing Arts Presenters</li> <li>▪ Dance/USA</li> <li>▪ League of American Orchestras</li> <li>▪ OPERA America</li> <li>▪ Theatre Communications Group</li> </ul>
<b>Visual Arts</b>	<ul style="list-style-type: none"> <li>▪ The National Art Education Society (NAEA)</li> <li>▪ American Craft Council</li> <li>▪ Society of Illustrators</li> </ul>
<b>Design and Fashion</b>	<ul style="list-style-type: none"> <li>▪ The American Institute of Graphic Arts</li> <li>▪ The American Institute of Architects</li> <li>▪ The Industrial Designers Society of America</li> <li>▪ The US Fashion Industry Association</li> <li>▪ The American Association of Advertising</li> </ul>

### 3.4 Top centres of creative industry activity

As illustrated below, the top four centres of activity in the United States for the seven creative industries under review in this report are:

1. California (Los Angeles)
2. New York (New York City)
3. Texas (Austin)
4. Tennessee (Nashville)

Figure 6 - Map of U.S. centres of creative industry activity

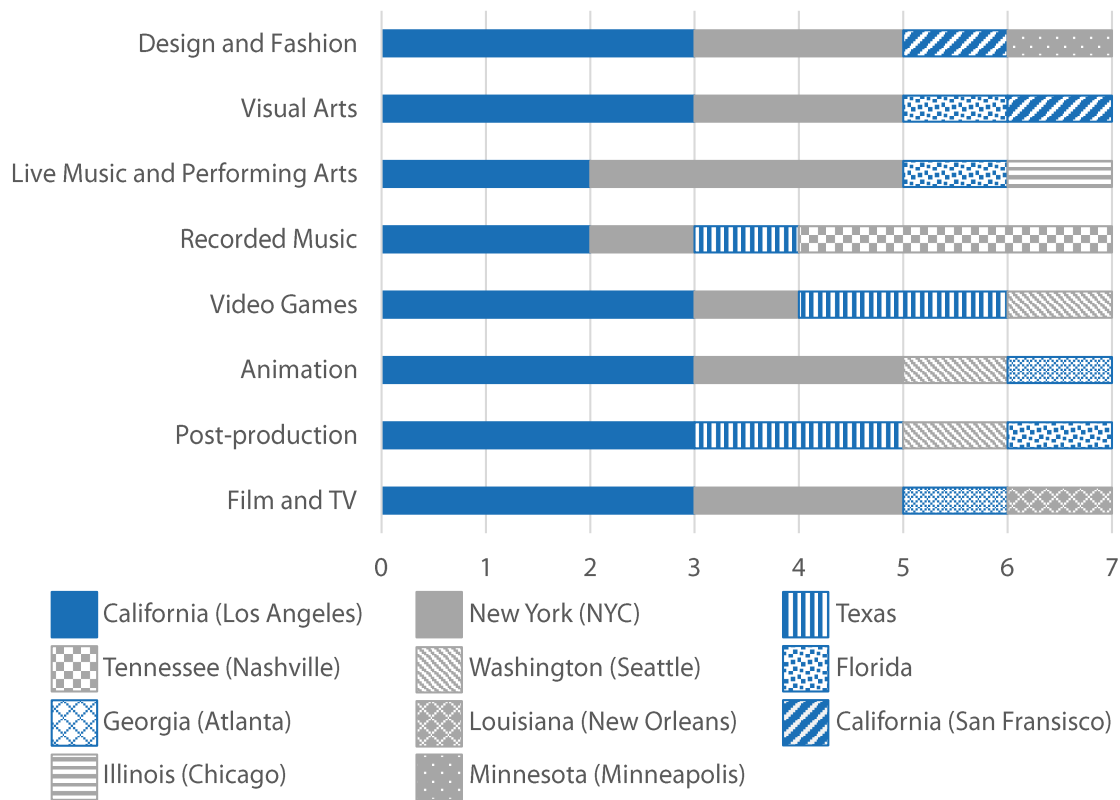


**Legend:** Red = #1 centre of activity; Orange = #2 centre of activity; Yellow = #3 centre of activity; Green = #4 Centre of Activity

In order to identify the top four centres of creative industry activity in the U.S., Nordicity first identified and ranked the top four centres of activity for each of the individual creative industry segments, respectively. Because this report relies on existing publicly available data, the level of activity was defined and measured in a variety of ways according to the available data. For example, it could have been measured by employment, the number of active companies, or by production volume. That being said, whenever possible employment was used as the unit of measurement.

For each creative industry segment, the top four centres of activity were identified and ranked and a score was applied to the ranking. For example, if a city ranked as the number one centre of activity for an industry segment it was given a score of three (3); if it was the second biggest centre of activity it was given a score of two (2); and if it ranked third or fourth a score of one (1) was applied. The following figure illustrates the top four jurisdictions in each of the creative industries examined. It shows the individual ranking of each jurisdiction using the assigned score.

Figure 7 – Summary of top jurisdictions by creative industry

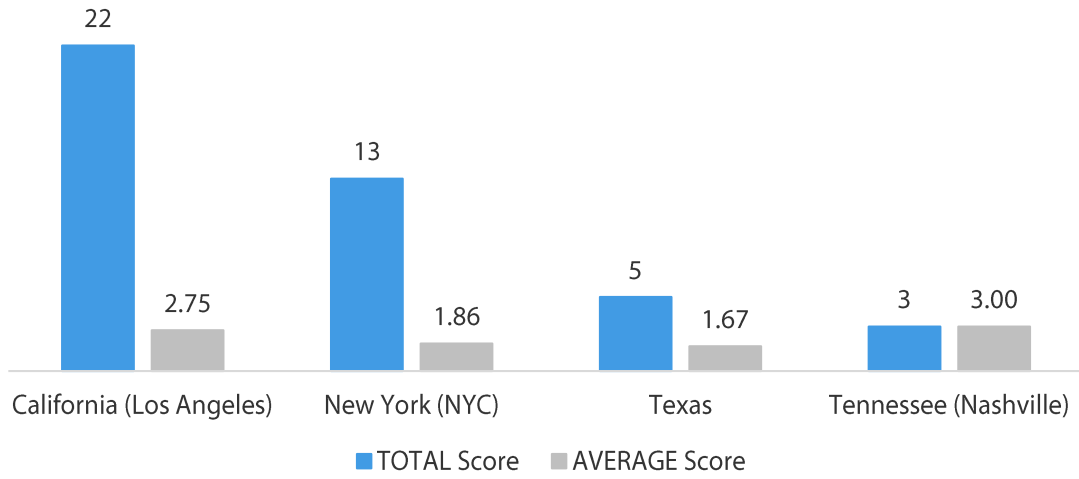


Source: Nordicity research and analysis

Although it is clear that California (Los Angeles) and New York (New York City) are the leading jurisdictions for the creative industries in the U.S., the assigned scores for each identified jurisdiction were tallied in order to identify the top four most active jurisdictions for the creative industries in the U.S. (across all creative industry segments examined). Nordicity tallied the scores by calculating both the total score and the mean average score for each jurisdiction.<sup>8</sup> The use of the scoring system ensures that the tallied scores are weighted according to the rank of the jurisdiction in each respective industry segment. The four locations with the highest total *and* average scores were selected as the top four centres of creative industry activity in the U.S., as illustrated in the figure below.

<sup>8</sup> For each industry, the top jurisdiction was awarded a score of 3, the next jurisdiction was awarded a score of 2, and the third jurisdiction a score of 1. The average score is then the total score (across all industries) divided by the number of creative industries examined (7).

Exhibit 8 - Summary of scores for four centres of creative industry activity in the U.S.



Source: Nordicity research and analysis

## 4. Industry Dashboards

The following industry dashboards, provide a profile of each of the creative industry segments:

- Film and TV (including post-production)
- Animation
- Digital Media
- Visual Art
- Fashion and Design
- Live Music and Performing Arts
- Recorded Music

## Film and TV (excluding post-production)

**Description:** The MPAA defines the industry as the production and distribution of motion pictures and television programmes. However, the present analysis focuses primarily on the production side of the industry.



### Basic Facts

National Employment: 302,000 (2013)  
 National Revenue: USD \$130 billion (2013)  
 National GDP Contribution: USD \$95.9 billion  
 Number of Companies: 94,000 (2013)

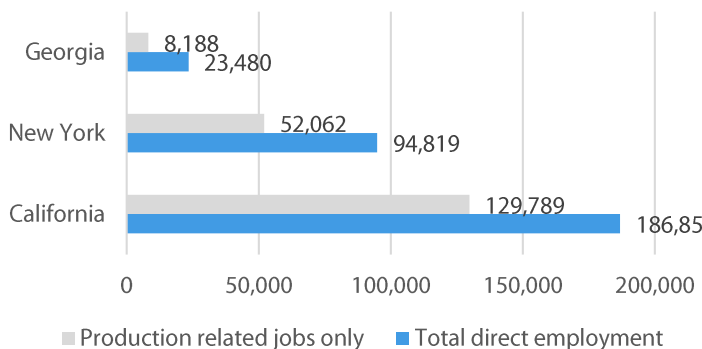
### Regulation

The industry is subject to regulation through the [Federal Communications Commission](#).

### Support Ecosystem

The [Motion Picture Association of America](#) is the trade association that represents the major motion picture studios in the U.S.. MPAA provides advocacy on policy and legislation impacting the Film & Television industry on behalf of its members. The independent side of the industry is represented by the [Independent Film & Television Alliance](#) that provides similar representation and support to independent film & television companies across the value chain. The top production jurisdictions all offer state-level tax credits for production and related activities.

### Geography – Top 3 jurisdictions by employment (2013)



Top 3 U.S. Jurisdictions		
California (Los Angeles)	New York (New York City)	Georgia (Atlanta)
129,789 production jobs (2013) 665 film and TV productions (2013) Home to the 6 "Major" studios (e.g. Sony, Paramount, etc.)	52,062 production jobs (2013) 280 film and TV productions (2013) 30% -35% tax credits for production and post-production activities	8,188 production jobs (2013) 62 film and TV productions (2013) State offers tax credit of up to 30% for production and related activities

## Leading Canadian Centres

### Ontario (Toronto)

- 19,910 direct FTEs employed in film and TV production in Ontario
- 42% of the national film and TV production volume is attributable to Ontario-based producers
- Supported by the [Ontario Film & Television Tax Credit](#)

### British Columbia (Vancouver)

- 13,600 direct FTEs employed in film and TV production in BC
- 16% of the national film and TV production volume is attributable to producers based in BC
- Supported by the [Film Incentive BC Tax Credit](#)

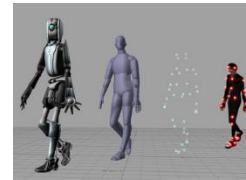
### Quebec (Montreal)

- 11,410 direct FTEs employed in film and TV production in Quebec
- 33% of the Canadian film and TV production volume is attributable to Quebec-based producers
- Supported by the [Quebec Film Incentive Tax Credit](#)



## Animation and Post-Production

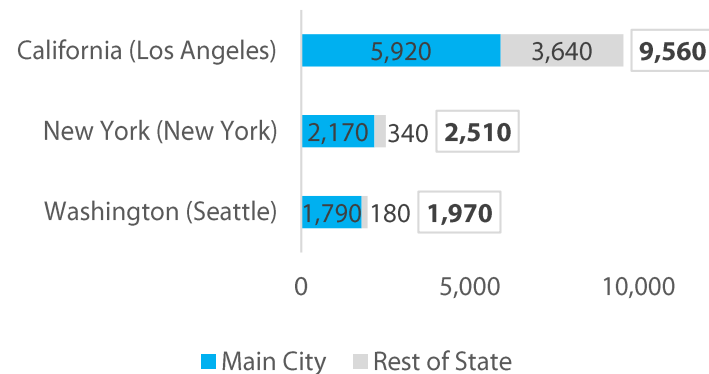
**Description:** This industry comprises animation, visuals effects, and other value-add services rendered to linear screen content creators (i.e. film and TV) as well as for some interactive products – like video games. Note: Jobs figures are related to **animation only** unless otherwise indicated.



### Basic Facts

National Employment (All post-production): 30,790 (2014)  
 National Employment (Animators only): 29,000 (2012)  
 National Revenue: \$5.3 billion (2012)  
 Number of Companies: 2,473 (2012)

### Geography – Top 3 jurisdictions by employment (2012)



### Support Ecosystem

Although there is no direct support offered to the animation and post-production industry in the U.S., post-production is supported as part of other film and TV tax credits and other, related incentive schemes (see Film and TV Dashboard).

Top 3 U.S. Jurisdictions		
California (Los Angeles)	New York (New York)	Washington (Seattle)
9,560 jobs, 68% of the national total 940 companies (in 2007) \$3.5 billion in annual revenue (2007) Other large centre in San Francisco (1310 jobs)	2,510 jobs, 18% of the national total 350 companies (in 2007)	1,970 jobs, 16% of the national total Roughly 40 companies (in 2007)

## Leading Canadian Centres

### Ontario (Toronto)

- About 220 companies employing approximately 2,200 people
- More about animation than visual effects
- Services both international production and Canadian domestic TV
- Supported by the [Ontario Computer Animation and Special Effect Tax Credit \(OCASE\)](#)

### British Columbia (Vancouver)

- Over 1,300 people employed by 105 companies
- Largely supports international projects (shot in BC)
- More focused on visual effects than animation
- Supported by the [Digital Animation and Visual Effects Tax Credits \(DAVE\)](#)

### Quebec (Montreal)

- About 100 companies employing over 900 people

## Digital Media (i.e. Video Games)

**Description:** This industry, broadly speaking, includes all interactive forms of media – from mobile games to online, interactive extensions of television programmes. The data presented here, however, will reflect the video games industry.



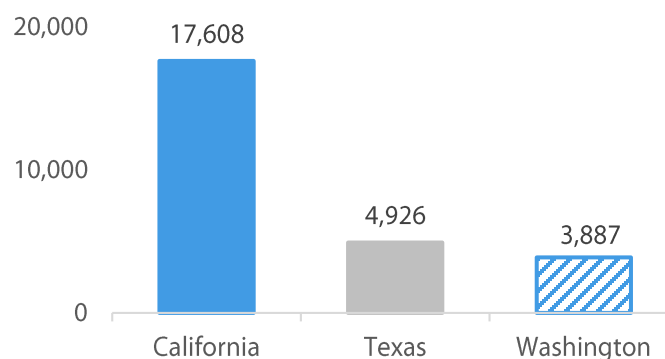
### Basic Facts

National Employment (2014): 42,500  
 National Revenue (2014): \$21.5 billion  
 National GDP (2013): \$6.2 billion  
 Number of Companies (2014): 986

### Regulation

The industry is subject to the [ESRB](#) voluntary rating scheme.  
 Tax incentives available for some jurisdictions (e.g., Texas).

### Geography –Top 3 jurisdictions by employment (2013)



### Support Ecosystem

The national body, the [Entertainment Software Association](#) (ESA) broadly represents video games publishers (who market games and finance their production) with advocacy and demographic studies on who plays games. Local chapters of the [Independent Game Developers' Association](#) (IGDA), in turn, comprise smaller developers who meet on issues of policy, terms of trade (with publishers) and work-place conditions.

### Top 3 U.S. Jurisdictions

California	Texas	Washington
17,600 jobs, or 41% of national total Home to some of the world's leading video games companies (e.g., Electronic Arts)	About 5,000 jobs, or 11% of the national total 5-20% tax credit (varies by size of project)	About 4,000 jobs, or about 9% of the national total Home of the leading platforms for PC games (Valve, maker of Steam)

## Leading Canadian Centres

### Quebec (Montreal)

- Largest video games development centre in Canada
- Over 8,750 employees in about 90 companies
- Several large, international publishers (e.g., Ubisoft, Gameloft)
- Produced over \$740 million of games (by expenditure) in 2013

### British Columbia (Vancouver)

- Over 5,000 employees in over 80 companies
- A few large publishers (e.g., Electronic Arts)
- Produced over \$550 million of games in 2013

### Toronto (Ontario)

- Home of independent game development in Canada (i.e., smaller studios)
- Roughly 2,000 people employed by 95 companies
- Produced about \$135 million of games in 2013

## Visual Art

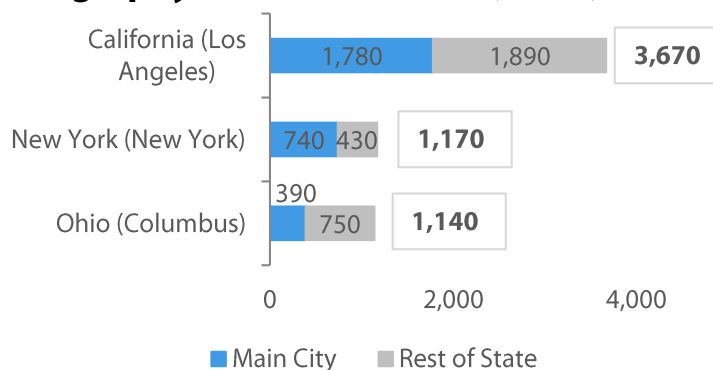
**Description:** Includes visual artists working across mediums, as well as craft artists who use materials such as glass, textiles, pottery, etc. Some employed in this sector will be art directors, archivists, curators and museum workers, as well as general arts administrators and teachers.



### Basic Facts

National Employment (arts and crafts):  
51,400 (2012).

### Geography - top three jurisdictions by employment



### Support Ecosystem

The visual arts and craft industry is supported by several national level industry associations targeting specific sub-sectors such as: art education, targeting educators, professors, researchers, scholars, administrators and museum educators ([The National Art Education Association](#)); illustrators ([The Society of Illustrators](#)); and, craft workers ([The American Craft Council](#)). These associations support members through conferences, award schemes, grants and a range of professional resources.

### Top 3 U.S. Jurisdictions

California (L.A. and San Francisco)	New York (New York)	Ohio (Columbus)
3,670 jobs, 7.1% of national total Visual arts organisations comprise 10% of the state's non-profits with budgets over \$10 million	1,170 jobs, 2.3% of national total New York is the city with the largest number of artists in the U.S.	1,140 jobs, 2.2% of national total

## Leading Canadian Centres

### Ontario (Toronto)

- Largest centre for visual arts in Canada
- Home of the Canadian Artists' Representation (CARFAC) association – currently leading a 3-year project developing a range of resources and tools to support the visual and craft based sector

### British Columbia (Vancouver)

- The internationally recognised ArtStarts in Schools programme provides 640,000 unique arts experiences for young people in urban, rural and remote communities across British Columbia

### Quebec (Montreal)

- Half of the province's art museums are located on the island of Montreal
- The Women's Art Society of Montreal is one of the earliest organisations in the country supporting women artists

## Fashion and Design

**Description:** This analysis of the design industry includes industrial/commercial, urban, graphic, landscape, set/exhibit design, interior design and architecture. Within the fashion industry data, jewelry is included as a sub-sector.



### Basic Facts

National Employment: 486,800 (2012)  
 National Revenue: \$114.95 billion (2012)  
 National GDP Contribution: \$71.28 billion (2012)  
 Number of Companies: 207,169 (2015)

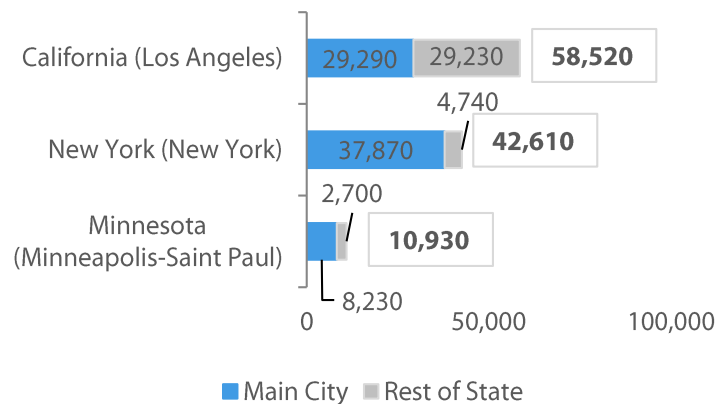
### Regulation

[The Federal Trade Commission](#)

### Support Ecosystem

[The National Endowment for the Arts](#) offers the design discipline (including fashion) support through its ART WORKS programme for the development of new work, research collaborations and residencies. There are also several relevant, national industry associations such as: the [American Institute of Graphic Arts](#), the [American Institute of Architects](#), the [Industrial Designers Society of America](#), the [U.S. Fashion Industry Association](#) and the [American Association of Advertising](#).

### Geography - top three jurisdictions by employment



Top 3 U.S. Jurisdictions		
California (L.A. and San Francisco)	New York (New York)	Minnesota (The Twin Cities)
58,520 jobs, 12% of national total San Francisco is the nation's leading design capital There are 21,000 architects in CA	42,610 jobs, 8.8% of the national total Dominates U.S. cities in terms of concentration of fashion designers	10,930 jobs, 2.3% of the national total Highest concentration of employed graphic designers in the U.S.

## Leading Canadian Centres

### Ontario (Toronto)

- Home to 27,970 designers (27% of all Canadian designers), Toronto has the largest design workforce in the country
- 71% of Ontario's architects, landscape architects, industrial, graphic and interior designers are located in Toronto

### British Columbia (Vancouver)

- Boasts a small but thriving performance apparel industry, with more than three dozen businesses in operation
- Example: Lululemon Athletica made US\$1.37 billion in operational revenue in 2013

### Quebec (Montreal)

- Designated a UNESCO City of Design in 2006
- Montreal has 50,000 manufacturing, distribution and retail jobs in the fashion sector
- 81% of Quebec garment industry jobs are in Montreal

## Recorded Music

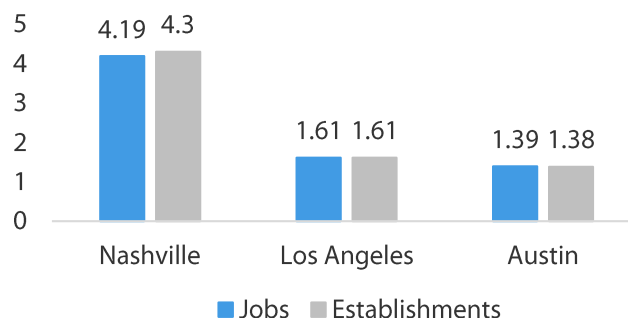
**Description:** The recorded music industry includes establishments primarily involved in the production, distribution and publishing of recorded music.



### Basic Facts

National Employment: 16,050 (2014)  
 National Revenue: \$4.86 billion (2014)  
 National GDP Contribution: \$16.3 billion (2012)  
 Number of Companies: 3,748 (2012)

**Geography – Top 3 cities by job and establishment location quotient (2012, national quotient = 1.0)**



### Support Ecosystem

The recorded music industry in the U.S. is primarily supported by the [Recording Industry Association of America](#), which represents the bulk of record labels and distributors in the industry. Independent record labels are represented and supported by the [American Association of Independent Music](#). Other support organisations serving the industry include the [Music Publishers Association of the United States](#) and [the National Association of Music Merchants](#).

Top 3 U.S. Jurisdictions		
Tennessee (Nashville)	California (Los Angeles)	Texas (Austin)
1,994 jobs, 7% of the national total (in 2007) Location Quotient >4 for both jobs and establishments	8,000, 30% of national total (in 2007)	1,588 Record Labels, Recording Studios and Music Publishers (2012) Austin also lays claim to the title of "Live Music Capital of the world"

## Leading Canadian Centres

### Ontario (Toronto)

- Contributes \$150.7 million to GDP in the Greater Toronto Area (2010)
- Generated 1,773 direct jobs in the GTA (2010)
- Accounts for 82% of the total industry revenue in Canada
- Supported by the [Ontario Sound Recording Tax Credit](#)

### British Columbia (Vancouver)

- Contributes \$4.8 million to BC's GDP (2010)
- 280 businesses (2014)
- Employs ~724 FTE's (2014)
- [Music BC](#) provides support, funding and advocacy for the local industry

### Quebec (Montreal)

- Montreal has the third highest concentration of music industry activity among major metropolitan areas in the U.S. and Canada
- Supported by the Quebec [Sound Recording Tax Credit](#)

## Live Music and Performing Arts

**Description:** The performing arts industry is characterised by those industries that provide live entertainment. It includes dance, theatre, opera, musical theatre, and live music performance. For the purposes of this analysis live music performance has been grouped with performing arts in order to reflect how these industries are typically presented.



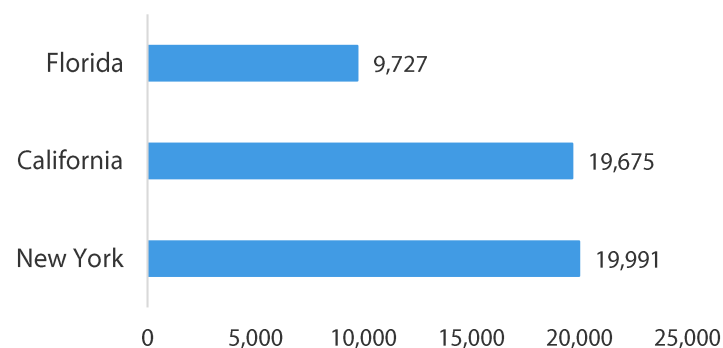
### Basic Facts

National Employment: 119,560  
 National Revenue: \$14 billion  
 National GDP Contribution: \$16.1 billion  
 Number of Companies: 9,000

### Support Ecosystem

The performing arts industry in the U.S. is supported by 15 organisations that comprise the [Performing Arts Alliance](#). Together these organisations support and advocate on behalf of the performing arts industry as a whole and on behalf of their respective segments of the industry (e.g. Dance, Opera, Theatre, etc).

### Geography – top three centres of activity by employment (2007)



### Top 3 U.S. Jurisdictions

New York	California	Florida
19,991 jobs, 16% of national total (in 2007)	19,675 jobs, 15% of national total (in 2007)	9,727 jobs, 8% of national total (in 2007)
1,329 establishments	1,540 establishments	561 establishments
Broadway theatre is a world leader and industry standard for commercial theatre production		

## Leading Canadian Centres

### Ontario (Toronto)

- Toronto is home to over **200 professional performing arts organisations**, including some of Canada’s top performing arts companies (i.e. [National Ballet of Canada](#), the [Canadian Opera Company](#) and the [Toronto Symphony Orchestra](#))
- 23,025 dancers, musicians, singers, actors and performers in Ontario (2011)
- 10,805 producers, choreographers, directors in Ontario (2011)

### British Columbia (Vancouver)

- 10,195 dancers, musicians, singers, actors and performers (2011)
- 3,530 producers, choreographers, directors (2011)

### Quebec (Montreal)

- 11,102 dancers, musicians, singers, actors and performers in Quebec (2011)
- 5,455 producers, choreographers, directors (2011)

## 5. Conclusion and Recommendations

The creative industries highlighted in this report create over 1 million jobs in the United States<sup>9</sup> and contributed over \$433.5 billion to the U.S. economy.<sup>10</sup> Film and TV, and fashion and design account for the vast majority of economic activity in the creative industries. Film and TV, and fashion and design also outpace the other segments with regards to the employment they create. And the size of the film and TV segment (by number of companies) far exceeds the other segments.

While there is no overarching regulatory agency for the creative industries in the U.S., the creative industry segments examined in this report are largely governed by the U.S. Copyright Law under the Copyright Act, 2011. In addition, there are a number of laws, regulatory bodies and national organisations that provide specific support or regulation to individual creative industry segments. These organisations are industry-specific and promote the interests of the specific industries that they serve while helping to create and support new opportunities for creative development.

In addition to providing a national summary profile of the creative industries in the United States, the above report identified the top centres for creative industry activity in the U.S. While New York (NYC) and California (Los Angeles) are the biggest centres of creative industry activity across all the industry segments, there are several other jurisdictions throughout the United States that support active centres of creative industry activity. For example, Minnesota is a significant centre for design and fashion while Nashville, Tennessee is the most active jurisdiction for music recording.

In this large and growing economic sector, training and educational opportunities should be promoted to develop the specific skill sets needed to work in these fields. The U.K., as a world leader in the creative industries, should capitalise on its strengths and recruit students from the U.S. and Canada for its academic programmes.

In addition, U.K. higher education institutions should:

- Assess the strengths among the U.K.'s universities and determine upon which of the creative industries North American recruitment should focus.
- Recruit students from outside of New York and Los Angeles. Consider non-traditional creative industry markets.
- Utilise the information provided by industry organisations and associations to learn about potential events at which to recruit and market.

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<sup>9</sup> The total employment figure presented here is an estimate based on existing publicly available data. The data used to calculate this estimate comes from a variety of sources and may be from different years. As such, this figure should not be taken as an exact figure of total employment but rather an estimate of the general level of employment created by these creative industries combined.

<sup>10</sup> The NEA uses "copyright-intensive" industries as a proxy for measuring the creative industries, based on the U.S. Patent Office definition of "copyright-intensive" industries. The NEA definition of "copyright-intensive" industries includes: Broadcasting; Motion picture and video production; Performing arts and independent artists, writers and performers; Advertising agencies; Sound recording; Specialised design; Photographic services (including photo-processing services [except one-hour photo processing]); Computer system design, and Other information services (excluding translation services).

*Arts and Cultural Production Satellite Account Issue Brief #4: Arts and Cultural Contributions to the Creative Economy*, National Endowment for the Arts, 2015.

## Appendix A – Dashboard Data Sources

### 1. Film and TV

- a. U.S. data:
  - i. [The Economic Contribution of the Motion Picture & Television Industry to the United States](#), Motion Picture Association of America, 2015.
  - ii. [ACPSA Issue Brief #1: The Arts and GDP](#), National Endowment for the Arts, 2015.
  - iii. [Creating Jobs](#), Motion Picture Association of America, 2015.
  - iv. [California Film & Television Tax Credit Program 2.0](#), California Film Commission website, accessed July 2015.
  - v. [Tax Incentives](#), Governor's Office of Motion Picture and Television Development website, accessed July 2015.
  - vi. [Georgia Film and TV Production](#), Georgia Department of Economic Development website, accessed July 2015.
- b. Canadian data:
  - i. [Profile: Economic Report on the Screen-based Media Production Industry in Canada](#), Canadian Media Production Association, 2014.

### 2. Animation and Post-Production

- a. U.S. data:
  - i. [Occupational Employment and Wages: 27-1014 - Multimedia Artists and Animators](#), U.S. Bureau of Labor Statistics, 2014.
  - ii. [Economic Census](#), U.S. Census Bureau, 2007.
  - iii. [Essential Facts about the Computer and Video Game Industry](#), Entertainment Software Association, 2014.
  - iv. [gamedevmap.com](#), data pulled June 5, 2014.
  - v. [Video Games in the 21st Century](#), Entertainment Software Association, 2014.
- b. Canadian data:
  - i. Nordicity Report to the British Columbia Ministry of International Trade, 2013.

### 3. Digital Media

- a. U.S. data:
  - i. [Occupational Employment and Wages: 27-1014 - Multimedia Artists and Animators](#), U.S. Bureau of Labor Statistics, 2014.
  - ii. [Video Games in the 21st Century](#), Stephen E. Siwek, Entertainment Software Association, 2014.
  - iii. [Essential Facts about the Computer and Video Game Industry](#), Entertainment Software Association, 2014.
  - iv. [Texas Moving Image Industry Incentive Program](#), Governor's Office, Texas Film Commission.
- b. Canadian data:



- i. [Video Games in Canada](#), Entertainment Software Association of Canada, 2013.

#### 4. Visual Art

- a. U.S. data:
  - i. [2012 Occupational Handbook](#), U.S. Bureau of Labor Statistics.
  - ii. [The State Occupational Employment and Wage Estimates](#), U.S. Bureau of Labor Statistics, May 2014.
  - iii. [California's Art and Cultural Ecology](#), The James Irvine Foundation, 2011.
  - iv. Richard Florida, [The Atlantic](#), 2011.
- b. Canadian data:
  - i. Toronto – [CARFAC](#), general website, accessed July 2015.
  - ii. Vancouver – [ArtStarts in Schools](#), general website, accessed July 2015.
  - iii. Montreal – [Made au Quebec](#), general website, accessed July 2015.

#### 5. Fashion and Design

- a. U.S. data:
  - i. [2012 Occupational Handbook](#), U.S. Bureau of Labor Statistics.
  - ii. [Creative Industries Reports](#), Americans for the Arts (with data from Dun & Bradstreet), 2015.
  - iii. [The State Occupational Employment and Wage Estimates](#), U.S. Bureau of Labor Statistics, May 2014.
  - iv. [California Architects Board](#), general website, accessed July 2015
  - v. Richard Florida, [The Atlantic](#), 2011.
- b. Canadian data:
  - i. Toronto – [Industry profile: Design](#), City of Toronto, general website, Key Industry Sectors, accessed July 2015.
  - ii. Vancouver – [Vancouver Economic Commission](#), general website, accessed July 2015; [Lululemon Annual Report](#), 2013.
  - iii. Montreal – [Fashion and Apparel in Montreal: Industry Profile](#), City of Montreal, 2009.

#### 6. Recorded Music

- a. U.S. data:
  - i. [ACPSA Issue Brief #1: The Arts and GDP](#), National Endowment for the Arts, 2015.
  - ii. [Economic Census](#), U.S. Census Bureau, 2012.
  - iii. [National Industry-Specific Occupational Employment and Wage Estimates: NAICS 512100 - Recording Industries](#), U.S. Bureau of Labor Statistics, 2014.
  - iv. [Economic Census](#), U.S. Census Bureau, 2007.

- v. [Nashville Music Industry Impact](#), Contribution and Cluster Analysis, Nashville Chamber of Commerce, 2012.
  - vi. Texas Music Office [Business Directory](#), accessed April 2015.
  - vii. [News and Notes on 2014 RIAA Music Industry Shipment and Revenue Statistics](#) Recording Industry Association of America (RIAA), 2014.
- b. Canadian data:
- i. [Economic Impact of the Sound Recording Industry in Canada](#), Music Canada, 2012.
  - ii. [Music Profile](#), Ontario Media Development Corporation.
  - iii. [British Columbia Music Industry Sector Profile](#), Creative BC, 2014.

## **7. Live Music and Performing Arts**

- a. U.S. data:
- i. [Performing Arts Companies in the U.S.](#), Research and Markets, 2014.
  - ii. [National Industry-Specific Occupational Employment and Wage Estimates: NAICS 7111 - Performing Arts Companies](#), U.S. Bureau of Labor Statistics, 2014.
  - iii. [Economic Census](#), U.S. Census Bureau, 2007.
  - iv. [ACPSA Issue Brief #1: The Arts and GDP](#), National Endowment for the Arts, 2015.
- b. Canadian data:
- i. [Toronto Facts: Arts & Culture](#), City of Toronto.
  - ii. [Artists and Cultural Workers in Canada's Provinces and Territories: Based on the 2011 National Household Survey and the Labour Force Survey](#), Hill Strategies, 2014.



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