INDIANA ARTS COMMISSION

CREATIVE ECONOMY REPORT

2016

Prepared by the Community Research Institute at Indiana University-Purdue University Fort Wayne and the Indiana University Public Policy Institute, School of Public and Environmental Affairs, Indiana-University-Purdue University Indianapolis

INDIANA UNIVERSITY PUBLIC POLICY INSTITUTE

ABOUT THE IPFW COMMUNITY RESEARCH INSTITUTE

The Community Research Institute (CRI) is one of Indiana University-Purdue University Fort Wayne's (IPFW) commitments at the Fort Wayne campus to promote the growth and vitality of northeast Indiana. The Institute serves as one of the portals linking expertise at IPFW with the needs of public, private, and non-profit leaders in northeast Indiana. CRI provides contract-based research and analytical services through ongoing support, special in-depth reports, presentations, and economic commentary. The Community Research Institute was founded in 1982 by Dr. Thomas Guthrie, who served as the director for 20 years, and led by John Stafford, AICP from 2003 until mid-2013. Today, CRI is led by Ellen Cutter, AICP and supported by researcher Valerie Richardson. Over the Institute's 34-year history, it has grown to become a trusted partner in northeast Indiana's business, government, and civic communities.

ABOUT THE INDIANA ARTS COMMISSION

The Indiana Arts Commission (IAC) is an agency of state government funded by the Indiana General Assembly and the National Endowment for the Arts, a federal agency. On behalf of the people of Indiana, the Indiana Arts Commission advocates engagement with the arts to enrich the quality of individual and community life. The Arts Commission encourages the presence of the arts in communities of all sizes while promoting artistic quality and expression. The Arts Commission advocates arts development opportunities across the state, and stewards the effective use of public and private resources for the arts. It stimulates public interest in, and participation with, Indiana's diverse arts resources and cultural heritage. The Arts Commission works to enhance public awareness of the arts, life-long learning opportunities, and arts education programs. Governed by a 15-member board of gubernatorial appointees, the IAC serves all citizens and regions of the state.

ABOUT ARTS UNITED OF GREATER FORT WAYNE, INC.

Founded in 1955, Arts United of Greater Fort Wayne exists to bring collective focus and support to arts and culture in northeast Indiana. Arts United is the only United Arts Fund and regional arts council serving the communities of northeast Indiana, and operates as a Regional Arts Partner on behalf of the Indiana Arts Commission. Arts United's mission is to advance the creative sector of northeast Indiana by mobilizing resources to elevate quality of life. Arts United's core programs are arts advocacy and promotion, management and operation of the Arts Campus in downtown Fort Wayne, capacity building for nonprofit arts organizations through grants and centralized business services, and community arts development and coordination.

INDIANA PUBLIC POLICY INSTITUTE

The Indiana University Public Policy Institute was established in 1992 as the Center for Urban Policy and the Environment, and is a multidisciplinary institute within the IU School of Public and Environmental Affairs (SPEA). The Institute delivers unbiased research and data-driven, objective, expert analysis to help public, private, and nonprofit sectors make important decisions that impact quality of life in Indiana and throughout the nation. Specifically, the Institute offers policy analysis, program evaluation, facilitated discussions and planning in areas including, but not limited to public safety, housing and community development, land use and the environment, and economic development. The Institute also houses the Indiana Advisory Commission on Intergovernmental Relations (IACIR).

Creative Economy is at the heart of all economy, as it sets the stage for job creation, talent attraction and retention, and the sought-after quality of life demanded by employers, employees, and their families.

This report provides a baseline for the State of Indiana answering questions such as: "How large is our creative industry?" "How does Indiana compare to national averages and trends?" "Where do our creative employees live and in what industries are they represented?" "How much of our creative industry is self-employed versus payroll-employed?" The answers to these questions provide a baseline for decision making for policy makers, employers, community leadership, and government on all levels, as together we aim to advance the appeal, stability and prosperity of Indiana's economic and creative profiles. The report also segments Indiana data into the IAC's 11 regional sections of the state, so comparisons can be made between different state locales, predominantly urban or rural areas, etc. In so doing, we hope that decision makers at all levels of government and the private sector will find value in the study.

The IAC would like to extend our gratitude to the Community Research Institute of Indiana University-Purdue University, Ft. Wayne; the Indiana University Public Policy Institute at Indiana University-Purdue University, Indianapolis; and Arts United of Greater Fort Wayne for their contributions to this report.

The IAC is committed to research which can inform effective strategies that advance the health of artists, arts organizations and providers, and local communities. It is our hope that this view of our current creative economy will ultimately inspire planning and decisions which will help to make our state a competitively creative place-of-choice for workers and their employers.

Nancy Stewart

Nancy Stewart
Commission Chair

Lewis C. Ricci
Executive Director

PURPOSE + OVERVIEW

INTRODUCTION

In conjunction with the Indiana Arts Commission, Arts United of Greater Fort Wayne, Inc. commissioned the Community Research Institute at Indiana University-Purdue University Fort Wayne to conduct a review of the Creative Economy for the State of Indiana. The Indiana Public Policy Institute then benchmarked that information against national data. **The Creative Economy is defined by the New England Creative Economy Framework as a range of "occupations and industries that focus on the production and distribution of cultural goods, services and intellectual property."** This review of the Creative Economy contains a baseline profile of Creative Industries and Creative Occupations, for the state of Indiana, by Indiana Arts Commission-designated regions and by county, and compared to the U.S.

SCOPE AND DESCRIPTION

The purpose of this review is to gather and establish a baseline profile of Indiana's Creative Economy to support the activities of the Indiana Arts Commission and its Regional Arts Partners as they seek to:

- Communicate the impact of the Creative Economy to decision makers, policy makers, academics, community leaders, and practitioners;
- Identify, classify and measure the contributions of artists and "creatives" to Indiana's workforce;
- Strengthen communities across the State of Indiana by measuring and communicating the impact of the Creative Economy at state, regional and county levels; and
- Initiate a best practice of utilizing data to benchmark the Creative Economy, develop performance metrics, and initiate discussion about long-term strategies that align with broader goals for economic development and quality of life.

The review is achieved by compiling data about total creative jobs by: Creative Industry (e.g. dance companies, museums, historic sites, architecture firms); and, Creative Occupation (e.g. artists, graphic designers, musicians).

The Creative Economy is defined in this report as follows:

- **Creative Industry Jobs:** Organizations coded as creative (e.g. a theater) have employees or contractors whose jobs are coded as creative occupations (e.g. an actor working at the theater) as well as employees or contractors whose jobs are coded as non-creative occupations (e.g. the accountant working at the theater). Together, these are referred to as creative industry jobs. These creative industry jobs (both with creative and non-creative job codes) may be filled by pay-rolled or self-employed workers (contractors). This category also includes all self-employed, "cottage industry" workers, such as a fine-arts painter who sells her/his work for her/his livelihood, as creative, self-employment is considered a "job in a creative organization."

- **Creative Occupations:** In addition to organizations coded as creative having employees or contractors whose jobs are coded as creative (such as a graphic designer working for a museum), organizations coded as non-creative may have employees or contractors whose jobs are coded as creative (such as a graphic designer working for a diesel engine manufacturer). Together, all jobs coded as creative, whether associated with a creative or non-creative organization, are referred to as creative occupations. Again, these jobs may be filled by pay-rolled or self-employed workers (contractors). This category also includes all self-employed, “cottage industry” workers, such as a fine-arts painter who sells her/his work for her/his livelihood, as creative, self-employment carries a creative job occupational code.

Creative Economy includes all of the designations above: creative jobs in creative organizations, non-creative jobs in creative organizations and creative jobs in non-creative organizations (including all self-employed contractors and “cottage industry” workers).

Additionally, data was gathered to provide a deeper understanding of employment trends within Indiana’s Creative Economy, including:

- Traditional payroll employees versus self-employed workers;
- Current year estimates for wages, benefit supplements and employers;
- Post-Great Recession trends, including changes in population, number of jobs and wages from 2010 to 2015; and
- Creative Industry profiles for all 92 counties of the State of Indiana and the 11 regions designated by the Indiana Arts Commission.

This report is organized into three main sections:

1. **Indiana’s Creative Economy**
   This section identifies overall indicators for Indiana’s Creative Industries and Occupations, compared to the U.S.
2. **Regional Profiles of the Creative Economy**
   This section replicates the indicators previous section for each of the IAC’s 11 arts regions.
3. **Statewide Trends and Comparisons**
   Key similarities and differences among all key geographies are identified. Implications for the future of Indiana’s Creative Economy are discussed.

METHODOLOGY

Currently, there is no officially recognized standard for defining and measuring employment in the Creative Economy. This study adopted a methodology that has been accepted by the Creative Economy Coalition, a standing working group of the National Creativity Network. The Creative Economy Coalition seeks to understand, support and advance Creative Industries and Creative Economies in North American through the standardization of research methodology. In 2014, the Creative Economy Coalition reviewed, summarized and compiled 27 different definitions of the Creative Economy used in previous state-wide reports to create a standardized list of 67 industries (measured through the North American Industry Classification System, “NAICS”), and 48 occupations (measured through the Standard Occupational Classification system, “SOC”).

Furthermore, the Creative Economy was defined to be inclusive of at least two of the following three categories: for profit creative service businesses, nonprofit arts groups, and independent creative businesses. The industries and occupations defined to be in the Creative Economy are identified in Appendix A. Similar research has been performed by the New England Foundation for the Arts, North Carolina Arts Council, Creative Alliance Milwaukee and the Houston Arts Alliance, among others.

ECONOMIC MODELING SPECIALIST INTERNATIONAL (EMSI 2015.3)
For this review, the Community Research Institute used data provided by Economic Modeling Specialists International (EMSI 2015.3) to access NAICS and SOC information and provide employment estimates for Indiana’s Creative Economy. EMSI is a workforce and economic modeling software, which compiles data from multiple databases to provide a more complete and highly reliable picture of economic and workforce trends. EMSI is used throughout North America by universities, economic and workforce development agencies, chambers of commerce and government units.

EMSI occupation employment data are based on final EMSI industry data and final EMSI staffing patterns. Wage estimates are based on Occupational Employment Statistics (QCEW and Non-QCEW Employees classes of worker) and the American Community Survey (Self-Employed and Extended Proprietors). Occupational wage estimates are also affected by county-level EMSI earnings by industry.

ADVANTAGES AND DISADVANTAGES OF REVIEW METHODOLOGY
The use of standardized data systems provides uniformity and comparability in the presentation and analysis of statistical data. Although there are defined sets of occupations and industries in which creative jobs are found, it is generally acknowledged that neither the Creative Industry or Creative Occupation list is all-inclusive.

For example, this study methodology does not include avocational (hobby) artists, student artists, volunteers, or other individuals otherwise involved in the Creative Economy who do not report earnings to the government.

Additionally, there are industries (profit and nonprofit business) that are colloquially considered “creative”, but report a NAICS code outside the standard “creative” NAICS code list in this review.

For example, Vera Bradley, which creates a distinctive line of handbags and accessories could be considered a Creative Industry, but the NAICS classification for this company (316992 Women's Handbag and Purse Manufacturing or 551114 Corporate Subsidiary and Regional Offices) is not included in the standardized NAICS list accepted by the Creative Economy Coalition.

Furthermore, EMSI does not provide county-level estimates of employment or establishments for which there is limited or insufficient data. For example, a locally defined "historic site" may not appear in the establishment data provided by EMSI in that category.

Even though localized Creative Economy activity is not fully captured by this review, the use of a consistent definition of generally accepted NAICS and SOC codes is what makes this information highly useful and comparable across counties, regions and states.

TERMINOLOGY

For the purposes of this review, we will use the following terms and definitions.

- **Creative Economy:** defined by the New England Creative Economy Framework as a range of "occupations and industries that focus on the production and distribution of cultural goods, services and intellectual property."
- **North American Industry Classification System (NAICS):** developed by the United States Office of Management and Budget and defined by the United States Census Bureau as "the standard used by federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy."
- **Standard Occupational Classification (SOC):** defined by the United States Bureau of Labor Statistics as the "system used by federal statistical agencies to classify workers into occupational categories for the purpose of collecting, calculating, or disseminating data. All workers are classified into one of 840 detailed occupations according to their occupational definition."
- **Creative Industries:** businesses, nonprofits and other establishments that focus on the production and distribution of cultural goods, services and intellectual property that are measured by the North American Industry Classification System (NAICS) (e.g. art dealers, musical instrument manufacturers, graphic design firms, etc.) Wired Telecommunication Carriers (which includes broadband internet service providers, local telephone carriers, satellite television distribution systems, and other similar businesses as distributors of creative content) is commonly designated as a Creative Industry and will be included as such in this review.
- **Creative Occupations:** vocations and occupations that focus on the production and distribution of cultural goods, services and intellectual property that are measured by the Standard Occupation Classification (SOC) system (e.g. architects, floral designers, musicians, etc.)
- **Payroll Jobs:** represents the number of workers of any business, nonprofit or other establishment who earn a wage or salary for their work.
- **Self-Employed/1099 Workers:** represents the number of workers who carry on a trade or business as a sole proprietor or independent contractor and most of whom report their earnings to the Internal Revenue Service using the 1099 annual income tax form.
- **Creative Business Establishment:** Actual businesses that exist in Creative Industries.

EXECUTIVE SUMMARY

The purpose of this report is to establish a baseline profile of Indiana's Creative Economy. As noted in the Introduction, the Creative Economy is defined by the New England Creative Economy Framework as a range of "occupations and industries that focus on the production and distribution of cultural goods, services and intellectual property".

Specifically, the report examines employment trends in Creative Industries and Creative Occupations. Both focus on the production and distribution of cultural goods, services, and intellectual property, but Creative Industries are establishments, while Creative Occupations are jobs that focus on the same, aforementioned outputs. Individuals may be employed in Creative Industries with non-Creative Occupations, have a Creative Occupation in a non-Creative Industry, or be employed in a Creative Occupation within a Creative Industry. Each category can be classified into individuals who are either on an organization's payroll or are self-employed.

We identify trends among each of these creative employment concepts from 2010 to 2015 using data accessed via Economic Modeling Specialists International (EMSI 2015.3). Based on reviews of multiple definitions of the creative economy, the identified data points utilize 67 North American Industry Classification System (NAICS) and 48 Standard Occupational Classification (SOC) codes (for Creative Industries and occupations, respectively) identified as categories of creative employment.

To gauge trends in overall employment, payroll employment, and self-employment in the Creative Economy, the report identifies both how Indiana compares to the U.S. and among the IAC's 11 arts regions. The regional and national findings compare (1) creative employment in 2015 and (2) employment changes from the end of the Great Recession in 2010 to 2015. Together, these geographic and time-oriented comparisons provide several key findings for Indiana's Creative Economy:

1. **Overall employment in Indiana's Creative Industries have declined since the recession, while overall employment in Creative Occupations increased.**
    - Indiana's change in overall employment in the Creative Industries was slower than the U.S.
    - Indiana's growth in overall employment in all industries outpaced growth in the Creative Industries.
    - Indiana's Creative Occupations increased overall, but at a lower rate than Creative Occupations nationally.
2. **Indiana's Creative Economy primarily consists of self-employed individuals.**
    - Indiana experienced growth in the number of self-employed individuals in Creative Occupations and Industries.
    - Indiana has a greater proportion of self-employed members of the Creative Economy than the U.S.
    - Indiana wages lag behind the U.S. among self-employed individuals in the Creative Economy.
    - The top self-employed Creative Occupations and Industries in Indiana did not vary much across regions.
3. **Average wages in Indiana's Creative Industries and Occupations generally lagged behind national averages and other industries in Indiana.**
    - Wages in Indiana's Creative Industries were substantially lower than national averages.
    - Average wages within Indiana varied when compared to other Indiana industries.
    - The lowest and highest paid Creative Occupations were similar in Indiana and the U.S.
4. **Types of creative employment varied across regions and compared to national trends.**
    - Indiana has stronger trends toward independent artists, which differs from national trends.
    - Many of Indiana's top growing jobs were among the lowest paid.
    - Growth and decline among Creative Industries and payroll occupations varied across regions; however, there was more growth among jobs in digital media, and greater declines among print media.
    - The top growing Creative Industries in IAC arts regions sometimes differed from the top growing Creative Industries in the U.S.
5. **Central Indiana has the strongest trends and opportunities for the state's Creative Economy**
    - The Indianapolis metro area over-represents the state's Creative Economy.
    - Central Indiana experienced growth in its Creative Economy, including counties bordering Region 7 (page 24).
    - Some rural counties within arts regions may have lower performing Creative Economies.

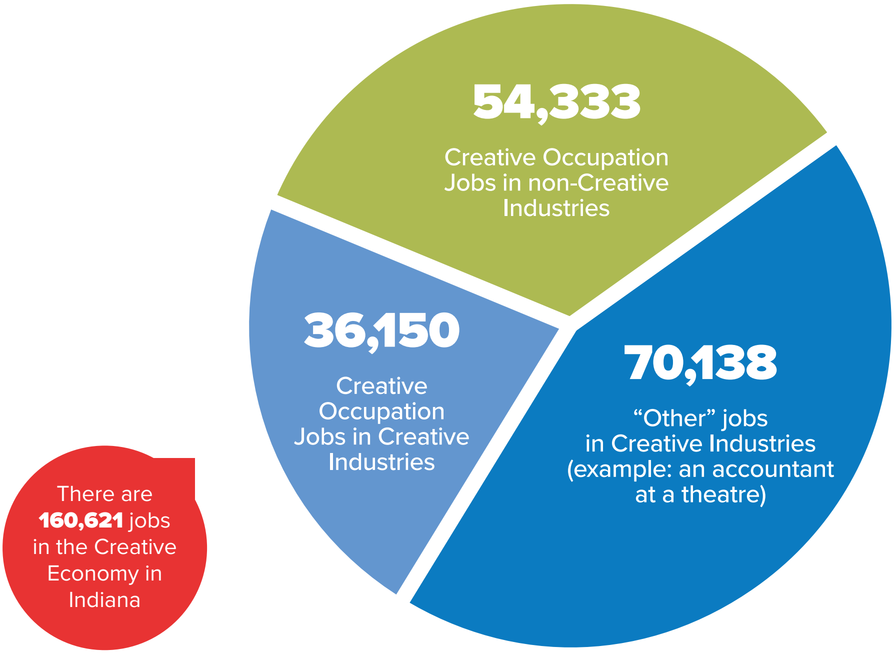
CONCLUSIONS AND RECOMMENDATIONS:

- Indiana lags behind U.S. trends in growing its Creative Economy. **Recommendation:** Consider the extent to which Indiana should follow national trends in creative employment and why.
- Indiana has a strong self-employed creative class, which may exist due to fewer opportunities to work in a payroll position. **Recommendation:** Balance Indiana's trend toward a self-employed creative class with payroll opportunities for employees in the Creative Economy.
- Central Indiana, including the Indianapolis metro and surrounding towns of Columbus, Nashville, and Bloomington, is a hub for the state's creative activity. **Recommendation:** Identify reasons for fewer employed creative opportunities outside of Central Indiana and clarify context for growth and/or sustainability of the Creative Economy at the regional level.

LIST OF TABLES + FIGURES

SECTION ONE: INDIANA'S CREATIVE ECONOMY

INDIANA’S CREATIVE ECONOMY

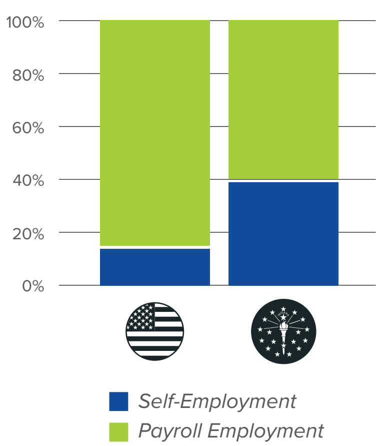


Indiana’s Creative Economy Wages	
Creative Industries	$34,006

*Annual wages are averaged

CREATIVE INDUSTRY EMPLOYMENT, 2015

Figure 1.1



INDIANA’S CREATIVE INDUSTRY

- From 2010 to 2015, Creative Industry employment grew at a faster pace across the U.S. than in Indiana.
- Indiana’s growth in self-employment in Creative Industries outpaced U.S. Creative Industry self-employment and self-employment in other Indiana industries.
- The top three Creative Industry jobs for both the U.S. and Indiana were the same, however unlike the U.S., independent artists drove Indiana’s Creative Industry employment. All of Indiana’s top payroll jobs in Creative Industries experienced declines from 2010 to 2015.
- Creative Industries in the U.S. with the most growth included web-based publishing, while Indiana’s largest industry growth was among print media, such as directory and mailing lists. The largest declines for both Indiana and the U.S. included print media, namely greeting cards and directories.
- The average U.S. wages for the highest-paying Creative Industry jobs were more than double the highest-paid Creative Industry jobs in Indiana.
- The industries with the largest proportions of creative jobs are in the information sector (83 percent). The information sector includes jobs related to publishing, broadcasting, and telecommunications. Arts, entertainment, and recreation (42 percent) provides facilities or services to meet recreational and cultural needs of individuals, and include professions related to sports, historical sites, and performing arts. The professional, scientific and technology (23 percent) sector specializes in performing technical activities for others, and includes jobs related to advertising, architecture, and photography.

Indiana's Top Creative Business Establishments

1. Commercial Printing*
2. Wired Telecommunications Carriers
3. Advertising Agencies
4. Architectural Services
5. Graphic Design Services

U.S. Top Creative Business Establishments
1. Independent Artists, Writers, and Performers; 2. Wired Telecommunications Carriers; 3. Architectural Services; 4. Commercial Printing*; 5. Advertising Agencies

**Excludes screen and book printing*

There are **5,132** Creative Business Establishments in Indiana

INDIANA'S CREATIVE OCCUPATIONS

- Like Indiana's Creative Industry, employment in Creative Occupations grew at a faster pace across the U.S. than in Indiana, with the exception of self-employment. Creative Occupation self-employment in Indiana was more than double the rate for the U.S.
- Indiana's growth in self-employment in Creative Industries outpaced U.S. Creative Industry self-employment and self-employment in other Indiana industries.
- Choreographers in payroll positions were the fastest growing Creative Occupation for the U.S., and the fastest declining among self-employment.
- Indiana's fastest-declining Creative Occupation, photographers in payroll positions, is also Indiana's most prevalent Creative Occupation.
- Indiana and the U.S. shared most of the Creative Occupations with the highest and lowest wages, but Indiana's wages were substantially lower than the average wages in the U.S.

Indiana's Creative Economy Wages	
Creative Occupations	$37,024

*Annual wages are averaged

CREATIVE OCCUPATION EMPLOYMENT, 2015
Figure 1.2

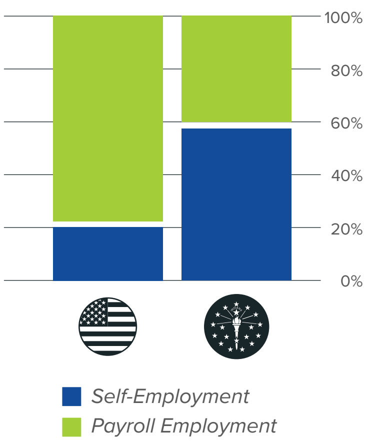


Table 1.2 Creative employment by industry sector, Indiana

INDUSTRY SECTOR	NUMBER OF CREATIVE JOBS IN SECTOR	TOTAL SECTOR EMPLOYMENT
Information	35,937	43,559
Arts, Entertainment, and Recreation	28,787	69,001
Professional, Scientific, & Tech	35,867	157,595
Educational Services	6,102	85,514
Manufacturing	21,599	537,981
Other Services	5,940	215,086
Mgmt. of Companies and Enterprises	1,132	34,429
Retail Trade	9,173	392,180
Government	7,411	444,965
Wholesale Trade	2,656	117,133
Adm., Support, Waste Mgmt (Temp Serv.)	2,478	223,096
Finance and Insurance	861	146,785
Utilities	89	14,828
All Other Industries	2,688	1,243,706

Figure 1.3, Creative Industry employment, 2010 to 2015

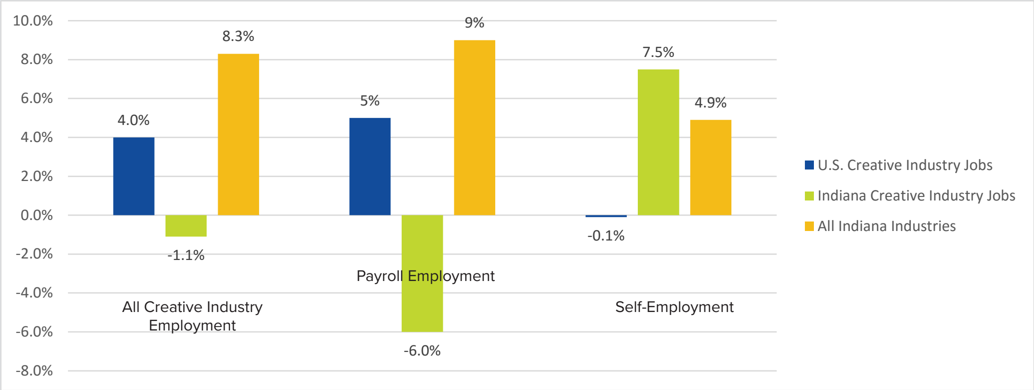


Table 1.3, Total, payroll, and self-employment in Creative Occupations, Indiana

ALL CREATIVE INDUSTRY EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Independent Artists, Writers, and Performers	14,640	9.7%
Wired Telecommunications Carriers	11,010	-13.2%
Commercial Printing (except Screen & Books)	9,939	-13.8%
Newspaper Publishers	5,675	-17.9%
Photography Studios, Portrait	4,632	7.9%

CREATIVE INDUSTRY PAYROLL EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Wired Telecommunications Carriers	9,433	-10.8%
Commercial Printing (except Screen & Books)	9,067	-15.1%
Newspaper Publishers	4,952	-20.6%
Commercial Screen Printing	3,330	-1.0%
Motion Picture Theaters (except Drive-Ins)	2,295	-18.9%

SELF-EMPLOYMENT IN CREATIVE INDUSTRIES	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Independent Artists, Writers, and Performers	14,305	9.9%
Photography Studios, Portrait	3,625	37.9%
Fine Arts Schools	2,436	-9.8%
Graphic Design Services	1,998	0.4%
Wired Telecommunications Carriers	1,577	-25%

Table 1.4, Total, payroll, and self-employment in Creative Occupations, U.S.

ALL CREATIVE INDUSTRY EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Wired Telecommunications Carriers	611,694	2%
Commercial Printing (except Screen and Books)	339,090	-12%
Software Publishers	321,257	24%
Independent Artists, Writers, and Performers	286,034	3%
Motion Picture and Video Production	272,947	15%
CREATIVE INDUSTRY PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Wired Telecommunications Carriers	611,694	2%
Commercial Printing (except Screen and Books)	325,188	-12%
Software Publishers	321,257	24%
Motion Picture and Video Production	224,452	14%
Advertising Agencies	206,665	17%
SELF-EMPLOYMENT IN CREATIVE INDUSTRIES	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Independent Artists, Writers, and Performers	230,824	-1.1%
Graphic Design Services	65,214	0.3%
Interior Design Services	49,025	2.9%
Motion Picture and Video Production	48,495	20.3%
Fine Arts Schools	44,058	5.4%

Figure 1.4
Largest growth in Creative Industry employment, 2010 to 2015

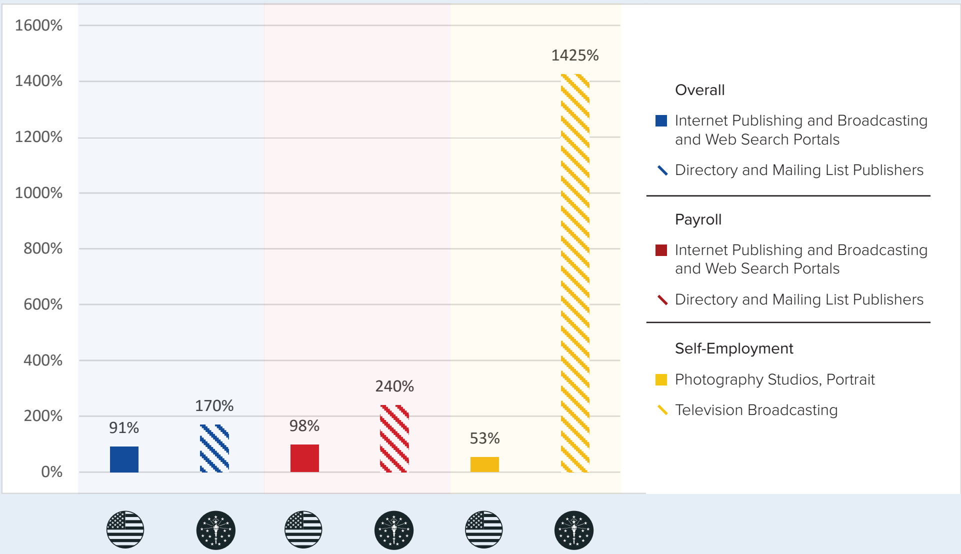


Figure 1.5
Largest declines in Creative Industry employment, 2010 to 2015

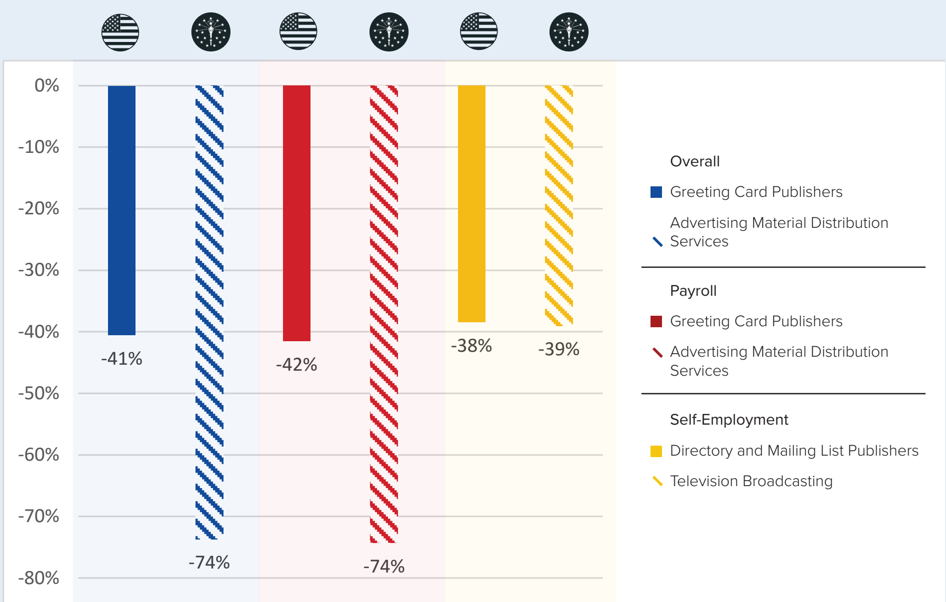


Figure 1.6, Highest average Creative Industry wages, by employment type

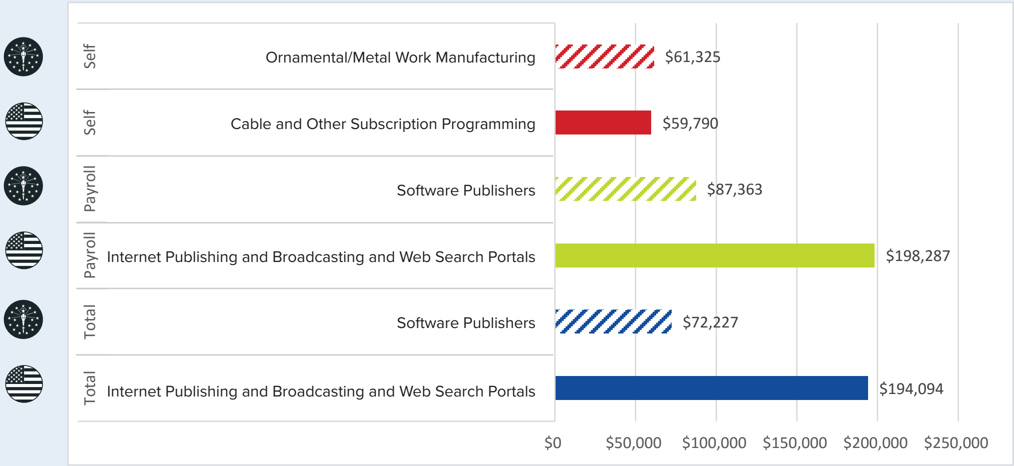


Figure 1.7, Lowest average Creative Industry wages, by employment type

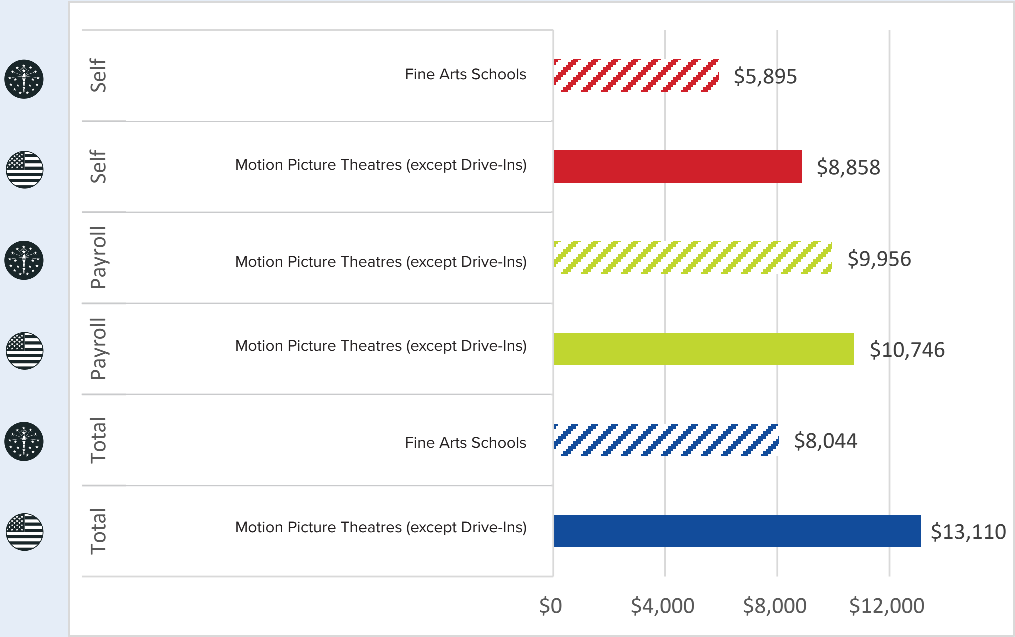


Figure 1.9, Change in Creative Occupation employment, 2010 to 2015

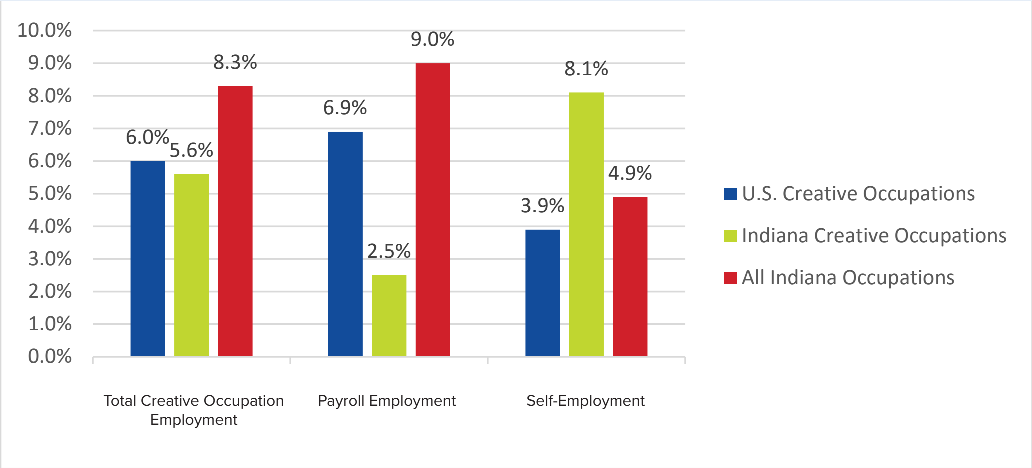


Figure 1.10, Largest growth in Creative Occupation employment, 2010 to 2015

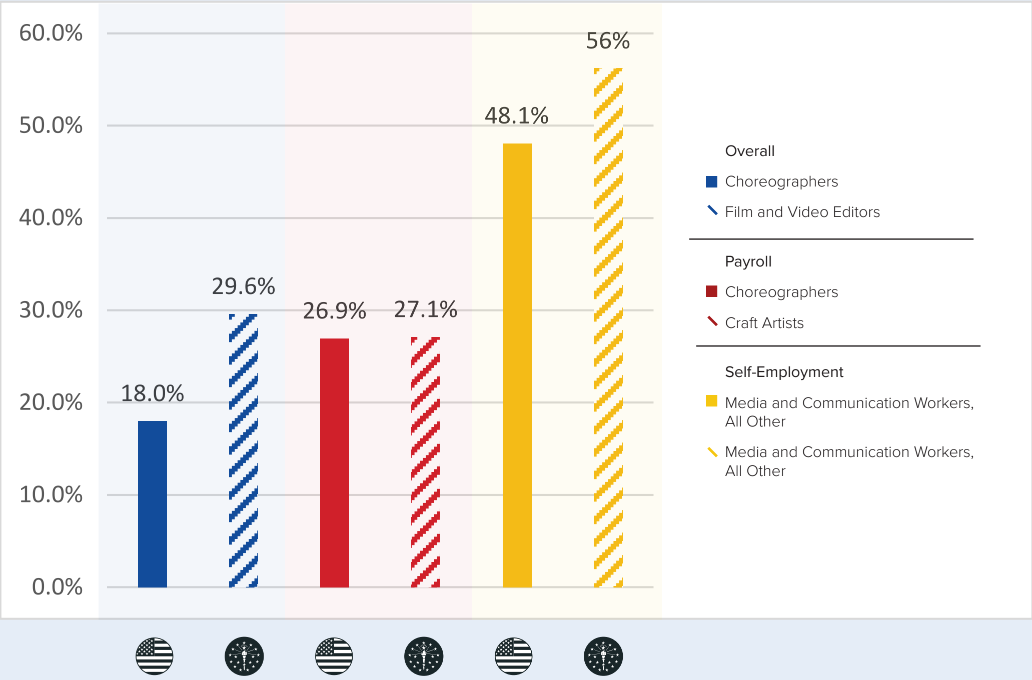


Figure 1.11, Largest declines in Creative Occupation employment, 2010 to 2015

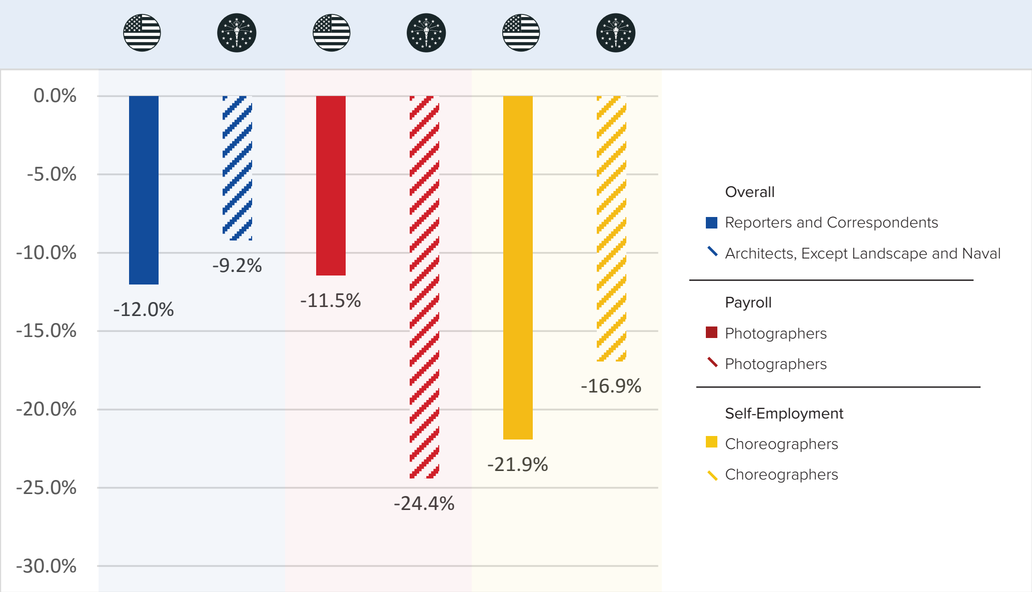


Figure 1.12, Highest average Creative Occupation wages, by employment type

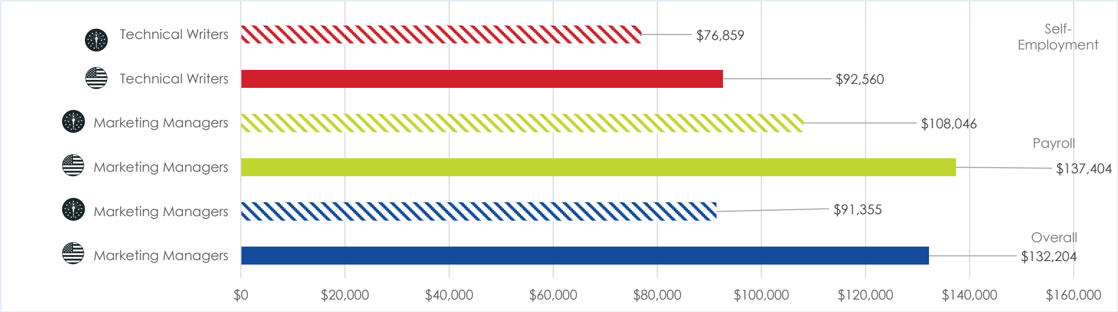
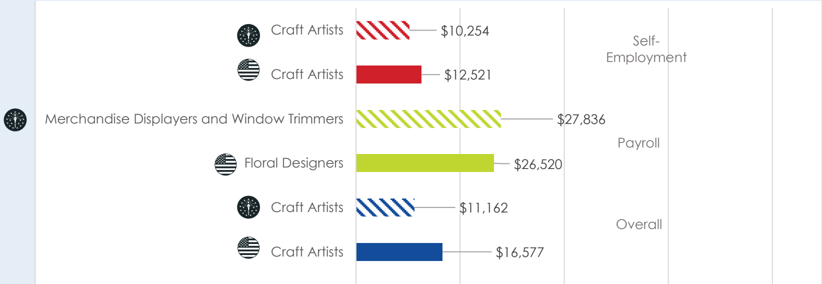


Figure 1.13, Lowest average Creative Occupation wages, by employment type



SECTION TWO: REGIONAL PROFILES OF THE CREATIVE ECONOMY

The Indiana Arts Commission delivers many of its services through a decentralized system of 11 regions. Each region is represented by a Regional Arts Partner contracted by the Indiana Arts Commission to provide re-granting services, technical assistance and information and referral to the artists, organizations and communities in their respective regions.

Note: Due to a regional restructuring several years ago, the Indiana Arts Commission does not have a "Region 11".

Region 1
South Shore Arts

Region 2
Community Foundation of St. Joseph County

Region 3
Arts United of Greater Fort Wayne

Region 4
Tippecanoe Arts Federation

Region 5
Community Foundation of Randolph County

Region 6
Arts Illiana

Region 7
Butler University

Region 8
Brown County Community Foundation

Region 9
Columbus Area Arts Council

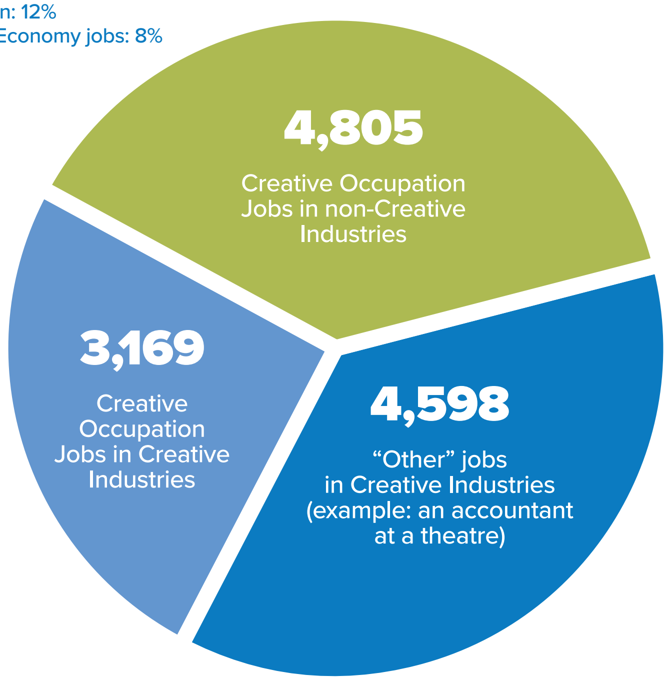
Region 10
Vanderburgh Community Foundation

Region 12
Hanover College

LAKE, PORTER, AND LAPORTE COUNTIES

REGION ONE: GREATER GARY

Total population: 766,437
% of population: 12%
% of Creative Economy jobs: 8%



There are **12,572** Creative Economy Jobs in Region One

Region One’s Creative Industry Wages
$26,434

*Annual wages are averaged

REGION ONE’S CREATIVE INDUSTRY

- From 2010 to 2015, Region 1 lost a greater proportion of Creative Industry employees than other regions. This drop was driven by a steep decline in Creative Industry employees with payroll jobs.
- Self-employed Creative Industry jobs in Region 1 outpaced growth in the state.
- Overall, independent artists, writers, and performers were the top Creative Industry employer in Region 1. Of the top Creative Industry jobs, independent artists were the only group to experience growth from 2010 to 2015.
- Even as one of the top Creative Industries in Region 1, newspaper publishers lost jobs from 2010-2015.
- Self-employed Creative Industry employees saw gains in the top three jobs, especially among photography studios.
- Independent artists experienced the most growth among payroll Creative Industry positions, though there were only 62 such positions in 2015.
- Directory and mailing publishers, book publishers, and advertising distribution services lost all previously existing jobs in Region 1 by 2015.
- Media-related positions earned the highest wages among payroll and all Creative Industry jobs in 2015.
- Fine arts schools and theater companies were among the lowest-paying Creative Industry jobs in Region 1. Most fine arts school employees in Region 1 were self-employed.

Region One's Top Creative Business Establishments

1. Commercial Printing*
2. Wired Telecommunications Carriers
3. Fine Arts Schools
4. Architectural Services
5. Book Stores

Indiana Top Creative Business Establishments
1. Commercial Printing*; 2. Wired Telecommunications Carriers; 3. Advertising Agencies; 4. Architectural Services; 5. Graphic Design Services

Excludes screen and book printing

There are **405** Creative Business Establishments in Region One

REGION ONE'S CREATIVE OCCUPATIONS

- Region 1 experienced growth in Creative Occupations from 2010 to 2015, just below Indiana's overall growth. This growth was driven by an increase in self-employed individuals working in Creative Occupations.
- Photography was the top Creative Occupation in Region 1, followed by musicians and singers, and writers and authors. Each of these occupations were driven by self-employed individuals in each profession.
- Musicians and singers experienced double-digit growth from 2010 to 2015. There was also an increase in musicians and singers who worked on an organization's payroll, though self-employed musicians and singers comprised 60 percent of these jobs.
- Public relations specialists and library technicians rounded out the top three payroll occupations, though these jobs experienced only modest gains or declines from 2010 to 2015.
- Media-related positions experienced the most growth from 2010 to 2015. The Creative Occupation, with the most growth across all occupations were film and video editors, in addition to broadcast technicians and media and communication workers in the payroll and self-employed sectors, respectively.
- The largest declines were among architects, and self-employed floral designers.
- In Region 1, the highest paid occupations tended to work in writing and management. The lowest average wages included craft artists and fine artists, driven by self-employed artists.

Region One's Creative Occupations Wages
$31,637

*Annual wages are averaged

Figure 2.1.1 Change in Creative Industry employment, 2010 to 2015

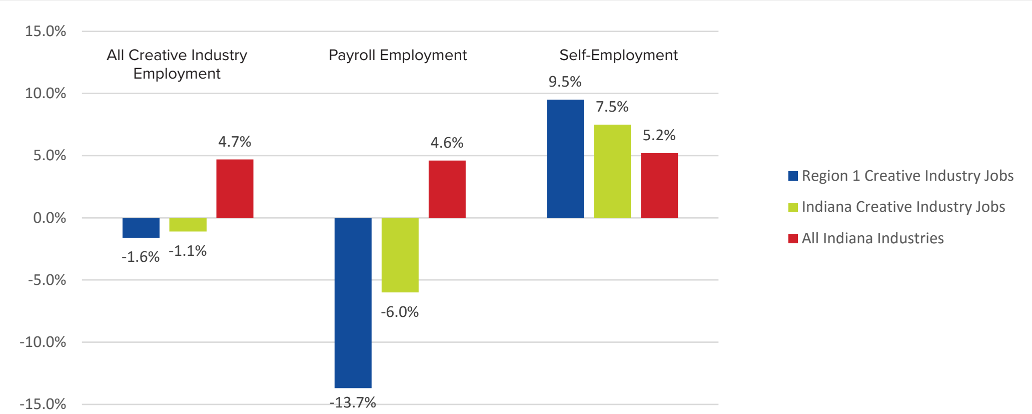


Table 2.1.1 Total, payroll, and self-employment in Creative Industries

ALL CREATIVE INDUSTRY EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Independent Artists, Writers, and Performers	1,398	5.6%
Wired Telecommunications Carriers	791	-9.0%
Newspaper Publishers	520	-15.8%
Commercial Printing (except Screen and Books)	485	2.1%
Fine Arts Schools	434	22.3%
CREATIVE INDUSTRY PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Wired Telecommunications Carriers	574	-6.2%
Commercial Printing (except Screen and Books)	419	-2.6%
Newspaper Publishers	408	-24.9%
Motion Picture Theaters (except Drive-Ins)	174	-27.1%
Fine Arts Schools	171	61.1%
SELF-EMPLOYMENT IN CREATIVE INDUSTRIES	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Independent Artists, Writers, and Performers	1,335	2.4%
Photography Studios, Portrait	333	37.9%
Fine Arts Schools	263	5.7%
Wired Telecommunications Carriers	217	-16.6%
Graphic Design Services	177	-10.4%

Figure 2.1.2 Largest growth and declines in Creative Industry employment, 2010 to 2015

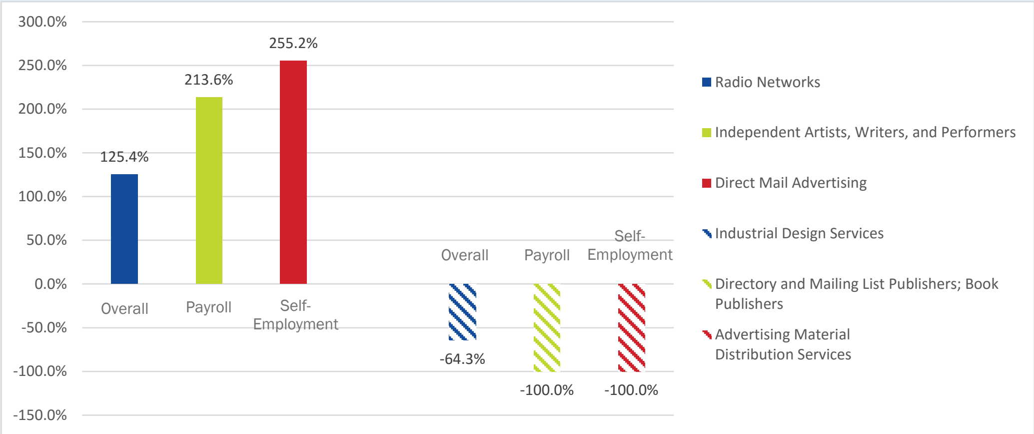


Figure 2.1.3 Lowest and highest average Creative Industry wages, by employment type

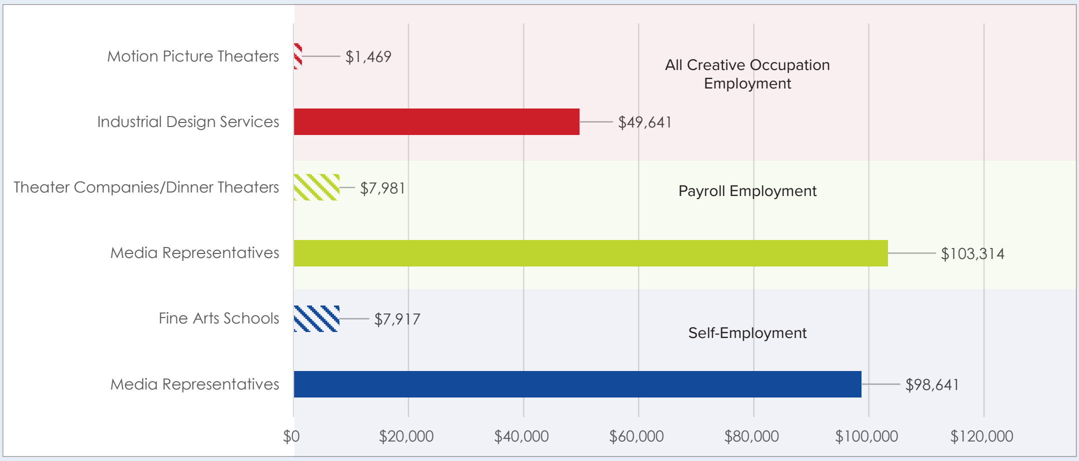


Figure 2.1.4 Change in Creative Occupation employment, 2010 to 2015

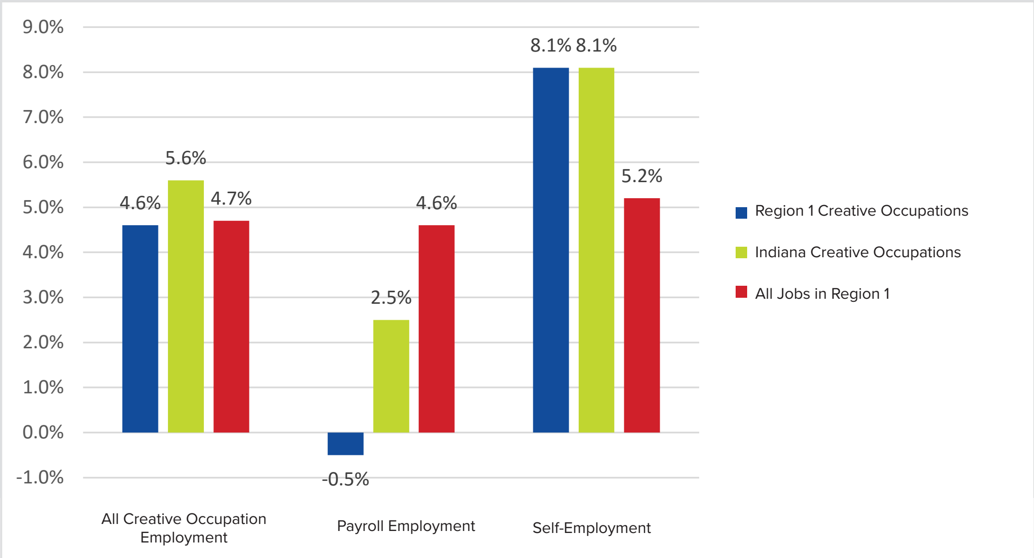


Table 2.1.2 Total, payroll, and self-employment in Creative Occupations

ALL CREATIVE OCCUPATION EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Photographers	1,174	5.6%
Musicians and Singers	792	16.3%
Writers and Authors	571	15.4%
Graphic Designers	481	-1.60%
Interpreters and Translators	403	-1.10%
CREATIVE OCCUPATION PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Public Relations Specialists	328	0.8%
Library Technicians	316	-0.7%
Musicians and Singers	314	19.4%
Librarians	286	-0.70%
Merchandise Displayers and Window Trimmers	225	6.20%
SELF-EMPLOYMENT IN CREATIVE OCCUPATIONS	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Photographers	1,088	9.2%
Writers and Authors	542	17.0%
Musicians and Singers	478	14.4%
Interpreters and Translators	329	-3.50%
Graphic Designers	291	5.20%

Figure 2.1.5 Largest growth and declines in Creative Occupation employment, 2010 to 2015

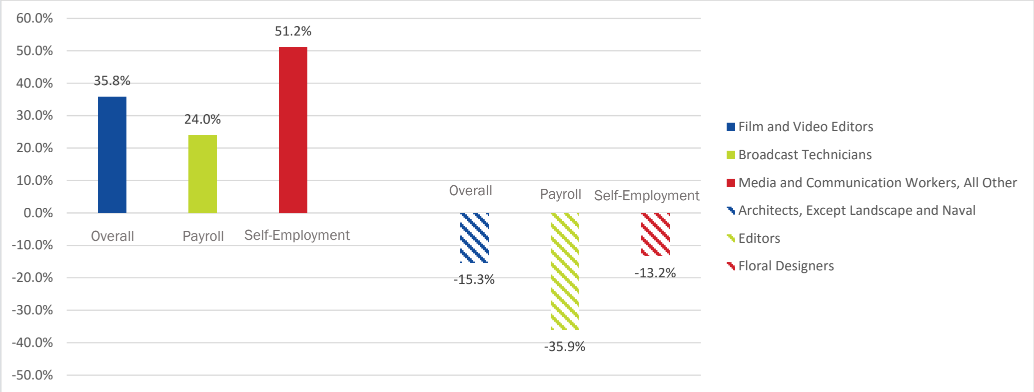
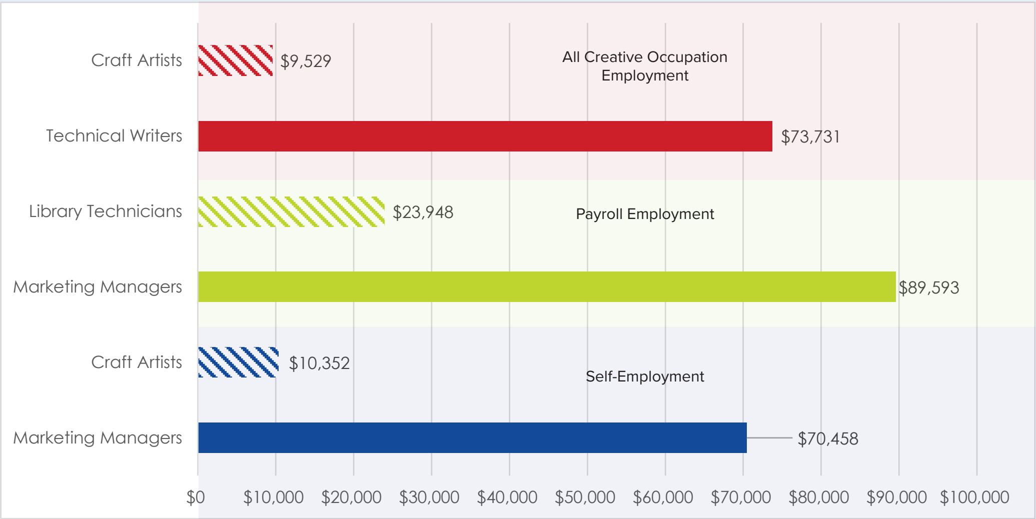


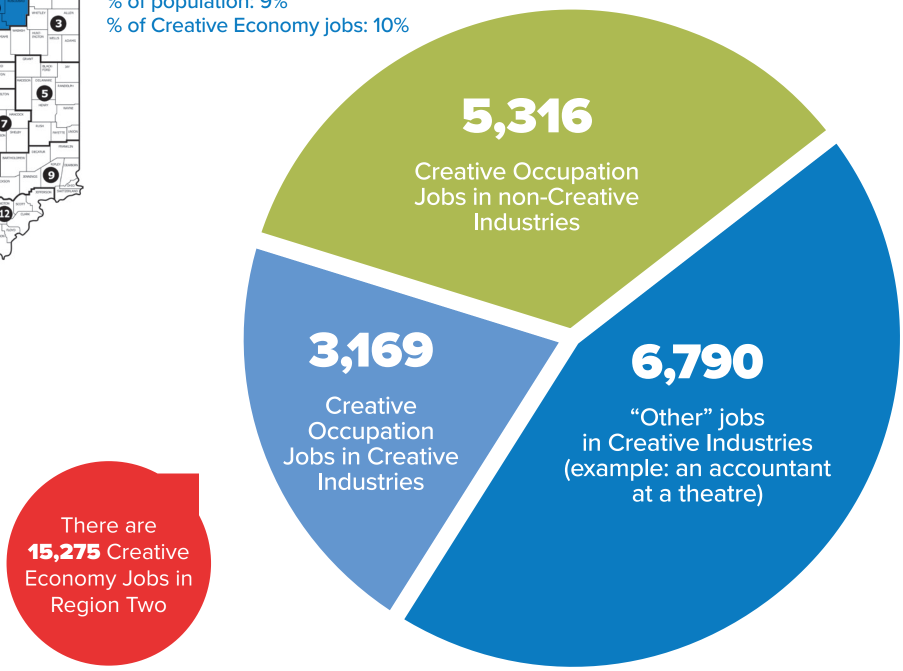
Figure 2.1.6 Lowest and highest average Creative Occupation wages, by employment type



ST. JOSEPH, ELKHART, STARKE, MARSHALL, KOSCIUSKO, AND FULTON COUNTIES

REGION TWO: GREATER SOUTH BEND

Total population: 640,665
% of population: 9%
% of Creative Economy jobs: 10%



Region Two's Creative Industry Wages
$31,159
*Annual wages are averaged

REGION TWO'S CREATIVE INDUSTRY

- Region 2 experienced a higher decline in Creative Industry employment from 2010 to 2015 than other regions in the state. This decline was driven by a decline in payroll employment (12.7 percent) that more than doubled the payroll decline across the entire state (six percent).
- Commercial printing was the largest Creative Industry employer, driven by large employment numbers among payroll jobs. This industry also experienced double-digit declines from 2010 to 2015.
- The top three self-employment industries experienced double-digit gains. Independent artists had the highest number of self-employed Creative Industry jobs, and the second-highest among all Creative Industries.
- Advertising and marketing drove Creative Industry employment. Direct mail advertising experienced the highest growth across all Creative Industries. This industry includes creating, designing, and/or preparing advertising campaigns for distribution. Commercial photography includes photography for business and industrial purposes, and promoters include those who manage and/or promote events operated by others.
- Though independent artists experienced some of the highest growth overall, they experienced the greatest decline among payroll jobs. Directory and mailing list publishers were eliminated from 2010 to 2015 (loss of all 25 employees), likely due to the closing of an establishment in the region.
- Media comprised almost all highest paid Creative Industries, led by media representatives and public relations. The least paid Creative Industries included musical groups and artists and those working in movie theaters (likely part-time employees).

Region Two’s Top Creative Business Establishments

1. Commercial Printing*
2. Architectural Services
3. Wired Telecommunications Carriers
4. Advertising Agencies
5. Graphic Design Services

Indiana Top Creative Business Establishments
1. Commercial Printing*; 2. Wired Telecommunications Carriers; 3. Advertising Agencies; 4. Architectural Services; 5. Graphic Design Services

**Excludes screen and book printing*

There are **451** Creative Business Establishments in Region Two

REGION TWO’S CREATIVE OCCUPATIONS

- Region 2’s Creative Occupations experienced growth in all sectors of Creative Occupation employment. Region 2 kept on pace with the state, and slightly exceeded the state’s growth in payroll jobs.
- Photographers were the largest Creative Occupation, mostly consisting of self-employed photographers. Musicians and singers, among the top three Creative Occupations, experienced double-digit increases in jobs from 2010 to 2015. Payroll employment drove the number of graphic designer jobs.
- Design-related professions experienced the largest growth in Region 2, particularly due to payroll jobs. Payroll employment drove the largest declines overall amongst floral designers.
- Similar to larger Creative Occupational trends, marketing and advertising-related positions earned the highest average wages, with independent artists earning the lowest average wages. Despite lower pay, craft and fine artists also experienced growth in their respective occupations from 2010 to 2015.

Region Two’s Creative Occupation Wages
$37,045

*Annual wages are averaged

Figure 2.2.1 Change in Creative Industry employment, 2010 to 2015

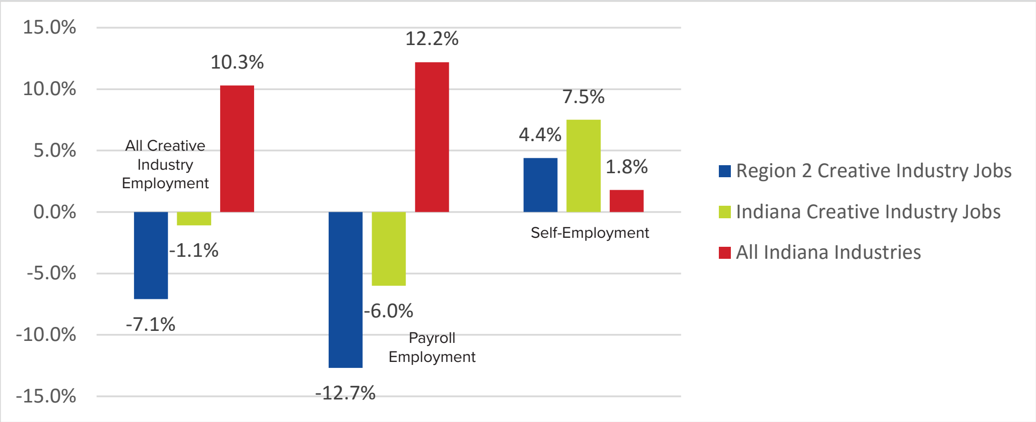


Table 2.2.1 Total, payroll, and self-employment in Creative Industries

ALL CREATIVE INDUSTRY EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Independent Artists, Writers, and Performers	1,398	5.6%
Wired Telecommunications Carriers	791	-9.0%
Newspaper Publishers	520	-15.8%
Commercial Printing (except Screen and Books)	485	2.1%
Fine Arts Schools	434	22.3%

CREATIVE INDUSTRY PAYROLL EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Wired Telecommunications Carriers	574	-6.2%
Commercial Printing (except Screen and Books)	419	-2.6%
Newspaper Publishers	408	-24.9%
Motion Picture Theaters (except Drive-Ins)	174	-27.1%
Fine Arts Schools	171	61.1%

SELF-EMPLOYMENT IN CREATIVE INDUSTRIES	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Independent Artists, Writers, and Performers	1,335	2.4%
Photography Studios, Portrait	333	37.9%
Fine Arts Schools	263	5.7%
Wired Telecommunications Carriers	217	-16.6%
Graphic Design Services	177	-10.4%

Figure 2.2.2 Largest growth and declines in Creative Industry employment, 2010 to 2015

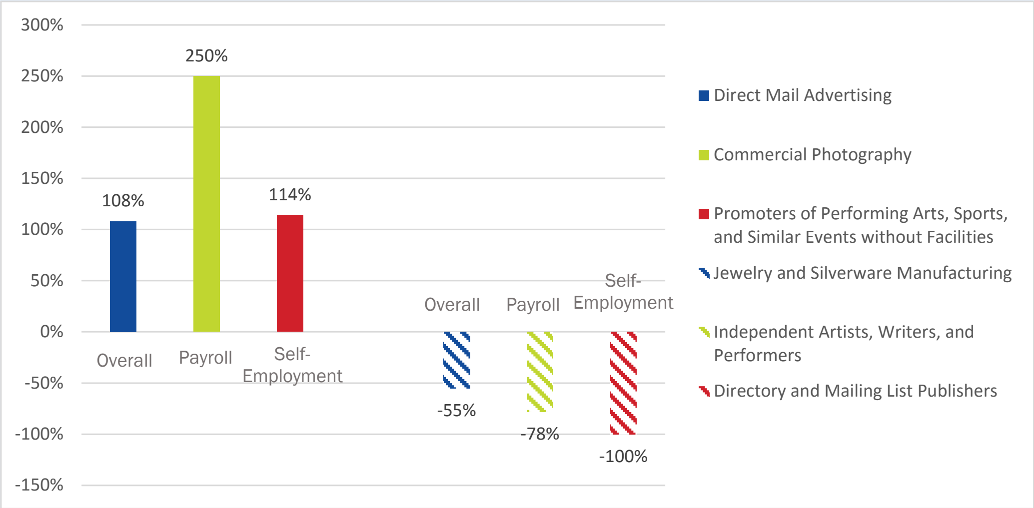


Figure 2.2.3 Lowest and highest average Creative Industry wages, by employment type

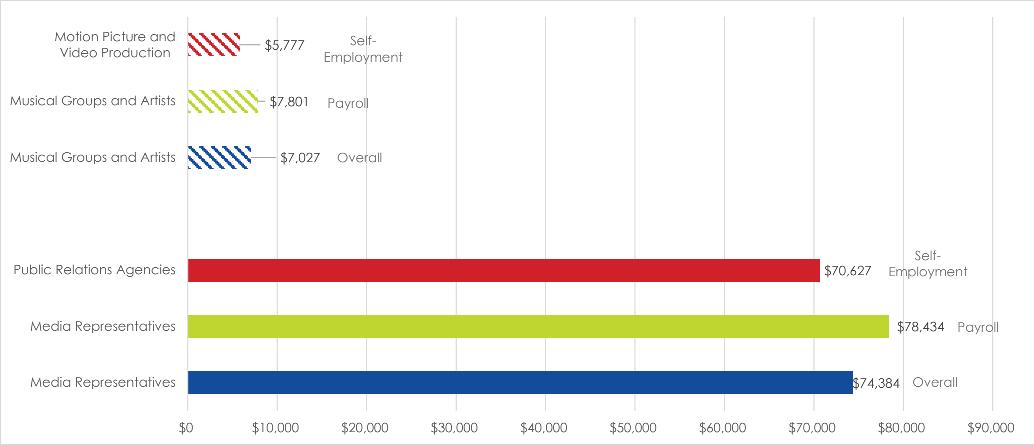


Figure 2.2.4 Change in Creative Occupation employment, 2010 to 2015

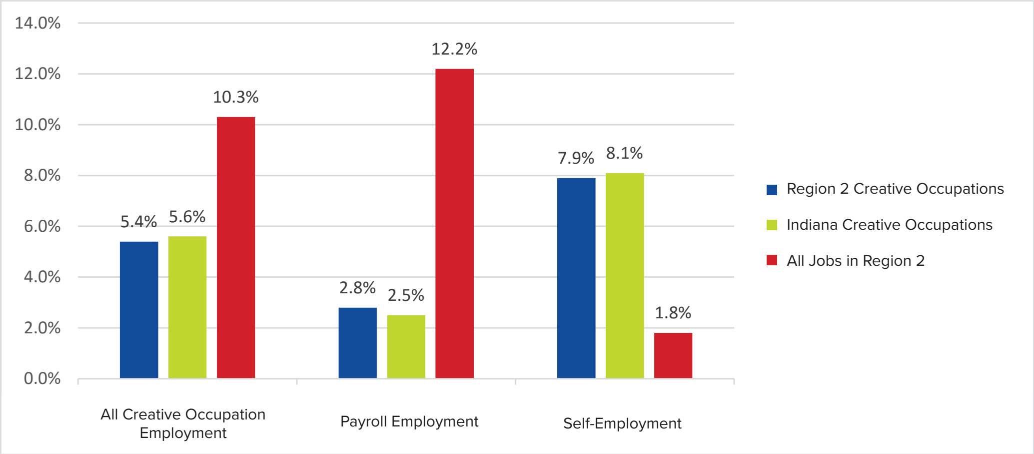


Table 2.2.2 Total, payroll, and self-employment in Creative Occupations

ALL CREATIVE OCCUPATION EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Photographers	1,174	5.6%
Musicians and Singers	792	16.3%
Writers and Authors	571	15.4%
Graphic Designers	481	-1.60%
Interpreters and Translators	403	-1.10%
CREATIVE OCCUPATION PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Public Relations Specialists	328	0.8%
Library Technicians	316	-0.7%
Musicians and Singers	314	19.4%
Librarians	286	-0.70%
Merchandise Displayers and Window Trimmers	225	6.20%
SELF-EMPLOYMENT IN CREATIVE OCCUPATIONS	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Photographers	1,088	9.2%
Writers and Authors	542	17.0%
Musicians and Singers	478	14.4%
Interpreters and Translators	329	-3.50%
Graphic Designers	291	5.20%

Figure 2.2.5 Largest growth and declines in Creative Occupation employment, 2010 to 2015

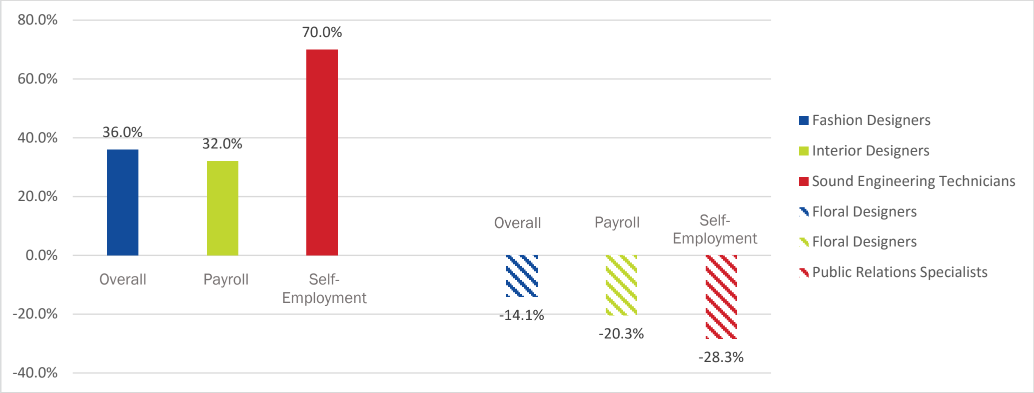
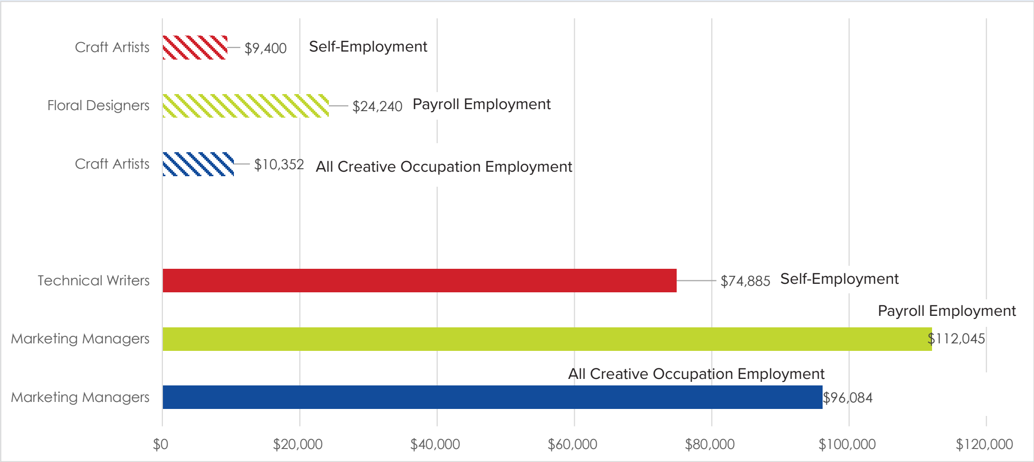
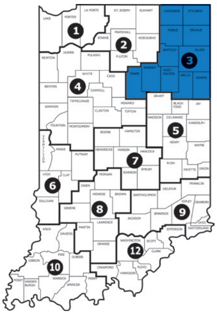


Figure 2.2.6 Lowest and highest average Creative Occupation wages, by employment type

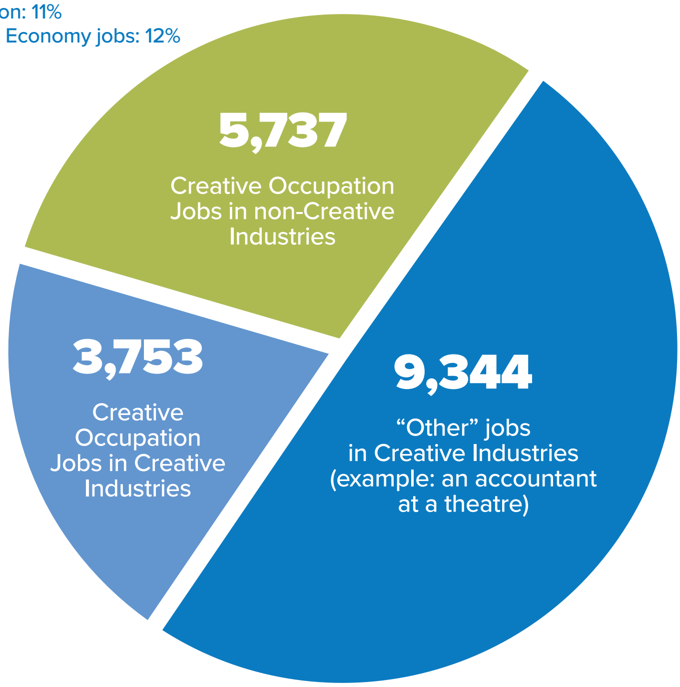


LAGRANGE, STEUBEN, NOBLE, DEKALB, WHITLEY, ALLEN, MIAMI, WABASH, HUNTINGTON, WELLS, AND ADAMS COUNTIES

REGION THREE: GREATER FORT WAYNE



Total population: 726,256
% of population: 11%
% of Creative Economy jobs: 12%



There are **18,834** Creative Economy Jobs in Region Three

Region Three's Creative Industry Wages
$35,852
*Annual wages are averaged

REGION THREE'S CREATIVE INDUSTRY

- Even though Region 3 experienced a decline in Creative Industry employment from 2010 to 2015, the decline was not as high as the rest of the state. The decline in Creative Industry jobs was driven by a decline in payroll positions in the Creative Industries. The decline was offset by an increase in self-employed jobs in the Creative Industries.
- Wired telecommunications carriers had the highest employment in 2015, supported by payroll jobs. Commercial printing saw high employment numbers as well due to payroll employment. Independent artists experienced high employment numbers due to self-employment growth.
- Though commercial printing had high employment numbers, the industry experienced a double-digit decline in employment compared to book printing, which experienced a double-digit increase in employment in the payroll sector.
- The largest growth in Creative Industry employment was among artists in both the payroll and self-employment sectors. Industrial design services, those involved in planning and designing residential structures, experienced the most growth overall.
- The largest declines were among publishers in the payroll and self-employment sectors.
- The highest Creative Industry wages in Region 3 were among wired telecommunications carriers, driven by self-employment wages in the industry.
- Even though photography was among the top three Creative Industry jobs, these employees earned the least across sectors. Employees at fine arts schools were also among the least paid.

Region Three's Top Creative Business Establishments

1. Commercial Printing*
2. Advertising Agencies
3. Wired Telecommunications Carriers
4. Architectural Services
5. Graphic Design Services

Indiana Top Creative Business Establishments
1. Commercial Printing*; 2. Wired Telecommunications Carriers; 3. Advertising Agencies; 4. Architectural Services; 5. Graphic Design Services

**Excludes screen and book printing*

There are **534** Creative Business Establishments in Region Three

REGION THREE'S CREATIVE OCCUPATIONS

- Region 3 experienced growth across all types of employment, though this growth did not keep pace with Indiana as a whole.
- Photographers, musicians and singers were among the top Creative Occupations, both supported by numbers in self-employment. Graphic designers were slightly more concentrated in the payroll sector.
- The greatest growth was among film and video editors, increasing to nearly 40 such editors in Region 3.
- The greatest declines were among photographers in payroll positions, as well as public relations-related positions.
- The highest average occupational wages were among marketing managers, as well as self-employed technical writers. The lowest average occupational wages were among craft and fine artists, driven by self-employed artists.

Region Three's Creative Occupations Wages
$34,382

*Annual wages are averaged

Figure 2.3.1 Change in Creative Industry employment, 2010 to 2015

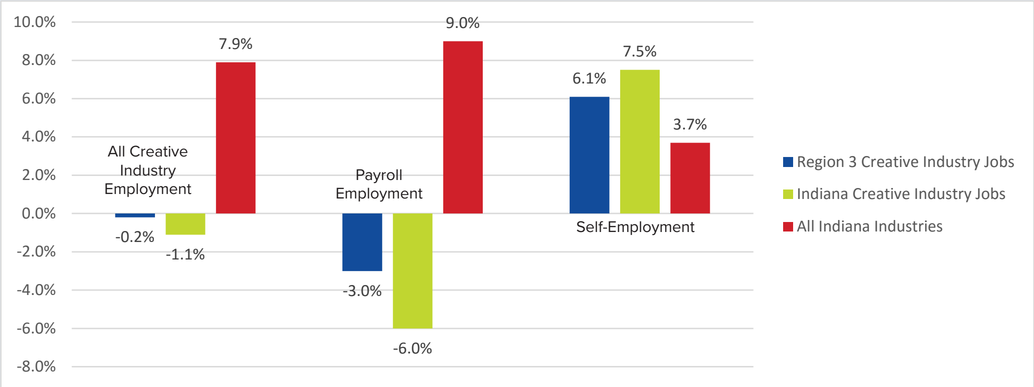


Table 2.3.1 Total, payroll, and self-employment in Creative Industries

ALL CREATIVE INDUSTRY EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Wired Telecommunications Carriers	1,755	-1.0%
Independent Artists, Writers, and Performers	1,441	6.1%
Commercial Printing (except Screen and Books)	1,424	-13.8%
Newspaper Publishers	632	-25.8%
Radio Stations	387	4.2%
CREATIVE INDUSTRY PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Wired Telecommunications Carriers	1,597	0.6%
Commercial Printing (except Screen and Books)	1,349	-15.4%
Book Printing	1,075	53.0%
Book Stores	353	2.0%
Musical Instrument Manufacturing	337	-23.5%
SELF-EMPLOYMENT IN CREATIVE INDUSTRIES	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Independent Artists, Writers, and Performers	1,397	4.0%
Photography Studios, Portrait	344	23.5%
Fine Arts Schools	268	-21.4%
Graphic Design Services	186	-7.1%
Interior Design Services	153	54.0%

Figure 2.3.2 Largest growth and declines in Creative Industry employment, 2010 to 2015

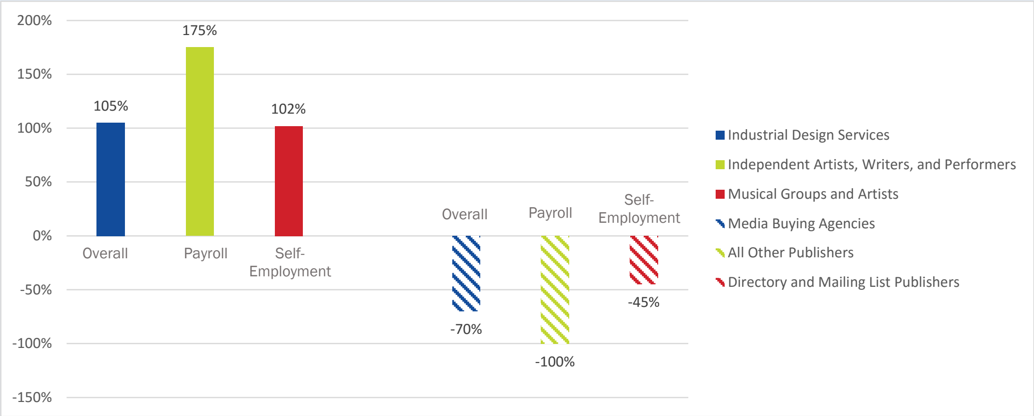


Figure 2.3.3 Lowest and highest average Creative Industry wages, by employment type

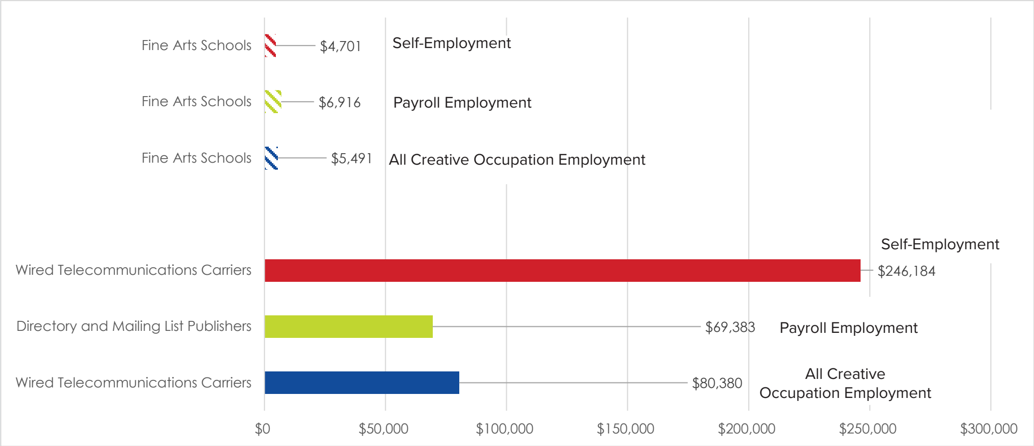


Figure 2.3.4 Change in Creative Occupation employment, 2010 to 2015

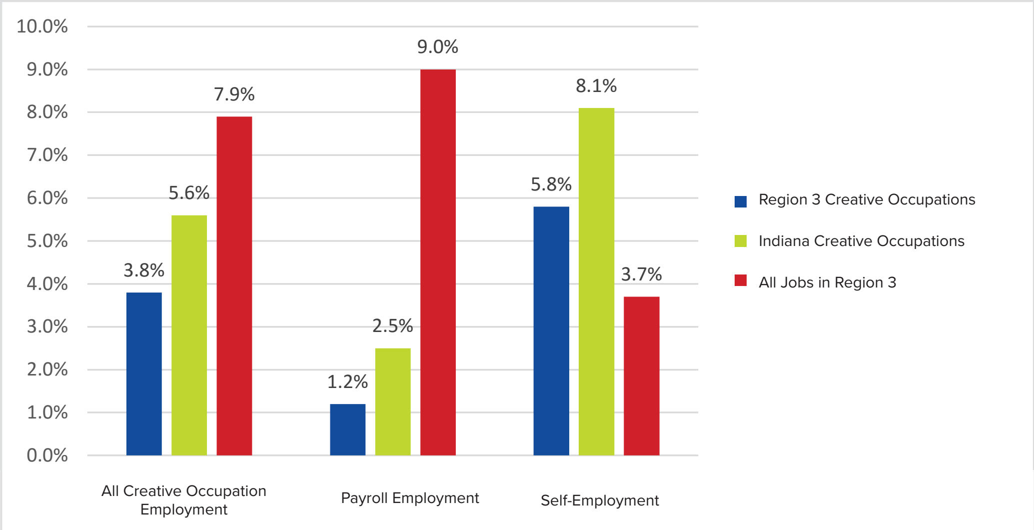


Table 2.3.2 Total, payroll, and self-employment in Creative Occupations

ALL CREATIVE OCCUPATION EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Photographers	1,274	-0.4%
Musicians and Singers	913	10.1%
Graphic Designers	806	8.0%
Writers and Authors	664	15.3%
Interpreters and Translators	466	-5.8%
CREATIVE OCCUPATION PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Graphic Designers	470	8.3%
Musicians and Singers	385	3.7%
Library Technicians	317	2.9%
Marketing Managers	294	5.8%
Public Relations Specialists	262	-0.2%
SELF-EMPLOYMENT IN CREATIVE OCCUPATIONS	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Photographers	1,194	2.1%
Writers and Authors	581	17.7%
Musicians and Singers	528	15.3%
Interpreters and Translators	360	-10.6%
Graphic Designers	336	7.7%

Figure 2.3.5 Largest growth and declines in Creative Occupation employment, 2010 to 2015

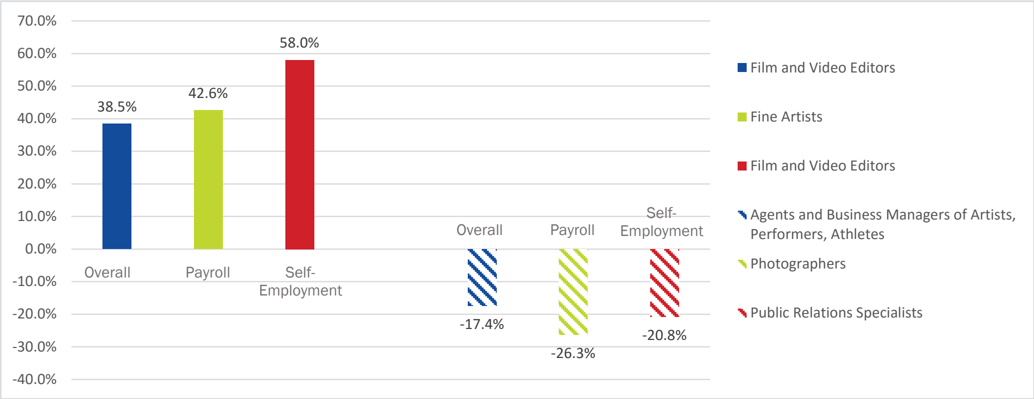
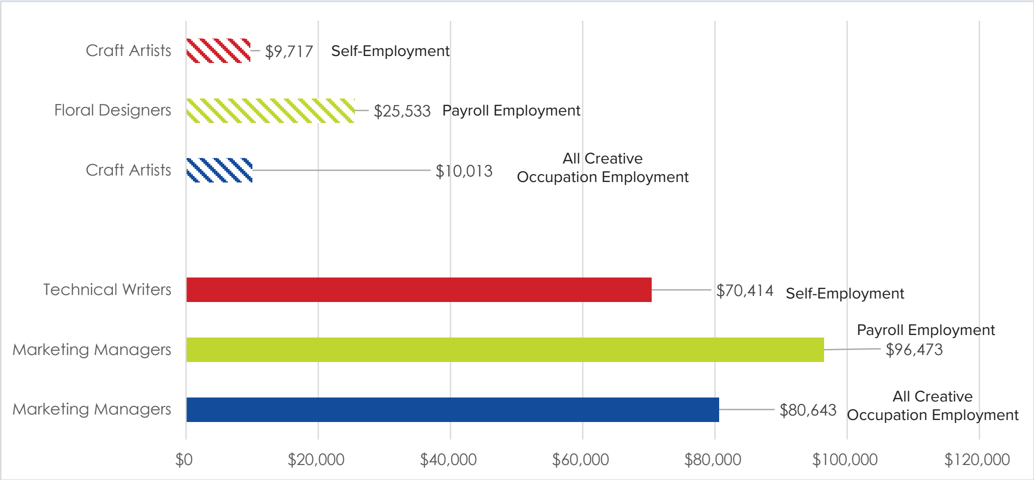
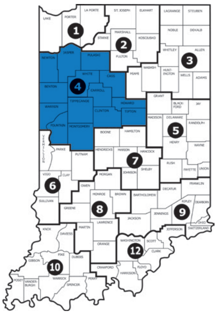


Figure 2.3.6 Lowest and highest average Creative Occupation wages, by employment type

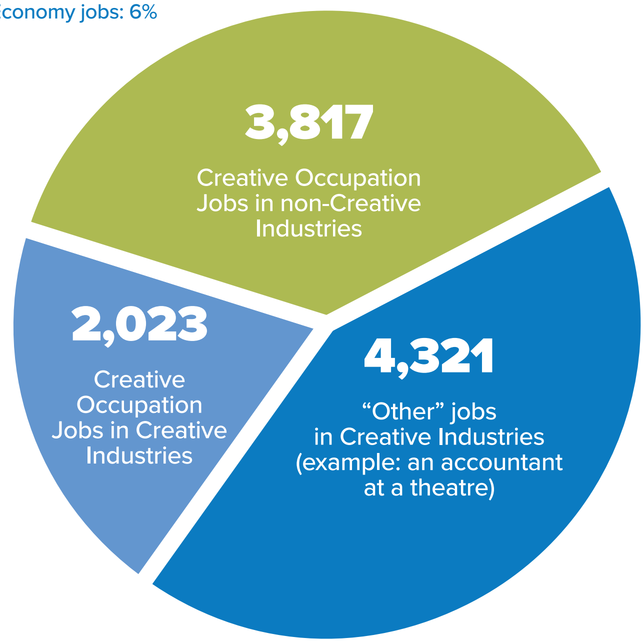


NEWTON, JASPER, PULASKI, BENTON, WHITE, CASS, CARROLL, WARREN, TIPPECANOE, CLINTON, HOWARD, TIPTON, FOUNTAIN, AND MONTGOMERY COUNTIES

REGION FOUR: GREATER LAFAYETTE



Total population: 431,396
% of population: 7%
% of Creative Economy jobs: 6%



There are **10,161** Creative Economy Jobs in Region Four

Region Four’s Creative Industry Wages
$29,790

*Annual wages are averaged

REGION FOUR’S CREATIVE INDUSTRY

- Region 4 experienced a decline in Creative Industry employment from 2010 to 2015. This decline was greater than Indiana’s overall decline. The decline in Region 4 was driven by a decrease in payroll employment.
- Book printing was the largest Creative Industry employer in Region 4 in 2015, though the industry experienced a decline from 2010 to 2015. Independent artists experienced an increase, as well as the second-highest number of employees in the region.
- The greatest increase among self-employment in Creative Industries was photography studios (36%).
- Publishing (internet, magazine, and books) all experienced the highest industry growth in Region 4.
- The greatest declines were among direct mail advertising and radio networks, which lost all employment in the payroll sector.
- Broadly, publishing (software and directories) had the highest average wages in Region 4, in addition to the highest Creative Industry growth.
- The average wage among workers in photography studios was the lowest overall.

Region Four's Top Creative Business Establishments

1. Wired Telecommunications Carriers
2. Commercial Printing*
3. Newspaper Publishers
4. Fine Arts Schools/Commercial Screen Printing/ Book Stores

Indiana Top Creative Business Establishments
1. Commercial Printing*; 2. Wired Telecommunications Carriers; 3. Advertising Agencies; 4. Architectural Services; 5. Graphic Design Services

**Excludes screen and book printing*

There are **267** Creative Business Establishments in Region Four

REGION FOUR'S CREATIVE OCCUPATIONS

- Region 4's in Creative Occupations increased from 2010 to 2015 driven by gains among those self-employed in the Creative Occupations.
- The most Creative Occupation jobs were among photographers, largely self-employed. Substantially fewer payroll occupations existed, though the top three payroll occupations experienced growth.
- Film and video editors experienced the most growth from 2010 to 2015, driven by self-employment. The least growth was among photographers on payroll jobs, corresponding with an increase of self-employed photographers.
- Like other regions, marketing managers were the highest paid among Creative Occupations. Artists and floral designers were among the lowest paid Creative Occupations.

Region Four's Creative Economy Wages	
Creative Occupations	$33,155

*Annual wages are averaged

Figure 2.4.1 Change in Creative Industry employment, 2010 to 2015

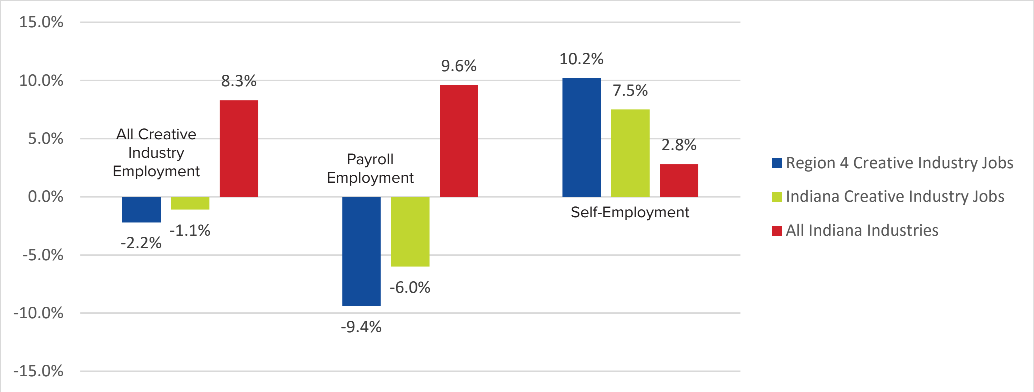


Table 2.4.1 Total, payroll, and self-employment in Creative Industries

ALL CREATIVE INDUSTRY EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Books Printing	1,022	-4.9%
Independent Artists, Writers, and Performers	964	12.1%
Wired Telecommunications Carriers	503	-5.5%
Newspaper Publishers	449	-23.2%
Fine Arts Schools	340	26.1%
CREATIVE INDUSTRY PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Books Printing	1,022	-4.9%
Wired Telecommunications Carriers	482	13.0%
Newspaper Publishers	399	-24.8%
Motion Picture Theaters (except Drive-Ins)	275	-21.2%
Book Stores	205	-43.5%
SELF-EMPLOYMENT IN CREATIVE INDUSTRIES	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Independent Artists, Writers, and Performers	951	12.0%
Photography Studios, Portrait	245	36.4%
Fine Arts Schools	231	9.1%
Graphic Design Services	93	-5.1%
Interior Design Services	82	8.4%

Figure 2.4.2 Largest growth and declines in Creative Industry employment, 2010 to 2015

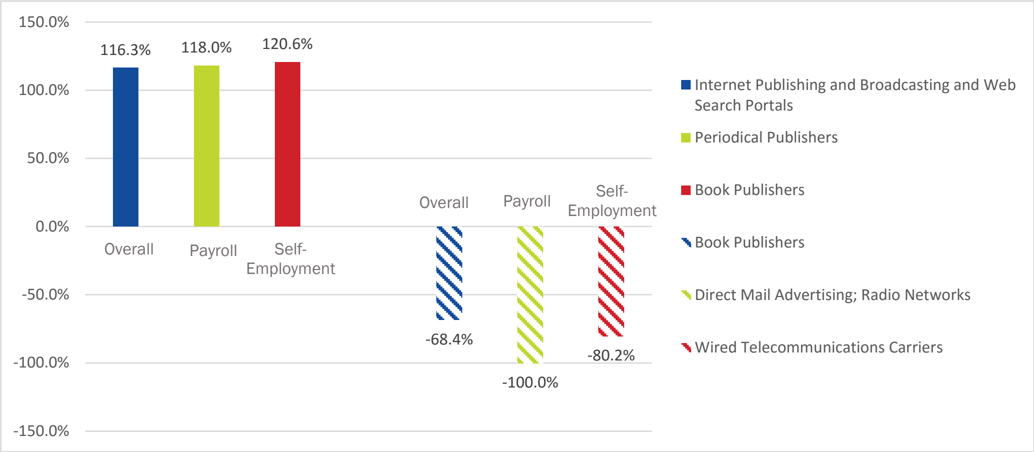


Figure 2.4.3 Lowest and highest average Creative Industry wages, by employment type

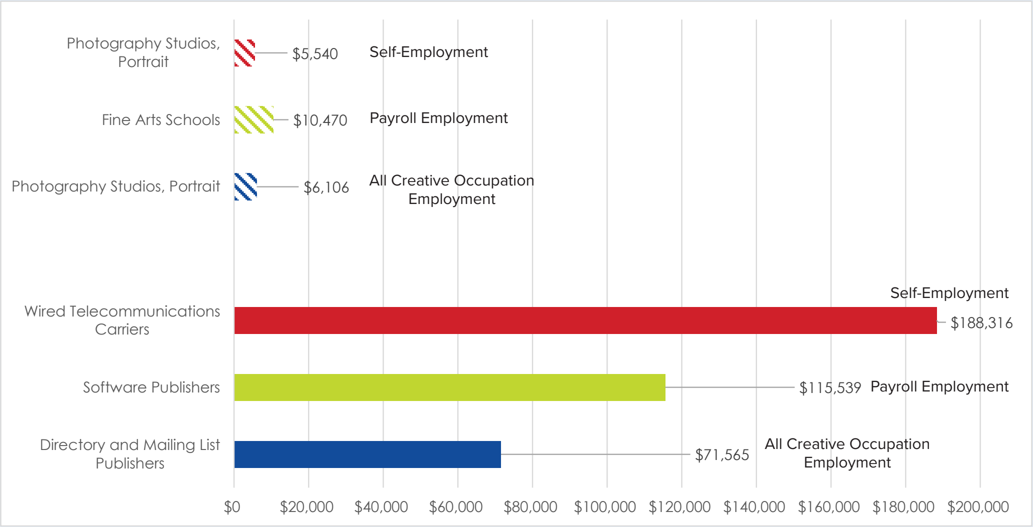


Figure 2.4.4 Change in Creative Occupation employment, 2010 to 2015

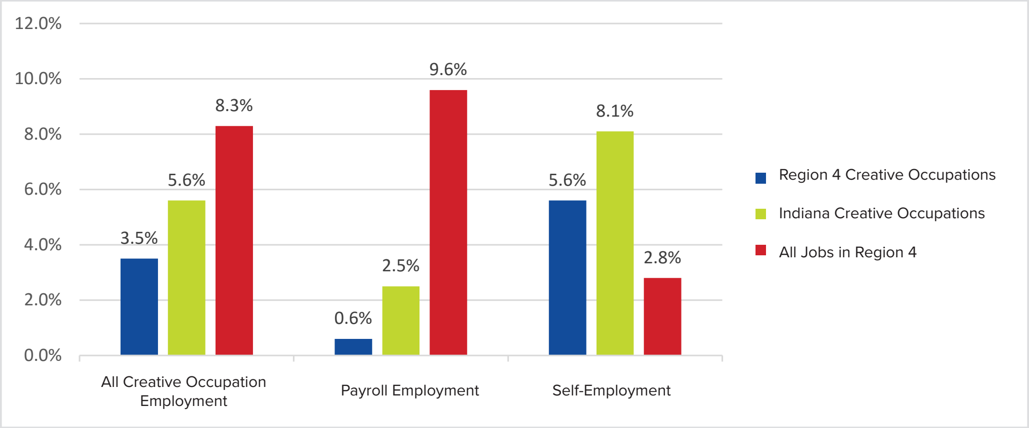


Table 2.4.2 Total, payroll, and self-employment in Creative Occupations

ALL CREATIVE OCCUPATION EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Photographers	906	-1.0%
Musicians and Singers	521	8.5%
Writers and Authors	426	16.6%
Graphic Designers	333	0.5%
Interpreters and Translators	311	-8.5%

CREATIVE OCCUPATION PAYROLL EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Library Technicians	298	11.5%
Public Relations Specialists	209	3.0%
Merchandise Displayers and Window Trimmers	180	7.0%
Musicians and Singers	169	-5.6%
Librarians	156	

SELF-EMPLOYMENT IN CREATIVE OCCUPATIONS	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Photographers	874	1.9%
Writers and Authors	389	18.8%
Musicians and Singers	352	16.9%
Interpreters and Translators	266	-11.1%
Fine Artists, Including Painters, Sculptors, and Illustrators	205	5.9%

Figure 2.4.5 Largest growth and declines in Creative Occupation employment, 2010 to 2015

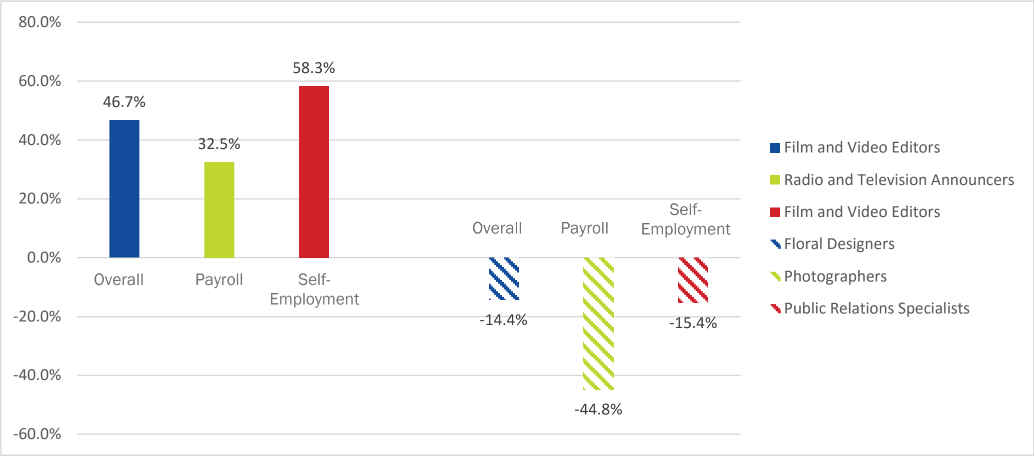
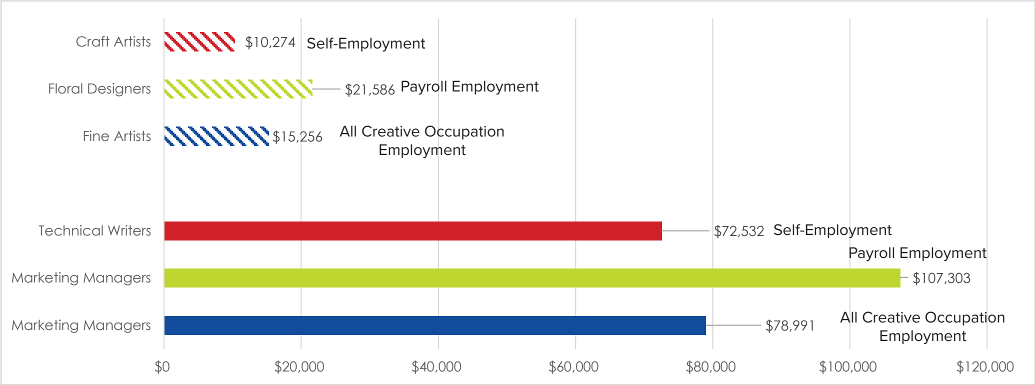


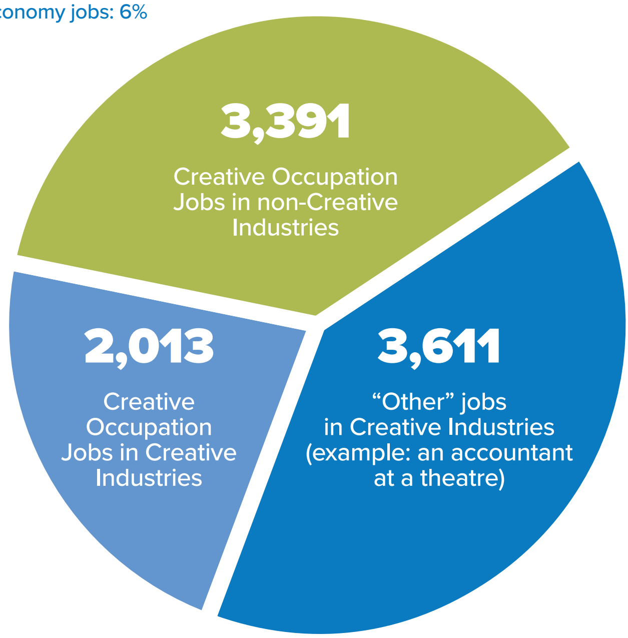
Figure 2.4.6 Lowest and highest average Creative Occupation wages, by employment type



GRANT, BLACKFORD, JAY, MADISON, DELAWARE, RANDOLPH, HENRY, WAYNE, RUSH, FAYETTE, AND UNION COUNTIES

REGION FIVE: GREATER MUNCIE

Total population: 524,121
% of population: 8%
% of Creative Economy jobs: 6%



There are **9,015** Creative Economy Jobs in Region Five

Region Five’s Creative Industry Wages
$26,748

*Annual wages are averaged

REGION FIVE’S CREATIVE INDUSTRY

- The overall decrease in Creative Industry employment was seven times greater in Region 5 than it was for the State of Indiana. These declines were driven in part by a reduction in payroll employment, which was more than double the decrease in creative payroll jobs in Indiana.
- Independent artists and photography studios comprised the top creative employment industries in Region 5, driven by self-employment.
- Event promoters experienced the greatest employment growth overall.
- The number of self-employed individuals at radio stations more than tripled from 2010 to 2015 in Region 5.
- Media representatives, those involved in selling media time for media owners, lost all of its Creative Industry jobs from 2010 to 2015.
- Ornamental metal work manufacturing experienced some of the greatest declines of 2010 to 2015, but employees had the highest average wages among Creative Industry employees in 2015.
- Fine arts schools and art dealers experienced the lowest Creative Industry wages in 2015.
- Event promoters without facilities (event operated by others) earned substantially more on average than event promoters with facilities (self-operated).

Region Five's Top Creative Business Establishments

1. Wired Telecommunications Carriers
2. Commercial Printing*
3. Newspaper Publishers
4. Book Stores
5. Architectural Services

Indiana Top Creative Business Establishments
1. Commercial Printing*; 2. Wired Telecommunications Carriers; 3. Advertising Agencies; 4. Architectural Services; 5. Graphic Design Services

**Excludes screen and book printing*

There are **285** Creative Business Establishments in Region Five

REGION FIVE'S CREATIVE OCCUPATIONS

- Employment in Creative Occupations increased slightly from 2010 to 2015 in Region 5, was driven by self-employment. Region 5 experienced a decline in payroll employment relative to Indiana as a whole.
- Photographers, writers and authors, and musicians and singers—driven by self-employment—were the most common Creative Occupations. All of the top three Creative Occupations experienced growth from 2010-2015.
- Communications-related professions experienced the highest growth and decline among Creative Occupations. Reporters and correspondents experienced the largest declines, especially among payroll jobs.
- Marketing managers earned the highest average wage, while craft and fine artists earned the least.

Region Five's Creative Occupations Wages
$33,301

*Annual wages are averaged

Figure 2.5.1 Change in Creative Industry employment, 2010 to 2015

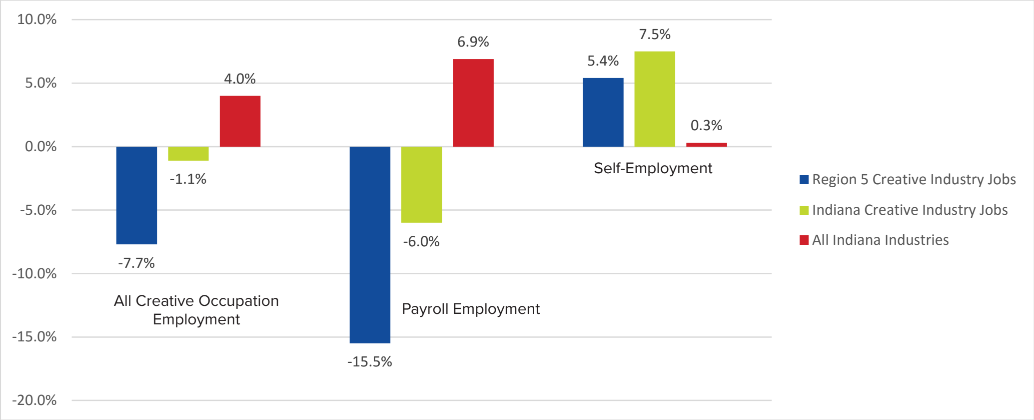


Table 2.5.1 Total, payroll, and self-employment in Creative Industries

ALL CREATIVE INDUSTRY EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Independent Artists, Writers, and Performers	847	3.4%
Wired Telecommunications Carriers	713	-2.5%
Photography Studios, Portrait	543	-6.9%
Commercial Printing (except Screen and Books)	504	-23.2%
Newspaper Publishers	454	-34.2%

CREATIVE INDUSTRY PAYROLL EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Wired Telecommunications Carriers	636	10.3%
Commercial Printing (except Screen and Books)	433	-28.6%
Newspaper Publishers	391	-38.8%
Photography Studios, Portrait	338	-24.8%
Book Stores	228	-9.3%

SELF-EMPLOYMENT IN CREATIVE INDUSTRIES	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Independent Artists, Writers, and Performers	839	3.6%
Photography Studios, Portrait	205	53.3%
Fine Arts Schools	123	-14.6%
Graphic Design Services	95	-7.2%
Musical Groups and Artists	87	101.7%

Figure 2.5.2 Largest growth and declines in Creative Industry employment, 2010 to 2015

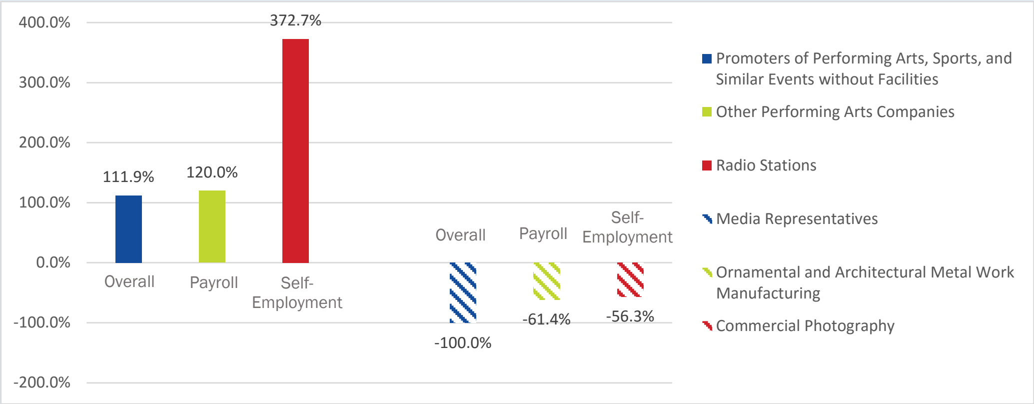


Figure 2.5.3 Lowest and highest average Creative Industry wages, by employment type

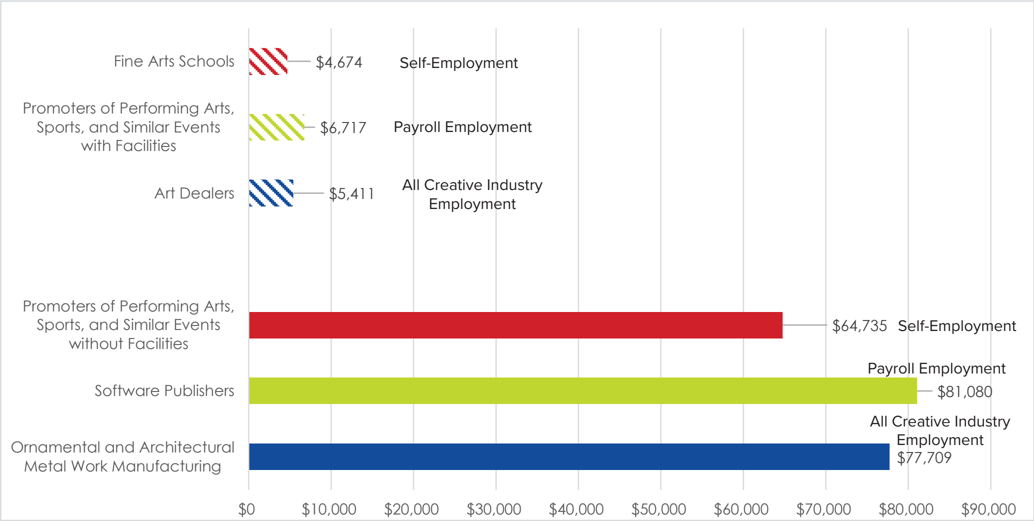


Figure 2.5.4 Change in Creative Occupation employment, 2010 to 2015

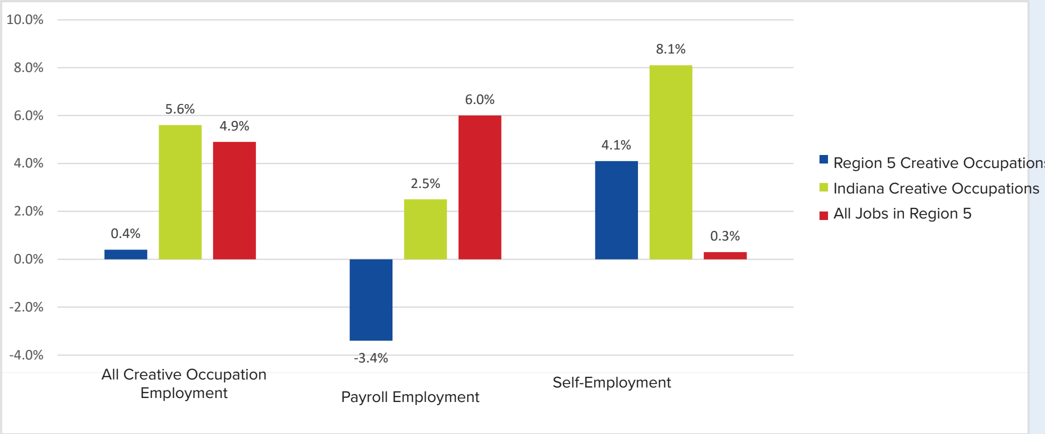


Table 2.5.2 Total, payroll, and self-employment in Creative Occupations

ALL CREATIVE OCCUPATION EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Photographers	12,682	4%
Musicians and Singers	7,918	12%
Writers and Authors	6,410	17%
Graphic Designers	6,292	4.3%
Interpreters and Translators	4,306	-2.2%
CREATIVE OCCUPATION PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Public Relations Specialists	3,778	4.6%
Library Technicians	3,244	5.5%
Graphic Designers	3,157	3.6%
Marketing Managers	3,052	13.5%
Musicians and Singers	2,587	0.3%
SELF-EMPLOYMENT IN CREATIVE OCCUPATIONS	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Photographers	11,614	7.4%
Writers and Authors	5,826	18.1%
Musicians and Singers	5,313	18.0%
Interpreters and Translators	3,502	-5.3%
Graphic Designers	3,086	4.9%

Figure 2.5.5 Largest growth and declines in Creative Occupation employment, 2010 to 2015

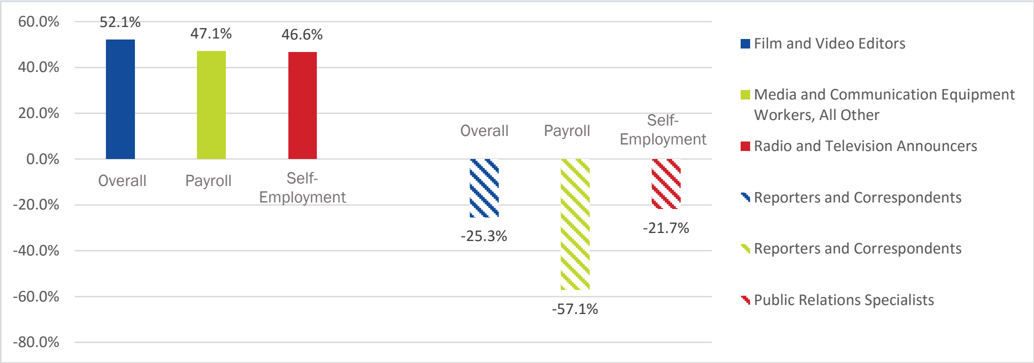
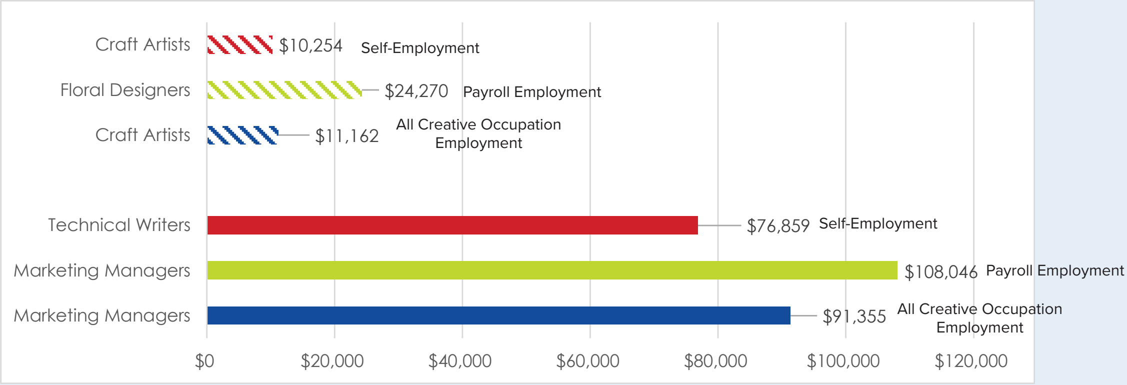


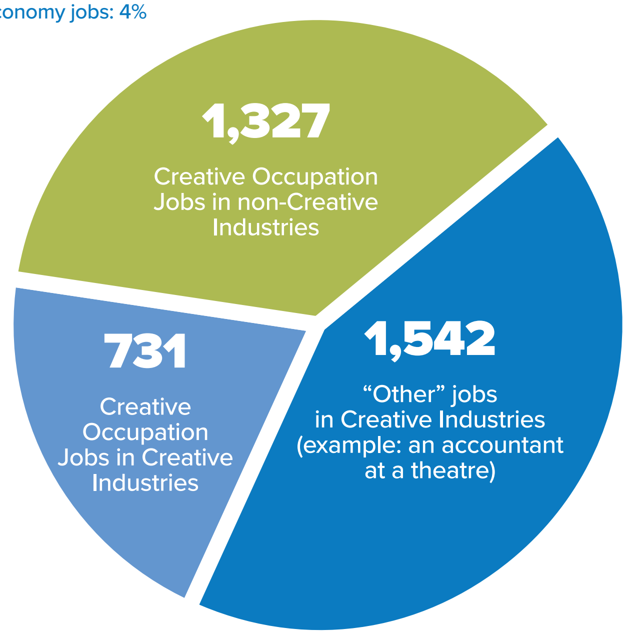
Figure 2.5.6 Lowest and highest average Creative Occupation wages, by employment type



VERMILLION, PARKE, PUTNAM, CLAY, VIGO, AND SULLIVAN COUNTIES

REGION SIX: GREATER TERRE HAUTE

Total population: 225,505
% of population: 3%
% of Creative Economy jobs: 4%



There are **3,600** Creative Economy Jobs in Region Six

Region Six's Creative Industry Wages
$27,388

*Annual wages are averaged

REGION SIX'S CREATIVE INDUSTRY

- Region 6 experienced declines across both types of Creative Industry employment. The decline was nearly four times higher among payroll employees in Region 6 than across the state. Self-employment in Creative Industry jobs declined in Region 6 even as self-employment across Indiana increased.
- Two of the top three Creative Industry employers experienced double-digit declines in employment from 2010 to 2015. The exceptions were independent artists and those self-employed in photography studios.
- Self-employed software publishers lost all jobs in Region 6 from 2010 to 2015.
- Event promoters earned the lowest wages in payroll occupations and overall.
- Outdoor advertising earned the highest average wage in Region 6, along with self-employed commercial printing establishments.

Region Six's Top Creative Business Establishments

1. Wired Telecommunications Carriers
2. Commercial Printing*
3. Graphic Design Services
4. Newspaper Publishers
5. Fine Arts Schools; Commercial Screen Printing; Photography Studios, Portrait

Indiana Top Creative Business Establishments
1. Commercial Printing*; 2. Wired Telecommunications Carriers; 3. Advertising Agencies; 4. Architectural Services; 5. Graphic Design Services

**Excludes screen and book printing*

There are **119** Creative Business Establishments in Region Six

REGION SIX'S CREATIVE OCCUPATIONS

- Similar to growth in Creative Industry employment, Region 6's Creative Occupation employment declined or had minimal growth compared to the state's growth in each area.
- Photography was the highest employed Creative Occupation, driven by self-employed photographers. Library-related occupations were among the top payroll occupations.
- Commercial and industrial designers experienced the most growth in jobs from 2010 to 2015. The largest decline in jobs was among payroll photographers.
- Craft artists and fine artists were among the least paid Creative Occupations. Marketing managers were the highest paid Creative Occupations in Region 6.

Region Six's Creative Occupation Wages
$33,883

*Annual wages are averaged

Figure 2.6.1 Change in Creative Industry employment, 2010 to 2015

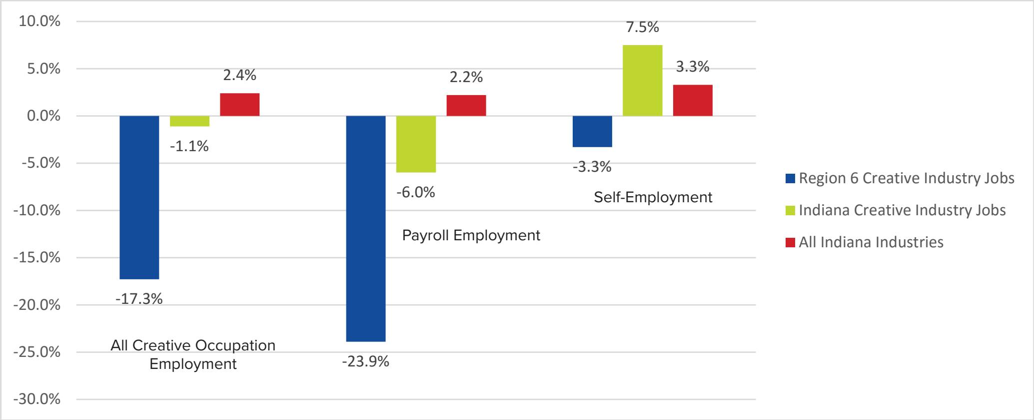


Table 2.6.1 Total, payroll, and self-employment in Creative Industries

ALL CREATIVE INDUSTRY EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Commercial Printing (except Screen and Books)	321	-46.9%
Independent Artists, Writers, and Performers	316	11.8%
Wired Telecommunications Carriers	307	-10.0%
Newspaper Publishers	209	-21.6%
Television Broadcasting	156	20.9%

CREATIVE INDUSTRY PAYROLL EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Commercial Printing (except Screen and Books)	279	-51.4%
Wired Telecommunications Carriers	259	-14.7%
Newspaper Publishers	197	-20.7%
Television Broadcasting	150	16.8%
Book Stores	101	-25.5%

SELF-EMPLOYMENT IN CREATIVE INDUSTRIES	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Independent Artists, Writers, and Performers	312	11.5%
Photography Studios, Portrait	66	32.5%
Fine Arts Schools	58	-55.4%
Wired Telecommunications Carriers	48	28.4%
Commercial Printing (except Screen and Books)	42	32.9%

Figure 2.6.2 Largest growth and declines in Creative Industry employment, 2010 to 2015

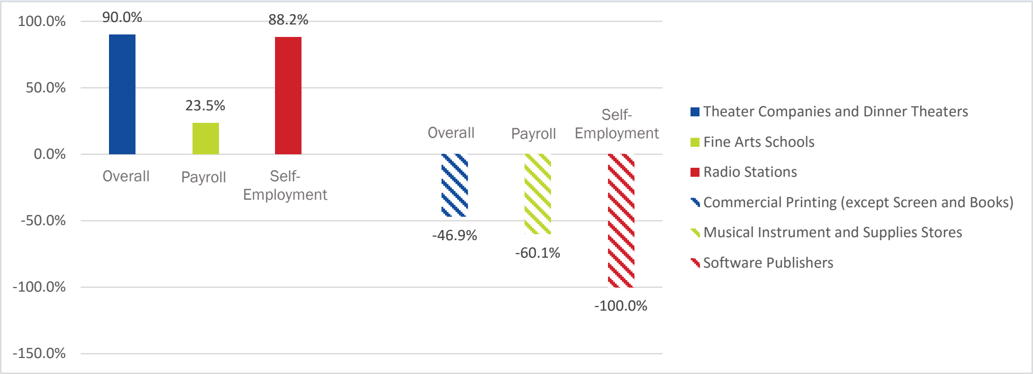


Figure 2.6.3 Lowest and highest average Creative Industry wages, by employment type

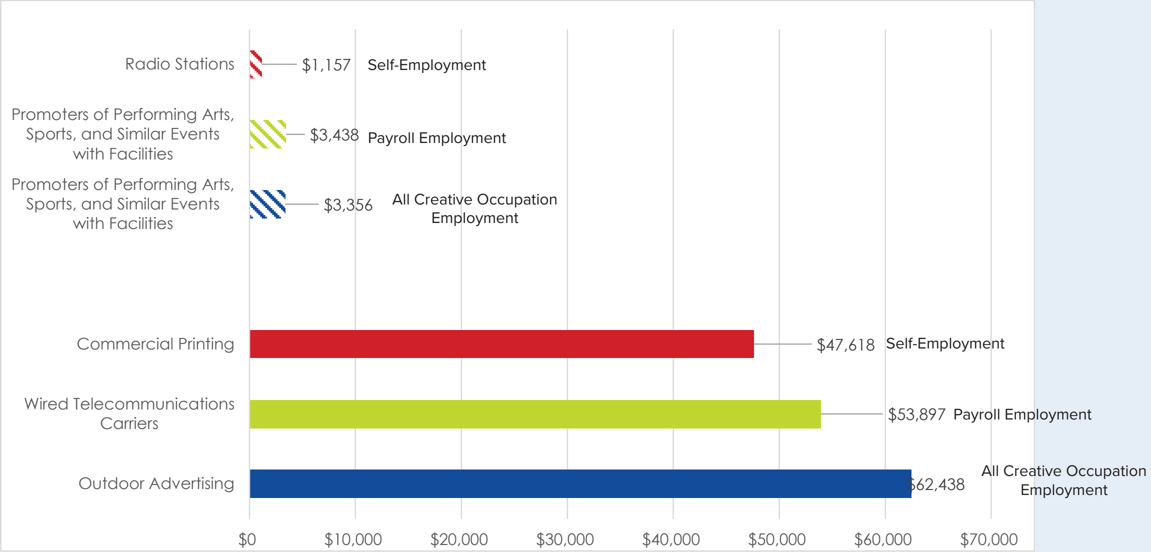


Figure 2.6.4 Change in Creative Occupation employment, 2010 to 2015

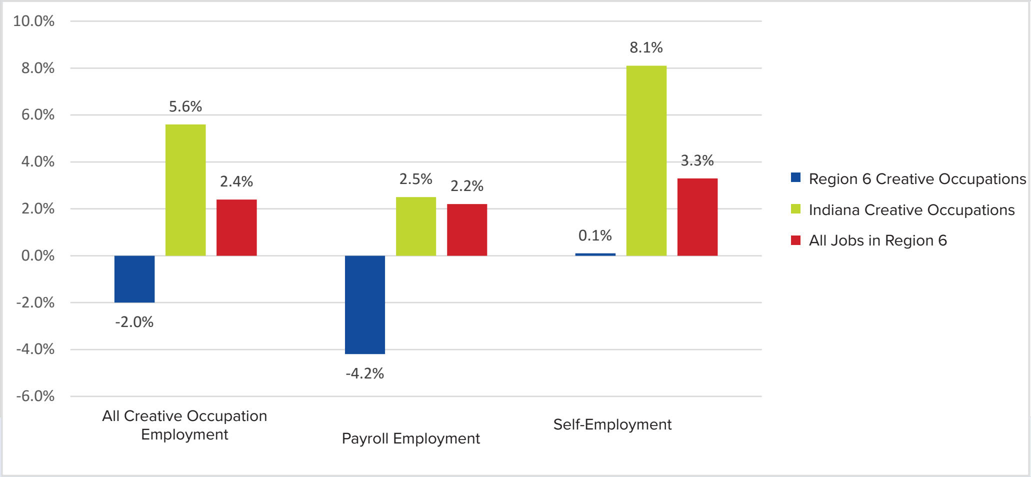


Table 2.6.2 Total, payroll, and self-employment in Creative Occupations

ALL CREATIVE OCCUPATION EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Photographers	243	-4.6%
Musicians and Singers	183	11.0%
Writers and Authors	134	2.9%
Library Technicians	133	-3.5%
Graphic Designers	106	-12.0%

CREATIVE OCCUPATION PAYROLL EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Library Technicians	133	-3.5%
Librarians	104	-4.9%
Public Relations Specialists	77	-5.7%
Musicians and Singers	64	11.7%
Merchandise Displayers and Window Trimmers	51	-8.2%

SELF-EMPLOYMENT IN CREATIVE OCCUPATIONS	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Photographers	228	-1.3%
Writers and Authors	121	3.7%
Musicians and Singers	119	10.7%
Fine Artists, Including Painters, Sculptors, and Illustrators	74	0.0%
Interpreters and Translators	67	-13.0%

Figure 2.6.5 Largest growth and declines in Creative Occupation employment, 2010 to 2015

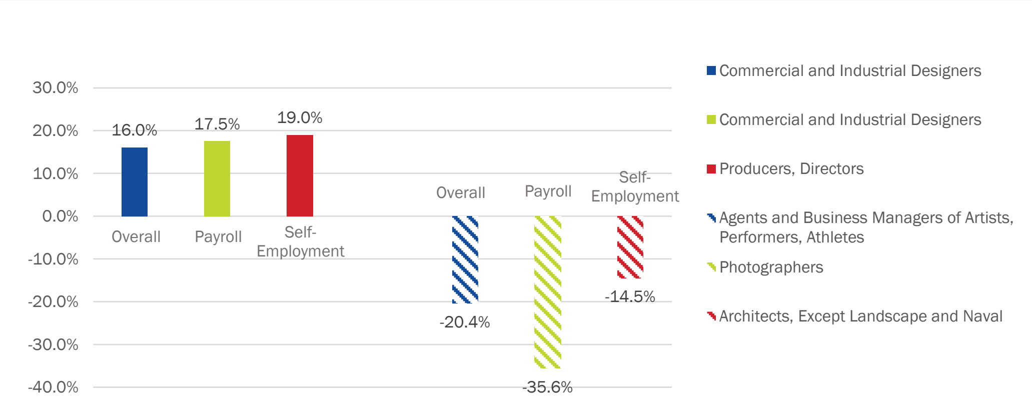
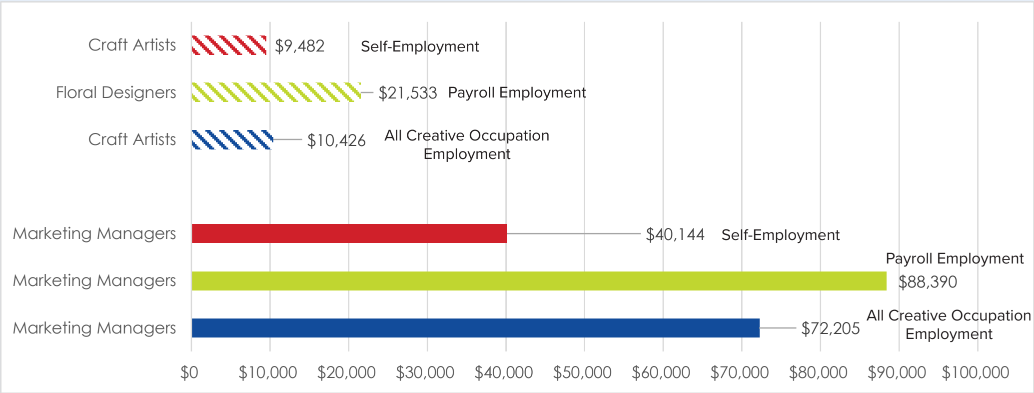


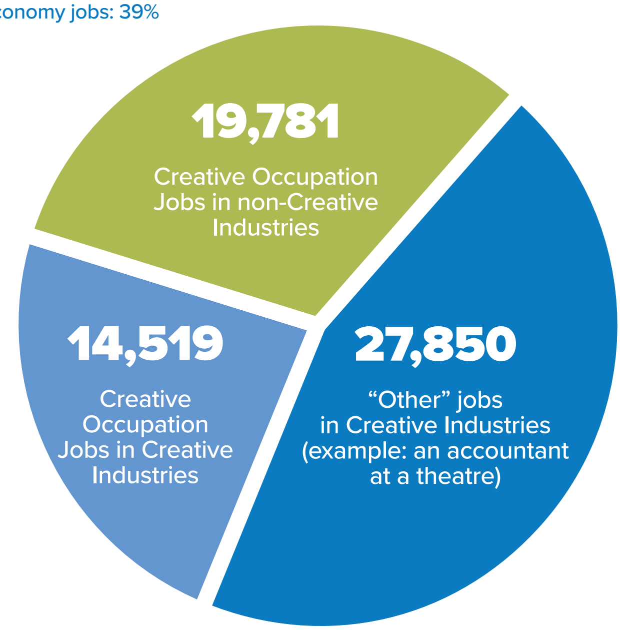
Figure 2.6.6 Lowest and highest average Creative Occupation wages, by employment type



BOONE, HAMILTON, HENDRICKS, MARION, HANCOCK, JOHNSON, AND SHELBY COUNTIES

REGION SEVEN: GREATER INDIANAPOLIS

Total population: 1,736,884
% of population: 27%
% of Creative Economy jobs: 39%



There are **62,150** Creative Economy Jobs in in Region Seven

Region Seven's Creative Industry Wages
$39,788
*Annual wages are averaged

REGION SEVEN'S CREATIVE INDUSTRY

- Region 7 performed better than Indiana across each indicator of growth in Creative Industry employment. Region 7's increase in employment across both types of Creative Industry jobs was driven by its strength in self-employed Creative Industry employment.
- The top Creative Industries in Region 7 were independent artists (driven by self-employments) and wired telecommunications and commercial printing (driven by payroll employment).
- All of the top three self-employed Creative Industries experienced job growth from 2010 to 2015.
- Creative Industry jobs with the most and least growth were in the advertising and mailing industries. Specifically, mailing and advertising-related services related to publishing print materials increased; but advertising distribution, or delivering printed advertised materials, experienced the largest declines.
- Advertising-related services increased, but advertising distribution (i.e. delivering samples door to door, handing out samples) experienced the largest declines.
- The lowest-paid jobs in Region 7 were those related to movie theaters, likely part-time positions. The highest paid occupations were related to media, including software publishing, media buying and presentation, and public relations.

Region Seven's Top Creative Business Establishments

1. Wired Telecommunications Carriers
2. Commercial Printing*
3. Graphic Design Services
4. Architectural Services
5. Advertising Agencies

There are **1,691** Creative Business Establishments in Region Seven

Indiana Top Creative Business Establishments
1. Commercial Printing*; 2. Wired Telecommunications Carriers; 3. Advertising Agencies; 4. Architectural Services; 5. Graphic Design Services

**Excludes screen and book printing*

REGION SEVEN'S CREATIVE OCCUPATIONS

- Region 7 experienced growth across self-employed and payroll of Creative Occupations. Growth in payroll occupations was nearly three times higher in Region 7 than the rest of the state.
- Photographers, musicians/singers, ad writers/authors were among the top three occupations. These jobs were by self-employed individuals.
- The top three Creative Occupations in both payroll and self-employed jobs areas experienced growth from 2010 to 2015.
- Media-related occupations led in Region 7 job growth while architecture led in job declines.
- Craft artists experienced an increase in payroll jobs. This is notable as craft artists are mostly self-employed in Region 7.
- Marketing, advertising, and promotions-related jobs earned the highest average wages.
- Craft artists and fine artists earned the lowest average wages.

Region Seven's Creative Occupations Wages
$41,080

*Wages are averaged

Figure 2.7.1 Change in Creative Industry employment, 2010 to 2015

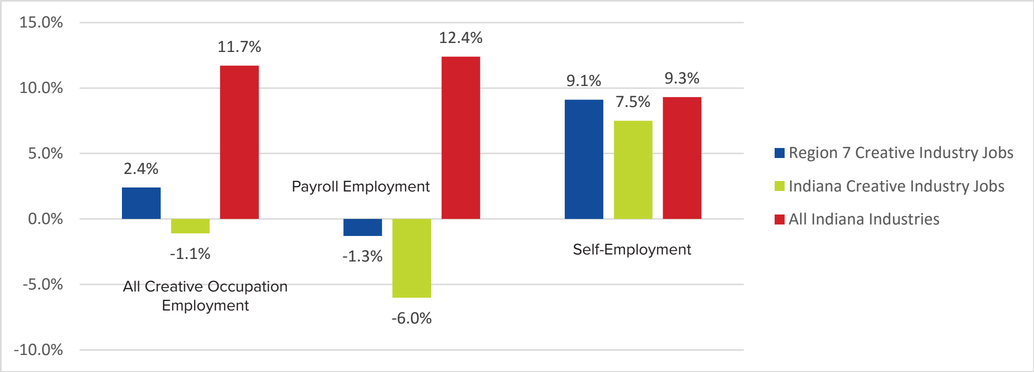


Table 2.7.1 Total, payroll, and self-employment in Creative Industries

ALL CREATIVE INDUSTRY EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Independent Artists, Writers, and Performers	5,322	13.9%
Wired Telecommunications Carriers	4,156	-24.3%
Commercial Printing (except Screen and Books)	3,006	-14.1%
Commercial Screen Printing	2,201	3.2%
Software Publishers	2,156	47.0%
CREATIVE INDUSTRY PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Wired Telecommunications Carriers	3,528	-25.3%
Commercial Printing (except Screen and Books)	2,723	-14.1%
Commercial Screen Printing	2,095	1.9%
Directory and Mailing List Publishers	2,094	271.8%
Software Publishers	1,723	41.5%
SELF-EMPLOYMENT IN CREATIVE INDUSTRIES	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Independent Artists, Writers, and Performers	5,200	13.8%
Photography Studios, Portrait	1,441	45.2%
Graphic Design Services	877	3.3%
Fine Arts Schools	793	-12.8%
Wired Telecommunications Carriers	628	-17.6%

Figure 2.7.2 Largest growth and declines in Creative Industry employment, 2010 to 2015

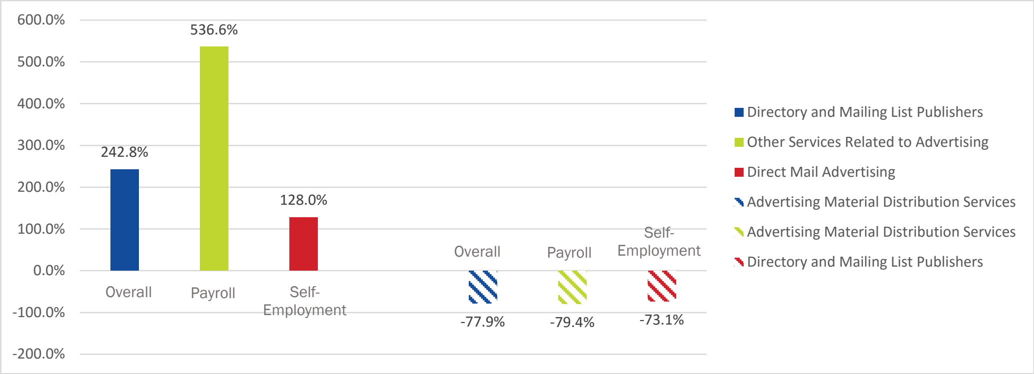


Figure 2.7.3 Lowest and highest average Creative Industry wages, by employment type

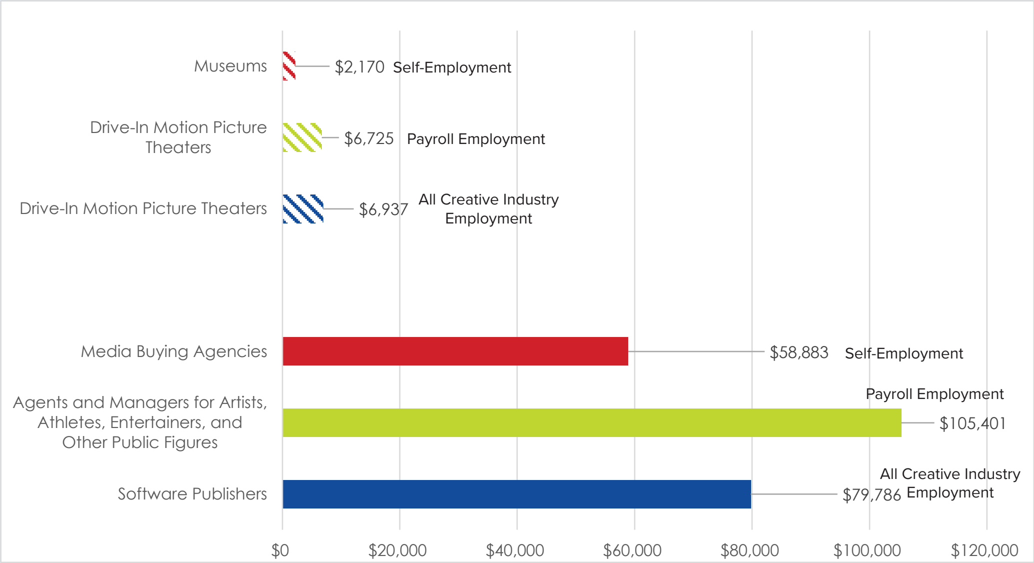


Figure 2.7.4 Change in Creative Occupation employment, 2010 to 2015

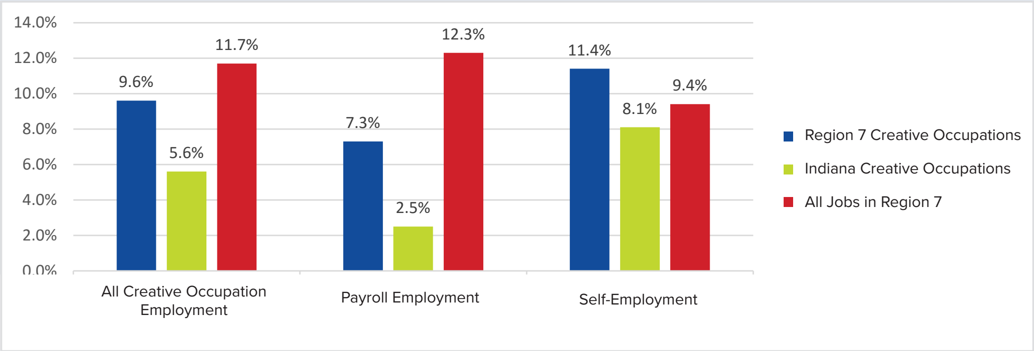


Table 2.7.2 Total, payroll, and self-employment in Creative Occupations

ALL CREATIVE OCCUPATION EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Photographers	5,080	12.1%
Musicians and Singers	2,724	9.7%
Writers and Authors	2,396	19.6%
Graphic Designers	2,385	8.8%
Marketing Managers	1,888	18.1%
CREATIVE OCCUPATION PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Public Relations Specialists	1,679	9.8%
Marketing Managers	1,490	15.4%
Graphic Designers	1,183	12.3%
Editors	839	20.5%
Library Technicians	811	3.0%
SELF-EMPLOYMENT IN CREATIVE OCCUPATIONS	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Photographers	4,771	15.0%
Writers and Authors	2,167	20.1%
Musicians and Singers	1,938	19.4%
Interpreters and Translators	1,456	1.6%
Graphic Designers	1,202	5.5%

Figure 2.7.5 Largest growth and declines in Creative Occupation employment, 2010 to 2015

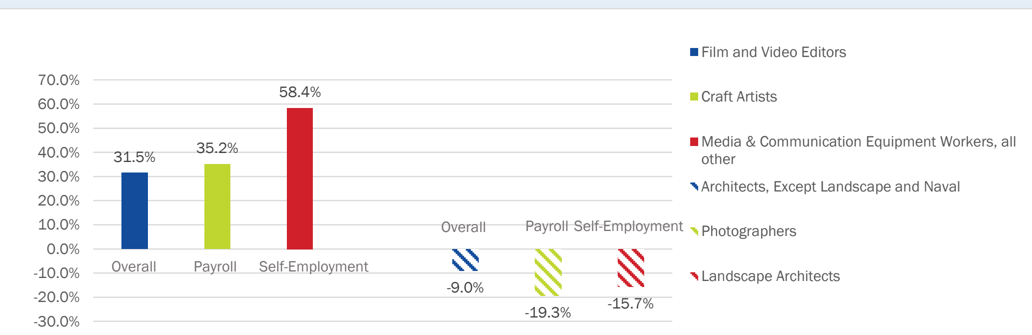
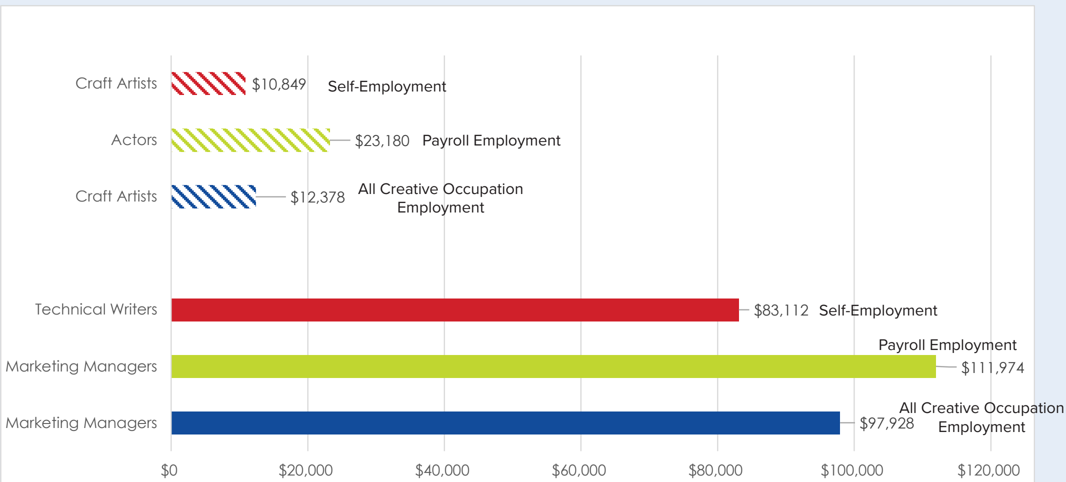
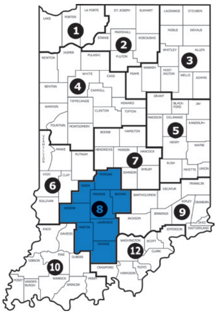


Figure 2.7.6 Lowest and highest average Creative Occupation wages, by employment type

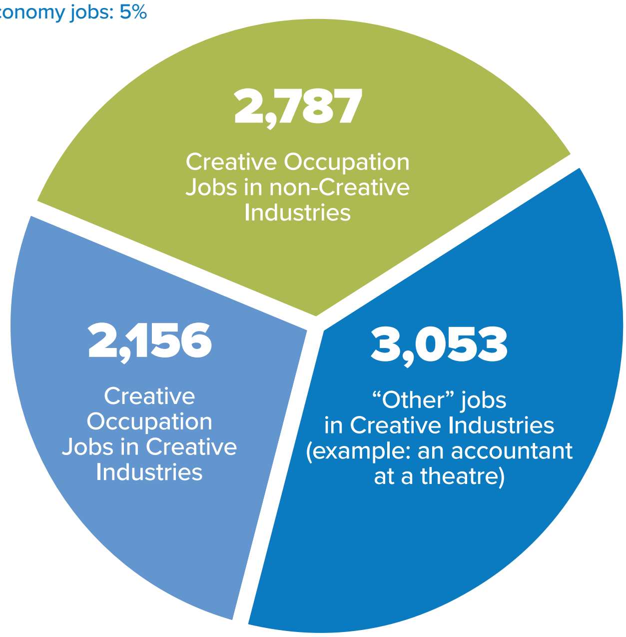


MORGAN, OWEN, MONROE, BROWN, GREENE, MARTIN, LAWRENCE, AND ORANGE COUNTIES

REGION EIGHT: GREATER BLOOMINGTON



Total population: 357,969
% of population: 6%
% of Creative Economy jobs: 5%



There are **7,996** Creative Economy Jobs in Region Eight

Region Eight's Creative Industry Wages
$25,831
*Annual wages are averaged

REGION EIGHT'S CREATIVE INDUSTRY

- Region 8 performed on par with or lower than Indiana across each indicator of growth in Creative Industry employment. The overall decline in Creative Industry employment was only slightly better than Indiana's.
- Independent artists were the most employed category among Creative Industry jobs in Region 8, largely driven by self-employed artists. Region 8 was one of the only regions to experience declines in this industry.
- Growth in Wired Telecommunications Carriers and Book Publishers was driven by payroll jobs.
- Event promoters and industrial design services more than doubled their job growth from 2010 to 2015. Self-employed industrial design services experienced a decline in self-employed positions.
- Fine arts schools were among the lowest paid Creative Industries overall, and in payroll and self-employment positions. Employment at museums was the lowest paid job overall and in self-employment.
- Wired telecommunications carriers and print media wholesalers were the top paid industry wages. Book store wages were among the highest in self-employed Creative Industries.

Region Eight's Top Creative Business Establishments

1. Wired Telecommunications Carriers
2. Commercial Printing*
3. Radio Stations
4. Software Publishers
5. Book Stores; Newspaper Publishers

Indiana Top Creative Business Establishments
1. Commercial Printing*; 2. Wired Telecommunications Carriers; 3. Advertising Agencies; 4. Architectural Services; 5. Graphic Design Services

**Excludes screen and book printing*

There are **223** Creative Business Establishments in Region Eight

REGION EIGHT'S CREATIVE OCCUPATIONS

- From 2010 to 2015, Region 8 experienced declines driven by reductions in payroll jobs and only a small increase in self-employed jobs.
- Like other regions, photographers, musicians, and writers had the highest employment of Region 8's Creative Occupations. In payroll jobs, library-related work was among the top three positions.
- Payroll jobs in photography experienced large declines. Losses in photographer jobs also occurred in self-employed Creative Occupations.
- Marketing and media-related jobs were among the highest paid jobs in Region 8, while artists were among the lowest.

Region Eight's Creative Occupation Wages
$35,464

*Annual wages are averaged

Figure 2.8.1 Change in Creative Industry employment, 2010 to 2015

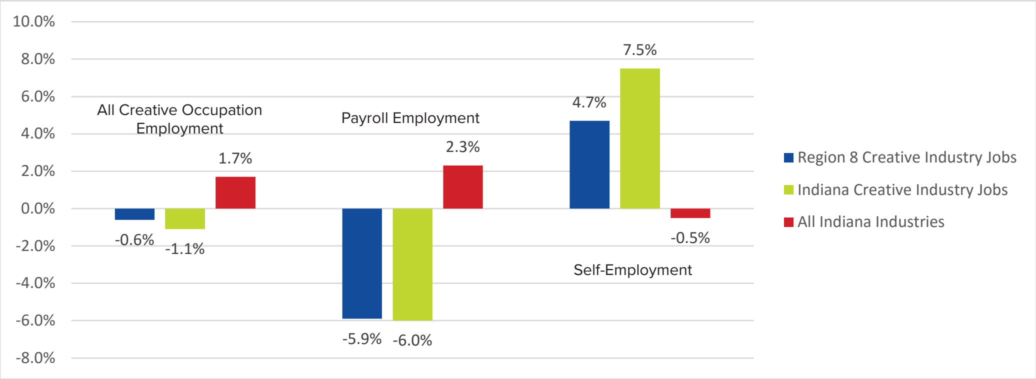


Table 2.8.1 Total, payroll, and self-employment in Creative Industries

ALL CREATIVE INDUSTRY EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Independent Artists, Writers, and Performers	1,179	-3.0%
Wired Telecommunications Carriers	559	5.4%
Book Publishers	486	37.0%
Newspaper Publishers	414	5.2%
Fine Arts Schools	214	26.5%
CREATIVE INDUSTRY PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Wired Telecommunications Carriers	501	5.6%
Book Publishers	458	47.8%
Newspaper Publishers	371	3.9%
Book Stores	145	1.7%
Book, Periodical, and Newspaper Merchant Wholesalers	134	-1.3%
SELF-EMPLOYMENT IN CREATIVE INDUSTRIES	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Independent Artists, Writers, and Performers	1172	-3.1%
Fine Arts Schools	168	19.3%
Photography Studios, Portrait	159	42.7%
Graphic Design Services	121	30.8%
Periodical Publishers	79	7.7%

Figure 2.8.2 Largest growth and declines in Creative Industry employment, 2010 to 2015

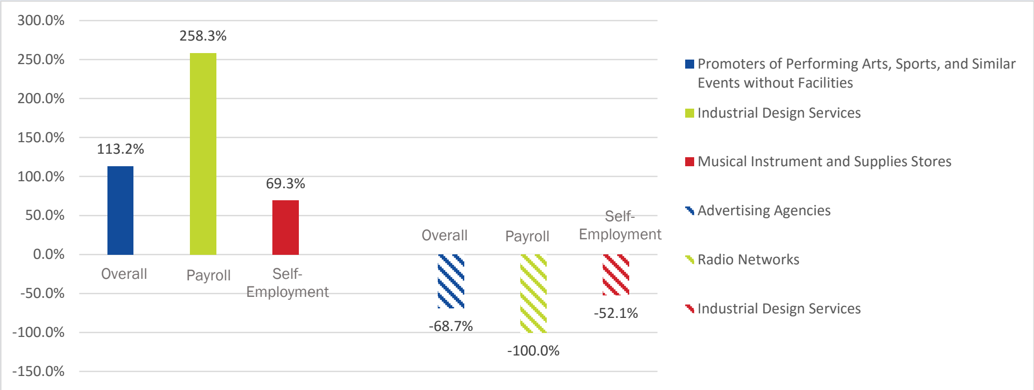


Figure 2.8.3 Lowest and highest average Creative Industry wages, by employment type

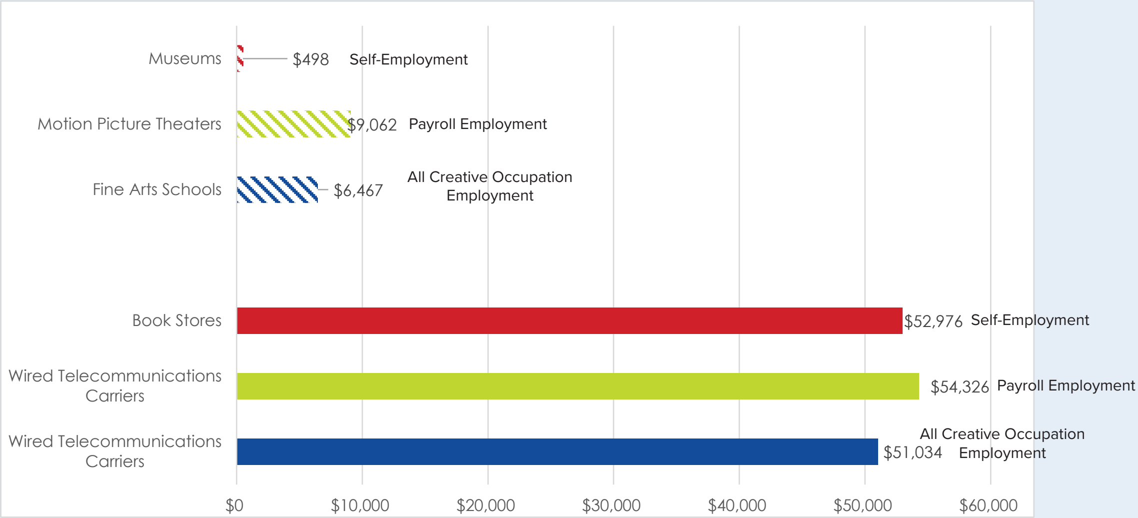


Figure 2.8.4 Change in Creative Occupation employment, 2010 to 2015

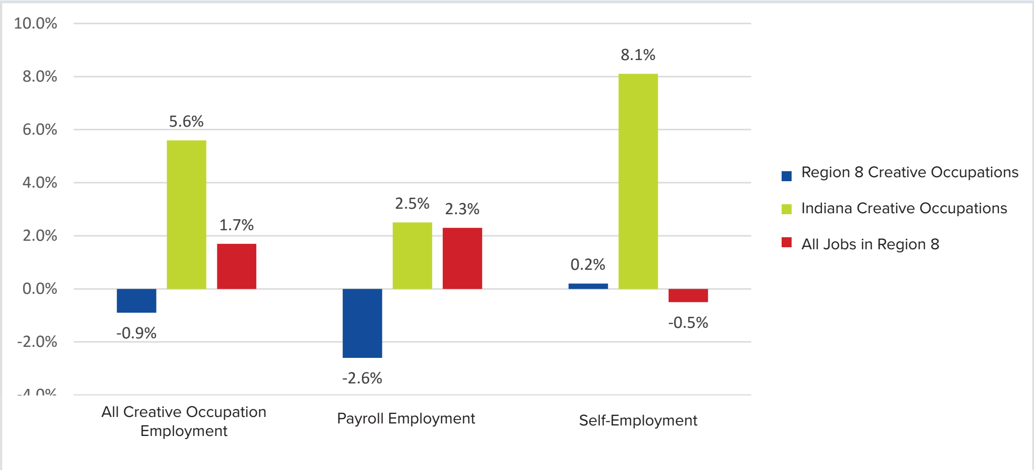


Table 2.8.2 Total, payroll, and self-employment in Creative Occupations

ALL CREATIVE OCCUPATION EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Photographers	556	-11.0%
Musicians and Singers	475	7.3%
Writers and Authors	440	6.0%
Graphic Designers	325	4.6%
Public Relations Specialists	291	-2.8%
CREATIVE OCCUPATION PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Public Relations Specialists	273	-1.0%
Library Technicians	184	6.8%
Librarians	161	-4.9%
Graphic Designers	155	-1.9%
Marketing Managers	120	3.9%
SELF-EMPLOYMENT IN CREATIVE OCCUPATIONS	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Photographers	528	-6.7%
Writers and Authors	408	6.9%
Musicians and Singers	385	7.4%
Fine Artists, Including Painters, Sculptors, and Illustrators	211	-4.6%
Graphic Designers	170	11.2%

Figure 2.8.5 Largest growth and declines in Creative Occupation employment, 2010 to 2015

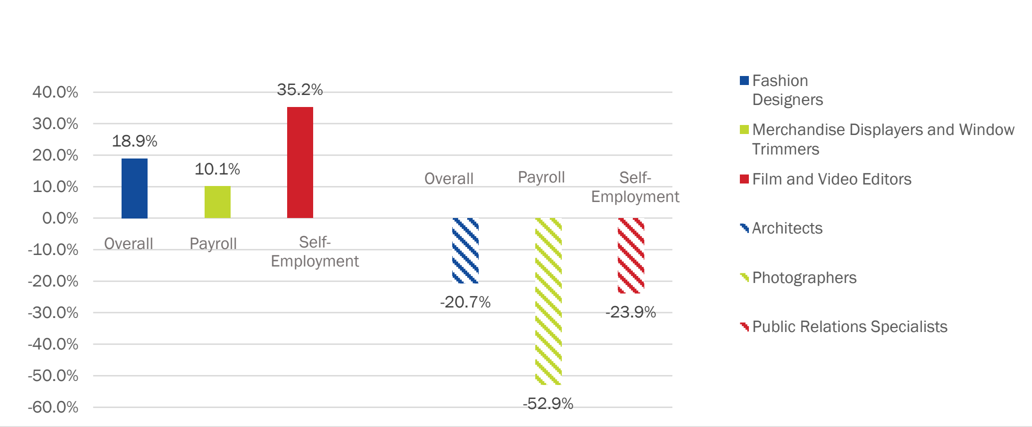
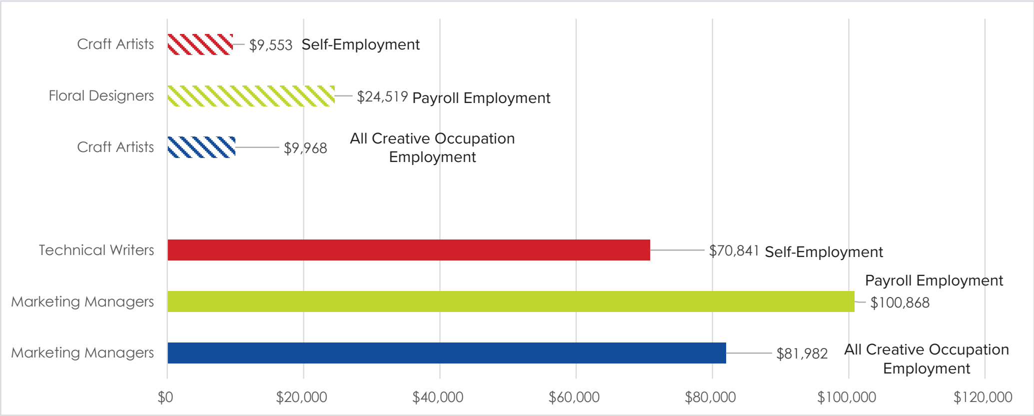


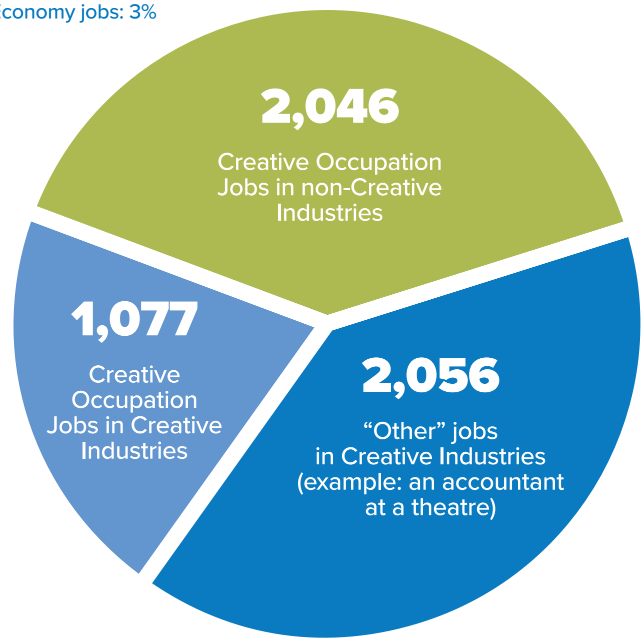
Figure 2.8.6 Lowest and highest average Creative Occupation wages, by employment type



BARTHOLOMEW, DECATUR, FRANKLIN, JACKSON, JENNINGS, RIPLEY, DEARBORN, OHIO, AND SWITZERLAND COUNTIES

REGION NINE: GREATER COLUMBUS

Total population: 297,139
% of population: 5%
% of Creative Economy jobs: 3%



There are **5,179** Creative Economy Jobs in Region Nine

Region Nine’s Creative Industry Wages
$24,538

*Annual wages are averaged

REGION NINE’S CREATIVE INDUSTRY

- Region 9 experienced an overall increase in Creative Industry employment, largely driven by growth in self-employment. The number of individuals self-employed in Creative Industries more than doubled in Region 9 from 2010 to 2015.
- Self-employed independent artists led Creative Industry employment in Region 9. Employment in commercial printing and wired telecommunications carriers was driven by growth in payroll jobs.
- Each of the top self-employed jobs experienced increases in employment.
- The number of jobs in musical instrument manufacturing, fine arts schools, and radio stations more than doubled from 2010 to 2015.
- Musical groups and artists and theater companies were among the lowest paid Creative Industry jobs.
- Web-related industries, including internet and software publishing, were among the highest paid Creative Industry jobs.

Region Nine's Top Creative Business Establishments

1. Commercial Printing*
2. Wired Telecommunications Carriers
3. Newspaper Publishers
4. Fine Arts Schools
5. Commercial Screen Printing

Indiana Top Creative Business Establishments
1. Commercial Printing*; 2. Wired Telecommunications Carriers; 3. Advertising Agencies; 4. Architectural Services; 5. Graphic Design Services

**Excludes screen and book printing*

There are **144** Creative Business Establishments in Region Nine

REGION NINE'S CREATIVE OCCUPATIONS

- Region 9's Creative Occupation employment in payroll and self-employed jobs was higher than Indiana's overall average.
- Photographers and musicians were among the top three Creative Occupation jobs, driven by self-employment.
- Employment among marketing managers was driven by employment among payroll jobs. Jobs among payroll Creative Occupations were largely related to marketing and media.
- Radio and television announcers experienced the largest job growth overall and in payroll occupations. Interior designers experienced the largest decline overall and in payroll occupations.
- Artists earned the least among Creative Occupations in Region 9, while marketing and promotions managers earned the most, on average.

Region Nine's Creative Occupation Wages
$37,502

*Annual wages are averaged

Figure 2.9.1 Change in Creative Industry employment, 2010 to 2015

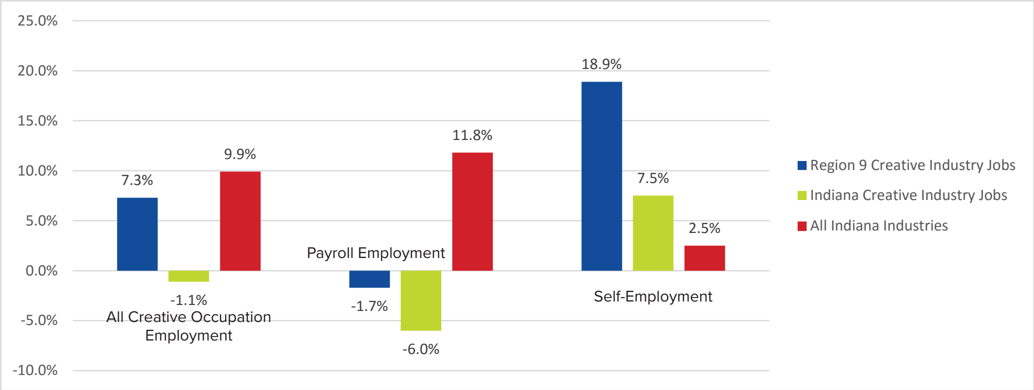


Table 2.9.1 Total, payroll, and self-employment in Creative Industries

ALL CREATIVE INDUSTRY EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Independent Artists, Writers, and Performers	499	13.9%
Commercial Printing (except Screen and Books)	414	-24.3%
Wired Telecommunications Carriers	408	-14.1%
Newspaper Publishers	255	-15.3%
Photography Studios, Portrait	188	15.5%

CREATIVE INDUSTRY PAYROLL EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Commercial Printing (except Screen and Books)	372	42.1%
Wired Telecommunications Carriers	338	2.4%
Newspaper Publishers	213	-20.5%
Motion Picture Theaters (except Drive-Ins)	90	-14.8%
Radio Stations	57	80.8%

SELF-EMPLOYMENT IN CREATIVE INDUSTRIES	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Independent Artists, Writers, and Performers	456	38.9%
Photography Studios, Portrait	182	32.6%
Fine Arts Schools	125	14.2%
Wired Telecommunications Carriers	70	-11.8%
Graphic Design Services	56	-10.2%

Figure 2.9.2 Largest growth and declines in Creative Industry employment, 2010 to 2015

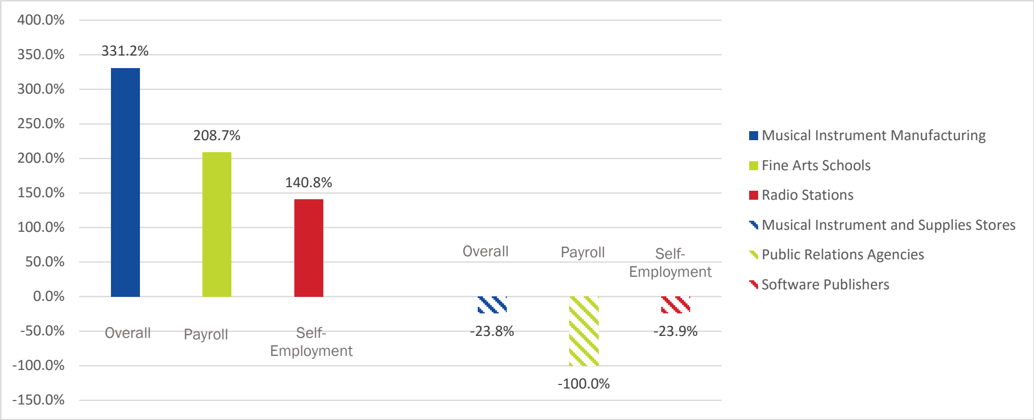


Figure 2.9.3 Lowest and highest average Creative Industry wages, by employment type

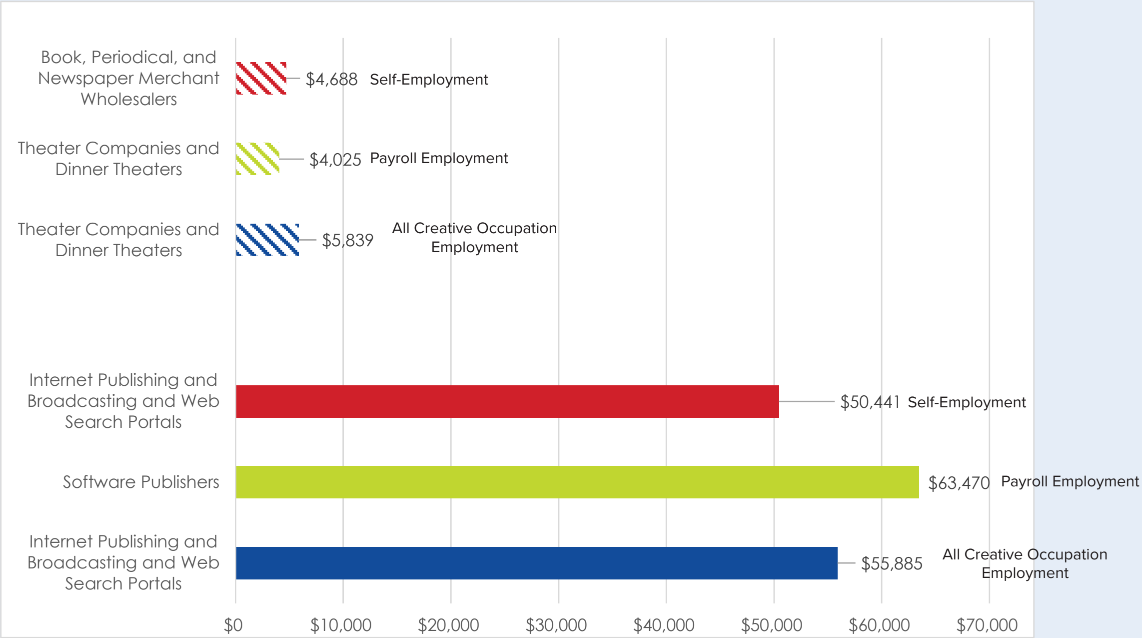


Figure 2.9.4 Change in Creative Occupation employment, 2010 to 2015

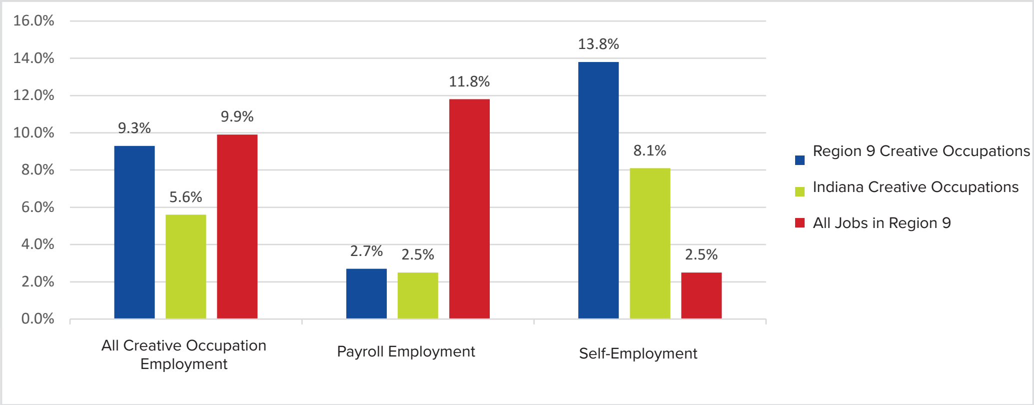


Table 2.9.2 Total, payroll, and self-employment in Creative Occupations

ALL CREATIVE OCCUPATION EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Photographers	430	5.7%
Musicians and Singers	283	32.6%
Marketing Managers	250	29.0%
Writers and Authors	224	24.9%
Graphic Designers	214	-7.0%
CREATIVE OCCUPATION PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Marketing Managers	211	31.1%
Public Relations Specialists	113	10.4%
Graphic Designers	103	-15.4%
Musicians and Singers	84	30.0%
Library Technicians	82	1.0%
SELF-EMPLOYMENT IN CREATIVE OCCUPATIONS	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Photographers	415	8.9%
Writers and Authors	210	29.4%
Musicians and Singers	199	33.7%
Interpreters and Translators	125	-4.6%
Fine Artists, Including Painters, Sculptors, and Illustrators	117	18.4%

Figure 2.9.5 Largest growth and declines in Creative Occupation employment, 2010 to 2015

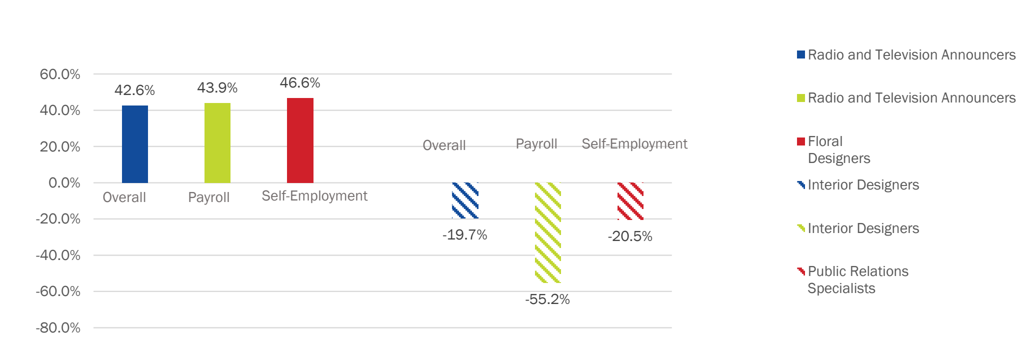
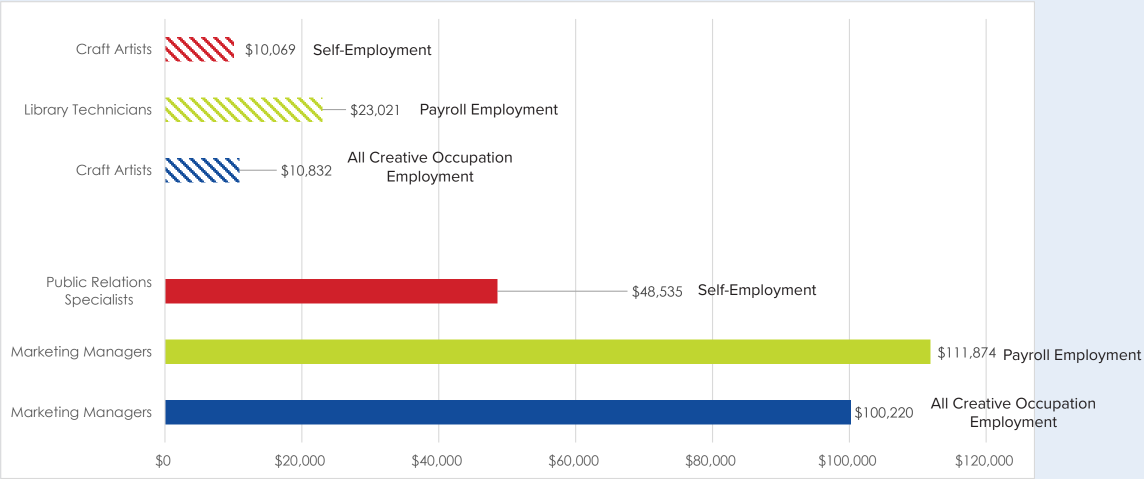
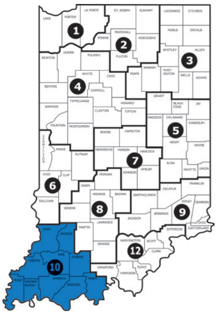


Figure 2.9.6 Lowest and highest average Creative Occupation wages, by employment type

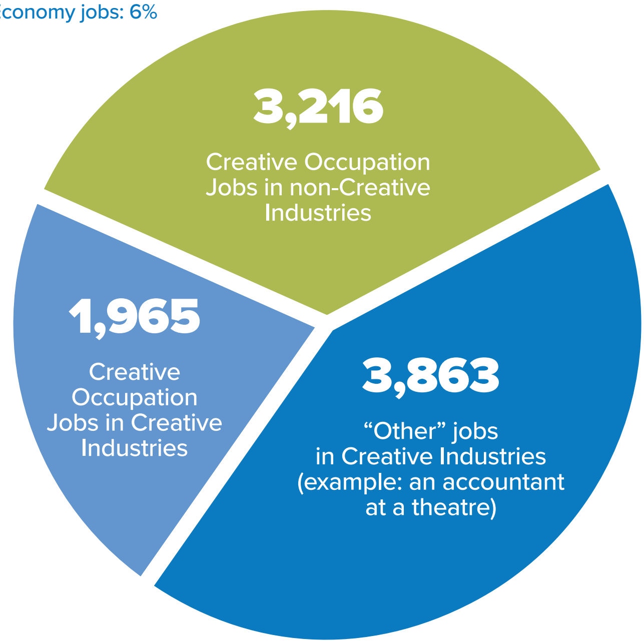


KNOX, DAVIESS, GIBSON, PIKE, DUBOIS, POSEY, VANDERBURGH, WARRICK, SPENCER, AND PERRY COUNTIES

REGION TEN: GREATER EVANSVILLE



Total population: 469,011
% of population: 7%
% of Creative Economy jobs: 6%



There are **9,044** Creative Economy Jobs in Region Ten

Region Ten’s Creative Industry Wages
$32,090

*Annual wages are averaged

REGION TEN’S CREATIVE INDUSTRY

- From 2010 to 2015, Region 10 experienced less Creative Industry job growth than the state.
- Unlike other regions, the number of employees in wired telecommunications carriers included employment in both payroll and self-employment.
- Jobs in newspaper publishers experienced double-digit declines, while event promoters increased by triple digits.
- Museums accounted for growth in Creative Industry jobs, driven by growth among payroll employment.
- Print media were among Region 10’s industries in decline, including magazine publishers and commercial printing.
- Individuals employed in fine arts schools earned the least among Creative Industries, while public relations agencies and wired telecommunications carriers earned the most in Region 10.

Region Ten's Top Creative Business Establishments

1. Wired Telecommunications Carriers
2. Commercial Printing*
3. Photography Studios, Portrait
4. Advertising Agencies
5. Radio Stations

Indiana Top Creative Business Establishments
1. Commercial Printing*; 2. Wired Telecommunications Carriers; 3. Advertising Agencies; 4. Architectural Services; 5. Graphic Design Services

**Excludes screen and book printing*

There are **302** Creative Business Establishments in Region Ten

REGION TEN'S CREATIVE OCCUPATIONS

- Growth in Creative Occupations was lower in Region 10 than the state. Region 10 experienced a substantial decline in payroll jobs.
- Photographers were the most employed occupation, driven by self-employment.
- Film and video editors and radio/TV announcers experienced the most growth, while reporters and PR specialists experienced the greatest declines.
- Marketing managers were the highest paid Creative Occupations, driven by employment in payroll jobs. Craft artists were the lowest-paid jobs, driven by employment in self-employed occupations.

Region Ten's Creative Occupation Wages
$35,027

*Annual wages are averaged

Figure 2.10.1 Change in Creative Industry employment, 2010 to 2015

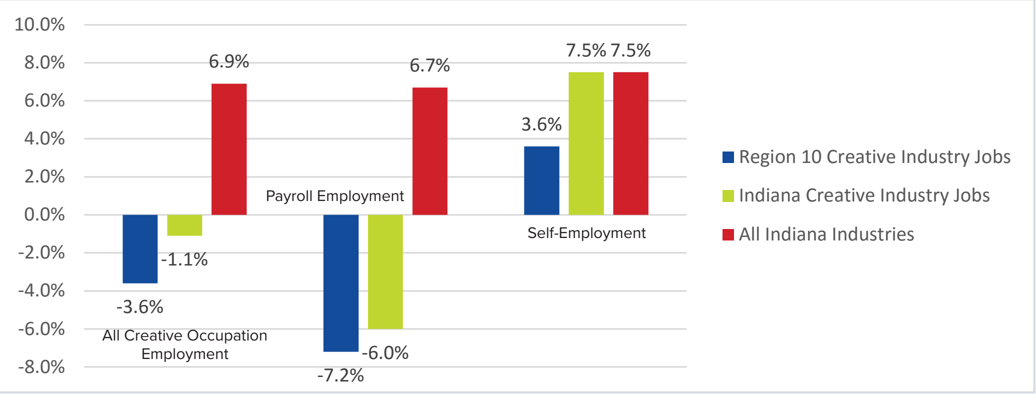


Table 2.10.1 Total, payroll, and self-employment in Creative Industries

ALL CREATIVE INDUSTRY EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Wired Telecommunications Carriers	833	1.8%
Independent Artists, Writers, and Performers	707	10.1%
Newspaper Publishers	440	-27.8%
Photography Studios, Portrait	363	5.6%
Promoters of Performing Arts, Sports, and Similar Events with Facilities	353	107.4%
CREATIVE INDUSTRY PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Wired Telecommunications Carriers	728	6.2%
Newspaper Publishers	402	-30.5%
Promoters of Performing Arts, Sports, and Similar Events with Facilities	341	124.6%
Motion Picture Theaters (except Drive-Ins)	243	-24.2%
Commercial Printing (except Screen and Books)	221	-50.1%
SELF-EMPLOYMENT IN CREATIVE INDUSTRIES	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Independent Artists, Writers, and Performers	701	10.2%
Photography Studios, Portrait	229	26.2%
Wired Telecommunications Carriers	105	-20.8%
Graphic Design Services	87	12.9%
Interior Design Services	71	5.6%

Figure 2.10.2 Largest growth and declines in Creative Industry employment, 2010 to 2015

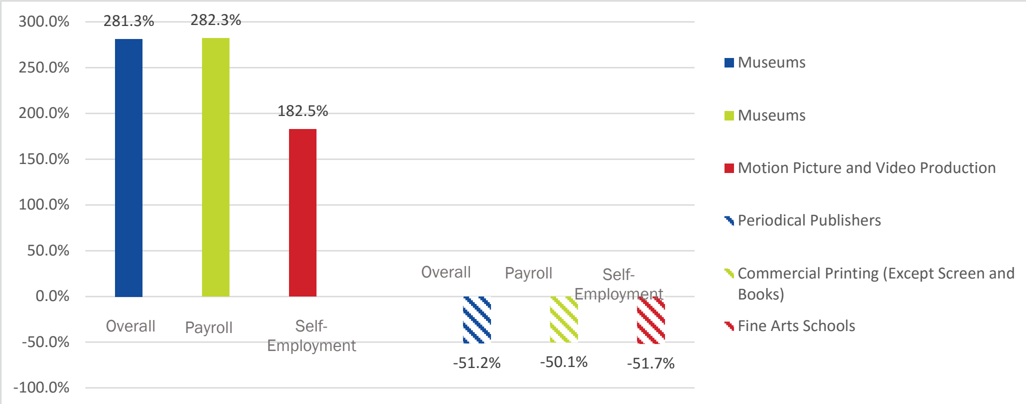


Figure 2.10.3 Lowest and highest average Creative Industry wages, by employment type

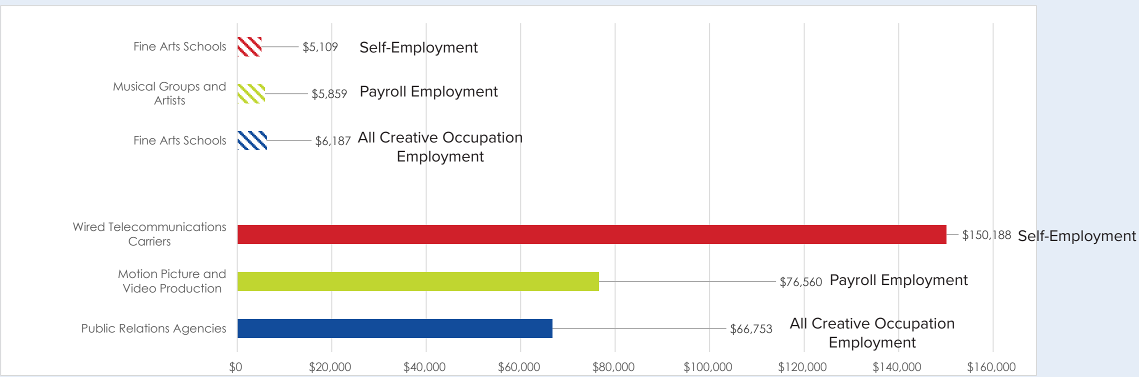


Figure 2.10.4 Change in Creative Occupation employment, 2010 to 2015

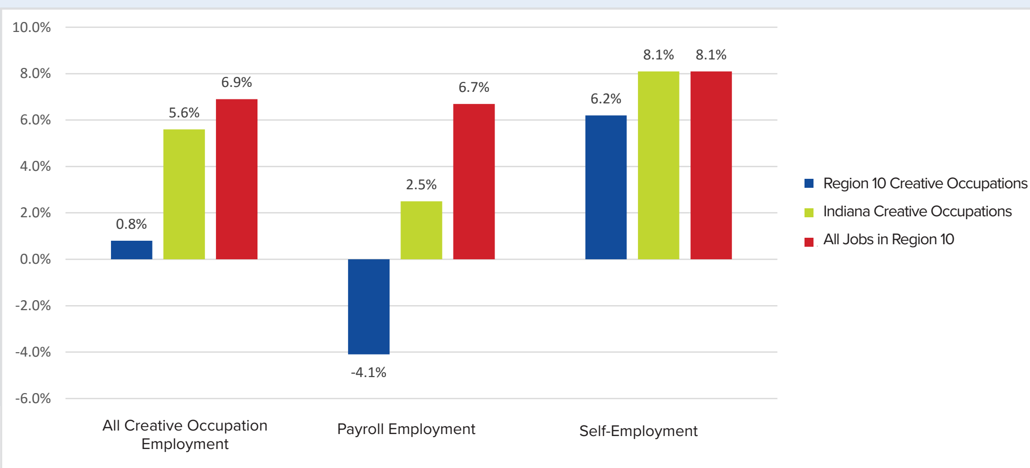


Table 2.10.2 Total, payroll, and self-employment in Creative Occupations

ALL CREATIVE OCCUPATION EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Photographers	642	-1.0%
Musicians and Singers	463	12.2%
Graphic Designers	368	-1.5%
Writers and Authors	327	12.8%
Public Relations Specialists	294	-2.9%
CREATIVE OCCUPATION PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Public Relations Specialists	273	-0.3%
Library Technicians	227	5.7%
Graphic Designers	216	-3.7%
Musicians and Singers	192	5.7%
Marketing Managers	175	-1.7%
SELF-EMPLOYMENT IN CREATIVE OCCUPATIONS	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Photographers	544	2.8%
Writers and Authors	288	16.7%
Musicians and Singers	270	17.2%
Fine Artists, Including Painters, Sculptors, and Illustrators	163	7.4%
Interpreters and Translators	162	-9.8%

Figure 2.10.5 Largest growth and declines in Creative Occupation employment, 2010 to 2015

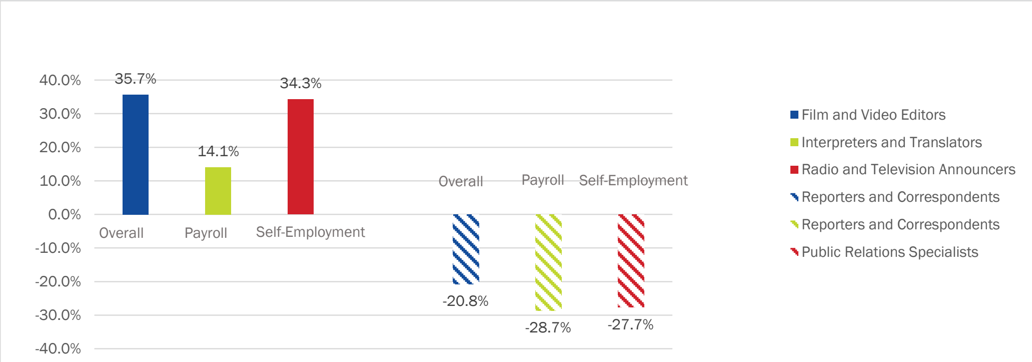
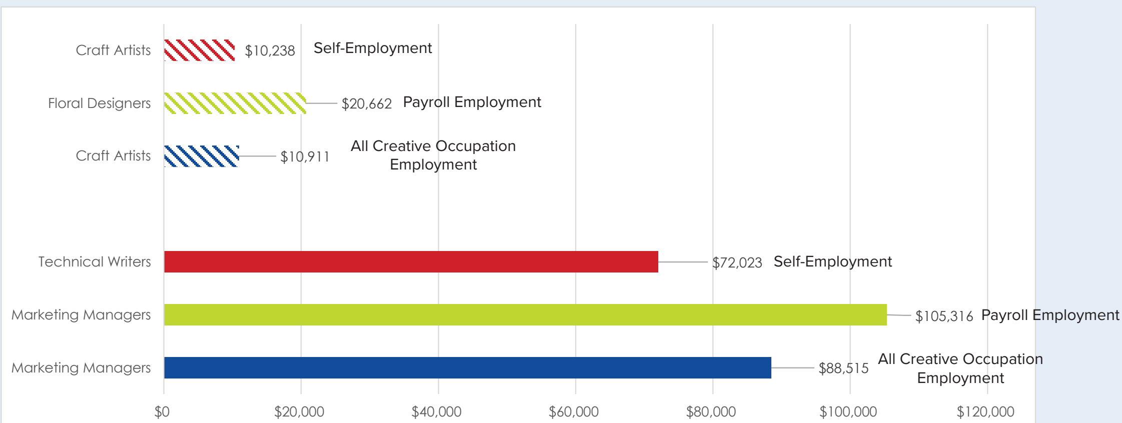


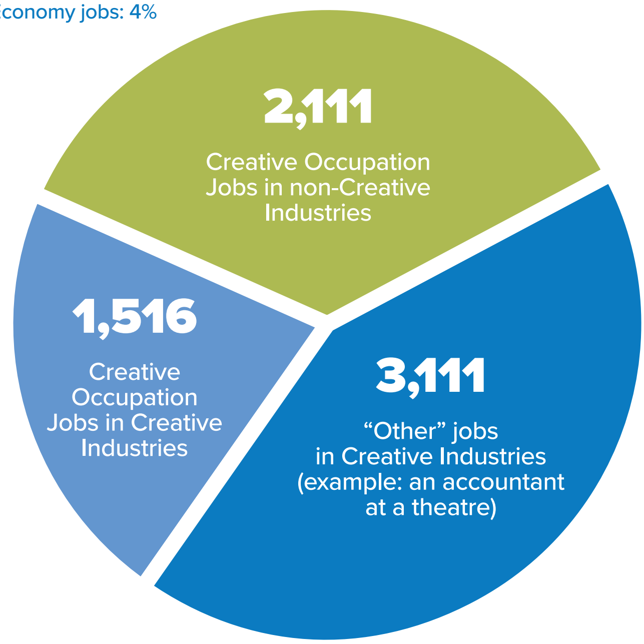
Figure 2.10.6 Lowest and highest average Creative Occupation wages, by employment type



WASHINGTON, SCOTT, JEFFERSON, CRAWFORD, HARRISON, FLOYD, AND CLARK COUNTIES

REGION TWELVE: GREATER NEW ALBANY

Total population: 326,197
% of population: 5%
% of Creative Economy jobs: 4%



There are **6,738** Creative Economy Jobs in Region Twelve

Region Twelve's Creative Industry Wages
$32,549
*Annual wages are averaged

REGION TWELVE'S CREATIVE INDUSTRY

- Region 12 experienced declines in Creative Industry employment, but the declines were not as large as for the State of Indiana overall. Region 12 did not gain as many Creative Industry jobs compared to the State of Indiana.
- Self-employed independent artists comprised the highest number of those employed in Creative Industries.
- Print media, including newspapers and advertising, experienced the greatest declines from 2010 to 2015, Event promotion, driven by self-employment, was the fastest growing.
- Radio-related industries were among the highest-paid employees in Region 12, while fine arts schools and theater companies were among the lowest paid.

Region Twelve's Top Creative Business Establishments

1. Commercial Printing*
2. Wired Telecommunications Carriers
3. Photography Studios, Portrait
4. Commercial Screen Printing
5. Newspaper Publishers

Indiana Top Creative Business Establishments
1. Commercial Printing*; 2. Wired Telecommunications Carriers; 3. Advertising Agencies; 4. Architectural Services; 5. Graphic Design Services

**excludes screen and book printing*

There are **194** Creative Business Establishments in Region Twelve

REGION TWELVE'S CREATIVE OCCUPATIONS

- Region 12 exceeded Indiana's growth in Creative Occupations, but not for growth in self-employment. Region 12's total Creative Occupation employment exceeded job growth for all Indiana jobs.
- Merchandise displayers and window trimmers were the top payroll jobs in Region 12. Overall, the top three Creative Occupations were similar to other regions.
- Commercial and industrial designers, who artistically develop and design manufactured products, experienced the most growth in Creative Occupations.
- Marketing managers were the highest paid Creative Occupations, driven by employment in payroll jobs. Craft artists were the lowest-paid jobs, driven by self-employment.

Region Twelve's Creative Occupation Wages
$35,942

*Annual wages are averaged

Figure 2.12.1 Change in Creative Industry employment, 2010 to 2015

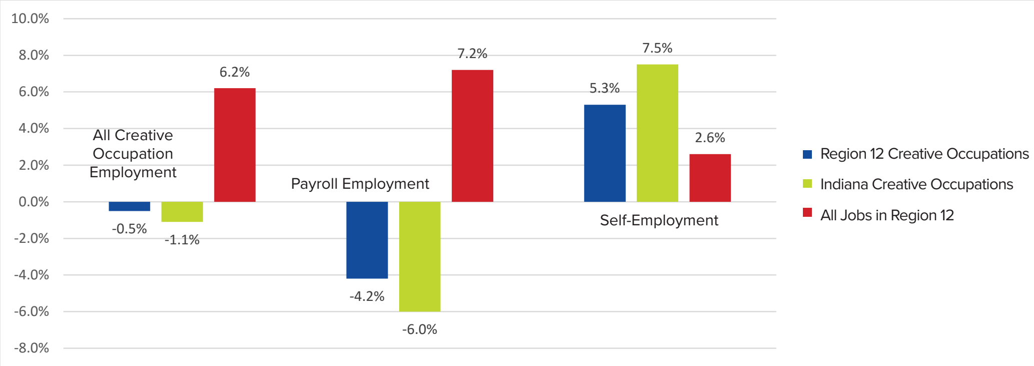


Figure 2.12.1 Total, payroll, and self-employment in Creative Industries

ALL CREATIVE INDUSTRY EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Commercial Printing (except Screen and Books)	1,456	10.7%
Independent Artists, Writers, and Performers	718	19.1%
Wired Telecommunications Carriers	254	-23.3%
Newspaper Publishers	200	-20.1%
Photography Studios, Portrait	182	-2.3%

CREATIVE INDUSTRY PAYROLL EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Commercial Printing (except Screen and Books)	1,420	12.5%
Newspaper Publishers	182	-16.5%
Wired Telecommunications Carriers	161	-30.5%
Motion Picture Theaters (except Drive-Ins)	150	-2.9%
Theater Companies and Dinner Theaters	113	8.4%

SELF-EMPLOYMENT IN CREATIVE INDUSTRIES	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Independent Artists, Writers, and Performers	705	20.2%
Photography Studios, Portrait	147	44.8%
Wired Telecommunications Carriers	93	-6.7%
Fine Arts Schools	91	-35.8%
Graphic Design Services	90	12.7%

Figure 2.12.2 Largest growth and declines in Creative Industry employment, 2010 to 2015

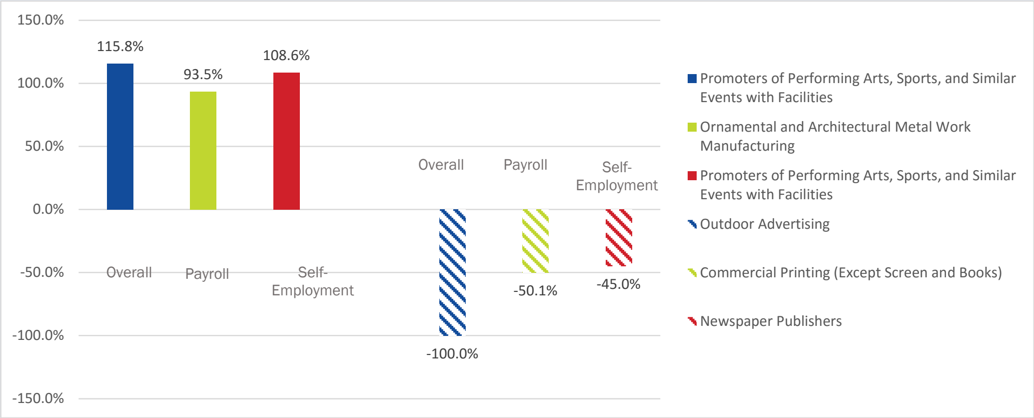


Figure 2.12.3 Lowest and highest average Creative Industry wages, by employment type

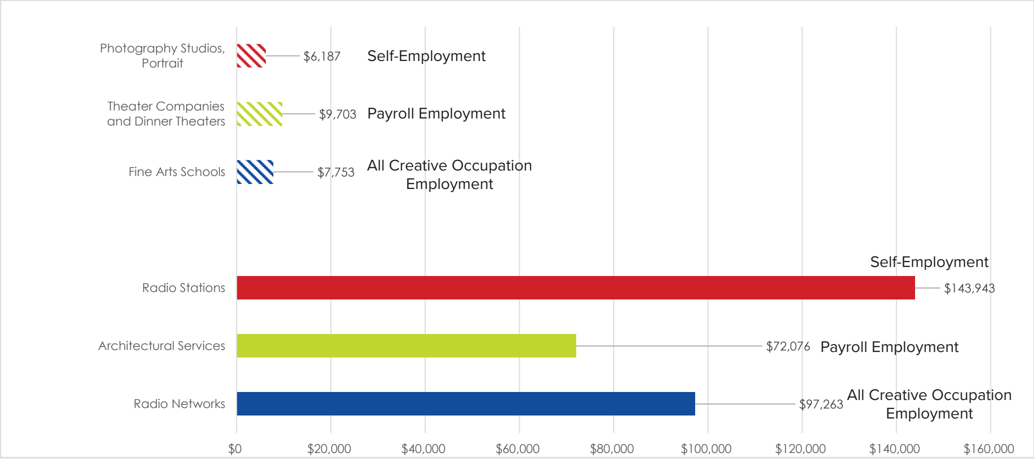


Figure 2.12.4 Change in Creative Occupation employment, 2010 to 2015

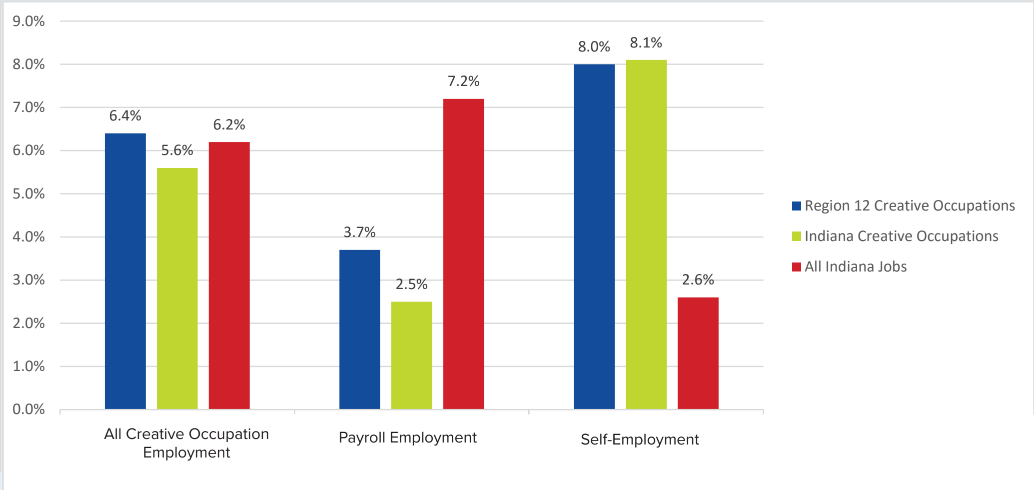


Table 2.12.2 Total, payroll, and self-employment in Creative Occupations

ALL CREATIVE OCCUPATION EMPLOYMENT	TOTAL EMPLOYED	CHANGE IN JOBS, 2010 TO 2015
Photographers	532	2.8%
Musicians and Singers	358	19.5%
Writers and Authors	297	17.5%
Graphic Designers	233	7.2%
Interpreters and Translators	162	-1.8%
CREATIVE OCCUPATION PAYROLL EMPLOYMENT	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Merchandise Displayers and Window Trimmers	113	10.1%
Public Relations Specialists	112	2.7%
Graphic Designers	103	13.0%
Musicians and Singers	99	13.6%
Marketing Managers	98	20.9%
SELF-EMPLOYMENT IN CREATIVE OCCUPATIONS	**TOTAL EMPLOYED**	**CHANGE IN JOBS, 2010 TO 2015**
Photographers	479	9.5%
Writers and Authors	272	17.8%
Musicians and Singers	259	21.9%
Fine Artists, Including Painters, Sculptors, and Illustrators	148	9.8%
Interpreters and Translators	141	-3.2%

Figure 2.12.5 Largest growth and declines in Creative Occupation employment, 2010 to 2015

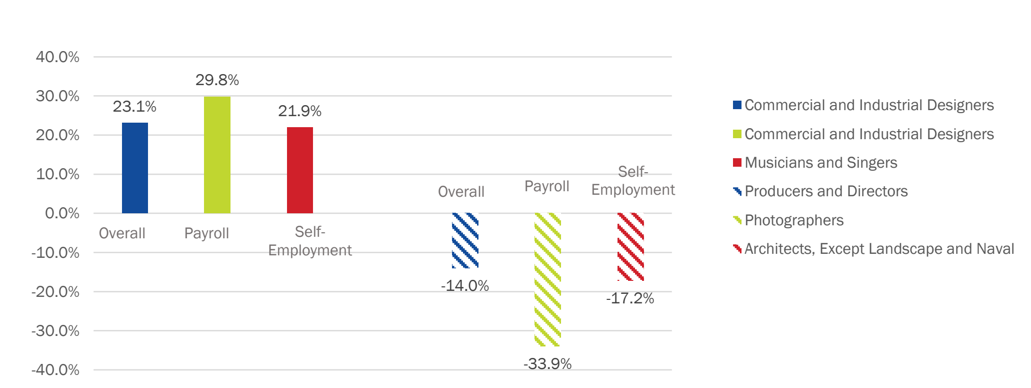
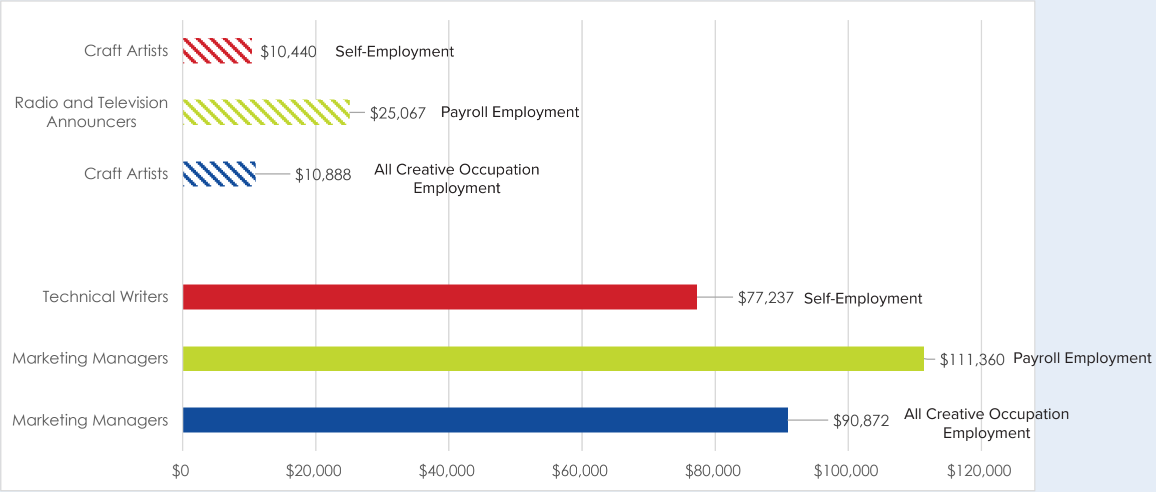


Figure 2.12.6 Lowest and highest average Creative Occupation wages, by employment type



SECTION THREE: STATEWIDE TRENDS + COMPARISONS

TRENDS

1 **OVERALL EMPLOYMENT IN INDIANA'S CREATIVE INDUSTRIES HAVE DECLINED SINCE THE RECESSION, WHILE OVERALL EMPLOYMENT IN CREATIVE OCCUPATIONS INCREASED.**
Indiana's change in overall employment in the Creative Industries was less than the U.S.

Most counties employed less than two percent of its workforce in Creative Industry jobs. Montgomery County (Region 4) has the greatest proportion of employees who are employed in Creative Industries, most of whom are employed in book printing.

See Map 5 Percent of Jobs in Creative Industries
See Map 5 Change in Employment among Creative Industries, 2010-2015

From 2010 to 2015, every IAC Arts Region's Creative Industry employment declined in at least one of its counties. Indiana experienced an overall decline in employment in Creative Industries (a loss of slightly more than one percent) compared to an increase of four percent across the U.S. Indiana's decline in employment in Creative Industries may have been driven by a decline in payroll jobs (a loss of 6 percent, compared to an increase of five percent nationally).

Indiana experienced an 8.3 percent increase in employment across all industries and occupations after the recession, compared to declines and smaller gains in Creative Industries and Occupations.

Indiana's Creative Occupations increased overall, but at a lower rate than Creative Occupations nationally.

Overall (5.6 percent) and in payroll jobs (2.5 percent), Indiana lagged behind national trends in Creative Occupation growth (seven and six percent, respectively).

Five counties have a relatively high proportion of individuals employed in Creative Occupations relative to other jobs. Sullivan County has over 13 percent of employees in Creative Occupations (mostly photographers, writers, and musicians), thought this number declined from 2010 to 2015. Three of these counties (Hancock, Hamilton, and Boone) are located in Region 7.

Map 5 Change in Employment among Creative Occupations, 2010-2015

Across Indiana counties, declines in Creative Occupation employment were lower than Indiana's decline in Creative Industry employment. Multiple counties experienced more than 15 percent declines in Creative Industry employment, while only one county (Ohio) lost more than 15 percent of its Creative Occupation employment.

2 **INDIANA'S CREATIVE ECONOMY PRIMARILY CONSISTS OF, AND WAS DRIVEN BY, SELF-EMPLOYED INDIVIDUALS.**
Indiana has a greater proportion of self-employed members of the creative economy than the U.S.

Map 6, Percent of Self-employed Individuals Working in a Creative Job

Overall, Indiana's arts regions vary in the proportion of creative jobs that are self-employed. Only three percent of all Indiana payroll jobs are creative jobs. Nearly 10 percent of self-employed jobs are creative. By region, Regions 7 (Greater Indianapolis) and 8 (Greater Bloomington) have the highest proportions of creative, self-employed jobs.

Figure 3.1, Percent of self-employed individuals in Creative Industry jobs
Figure 3.2, Percent of self-employed individuals in Creative Occupations

Self-employed individuals comprise 40 percent of the Creative Industry jobs in Indiana, compared to 14 percent of Creative Industry jobs nationally. Similarly, 20 percent of Creative Occupations are self-employed nationally, compared to 57 percent in Indiana.

Region 1 (Greater Gary) has the highest proportion of both self-employed Creative Industry employees (more than double the national rate) and Creative Occupation employees (more than triple the national rate).

Indiana experienced growth in self-employed individuals in the Creative Occupations and Industries.

Indiana's growth in self-employed individuals in Creative Occupations (8.1 percent) outpaced self-employment in other occupations across the state (5.6 percent). The same trend holds for self-employment in the Creative Industries (7.5 percent growth compared to 4.9 percent growth across all industries).

Both Indiana and the U.S. experienced an increase in self-employed individuals in the Creative Industries after the recession, with Indiana having a higher increase (7.5 percent) than the U.S. (.1%).

Indiana lags behind the U.S. in wages for the self-employed in the Creative Economy

Self-employed members of Indiana's creative economy earn less (on average, a difference of $4,000) than self-employed individuals across the U.S.'s Creative Industries and Occupations.

The top self-employed Creative Occupations and Industries in Indiana did not vary much across regions.

Figure 3.3, Percent of IAC Arts Regions with self-employment in the top Creative Occupations
Figure 3.4, Percent of Indiana Arts Regions with self-employment in the top Creative Industry

The top three self-employed Creative Occupations across each of the 11 IAC arts regions included photographers, writers, and musicians. Each of the 11 regions included independent artists and photography studios as their largest Creative Industries, while 10 of 11 regions included fine arts schools and graphic design services.

3 AVERAGE WAGES IN INDIANA'S CREATIVE INDUSTRIES AND OCCUPATIONS GENERALLY LAGGED BEHIND NATIONAL AVERAGES AND OTHER INDUSTRIES IN INDIANA.

Map 7, Average Annual Wages among Creative Industry Employees, 2015
Map 8, Average Annual Wages among Creative Occupation Employees, 2015

Wages in Indiana's Creative Industries were substantially lower than national averages.

Map 9, Percent of Payroll Establishments that are Creative Businesses, 2015

The average wage for Creative Industries in Indiana was about $30,000 less than the national average. The difference was about $4,000 for self-employed workers, and about $30,000 for payroll employees.

One of the reasons Indiana's Creative Economy wages are lower than the U.S. may be due to the lack of payroll establishments in the Creative Economy. Creative employees who have payroll jobs earn more than those who are self-employed. Region 7 has the highest proportion of creative businesses or establishments, as well as the highest wages for creative workers.

Average wages within Indiana varied when compared to other Indiana industries.

See Map 10, Difference between Average Wages for All Industries and Creative

Industry Wages

Creative Industry employees earned less on average in both overall employment and self-employment, but earned more than other payroll employees in Indiana. The average salary for Creative Industries was closer to the regional average than others. Specifically, Regions 3 (Fort Wayne) and 12 (New Albany) were within $700 of all industry pay. Regions 8 and 9 had the greatest disparity between creative and all industries.

There were few counties in which Creative Industry employees earned an annual average salary of more than $50,000.

Similar Creative Occupations were the lowest and highest paid nationally and in Indiana.

Managerial positions in advertising and marketing tended to be the highest earners, while craft artists, photographers, and movie theater employees were among the lowest paid for both groups. These trends may be slightly problematic, as photographers are the most common Creative Occupation, while managerial positions were mostly located in the Indianapolis metro area.

4 TYPES OF CREATIVE EMPLOYMENT VARIED ACROSS REGIONS AND COMPARED TO NATIONAL TRENDS.

Indiana has stronger trends toward traditional, independent artists, which differs from national trends.

The top Creative Occupations in the U.S. were mostly in strategic communications (financial and marketing managers, graphic design, and public relations specialists), while the top Creative Occupations in Indiana include photographers, writers and authors, and musicians and singers. Independent artists and commercial printers comprised the top Creative Industries across all but two Indiana Arts Regions.

Nationally, industries with the highest growth included internet publishing and advertising-related services, compared to photography and independent artists in Indiana.

Many of Indiana's largest and fastest growing jobs were also among the lowest paid.

Indiana's top five growing Creative Industries averaged about $33,000 in annual wages compared to about $83,000 for the top five growing Creative Industries nationally. Similar trends exist for Creative Occupations, with craft artists comprising the lowest paid employees.

On the other hand, marketing managers tended to earn the most nationally and in Indiana, but were most strongly concentrated for overall employment in Regions 7 and 9 (Columbus).

Growth and decline in Creative Economy jobs was much more diverse across regions than other indicators, but followed trends of newer versus older media.

Most overall occupational growth in Indiana included video production and editing, and marketing, similar to the U.S. With the exception of internet publishing, most regional payroll occupational declines in Indiana included advertising and publishing hard copy materials, in addition to musical instruments.

The top Creative Industries included advertising, media, and events promotion for the U.S. For Indiana, the top growing Creative Industry was directory and mailing list publishing—the third most declining Creative Industry in the U.S.

Employment changes since the recession in each Creative Industry did not always align with national trends.

See Figure 3.5, Percent of IAC Arts Regions with total employment in the top Creative Industries, by growth trends

Of the top five Creative Industries from each region, three experienced declines in employment industries nationally and in Indiana. Five industries increased both nationally and in the State of Indiana, suggesting that Indiana has opportunities to continue to expand its Creative Economy. However, two of those growing industries were among the top industries in only two regions. With the exception of interpreters and translators, employment in the top Creative Occupations matched with national trends (all increasing).

5 CENTRAL INDIANA HAD THE STRONGEST TRENDS AND OPPORTUNITIES FOR THE STATE'S CREATIVE ECONOMY

The Indianapolis metro area over-represents the state's Creative Economy.

Map 11, Creative Employment per 100,000 People, 2015

Creative employment is overrepresented in Region 7, which contains the Indianapolis metro area. For example, the region has 26 percent of Indiana's population, but 40 percent of its Creative Industries and Occupations. Specifically, Region 7 has more creative employment per capita than the other regions, among other factors:

Region 7 has the highest average pay for each category of Creative Occupations, and the highest average pay for total and payroll Creative Industry jobs.

Region 7 has the highest proportion of Creative Occupation employees who are self-employed.

Region 7 is the only IAC arts region that has its highest employment in a growing U.S. Creative Industry and Occupation: software publishing, which is also the highest paid Creative Industry.

Region 7 has the highest proportion of payroll establishments that are creative.

Central Indiana has experienced growth in its Creative Economy, including counties bordering Region 7.

Region 7's Creative Industry jobs increased, even when the rest of Indiana experienced a decline in overall Creative Industry employment. Region 7's self-employment also grew at almost the same rate as all Indiana industries. Region 7's growth in Creative Occupations after the recession strongly outpaced the state, and exceeded the state in all self-employed, occupational growth.

Bordering Region 7 are regions containing Bloomington, Columbus, and Nashville, each of which were some of the few counties outside of Region 7 to experience comparable growth in creative employment and larger proportions of Creative Occupations. Regions 7 and 8 have the highest proportion of self-employed creative jobs compared to other regions.

Some non-urban counties within IAC Arts Regions have lower performing Creative Economies than other counties in that region as a whole.

Many non-urban counties have fewer creative employment opportunities, shown by lower proportions of employment in Creative Industry and Occupations. Many of these counties also have high levels of poverty, high population declines, and a large loss in employers since 2000.

CONCLUSIONS AND RECOMMENDATIONS

INDIANA LAGS BEHIND U.S. TRENDS IN GROWING ITS CREATIVE ECONOMY.
Recommendation: Consider the extent to which Indiana should follow national trends in creative employment and why.

Though Indiana lags behind the U.S. in growth and per capita employment in Creative Industries and Occupations, the state also has a culture that identifies strongly with other occupations, such as manufacturing. Indiana's challenge may include providing opportunities for a creative class alongside other traditional economic mainstays of the state. Indiana also shares similar strengths among some Creative Industries and Occupations with the U.S., which should be considered.

INDIANA HAS A STRONG SELF-EMPLOYED CREATIVE CLASS, WHICH MAY EXIST DUE TO FEWER OPPORTUNITIES TO WORK IN A PAYROLL POSITION.
Recommendation: Balance Indiana's trend toward a self-employed creative class with payroll opportunities for employees in the Creative Economy.

Indiana's self-employment trends are stronger than the U.S., even with lower average wages than creative employees on payroll. Still, the difference between national and state self-employment wages aren't as drastic as the differences in salary for payroll jobs. With a lower cost of living, Indiana could be a promising location for self-employed artists and other creative entrepreneurs.

At the same time, higher rates of self-employment in Indiana may exist due to fewer opportunities for payroll jobs in the state's Creative Economy. Balancing payroll employment opportunities with supporting an entrepreneurial creative class may support future intentions toward expanding the state's creative economy.

CENTRAL INDIANA, INCLUDING THE INDIANAPOLIS METRO AND SURROUNDING TOWNS OF COLUMBUS, NASHVILLE, AND BLOOMINGTON, IS A HUB FOR THE STATE'S CREATIVE ACTIVITY.
Recommendation: Identify reasons for fewer employed creative opportunities outside of Central Indiana and clarify context for growth and/or sustainability of the Creative Economy in other regions of Indiana.

What cultural factors account for the variation in the Creative Economy in different regions? Multiple factors, such as low employment, lower-paid Creative Economy jobs, higher poverty rates, and declining populations that may help shape a regional Creative Economy that is less engaged than cities in the central parts of the state.

Map 2. Percent of Jobs in Creative Industries, 2015

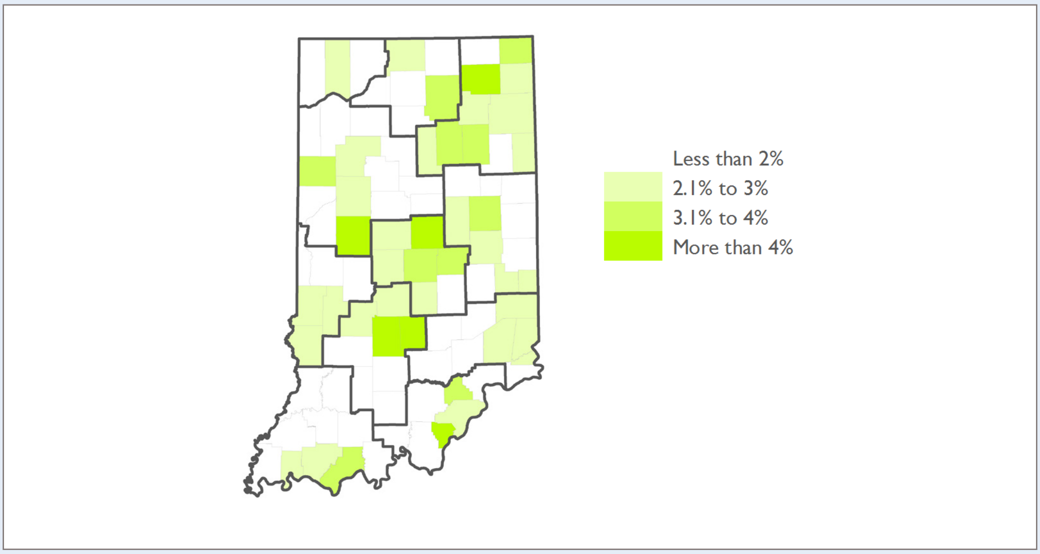
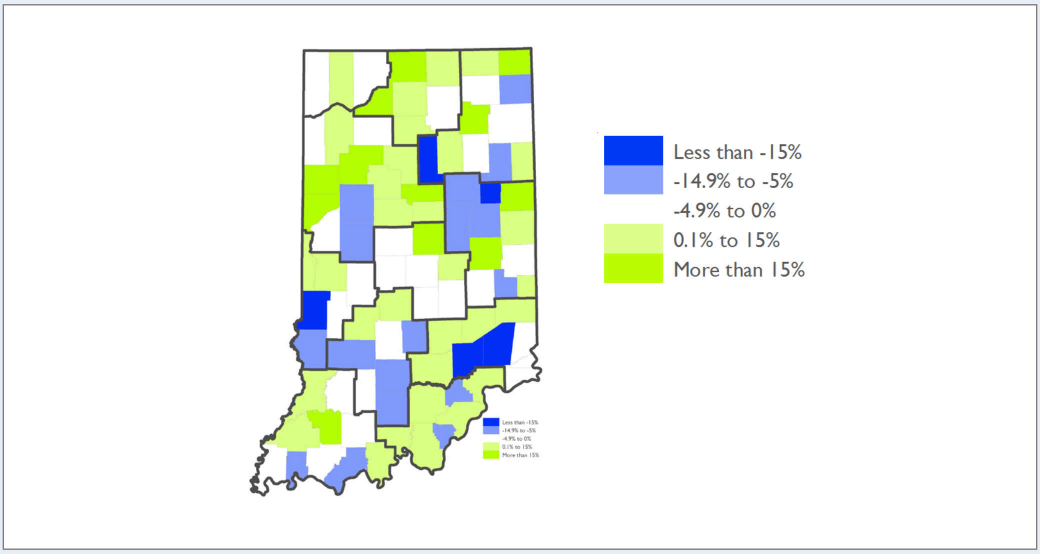


Table 3.1 Proportion of county-level employment in Creative Industry jobs

County	% Creative Industry as a Percent of Total Industry Employment
Montgomery (Region 4, Greater Lafayette)	6.8%
Noble (Region 3, Greater Fort Wayne)	5.5%
Brown (Region 8, Greater Bloomington)	5.2%
Hamilton (Region 7, Greater Indianapolis)	5.0%
Floyd (Region 12, Greater New Albany)	4.2%

Map 3. Change in employment among Creative Industries, 2010 to 2015



Map 4. Percent of Jobs in Creative Occupations, 2015

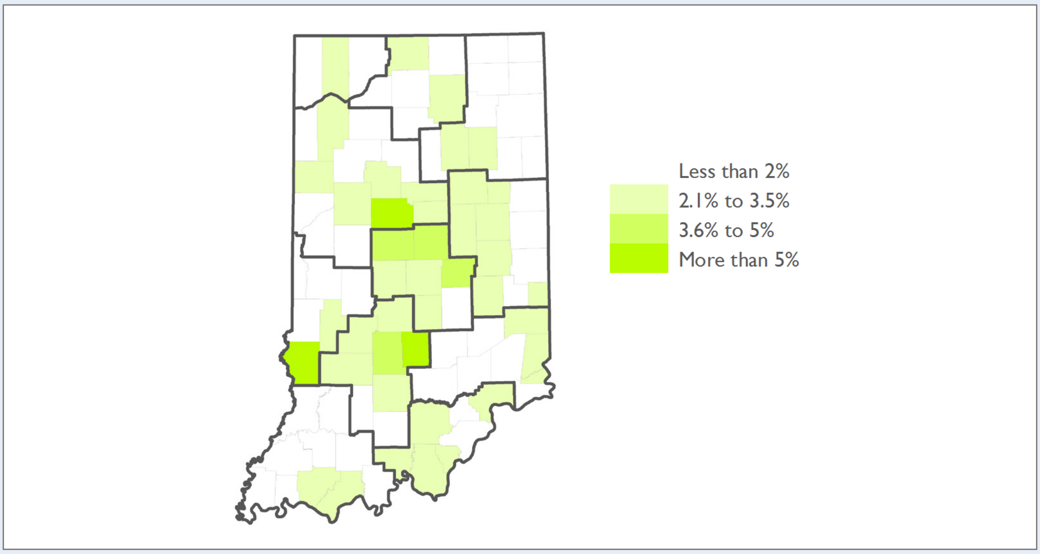
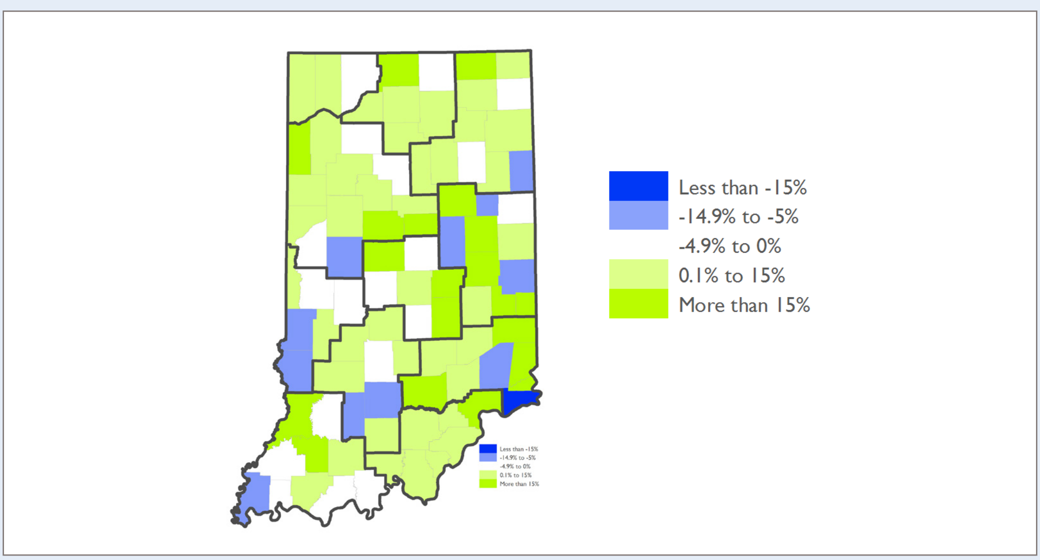


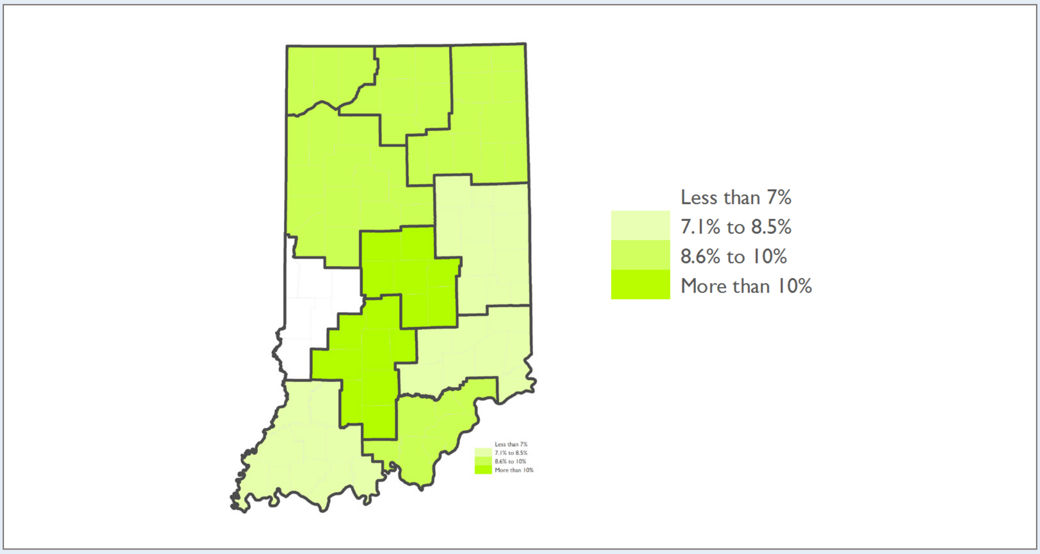
Table 3.2 Proportion of county-level employment in Creative Occupations

County	% Creative Occupations as a Percent Total Employment
Sullivan (Region 6, Greater Terre Haute)	13.4%
Clinton (Region 4, Greater Lafayette)	5.7%
Brown (Region 8, Greater Bloomington)	5.5%
Hamilton (Region 7, Greater Indianapolis)	4.4%
Hancock (Region 7, Greater Indianapolis)	4.0%

Map 5. Change in employment among Creative Occupations, 2010 to 2015



Map 6. Percent of self-employed Individuals Working in a Creative Job



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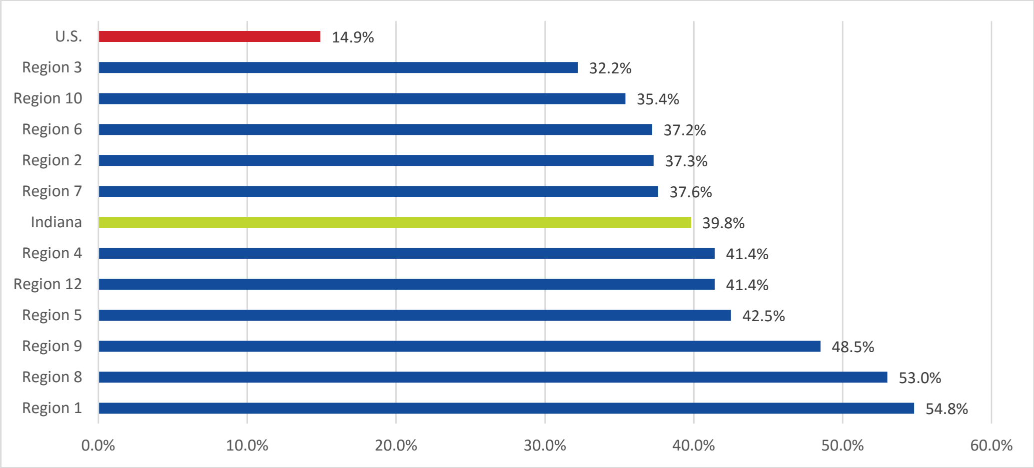


Figure 3.2 Percent of self-employed individuals in Creative Occupations

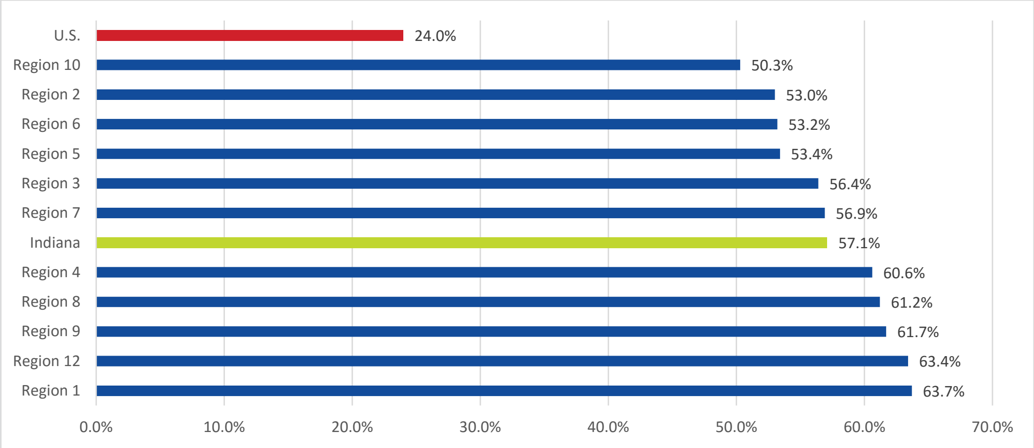


Figure 3.3 Percent of Indiana Arts Regions with self-employment in the top Creative Occupations

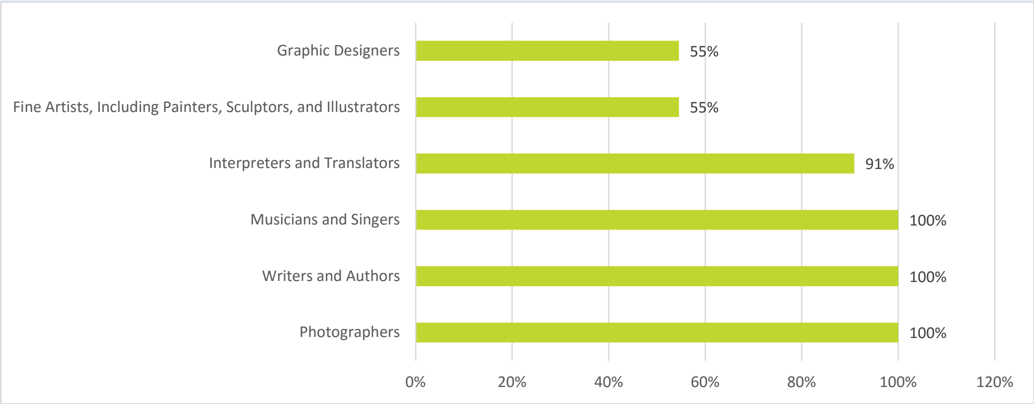
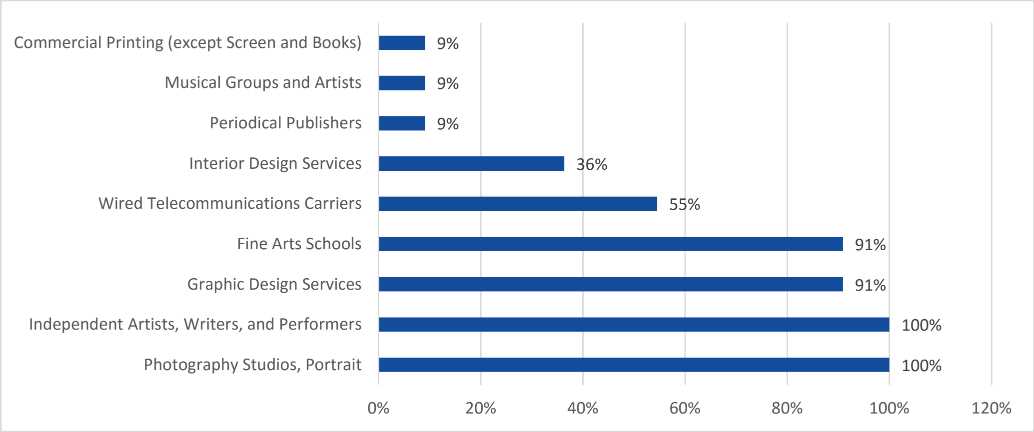
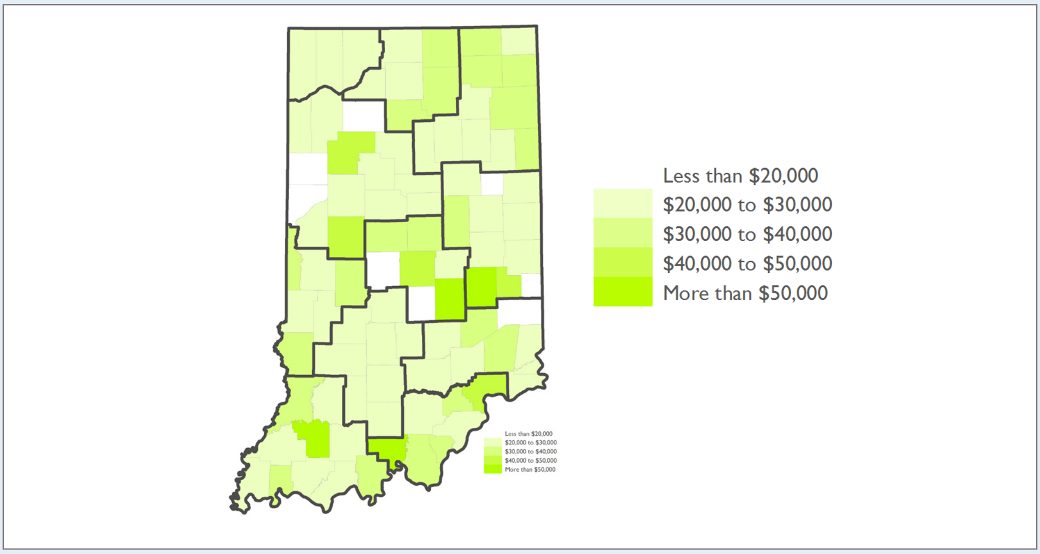


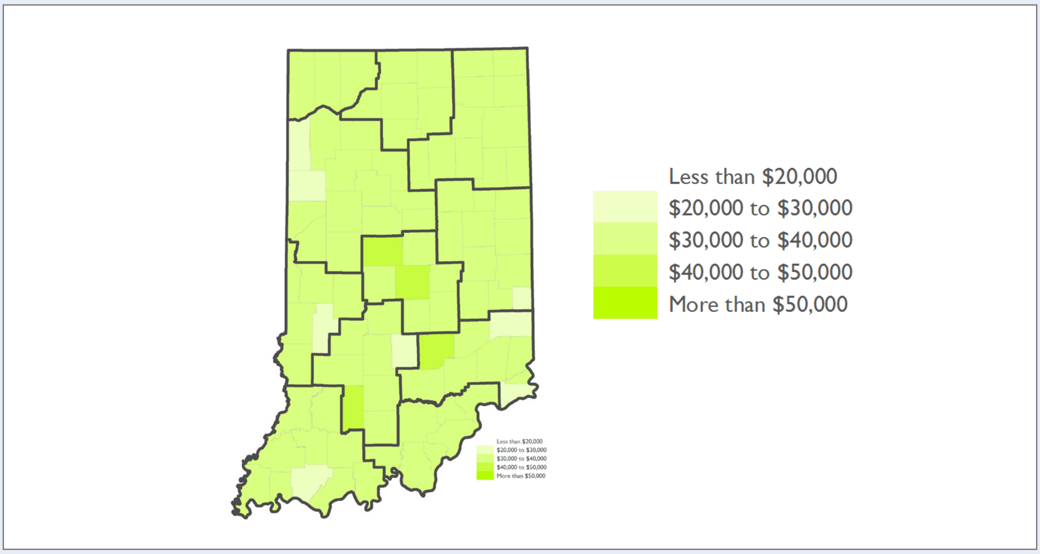
Figure 3.4 Percent of Indiana Arts Regions with self-employment in the top Creative Industry



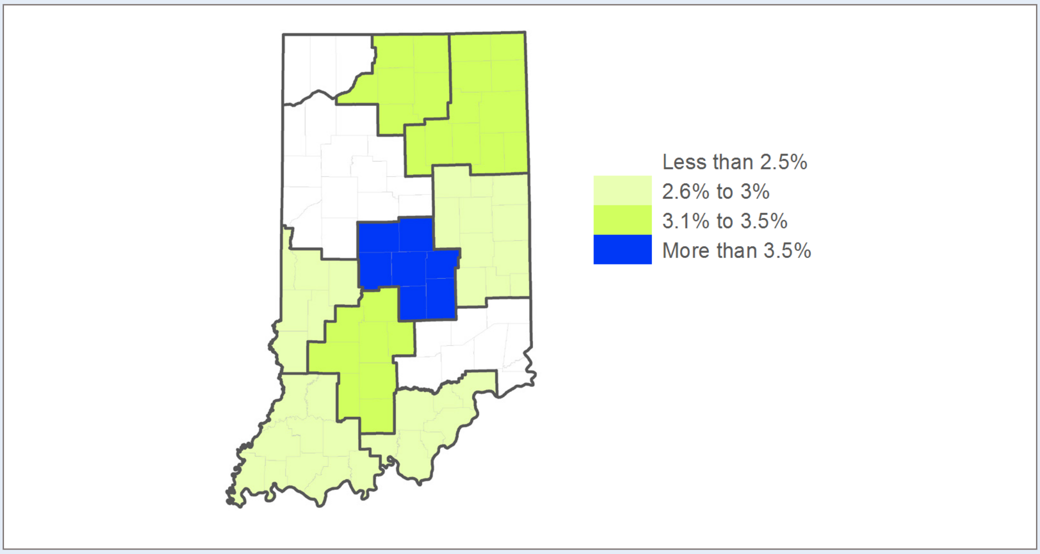
Map 7. Average Annual Wages among Creative Industry Employees, 2015



Map 8. Average Annual Wages among Creative Occupation Employees, 2015



Map 9. Percent of Payroll Establishments that are Creative Businesses, 2015



Map 10. Difference between Average Wages for All Industries and Creative Industry Wages

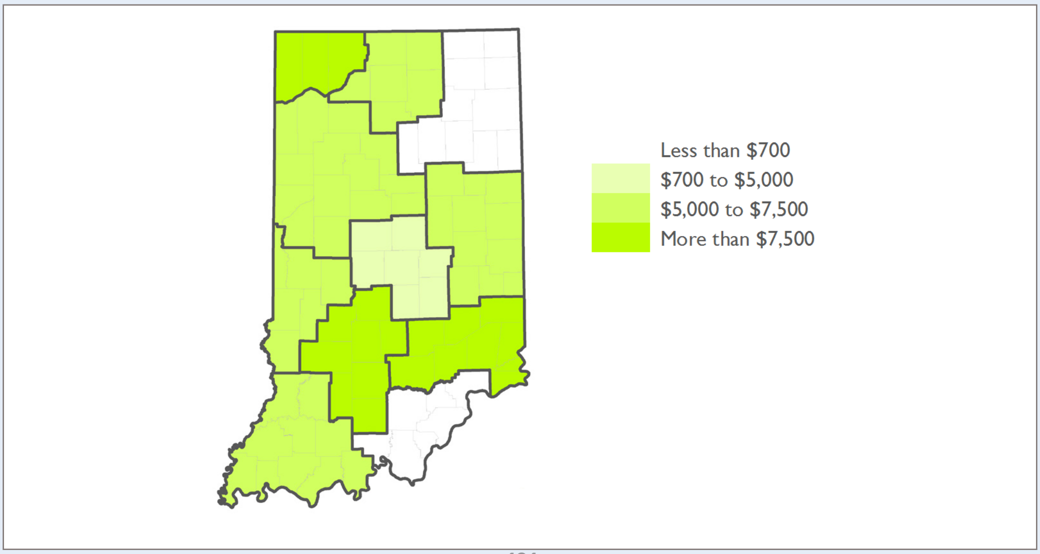
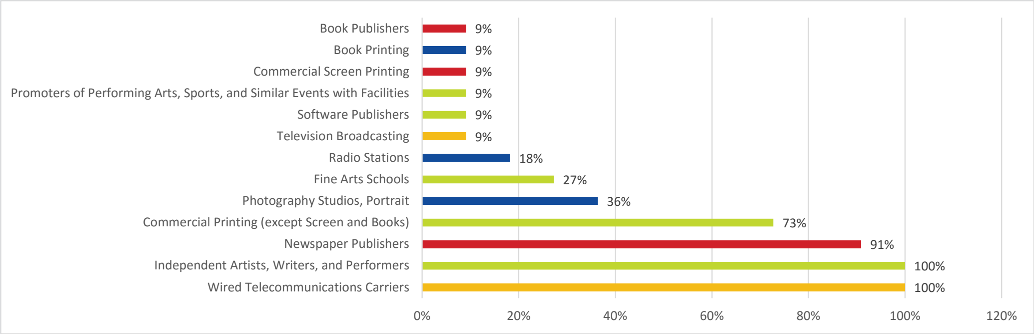
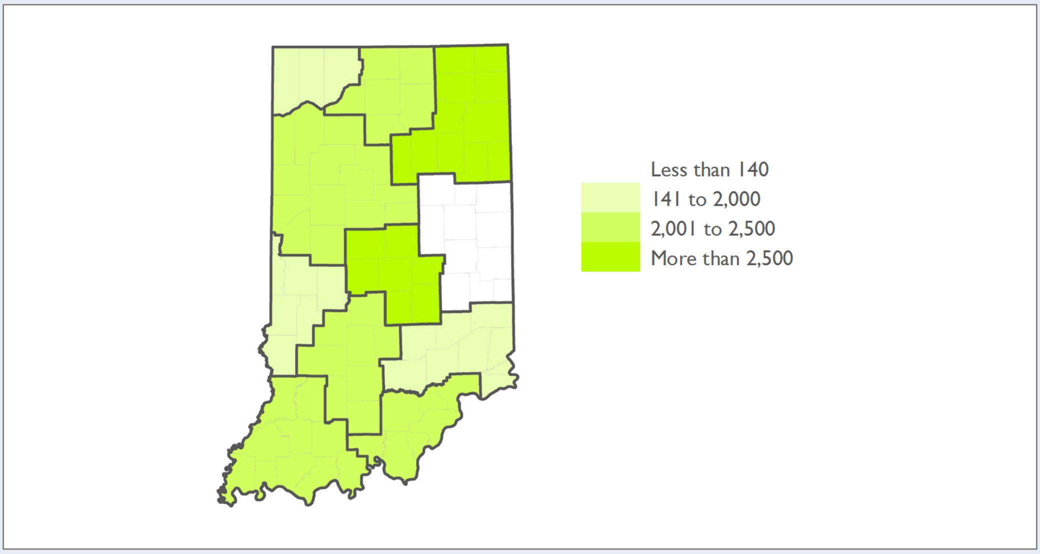


Figure 3.5 Percent of Indiana Arts Regions with total employment in the top Creative Industries, by growth trends



Map 11. Creative Employment per 100,000 People, 2015



APPENDIX A: INDUSTRIES AND OCCUPATION CODES

CREATIVE INDUSTRY CODES

NAICS CODE	INDUSTRY DESCRIPTION
323111	Commercial Printing (except Screen and Books)
323113	Commercial Screen Printing
323117	Books Printing
323120	Support Activities for Printing
332323	Ornamental and Architectural Metal Work Manufacturing
337212	Custom Architectural Woodwork and Millwork Manufacturing
339910	Jewelry and Silverware Manufacturing
339992	Musical Instrument Manufacturing
424920	Book, Periodical, and Newspaper Merchant Wholesalers
451140	Musical Instrument and Supplies Stores
451211	Book Stores
453920	Art Dealers
511110	Newspaper Publishers
511120	Periodical Publishers
511130	Book Publishers
511140	Directory and Mailing List Publishers
511191	Greeting Card Publishers
511199	All Other Publishers
511210	Software Publishers
512110	Motion Picture and Video Production
512120	Motion Picture and Video Distribution
512131	Motion Picture Theaters (except Drive-Ins)
512132	Drive-In Motion Picture Theaters
512191	Teleproduction and Other Postproduction Services
512199	Other Motion Picture and Video Industries
512210	Record Production
512220	Integrated Record Production/Distribution
512230	Music Publishers
512240	Sound Recording Studios
512290	Other Sound Recording Industries
515111	Radio Networks
515112	Radio Stations
515120	Television Broadcasting
515210	Cable and Other Subscription Programming

517110	Wired Telecommunications Carriers
519110	News Syndicates
519120	Libraries and Archives
519130	Internet Publishing and Broadcasting and Web Search Portals
541310	Architectural Services
541320	Landscape Architectural Services
541410	Interior Design Services
541420	Industrial Design Services
541430	Graphic Design Services
541490	Other Specialized Design Services
541810	Advertising Agencies
541820	Public Relations Agencies
541830	Media Buying Agencies
541840	Media Representatives
541850	Outdoor Advertising
541860	Direct Mail Advertising
541870	Advertising Material Distribution Services
541890	Other Services Related to Advertising
541921	Photography Studios, Portrait
541922	Commercial Photography
611610	Fine Arts Schools
711110	Theater Companies and Dinner Theaters
711120	Dance Companies
711130	Musical Groups and Artists
711190	Other Performing Arts Companies
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures
711510	Independent Artists, Writers, and Performers
712110	Museums
712120	Historical Sites
712130	Zoos and Botanical Gardens
712190	Nature Parks and Other Similar Institutions

CREATIVE OCCUPATION CODES

SOC CODE	OCCUPATION TITLE
11-2011	Advertising and Promotions Managers
11-2021	Marketing Managers
13-1011	Agents and Business Managers of Artists, Performers, and Athletes
17-1011	Architects, Except Landscape and Naval
17-1012	Landscape Architects
25-4011	Archivists
25-4012	Curators
25-4013	Museum Technicians and Conservators
25-4021	Librarians
25-4031	Library Technicians
25-9011	Audio-Visual and Multimedia Collections Specialists
27-1011	Art Directors
27-1012	Craft Artists
27-1013	Fine Artists, Including Painters, Sculptors, and Illustrators
27-1014	Multimedia Artists and Animators
27-1019	Artists and Related Workers, All Other
27-1021	Commercial and Industrial Designers
27-1022	Fashion Designers
27-1023	Floral Designers
27-1024	Graphic Designers
27-1025	Interior Designers
27-1026	Merchandise Displayers and Window Trimmers
27-1027	Set and Exhibit Designers
27-1029	Designers, All Other
27-2011	Actors
27-2012	Producers and Directors
27-2031	Dancers
27-2032	Choreographers

27-2041	Music Directors and Composers
27-2042	Musicians and Singers
27-2099	Entertainers and Performers, Sports and Related Workers, All Other
27-3011	Radio and Television Announcers
27-3021	Broadcast News Analysts
27-3022	Reporters and Correspondents
27-3031	Public Relations Specialists
27-3041	Editors
27-3042	Technical Writers
27-3043	Writers and Authors
27-3091	Interpreters and Translators
27-3099	Media and Communication Workers, All Other
27-4011	Audio and Video Equipment Technicians
27-4012	Broadcast Technicians
27-4013	Radio Operators
27-4014	Sound Engineering Technicians
27-4021	Photographers
27-4031	Camera Operators, Television, Video, and Motion Picture
27-4032	Film and Video Editors
27-4099	Media and Communication Equipment Workers, All Other

APPENDIX B:
CREATIVE OCCUPATION AND INDUSTRY DESCRIPTIONS

OCCUPATION DESCRIPTIONS

ADVERTISING AND PROMOTIONS MANAGERS (11-2011)
Plan, direct, or coordinate advertising policies and programs or produce collateral materials, such as posters, contests, coupons, or give-aways, to create extra interest in the purchase of a product or service for a department, an entire organization, or on an account basis.

MARKETING MANAGERS (11-2021)
Plan, direct, or coordinate marketing policies and programs, such as determining the demand for products and services offered by a firm and its competitors, and identify potential customers. Develop pricing strategies with the goal of maximizing the firm's profits or share of the market while ensuring the firm's customers are satisfied. Oversee product development or monitor trends that indicate the need for new products and services.

AGENTS AND BUSINESS MANAGERS OF ARTISTS, PERFORMERS, AND ATHLETES (13-1011)
Represent and promote artists, performers, and athletes in dealings with current or prospective employers. May handle contract negotiation and other business matters for clients.

ARCHITECTS, EXCEPT LANDSCAPE AND NAVAL (17-1011)
Plan and design structures, such as private residences, office buildings, theaters, factories, and other structural property. Excludes "Landscape Architects" (17-1012) and "Marine Engineers and Naval Architects" (17-2121).

LANDSCAPE ARCHITECTS (17-1012)
Plan and design land areas for projects such as parks and other recreational facilities, airports, highways, hospitals, schools, land subdivisions, and commercial, industrial, and residential sites.

ARCHIVISTS (25-4011)
Appraise, edit, and direct safekeeping of permanent records and historically valuable documents. Participate in research activities based on archival materials.

CURATORS (25-4012)
Administer collections, such as artwork, collectibles, historic items, or scientific specimens of museums or other institutions. May conduct instructional, research, or public service activities of institution.

MUSEUM TECHNICIANS AND CONSERVATORS (25-4013)
Restore, maintain, or prepare objects in museum collections for storage, research, or exhibit. May work with specimens such as fossils, skeletal parts, or botanicals; or artifacts, textiles, or art. May identify and record objects or install and arrange them in exhibits. Includes book or document conservators.

LIBRARIANS (25-4021)
Administer libraries and perform related library services. Work in a variety of settings, including public libraries, educational institutions, museums, corporations, government agencies, law firms, non-profit organizations, and healthcare providers. Tasks may include selecting, acquiring, cataloging, classifying, circulating, and maintaining library materials; and furnishing reference, bibliographical, and readers' advisory services. May perform in-depth, strategic research, and synthesize, analyze, edit, and filter information. May set up or work with databases and information systems to catalogue and access information.

LIBRARY TECHNICIANS (25-4031)
Assist librarians by helping readers in the use of library catalogs, databases, and indexes to locate books and other materials; and by answering questions that require only brief consultation of standard reference. Compile records; sort and shelve books or other media; remove or repair damaged books or other media; register patrons; and check materials in and out of the circulation process. Replace materials in shelving area (stacks) or files. Includes bookmobile drivers who assist with providing services in mobile libraries.

AUDIO-VISUAL AND MULTIMEDIA COLLECTIONS SPECIALISTS (25-9011)
Prepare, plan, and operate multimedia teaching aids for use in education. May record, catalogue, and file materials.

ART DIRECTORS (27-1011)
Formulate design concepts and presentation approaches for visual communications media, such as print, broadcasting, and advertising. Direct workers engaged in art work or layout design.

CRAFT ARTISTS (27-1012)
Create or reproduce hand-made objects for sale and exhibition using a variety of techniques, such as welding, weaving, pottery, and needlecraft.

FINE ARTISTS, INCLUDING PAINTERS, SCULPTORS, AND ILLUSTRATORS (27-1013)
Create original artwork using any of a wide variety of media and techniques.

MULTIMEDIA ARTISTS AND ANIMATORS (27-1014)
Create special effects, animation, or other visual images using film, video, computers, or other electronic tools and media for use in products or creations, such as computer games, movies, music videos, and commercials.

ARTISTS AND RELATED WORKERS, ALL OTHER (27-1019)
All artists and related workers not listed separately. Illustrative examples: Calligrapher, Tattoo Artist.

COMMERCIAL AND INDUSTRIAL DESIGNERS (27-1021)
Develop and design manufactured products, such as cars, home appliances, and children's toys. Combine artistic talent with research on product use, marketing, and materials to create the most functional and appealing product design.

FASHION DESIGNERS (27-1022)
Design clothing and accessories. Create original designs or adapt fashion trends.

FLORAL DESIGNERS (27-1023)
Design, cut, and arrange live, dried, or artificial flowers and foliage.

GRAPHIC DESIGNERS (27-1024)
Design or create graphics to meet specific commercial or promotional needs, such as packaging, displays, or logos. May use a variety of mediums to achieve artistic or decorative effects.

INTERIOR DESIGNERS (27-1025)
Plan, design, and furnish interiors of residential, commercial, or industrial buildings. Formulate design which is practical, aesthetic, and conducive to intended purposes, such as raising productivity, selling merchandise, or improving life style. May specialize in a particular field, style, or phase of interior design. Excludes "Merchandise Displayers and Window Trimmers" (27-1026).

MERCHANDISE DISPLAYERS AND WINDOW TRIMMERS (27-1026)
Plan and erect commercial displays, such as those in windows and interiors of retail stores and at trade exhibitions

SET AND EXHIBIT DESIGNERS (27-1027)
Design special exhibits and movie, television, and theater sets. May study scripts, confer with directors, and conduct research to determine appropriate architectural styles.

DESIGNERS, ALL OTHER (27-1029)
All designers not listed separately, Illustrative example: Memorial Marker Designer

ACTORS (27-2011)
Play parts in stage, television, radio, video, motion picture productions, or other settings for entertainment, information, or instruction. Interpret serious or comic role by speech, gesture, and body movement to entertain or inform audience. May dance and sing.

PRODUCERS AND DIRECTORS (27-2012)
Produce or direct stage, television, radio, video, or motion picture productions for entertainment, information, or instruction. Responsible for creative decisions, such as interpretation of script, choice of actors or guests, set design, sound, special effects, and choreography.

DANCERS (27-2031)
Perform dances. May perform on stage, for on-air broadcasting, or for video recording

CHOREOGRAPHERS (27-2032)
Create new dance routines. Rehearse performance of routines. May direct and stage presentations.

MUSIC DIRECTORS AND COMPOSERS (27-2041)
Conduct, direct, plan, and lead instrumental or vocal performances by musical groups, such as orchestras, bands, choirs, and glee clubs. Includes arrangers, composers, choral directors, and orchestrators.

MUSICIANS AND SINGERS (27-2042)
Play one or more musical instruments or sing. May perform on stage, for on-air broadcasting, or for sound or video recording.

ENTERTAINERS AND PERFORMERS, SPORTS AND RELATED WORKERS, ALL OTHER (27-2099)
All entertainers and performers, sports and related workers not listed separately. Illustrative examples: Clown, Magician, Comedian

RADIO AND TELEVISION ANNOUNCERS (27-3011)
Speak or read from scripted materials, such as news reports or commercial messages, on radio or television. May announce artist or title of performance, identify station, or interview guests. Excludes "Broadcast News Analysts" (27-3021).

BROADCAST NEWS ANALYSTS (27-3021)
Analyze, interpret, and broadcast news received from various sources.

REPORTERS AND CORRESPONDENTS (27-3022)
Collect and analyze facts about newsworthy events by interview, investigation, or observation. Report and write stories for newspaper, news magazine, radio, or television. Excludes "Broadcast News Analysts" (27-3021).

PUBLIC RELATIONS SPECIALISTS (27-3031)
Engage in promoting or creating an intended public image for individuals, groups, or organizations. May write or select material for release to various communications media.

EDITORS (27-3041)
Plan, coordinate, or edit content of material for publication. May review proposals and drafts for possible publication. Includes technical editors.

TECHNICAL WRITERS (27-3042)
Write technical materials, such as equipment manuals, appendices, or operating and maintenance instructions. May assist in layout work.

WRITERS AND AUTHORS (27-3043)
Originate and prepare written material, such as scripts, stories, advertisements, and other material. Excludes "Public Relations Specialists" (27-3031) and "Technical Writers" (27-3042).

INTERPRETERS AND TRANSLATORS (27-3091)
Interpret oral or sign language, or translate written text from one language into another.

MEDIA AND COMMUNICATION WORKERS, ALL OTHER (27-3099)
All media and communication workers not listed separately. Illustrative example: Stage Technician.

AUDIO AND VIDEO EQUIPMENT TECHNICIANS (27-4011)
Set up, or set up and operate audio and video equipment including microphones, sound speakers, video screens, projectors, video monitors, recording equipment, connecting wires and cables, sound and mixing boards, and related electronic equipment for concerts, sports events, meetings and conventions, presentations, and news conferences. May also set up and operate associated spotlights and other custom lighting systems. Excludes "Sound Engineering Technicians" (27-4014).

BROADCAST TECHNICIANS (27-4012)
Set up, operate, and maintain the electronic equipment used to transmit radio and television programs. Control audio equipment to regulate volume level and quality of sound during radio and television broadcasts. Operate transmitter to broadcast radio or television programs.

RADIO OPERATORS (27-4013)
Receive and transmit communications using radiotelephone equipment in accordance with government regulations. May repair equipment. Excludes "Radio, Cellular, and Tower Equipment Installers and Repairs" (49-2021).

SOUND ENGINEERING TECHNICIANS (27-4014)
Operate machines and equipment to record, synchronize, mix, or reproduce music, voices, or sound effects in sporting arenas, theater productions, recording studios, or movie and video productions.

PHOTOGRAPHERS (27-4021)
Photograph people, landscapes, merchandise, or other subjects, using digital or film cameras and equipment. May develop negatives or use computer software to produce finished images and prints. Includes scientific photographers, aerial photographers, and photojournalists.

CAMERA OPERATORS, TELEVISION, VIDEO AND MOTION PICTURE (27-4031)
Operate television, video, or motion picture camera to record images or scenes for various purposes, such as TV broadcasts, advertising, video production, or motion pictures.

FILM AND VIDEO EDITORS (27-4032)
Edit moving images on film, video, or other media. May edit or synchronize soundtracks with images. Excludes "Sound Engineering Technicians"(27-4014).

MEDIA AND COMMUNICATION EQUIPMENT WORKERS, ALL OTHER (27-4099)
All media and communication equipment workers not listed separately. Illustrative examples: Spotlight Operator, Satellite Communications Operator, Dimmer Board Operator.

Source: U.S. Bureau of Labor Statistics: http://www.bls.gov/oes/current/oes_stru.htm

INDUSTRY DESCRIPTIONS

COMMERCIAL PRINTING (EXCEPT SCREEN AND BOOKS) (323111)
This U.S. industry comprises establishments primarily engaged in commercial printing (except screen printing, books printing) without publishing (except grey goods printing). Printing processes used in this industry include lithographic, gravure, flexographic, letterpress, engraving, and various digital printing technologies. This industry includes establishments engaged in commercial printing on purchased stock materials, such as stationery, invitations, labels, and similar items, on a job order basis. Establishments primarily engaged in traditional printing activities combined with document photocopying services (i.e., quick printers) or primarily engaged in printing graphical materials using digital printing equipment are included in this industry.

COMMERCIAL SCREEN PRINTING (323113)
This U.S. industry comprises establishments primarily engaged in screen printing without publishing (except books, grey goods, and manifold business forms). This industry includes establishments engaged in screen printing on purchased stock materials, such as stationery, invitations, labels, and similar items, on a job order basis. Establishments primarily engaged in printing on apparel and textile products, such as T-shirts, caps, jackets, towels, and napkins, are included in this industry

BOOKS PRINTING (323117)
This U.S. industry comprises establishments primarily engaged in printing or printing and binding books and pamphlets without publishing.

SUPPORT ACTIVITIES FOR PRINTING (323120)
This industry comprises establishments primarily engaged in performing prepress and postpress services in support of printing activities. Prepress services may include such things as platemaking, typesetting, tradebinding and sample mounting. Postpress services include such things as book or paper bronzing, die-cutting, edging, embossing, folding, gilding, gluing, and indexing.

ORNAMENTAL AND ARCHITECTURAL METAL WORK MANUFACTURING (332323)
This U.S. industry comprises establishments primarily engaged in manufacturing ornamental and architectural metal work, such as staircases, metal open steel flooring, fire escapes, railings, and scaffolding.

CUSTOM ARCHITECTURAL WOODWORK AND MILLWORK MANUFACTURING (337212)
This U.S. industry comprises establishments primarily engaged in manufacturing custom designed interiors consisting of architectural woodwork and fixtures utilizing wood, wood products, and plastics laminates. All of the industry output is made to individual order on a job shop basis and requires skilled craftsmen as a labor input. A job might include custom manufacturing of display fixtures, gondolas, wall shelving units, entrance and window architectural detail, sales and reception counters, wall paneling, and matching furniture.

JEWELRY AND SILVERWARE MANUFACTURING (339910)
This industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing, engraving, chasing, or etching jewelry; (2) manufacturing, engraving, chasing, or etching metal personal goods (i.e., small articles carried on or about the person, such as compacts or cigarette cases); (3) manufacturing, engraving, chasing, or etching precious metal solid, precious metal clad, or pewter flatware and other hollowware; (4) stamping coins; (5) manufacturing unassembled jewelry parts and stock shop products, such as sheet, wire, and tubing; (6) cutting, slabbing, tumbling, carving, engraving, polishing, or faceting precious or semiprecious stones and gems; (7) recutting, repolishing, and setting gem stones; and (8) drilling, sawing, and peeling cultured and costume pearls. This industry includes establishments primarily engaged in manufacturing precious solid, precious clad, and precious plated jewelry and personal goods.

MUSICAL INSTRUMENT MANUFACTURING (339992)
This U.S. industry comprises establishments primarily engaged in manufacturing musical instruments (except toys).

BOOK, PERIODICAL, AND NEWSPAPER MERCHANT WHOLESALERS (424920)
This industry comprises establishments primarily engaged in the merchant wholesale distribution of books, periodicals, and newspapers.

MUSICAL INSTRUMENT AND SUPPLIES STORES (451140)
This industry comprises establishments primarily engaged in retailing new musical instruments, sheet music, and related supplies; or retailing these new products in combination with musical instrument repair, rental, or music instruction.

BOOK STORES (451211)
This U.S. industry comprises establishments primarily engaged in retailing new books.

ART DEALERS (453920)
This industry comprises establishments primarily engaged in retailing original and limited edition art works. Included in this industry are establishments primarily engaged in displaying works of art for retail sale in art galleries.

NEWSPAPER PUBLISHERS (511110)
This industry comprises establishments known as newspaper publishers. Establishments in this industry carry out operations necessary for producing and distributing newspapers, including gathering news; writing news columns, feature stories, and editorials; and selling and preparing advertisements. These establishments may publish newspapers in print or electronic form.

PERIODICAL PUBLISHERS (511120)
This industry comprises establishments known either as magazine publishers or periodical publishers. These establishments carry out the operations necessary for producing and distributing magazines and other periodicals, such as gathering, writing, and editing articles, and selling and preparing advertisements. These establishments may publish magazines and other periodicals in print or electronic form.

BOOK PUBLISHERS (511130)
This industry comprises establishments known as book publishers. Establishments in this industry carry out design, editing, and marketing activities necessary for producing and distributing books. These establishments may publish books in print, electronic, or audio form.

DIRECTORY AND MAILING LIST PUBLISHERS (511140)
This industry comprises establishments primarily engaged in publishing directories, mailing lists, and collections or compilations of fact. The products are typically protected in their selection, arrangement and/or presentation. Examples are lists of mailing addresses, telephone directories, directories of businesses, collections or compilations of proprietary drugs or legal case results, compilations of public records, etc. These establishments may publish directories and mailing lists in print or electronic form.

GREETING CARD PUBLISHERS (511191)
This U.S. industry comprises establishments primarily engaged in publishing greeting cards.

ALL OTHER PUBLISHERS (511199)
This U.S. industry comprises establishments generally known as publishers (except newspaper, magazine, book, directory, database, music, and greeting card publishers). These establishments may publish works in print or electronic form.

SOFTWARE PUBLISHERS (511210)
This industry comprises establishments primarily engaged in computer software publishing or publishing and reproduction. Establishments in this industry carry out operations necessary for producing and distributing computer software, such as designing, providing documentation, assisting in installation, and providing support services to software purchasers. These establishments may design, develop, and publish, or publish only.

MOTION PICTURE AND VIDEO PRODUCTION (512110)
This industry comprises establishments primarily engaged in producing, or producing and distributing motion pictures, videos, television programs, or television commercials.

MOTION PICTURE AND VIDEO DISTRIBUTION (512120)
This industry comprises establishments primarily engaged in acquiring distribution rights and distributing film and video productions to motion picture theaters, television networks and stations, and exhibitors.

MOTION PICTURE THEATERS (EXCEPT DRIVE-INS) (512131)
This U.S. industry comprises establishments primarily engaged in operating motion picture theaters (except drive-ins) and/or exhibiting motion pictures or videos at film festivals, and so forth.

DRIVE-IN MOTION PICTURE THEATERS (512132)
This U.S. industry comprises establishments primarily engaged in operating drive-in motion picture theaters.

TELEPRODUCTION AND OTHER POSTPRODUCTION SERVICES (512191)
This U.S. industry comprises establishments primarily engaged in providing specialized motion picture or video postproduction services, such as editing, film/tape transfers, subtitling, credits, closed captioning, and animation and special effects.

OTHER MOTION PICTURE AND VIDEO INDUSTRIES (512199)
This U.S. industry comprises establishments primarily engaged in providing motion picture and video services (except motion picture and video production, distribution, exhibition, and teleproduction and other postproduction services).

RECORD PRODUCTION (512210)
This industry comprises establishments primarily engaged in record production (e.g., tapes, CDs). These establishments contract with artists and arrange and finance the production of original master recordings. Establishments in this industry hold the copyright to the master recording and derive most of their revenues from the sales, leasing, and licensing of master recordings. Establishments in this industry do not have their own duplication or distribution capabilities.

INTEGRATED RECORD PRODUCTION/DISTRIBUTION (512220)
This industry comprises establishments primarily engaged in releasing, promoting, and distributing sound recordings. These establishments manufacture or arrange for the manufacture of recordings, such as audio tapes/cassettes and compact discs, and promote and distribute these products to wholesalers, retailers, or directly to the public. Establishments in this industry produce master recordings themselves, or obtain reproduction and distribution rights to master recordings produced by record production companies or other integrated record companies.

MUSIC PUBLISHERS (512230)
This industry comprises establishments primarily engaged in acquiring and registering copyrights for musical compositions in accordance with law and promoting and authorizing the use of these compositions in recordings, radio, television, motion pictures, live performances, print, or other media. Establishments in this industry represent the interests of the songwriter or other owners of musical compositions to produce revenues from the use of such works, generally through licensing agreements. These establishments may own the copyright or act as administrator of the music copyrights on behalf of copyright owners. Publishers of music books and sheet music are included in this industry.

SOUND RECORDING STUDIOS (512240)
This industry comprises establishments primarily engaged in providing the facilities and technical expertise for sound recording in a studio. This industry includes establishments that provide audio production and postproduction services to produce master recordings. These establishments may provide audio services for film, television, and video productions.

OTHER SOUND RECORDING INDUSTRIES (512290)
This industry comprises establishments primarily engaged in providing sound recording services (except record production, distribution, music publishing, and sound recording in a studio). Establishments in this industry provide services, such as the audio recording of meetings and conferences.

RADIO NETWORKS (515111)
This U.S. industry comprises establishments primarily engaged in assembling and transmitting aural programming to their affiliates or subscribers via over-the-air broadcasts, cable, or satellite. The programming covers a wide variety of material, such as news services, religious programming, weather, sports, or music.

RADIO STATIONS (515112)
This U.S. industry comprises establishments primarily engaged in broadcasting aural programs by radio to the public. Programming may originate in their own studio, from an affiliated network, or from external sources.

TELEVISION BROADCASTING (515120)
This industry comprises establishments primarily engaged in broadcasting images together with sound. These establishments operate television broadcasting studios and facilities for the programming and transmission of programs to the public. These establishments also produce or transmit visual programming to affiliated broadcast television stations, which in turn broadcast the programs to the public on a predetermined schedule. Programming may originate in their own studio, from an affiliated network, or from external sources.

CABLE AND OTHER SUBSCRIPTION PROGRAMMING (515210)
This industry comprises establishments primarily engaged in operating studios and facilities for the broadcasting of programs on a subscription or fee basis. The broadcast programming is typically narrowcast in nature (e.g., limited format, such as news, sports, education, or youth-oriented). These establishments produce programming in their own facilities or acquire programming from external sources. The programming material is usually delivered to a third party, such as cable systems or direct-to-home satellite systems, for transmission to viewers.

WIRED TELECOMMUNICATIONS CARRIERS (517110)
This industry comprises establishments primarily engaged in operating and/or providing access to transmission facilities and infrastructure that they own and/or lease for the transmission of voice, data, text, sound, and video using wired telecommunications networks. Transmission facilities may be based on a single technology

or a combination of technologies. Establishments in this industry use the wired telecommunications network facilities that they operate to provide a variety of services, such as wired telephony, including VoIP services; wired (cable) audio and video programming distribution; and wired broadband Internet services. By exception, establishments providing satellite television distribution services using facilities and infrastructure that they operate are included in this industry.

NEWS SYNDICATES (519110)
This industry comprises establishments primarily engaged in supplying information, such as news reports, articles, pictures, and features, to the news media.

LIBRARIES AND ARCHIVES (519120)
This industry comprises establishments primarily engaged in providing library or archive services. These establishments are engaged in maintaining collections of documents (e.g., books, journals, newspapers, and music) and facilitating the use of such documents (recorded information regardless of its physical form and characteristics) as are required to meet the informational, research, educational, or recreational needs of their user. These establishments may also acquire, research, store, preserve, and generally make accessible to the public historical documents, photographs, maps, audio material, audiovisual material, and other archival material of historical interest. All or portions of these collections may be accessible electronically.

INTERNET PUBLISHING AND BROADCASTING AND WEB SEARCH PORTALS (519130)
This industry comprises establishments primarily engaged in 1) publishing and/or broadcasting content on the Internet exclusively or 2) operating Web sites that use a search engine to generate and maintain extensive databases of Internet addresses and content in an easily searchable format (and known as Web search portals). The publishing and broadcasting establishments in this industry do not provide traditional (non-Internet) versions of the content that they publish or broadcast. They provide textual, audio, and/or video content of general or specific interest on the Internet exclusively. Establishments known as Web search portals often provide additional Internet services, such as e-mail, connections to other web sites, auctions, news, and other limited content, and serve as a home base for Internet users.

ARCHITECTURAL SERVICES (541310)
This industry comprises establishments primarily engaged in planning and designing residential, institutional, leisure, commercial, and industrial buildings and structures by applying knowledge of design, construction procedures, zoning regulations, building codes, and building materials.

LANDSCAPE ARCHITECTURAL SERVICES (541320)
This industry comprises establishments primarily engaged in planning and designing the development of land areas for projects, such as parks and other recreational areas; airports; highways; hospitals; schools; land subdivisions; and commercial, industrial, and residential areas, by applying knowledge of land characteristics, location of buildings and structures, use of land areas, and design of landscape projects.

INTERIOR DESIGN SERVICES (541410)
This industry comprises establishments primarily engaged in planning, designing, and administering projects in interior spaces to meet the physical and aesthetic needs of people using them, taking into consideration building codes, health and safety regulations, traffic patterns and floor planning, mechanical and electrical needs, and interior fittings and furniture. Interior designers and interior design consultants work in areas, such as hospitality design, health care design, institutional design, commercial and corporate design, and residential design. This industry also includes interior decorating consultants engaged exclusively in providing aesthetic services associated with interior spaces.

INDUSTRIAL DESIGN SERVICES (541420)
This industry comprises establishments primarily engaged in creating and developing designs and specifications that optimize the use, value, and appearance of their products. These services can include the determination of the materials, construction, mechanisms, shape, color, and surface finishes of the product, taking into consideration human characteristics and needs, safety, market appeal, and efficiency in production, distribution, use, and maintenance. Establishments providing automobile or furniture industrial design services or industrial design consulting services are included in this industry.

GRAPHIC DESIGN SERVICES (541430)
This industry comprises establishments primarily engaged in planning, designing, and managing the production of visual communication in order to convey specific messages or concepts, clarify complex information, or project visual identities. These services can include the design of printed materials, packaging, advertising, signage systems, and corporate identification (logos). This industry also includes commercial artists engaged exclusively in generating drawings and illustrations requiring technical accuracy or interpretative skills.

OTHER SPECIALIZED DESIGN SERVICES (541490)
This industry comprises establishments primarily engaged in providing professional design services (except architectural, landscape architecture, engineering, interior, industrial, graphic, and computer system design).

ADVERTISING AGENCIES (541810)
This industry comprises establishments primarily engaged in creating advertising campaigns and placing such advertising in periodicals, newspapers, radio and television, or other media. These establishments are organized to provide a full range of services (i.e., through in-house capabilities or subcontracting), including advice, creative services, account management, production of advertising material, media planning, and buying (i.e., placing advertising).

PUBLIC RELATIONS AGENCIES (541820)
This industry comprises establishments primarily engaged in designing and implementing public relations campaigns. These campaigns are designed to promote the interests and image of their clients. Establishments providing lobbying, political consulting, or public relations consulting are included in this industry.

MEDIA BUYING AGENCIES (541830)
This industry comprises establishments primarily engaged in designing and implementing public relations campaigns. These campaigns are designed to promote the interests and image of their clients. Establishments providing lobbying, political consulting, or public relations consulting are included in this industry.

MEDIA REPRESENTATIVES (541840)
This industry comprises establishments of independent representatives primarily engaged in selling media time or space for media owners.

OUTDOOR ADVERTISING (541850)
This industry comprises establishments primarily engaged in creating and designing public display advertising campaign materials, such as printed, painted, or electronic displays; and/or placing such displays on indoor or outdoor billboards and panels, or on or within transit vehicles or facilities, shopping malls, retail (in-store) displays, and other display structures or sites.

DIRECT MAIL ADVERTISING (541860)
This industry comprises establishments primarily engaged in (1) creating and designing advertising campaigns for the purpose of distributing advertising materials (e.g., coupons, flyers, samples) or specialties (e.g., key chains, magnets, pens with customized messages imprinted) by mail or other direct distribution; and/or (2) preparing advertising materials or specialties for mailing or other direct distribution. These establishments may also compile, maintain, sell, and rent mailing lists.

ADVERTISING MATERIAL DISTRIBUTION SERVICES (541870)
This industry comprises establishments primarily engaged in the direct distribution or delivery of advertisements (e.g., circulars, coupons, handbills) or samples. Establishments in this industry use methods, such as delivering advertisements or samples door-to-door, placing flyers or coupons on car windshields in parking lots, or handing out samples in retail stores.

OTHER SERVICES RELATED TO ADVERTISING (541890)
This industry comprises establishments primarily engaged in providing advertising services (except advertising agency services, public relations agency services, media buying agency services, media representative services, display advertising services, direct mail advertising services, advertising material distribution services, and marketing consulting services).

PHOTOGRAPHY STUDIOS, PORTRAIT (541921)
This U.S. industry comprises establishments known as portrait studios primarily engaged in providing still, video, or digital portrait photography services.

COMMERCIAL PHOTOGRAPHY (541922)
This U.S. industry comprises establishments primarily engaged in providing commercial photography services, generally for advertising agencies, publishers, and other business and industrial users.

FINE ARTS SCHOOLS (611610)
This industry comprises establishments primarily engaged in offering instruction in the arts, including dance, art, drama, and music.

THEATER COMPANIES AND DINNER THEATERS (711110)
This industry comprises (1) companies, groups, or theaters primarily engaged in producing the following live theatrical presentations: musicals; operas; plays; and comedy, improvisational, mime, and puppet shows and (2) establishments, commonly known as dinner theaters, engaged in producing live theatrical productions and in providing food and beverages for consumption on the premises. Theater groups or companies may or may not operate their own theater or other facility for staging their shows.

DANCE COMPANIES (711120)
This industry comprises companies, groups, or theaters primarily engaged in producing all types of live theatrical dance (e.g., ballet, contemporary dance, folk dance) presentations. Dance companies or groups may or may not operate their own theater or other facility for staging their shows.

MUSICAL GROUPS AND ARTISTS (711130)
This industry comprises (1) groups primarily engaged in producing live musical entertainment (except theatrical musical or opera productions), and (2) independent (i.e., freelance) artists primarily engaged in providing live musical entertainment. Musical groups and artists may perform in front of a live audience or in a studio, and may or may not operate their own facilities for staging their shows.

OTHER PERFORMING ARTS COMPANIES (711190)
This industry comprises companies or groups (except theater companies, dance companies, musical groups, and artists) primarily engaged in producing live theatrical presentations.

PROMOTERS OF PERFORMING ARTS, SPORTS, AND SIMILAR EVENTS WITH FACILITIES (711310)
This industry comprises establishments primarily engaged in (1) organizing, promoting, and/or managing live performing arts productions, sports events, and similar events, such as state fairs, county fairs, agricultural fairs, concerts, and festivals, held in facilities that they manage and operate and/or (2) managing and providing the staff to operate arenas, stadiums, theaters, or other related facilities for rent to other promoters.

PROMOTERS OF PERFORMING ARTS, SPORTS, AND SIMILAR EVENTS WITHOUT FACILITIES (711320)
This industry comprises promoters primarily engaged in organizing, promoting, and/or managing live performing arts productions, sports events, and similar events, such as state fairs, county fairs, agricultural fairs, concerts, and festivals, in facilities that are managed and operated by others. Theatrical (except motion picture) booking agencies are included in this industry.

AGENTS AND MANAGERS FOR ARTISTS, ATHLETES, ENTERTAINERS, AND OTHER PUBLIC FIGURES (711410)
This industry comprises establishments of agents and managers primarily engaged in representing and/or managing creative and performing artists, sports figures, entertainers, and other public figures. The representation and management includes activities such as representing clients in contract negotiations; managing or organizing clients' financial affairs; and generally promoting the careers of their clients.

INDEPENDENT ARTISTS, WRITERS, AND PERFORMERS (711510)
This industry comprises independent (i.e., freelance) individuals primarily engaged in performing in artistic productions, in creating artistic and cultural works or productions, or in providing technical expertise necessary for these productions. This industry also includes athletes and other celebrities exclusively engaged in endorsing products and making speeches or public appearances for which they receive a fee.

MUSEUMS (712110)
This industry comprises establishments primarily engaged in the preservation and exhibition of objects of historical, cultural, and/or educational value.

HISTORICAL SITES (712120)
This industry comprises establishments primarily engaged in the preservation and exhibition of sites, buildings, forts, or communities that describe events or persons of particular historical interest. Archeological sites, battlefields, historical ships, and pioneer villages are included in this industry.

ZOOS AND BOTANICAL GARDENS (712130)
This industry comprises establishments primarily engaged in the preservation and exhibition of live plant and animal life displays.

NATURE PARKS AND OTHER SIMILAR INSTITUTIONS (712190)
This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

Source: North American Industry Classification System (NAICS): www.naics.com

Local and Statewide Partners
Access Indy
Arts Council of Indianapolis
Arts Illiana
Art Mix
Arts Place
Arts United of Greater Fort Wayne
Arts Village Brown County
Ball State University's Indiana Communities Institute
Butler University
Bloomington Arts Commission
Bloomington Entertainment and Arts District
Brown County Community Foundation
Carmel Arts & Design District
Carmel Center for the Performing Arts
Center for Visual and Performing Arts, Munster
Central Indiana Community Foundation
Columbus Area Arts Council
Columbus Arts and Entertainment District
Community Research Institute at Indiana – Purdue University Fort Wayne
HANDS in Autism Interdisciplinary Training and Resource Center
Hanover College
Harrison Center for the Arts
Indiana Bicentennial Commission
Indiana Civil Rights Commission
Indiana Department of Administration
Indiana Department of Education
Indiana Department of Natural Resources
Indiana Economic Development Corporation
Indiana Governor's Council for People with Disabilities
Indiana Historical Bureau
Indiana Housing and Community Development Authority
Indiana Institute on Disability and Community
Indiana Office of Community and Rural Affairs
Indiana Office of the Governor
Indiana Office of the Lieutenant Governor
Indiana Office of the Treasurer
Indiana Office of Tourism Development
Indiana State Library
Indiana State Museum
Indiana State Museum & Historic Sites
Indiana – Purdue University Fort Wayne
Indiana University School of Public and Environmental Affairs
Indiana University Public Policy Institute
Indiana University South Bend
Ivy Tech Community College
Madison Arts and Cultural District
Purdue University
Randolph County Community Foundation
Saint Joseph County Community Foundation
Serve Indiana
South Shore Arts
Tippecanoe Arts Federation
Tippecanoe Arts and Cultural District
Traditional Arts Indiana
Vanderburgh Community Foundation

Regional and National Partners
Americans for the Arts
Arts Midwest
Cuyahoga Arts and Culture
Michigan Council for Arts and Cultural Affairs
National Assembly of State Arts Agencies
National Center for Creative Aging
National Endowment for the Arts

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