

Exploring Structural Differences in the Creative Industries of Texas Metropolitan Areas

Michael C. Carroll

University of North Texas

Michael Seman

University of North Texas

Economics Research Group

The Economics Research Group is an interdisciplinary research platform with expertise in regional economics, policy, economic development strategies, and community development.

- Promote academic research of the highest caliber.
- Promote meaningful public dialogue on issues important to the residents and institutions of the DFW Metroplex.
- Provide regional policymakers with the opportunity to interact with scholars within the academy on important issues relevant to the welfare of their DFW constituents.

Outline

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

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

Selected Creative Economies 2015

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



Map data ©2016 Google, INEGI

ECONOMICS
RESEARCH
GROUP

UNT

Basic Economic Structure

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

Data

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

Subsectors 2005-2015

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

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

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

Museums and Education 2005-2015

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

Performing and Visual Arts 2005-2015

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

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

Film, Radio, and TV 2005-2015

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

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

Design and Publishing 2005-2015

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

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

Temporal Analysis

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

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

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

* National employment data for 2015 represents 2014 numbers

Temporal Analysis

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

	% Chg 2005 - 2007	Net Chg 2005 - 2007	% Chg 2007 - 2009	Net Chg 2007 - 2009	% Chg 2009 - 2015	Net Chg 2009 - 2015	% Chg 2005 - 2015	Net Chg 2005 - 2015
Austin Creative Emp	15.1%	3,969	0.7%	208	34.0%	9,665	55.3%	14,511
Austin Total Emp	10.2%	83,171	-1.7%	-15,490	26.2%	231,589	36.7%	299,270
DFW Creative Emp	3.1%	2,942	-5.4%	-5,195	9.3%	8,188	6.5%	6,054
DFW Total Emp	6.8%	220,572	-3.2%	-108,831	18.0%	601,540	22.1%	713,281
Houston Creative Emp	9.2%	4,969	-0.4%	-210	6.0%	5,584	15.3%	8,267
Houston Total Emp	7.9%	218,672	-0.1%	-2,631	16.3%	483,590	24.4%	699,631
San Antonio Creative Emp	3.7%	797	-4.0%	-887	11.2%	2,524	10.7%	2,292
San Antonio Total Emp	7.0%	63,879	-0.3%	-3,211	16.7%	162,150	24.5%	222,818
Texas Creative Emp	5.9%	15,676	-4.2%	-11,824	8.0%	21,466	21.9%	25,961
Texas Total Emp	6.9%	785,903	-1.3%	-159,766	15.6%	1,880,756	21.9%	2,506,893
Nation Creative Emp*	6.4%	282,995	-7.3%	-345,794	4.2%	182,448	2.7%	119,649
Nation Total Emp*	3.4%	5,110,436	-4.3%	-6,770,457	6.8%	10,146,876	5.6%	8,486,855

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

* National employment data for 2015 represents 2014 numbers



Thank You

Michael C. Carroll

Michael Seman