JULY 2012

THE CREATIVE ECONOMY OF HOUSTON

A COMPREHENSIVE STUDY OF CREATIVE-SECTOR INDUSTRIES AND THEIR IMPACT ON THE HOUSTON ECONOMY

Commissioned by Houston Arts Alliance
and University of Houston
in partnership with Greater Houston Partnership

Data and Analysis by EMSI

WELCOME LETTER

Thank you to all of the many thoughtful participants in bringing this study to a reality. Nearly three years ago, Houston Arts Alliance and University of Houston convened a group of creative, academic and policy leaders to discuss the broad creative sector in Houston. A few preliminary take-aways have informed the work since then.

Among them is the sense that the delineation between the for-profit creative sectors and the non-profit arts is now highly porous. Artists and other creatives move fluidly between work in major arts institutions, community-based organizations, film, design and other creative endeavors. The "arts" today are about creative expression and creative experience, and don't fall neatly within for-profit and non-profit parameters. We need to shift the perception from the arts as a quality of life attraction for a well-qualified workforce, to the creative sectors as a tremendously powerful component of the economy unto itself. I believe this study reflects these early ideas.

This is a conservative study. By design, we asked our colleagues at EMSI to mirror the study as much as possible to successful studies in other major US cities, but to tailor it to Houston. The result are findings that are defendable, easy to grasp, and are presented within the context of Houston's job sectors.

We have to extend thanks to the many thoughtful participants in those early conversations, including Patricia Martin, who led us through the initial phase of the study. Thanks also to Don Henderson and the Culture & Tourism Committee of the Greater Houston Partnership—a group of lively community leaders committed to advancing the arts and culture within the business community; and to Karen Farber at University of Houston, our partner from the get-go, with an eye on the academic implications of the study. Finally, thanks to the board at Houston Arts Alliance (HAA), who endorsed the need for this study three plus years ago, and my collegues at HAA who helped realize those early ideas into this final document.

This study is, ideally, only a starting point. Houston's creative sector is poised to grow quickly in the coming years, and with incremental investment and policy leadership, the opportunities are extraordinary. As the story unfolds, please continue to see more profiles like those throughout this study and information about the creative economy on our website at www.houstonartsalliance.com and www.facebook.com/houstonartsalliance.

Thank you, Creatives, for advancing our lives, community and economic well-being.

Jonathon Glus, CEO, Houston Arts Alliance

INTRODUCTION

On the world economic stage, Houston is a big player. It is the fourth largest city in the United States, with a population of more than two million, and a 10-county regional population of approximately 6.1 million people, the country's fifth largest metropolitan region. With the most recent national census, Houston is the country's second fastest growing major metro area and is now the most culturally diverse city in the country. Among its assets are a global population, a talented and productive workforce, a comparatively reasonable cost of living and a good quality of life. Urban expert Joel Kotkin touted Houston's "successful 21st-century urbanism," noting abundant opportunity due to lower taxes and inexpensive real estate relative to other major cities and a continued rise in white-collar, college-educated residents. In 2008, Houston was rated number one on *Kiplinger's Personal Finance* Best Cities report, and *The Wall Street Journal* and *The New York Times* are only two of many national dailies recently reporting on Houston's robust economy and growing profile as a leading 21st century city.

As the global energy capital and the American center of space technology, Houston is known as powerful, resourceful and productive. But is it known for its CREATIVE ECONOMY as well?

The following report, commissioned by Houston Arts Alliance and University of Houston, examines that question, analyzing Houston's creative economy and comparing its creative-business sector (for-profit and non-profit) with those in comparable American cities. The result is a new and compelling view of Houston as a city of great creative activity, employing many tens of thousands and generating billions in economic activity. At a time when the creative economies in other American cities have seen a constriction, this is the story of a city on the rise in creative economy output with potential of tremendous growth with the right investment.

Read on to learn more about Houston's creative outlook—and why the city has good reason to be excited about the future.

EXECUTIVE SUMMARY

Cities, regions and states across the country—as well as across the world—have been measuring the size, profile and impact of their creative sectors for years. Regions that once relied on industry as the primary engine for the economy, such as New England and portions of Great Britain and Northern Europe, began in earnest decades ago to measure this opportunity area—the creative sector—as a part of retooling their economies for intellectual enterprise, tourism and other 21st century economic generators.

And here in the States, younger cities and regions such as Seattle, Austin and greater Los Angeles, have adopted the "creative economy" as a vital and even critical component to a diversified regional economy.

Fortunate to have a growing and diversifying economy, Houston has not been faced with the hard work of rebuilding. The city has reaped great rewards by investing in the medical industry, energy, and the great Port of Houston. And with that has come a booming construction industry and services to support.

Less measured, but tremendously vital, the creative economy is a diverse and broad-based collection of industries—non-profit and for-profit—that employ more than **146,000** individuals in primary and support roles across the ten-county region. In 2011, creative businesses in Houston had an economic impact of more than **$9.1 billion.**

Houston has been on the rise for a decade. Comparison data shows that, of the six cities considered for this study, only Houston and Dallas saw creative-sector gains in the decade between 2001 and 2011. During that period, the city's industry grew by 8 percent. Projections indicate that by 2016 employment in Houston's creative economy will be 16 percent larger than it was in 2001—the largest gain of any city in the study.

For workers in the creative sector, Houston has strong earnings potential. The city ranked ahead of Dallas, Philadelphia, Miami, Chicago and Los Angeles in median earnings per creative worker. With Houston's low cost of living, these findings could be attractive to creative workers looking to relocate or creative business owners looking to move or expand their business.

Importantly, Houston is underserved by local creative businesses. While demand by city residents is $20.53 billion in sales, local companies provide only $10.77 billion worth of creative goods and services. Houstonians import almost half of the creative goods they use, revenue that is sent to other communities. By growing the local creative sector, Houston can meet more of its own demand and keep more revenue at home.

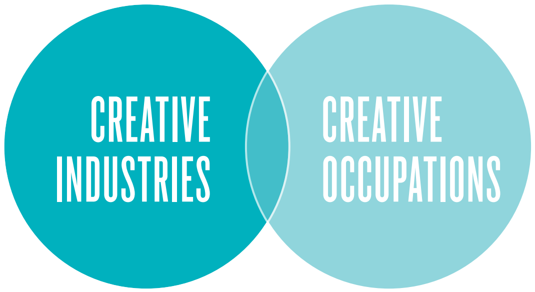
Creative economy workers overall are educated, highly compensated workers. Many American cities from Milwaukee to Albuquerque are attempting to attract them to bring their industries and families to those cities. Without much effort, Houston has created one of the country's larger and more robust creative economies. With targeted resources, Houston could evolve this sector at an even greater rate than is already predicted.

CHLOE DAO

As a young immigrant from Laos, Chloe Dao spent Saturdays at her family's snack bar at a Houston flea market—making shish kabobs and watching CNN's "Style with Elsa Klensch." "That was really my first insight into international fashion." After eight years in New York, working in fashion and attending the Fashion Institute of Technology, she moved back to Houston in 2000 to open her own boutique. Lot 8 (now called Dao Chloe Dao) was an innovative, gallery-style showcase for young American designers and her own work. In 2005, she auditioned, almost on a whim, for Season 2 of "Project Runway" and ended up winning. She considers that achievement a triumph for her mother, a hard-working entrepreneurial type who raised eight daughters, and her hometown. "It lets everyone know that Houston is actually a very, very sophisticated international city." Houstonians, she says, "are hungry for new stuff. They love fashion. They love the arts. They love to travel."

HOUSTON'S CURRENT CREATIVE ECONOMY

HOUSTON'S CREATIVE ECONOMY



2011 TOTAL EMPLOYMENT
146,625

55,436
non-creative workers in creative industries
accountant at graphic design company

35,747
creative-artistic workers in creative industries
architect at architecture firm
curator at a museum

55,442
creative-artistic workers in non-creative industries
graphic designer at oil & gas company

91,804
CREATIVE INDUSTRIES

CULTURE & HERITAGE
museums; libraries and archives; historical sites

DESIGN
Built Environment: architectural services; graphic design services; interior design services; landscape architectural services

Product: interior design services; architectural metal work manufacturing; fashion and special product design

Communications: advertising; graphic design; printing

MEDIA & FILM
Advertising agencies; newspaper publishers; software publishers; periodical publishers; television broadcasting; radio stations; direct mail advertising; motion picture and video production; teleproduction and other postproduction services; record production; sound recording studios

PERFORMING ARTS
Independent artists, writers, and performers; theater companies and dinner theaters; musical groups; musical instrument and supply stores; dance companies

VISUAL ARTS & CRAFTS
Hobby, toy and game stores; photography studios; jewelry stores; fine art schools; book stores; art dealers; commercial photography; lighting equipment manufacturing

91,189
CREATIVE OCCUPATIONS

ARTISTS
Musicians and singers; writers and authors; music directors and composers; entertainers and performers; actors; fine artists (including painters, sculptors, etc.); choreographers; molders, shapers and casters; craft artists; dancers; curators; makeup artists

CULTURAL
Librarians; library technicians; curators; audio-visual collections specialists

DESIGNERS
Architects; architectural and civil drafters; multi-media artists and animators; interior designers; jewelers and precious stone designers; landscape architects; set and exhibit designers; fashion designers

MEDIA
Photographers; graphic designers; marketing managers; art directors; editors; producers and directors; radio and television announcers; advertising and promotions managers, A/V equipment technicians; reporters and correspondents; broadcast technicians; proofreaders and copy markers; film and video editors

WHAT IS A CREATIVE ECONOMY?

Who's in the creative economy? A trucking company isn't considered "creative," but the graphic artist who designs its brochures makes the list. Similarly, a business that produces a creative product, like an architectural firm, will likely employ accountants, janitors and other non-creative personnel.

Before a city or region can determine the size and condition of its creative economy it has to answer a question: what is a creative economy? Or more specifically, what is **our** creative economy?

Like so many of the world's great ponderings, it depends on who you ask.

All companies have a creative element and, for all we know, employ an incredible number of weekend sculptors, origami enthusiasts and shower singers. But staffing creative people is not the same thing as operating a creative business. "Creative business" isn't a subjective label, it's an employment-category.

Still, determining which jobs and businesses fall into the creative sector can be confusing. With so many variables, how do you draw a creative line?

From a national perspective, there is no one accepted measure for creative economy. Washington D.C. defines the sector differently from Chicago or Miami—or Houston. For this study to ring true in Houston, we defined the creative economy more narrowly than other cities. At the same time, we attempted to identify common employment categories to begin to create more consistent criteria among American cities conducting similar studies.

In order to make direct comparisons, analysts used accepted classification-criteria in identifying creative businesses for study. So, for the purposes of this report, you'll need a few definitions:

Creative industries are those in which a creative or artistic element is an integral part of the delivery of its product or service, e.g. "photography."

Creative businesses are those individuals and companies working within that industry, e.g. "recording studio."

And a *creative job* is any occupation having, as its primary purpose, a task which requires the use of creative or artistic skills, regardless of industry, e.g. "writer."

The economic activity generated from these groups combines to form a *creative economy*.

GREG CARTER

It all began with a film class at Texas A&M. Greg Carter was earning a degree in engineering when he took that course and found his passion. After graduation, he studied film at Rice, then soon went on to write, produce and direct *Fifth Ward* (1998), winning Best Director and Best Film at the 30th Parallel Film Festival. Now with more than 19 feature films and documentaries under his belt as producer—he directed nine and wrote six of those projects—Carter has worked all over the country. Yet he still contends Houston is who he is. "Nowhere else in the world are people more supportive or friendlier," says the Texas Filmmakers' Hall of Fame inductee. "People sincerely want you to succeed here. Maybe that's why I see everything through those Houston-rose-colored glasses. Houston is my first choice for making a film."

WHY THE CREATIVE ECONOMY MATTERS

Creative businesses, in their various forms, conceptualize, create or sell an array of products ranging from architecture, music, photographs and films to textiles, fashion, websites, advertising and much, much more. But there is one thing that they all produce in common—revenue.

Creative industries provide a surprisingly sizable component of any city's economy. They also provide a significant number of jobs. Combine that with the multiplier effect through suppliers and peripheral businesses, and there's no doubt that the creative sector is a highly desirable and sought-after piece of today's urban economies.

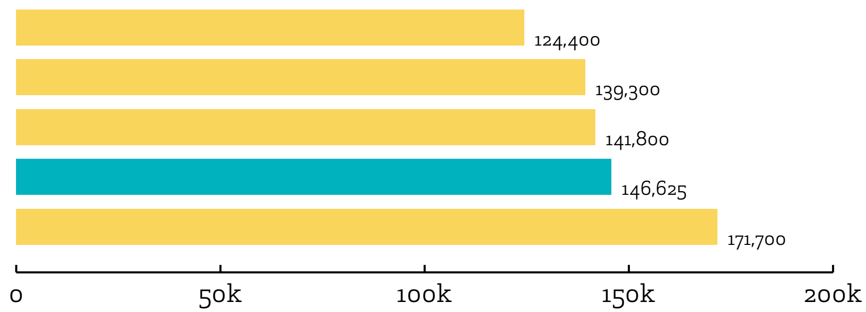
It's no wonder that cities increasingly are looking to creative businesses as they begin to position themselves for growth in the 21st century. Creative businesses are a symbol of vibrant, clean and forward-thinking communities, which can bring numerous benefits, such as:

- Greater diversity—and thus greater stability—of a local economy
- Greater ability to attract new employers (quality of life)
- Greater ability to attract professionals and families (diverse job opportunities)
- Higher profile in national and international media ("creative" is cool)
- Proven record as a growth industry with great potential for further expansion
- Elevated tourism appeal

"The emerging creative economy has become a leading component of economic growth, employment, trade and innovation, and social cohesion in most advanced economies."

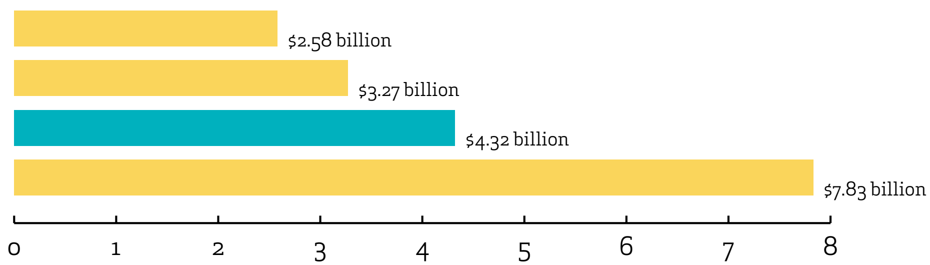
—The United Nations Conference on Trade and Development

LOCAL EMPLOYMENT BY SECTOR, 2011



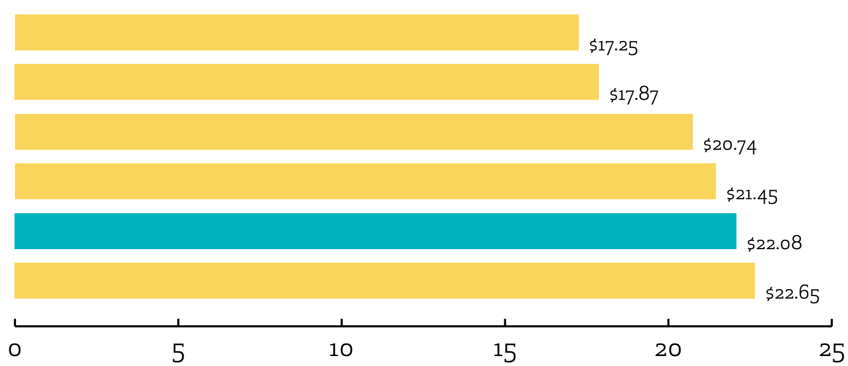
source: Texas Workforce Commission

LOCAL EARNINGS BY INDUSTRY, 2011



source: Quarterly Census of Employment & Wages

LOCAL MEDIAN HOURLY WAGES, 2011



source: U.S. Bureau of Labor Statistics

IS HOUSTON A "CREATIVE CITY"?

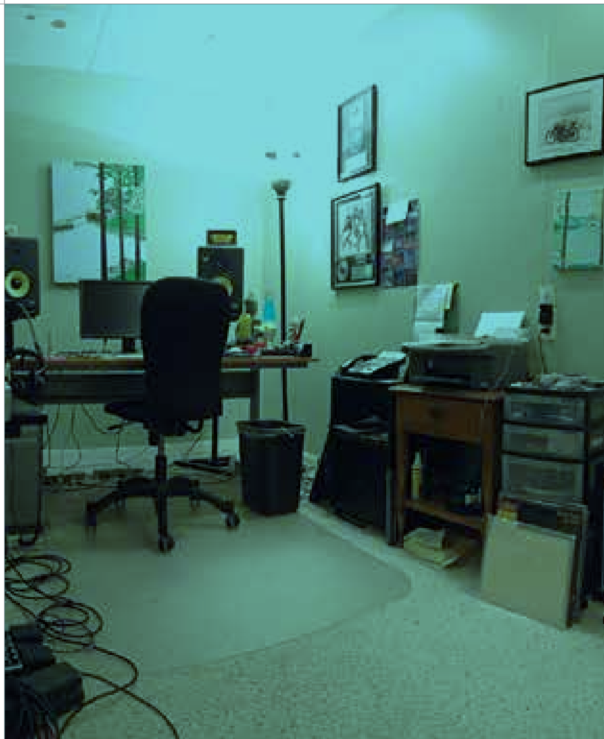
Known for its prowess in medical research, health care and energy, and as one of the continent's most productive sea ports, Houston is also a center of education, anchored by the esteemed Rice University and University of Houston. Both serve as deep training grounds in the creative sectors, including art theory, architecture, film, theatre, dance and industrial design. So while Houston is known as a dynamic city, a productive city, a resourceful city, the question remains: Is Houston a "creative city"?

The good news: Houston is a creative city. Creative job growth and revenues confirm that story. Houston's creative economy has grown during a decade in which similar cities across the nation experienced decline. Some of that is its location—Texas is a jobs-magnet even in a recession—but Houston's creative sector outgrew even other urban areas in the state.

The less than good news: Although Houston's creative sectors grew more rapidly than other major metro areas, our creative employment figures are still lower than those in Dallas, Chicago, Miami, Philadelphia and Los Angeles. In other words, we are growing rapidly, but other, sometimes smaller, cities still have larger sectors than ours.

Why? One reason is likely perception. There is a difference between being a creative city and being perceived as a creative city. In the 21st century, Houston has an opportunity to redefine itself as a modern, forward-thinking, creative-industry center in the eyes of the world community. By honing that image, Houston as the energy capital can also become the global hub for creative energy.

Houston's creative economy has grown during a decade in which similar cities across the nation experienced decline.



DAN WORKMAN

People are sometimes surprised that Dan Workman earns his living in the record industry in Houston. "I just remind them it's a city of two million people and there are lots of people who need music recording," says the president of SugarHill Recording Studios, the nation's oldest continuously operating recording studio. "As a result of sticking with it, I have become one of the go-to guys for doing that in a major metropolitan area." Workman learned the business as a guitarist in the experimental punk band Culturcide and purchased SugarHill with his partners in 1996. "Houston's biggest asset is its diversity," says the man who runs the studio where The Rolling Stones, Destiny's Child and Freddy Fender have all put down tracks. "Oftentimes people are not aware of the huge burgeoning music scene that is literally right next door to them."

HOUSTON'S CREATIVE ECONOMY AT-A-GLANCE

These key facts about the creative economy in Houston tell the high-level story. Details follow elsewhere in this report.

- Houston has a growing creative economy.
- In 2011, 146,625 jobs made up the creative economy in Houston.
- Houston's creative economy employs more people than the Texas Medical Center.
- The economic impact of Houston's creative goods and services was $9.1 billion in 2011.
- Houston's creative economy grew by 8% between 2001 and 2011.
- By 2016, the city's creative economy is projected to grow by an additional 7%.
- In a comparison of the Houston, Dallas, Miami, Philadelphia, Chicago and Los Angeles metropolitan areas, only Houston and Dallas added creative-sector jobs between 2001 and 2011.
- In the same comparison, only Houston and Dallas are projected to have more creative-sector jobs in 2016 than they did in 2001.
- In the median earning per worker analysis, Houston was ahead of the other cities in the study.
- Nine of ten counties in the Houston metropolitan area increased arts-sector employment between 2001 and 2011.
- Though growing, Houston's creative economy is still smaller than the five other cities cited in the study.

The economic impact of Houston creative goods and services was $9.1 billion in 2011.

SABA AND SARAH JAWDA

Growing up, sisters Saba and Sarah Jawda were encouraged to be creative. As adults that creativity translated into graphic design, advertising, public relations and marketing (for Sarah) and architecture, interior design and art (for Saba). Together they are the design team of Jawda and Jawda. The collaboration came naturally, and while each sister specializes in specific aspects of the design business, they depend upon one another. "We have similar style, but with different takes on how we get there, so it helps to step back and view each project separately and again together," says Saba Jawda. "We have fun, and we really push one another creatively and professionally." Right now they are focused on interior design, graphic design and a furniture line JAW[LINE]. "That's not saying we stop there—we are problem solvers, we don't limit ourselves," she concludes. With Houston as their home base, they feel the opportunities are endless.

HOW HOUSTON'S CREATIVE ECONOMY COMPARES

CHUY BENITEZ

Born in El Paso, Texas, photographer Chuy Benitez came to Houston by way of University of Notre Dame, where he began in engineering and ended up in photography. His college advisor tried to talk him out of it, but Benitez had found his focus. He came by his passion naturally: Growing up in his family's wedding-planning business, he took tons of photos. Not long after graduating from Notre Dame, he came to Houston, attracted by the reputation of Fotofest and University of Houston's MFA program. Soon, his signature panoramic portraits had created a buzz. "I don't have family here in Houston, but Fotofest Co-founders Wendy Watriss and Fred Baldwin are like family to me," says Benitez. "In fact, everyone at Fotofest is like family. They've all just been so supportive of me and of my work." At Notre Dame, Benitez also discovered he has a knack for the classroom. He now teaches photography at St. John's School. The students, he says, "have an abundance of talent. They are the real stars."

A TALE OF SIX CITIES : CREATIVE JOB GROWTH

Of the six cities cited in the study, Houston saw the largest creative-job growth between 2001 and 2011.

Houston's creative community is responsible for 146,625 jobs and has an economic impact of $9.1 billion. The figures say a lot about the importance of creative commerce—but, viewed alone, they can't tell you if you're keeping up with the Joneses.

In this case, the Joneses are five cities across the nation selected for comparison studies—Dallas, Miami, Philadelphia, Chicago and Los Angeles.

In a side-by-side comparison, the Houston metro area leads the pack in terms of creative-sector job growth since 2001. Among the findings in the study:

- Houston has added 11,268 creative industry jobs, growing over eight percent over the past ten years. Houston and Dallas were the only cities in the study with positive job growth since 2001, with Dallas reporting one percent in the past ten years. By comparison, Miami shed 13,521, Philadelphia 15,214, Chicago 31,279, and Los Angeles 66,146.
- From 2001 to 2016, Houston's creative sector is projected to grow by 16 percent. Dallas is expected to grow by eight percent. Each of the other cities is projected to have net job losses over the same period, with Chicago declining eight percent, Philadelphia and Los Angeles six percent, and Miami four percent.
- While each of the cities in the study is expected to see creative-sector growth between 2011 and 2016, Houston and Dallas are expected to grow at a more rapid pace. Dallas and Houston are projected to grow at seven percent, Miami by three percent, Chicago and Los Angeles by two percent, and Philadelphia by one percent.
- Of the six cities studied, only Houston and Dallas are projected to have larger creative economies in 2016 than they did in 2001.

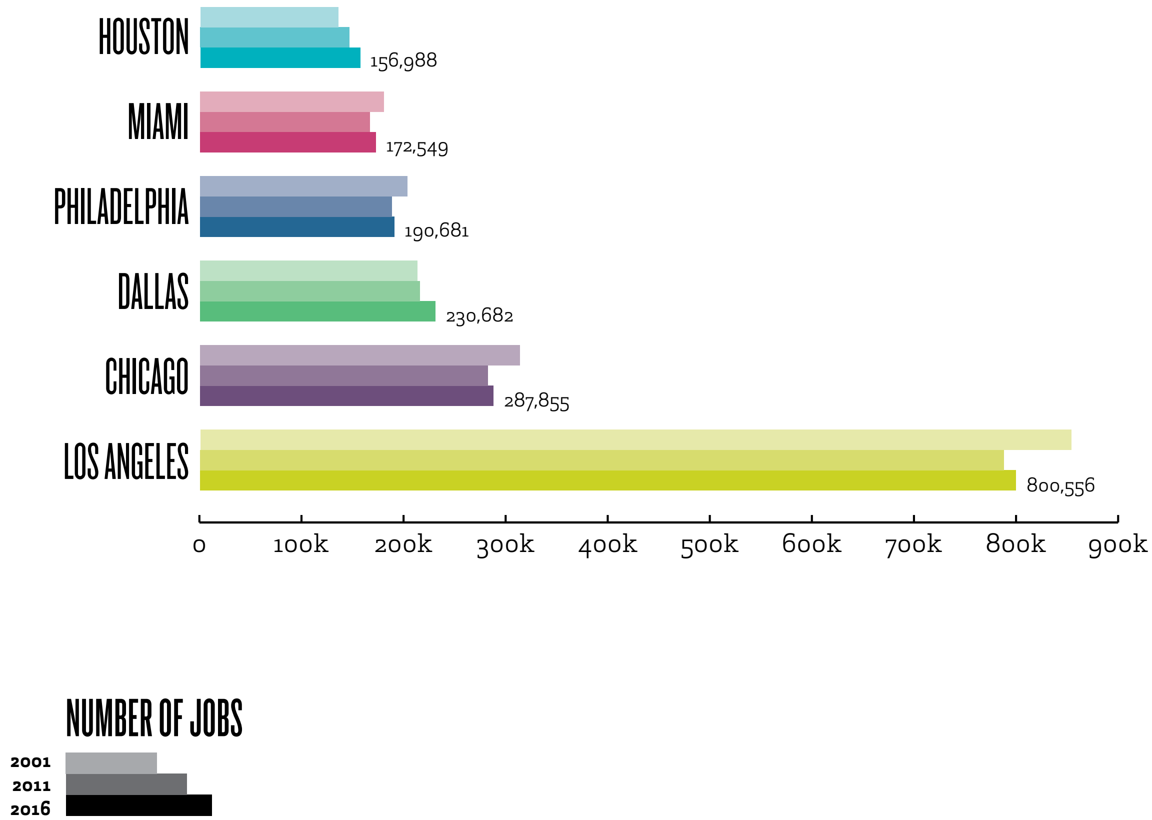
FIONA MCGETTIGAN AND ALAN KRATHAUS

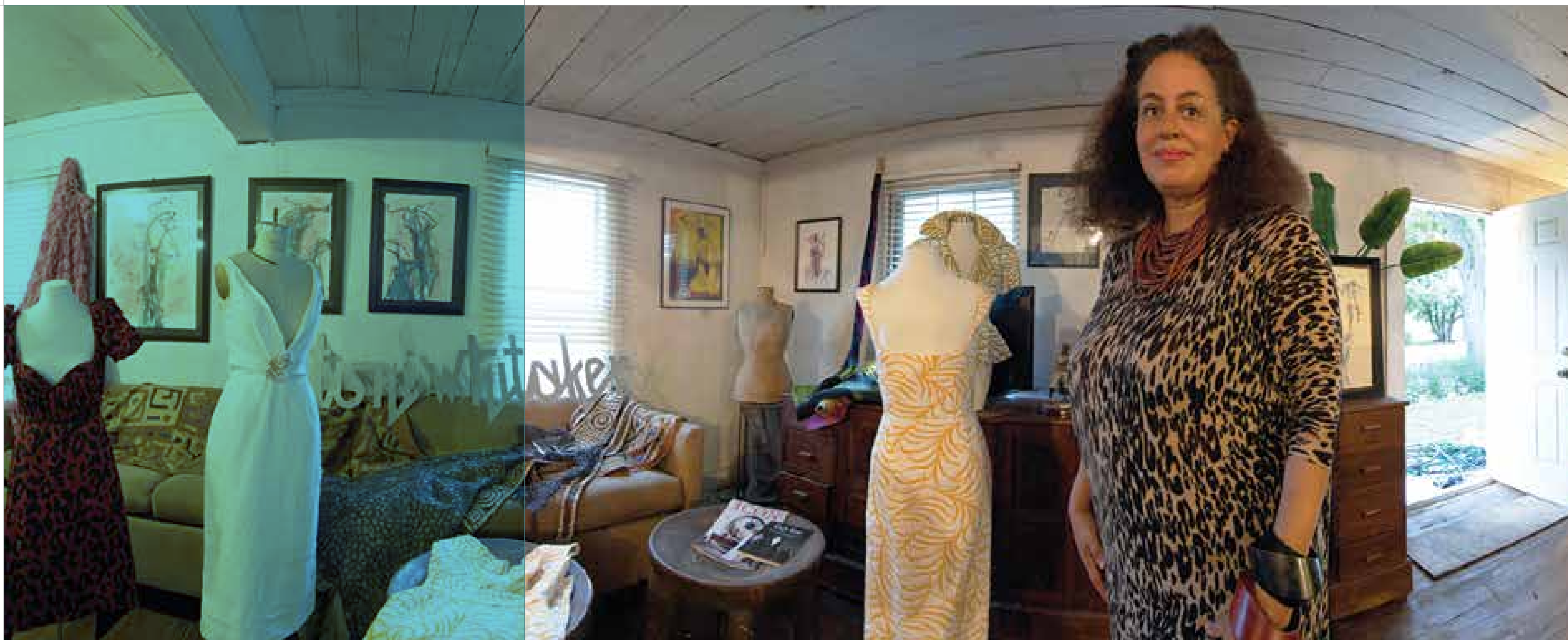
You'll find CORE Design Studio partners Alan Krathaus and Fiona McGettigan working on projects all around town. That's because their contemporary design practice finds solutions for a wide range of challenges. "While our primary interest is textual," says McGettigan, "our work includes environmental design, landscape, exhibit and public art, too." They look at their studio flexibly, working with cultural, non-profit organizations, educational and architectural offices, urban planning groups and a variety of businesses on projects ranging from identity programs and branding (Academy, Houston Arts Alliance) to environmental graphics, exhibit design and public art and design. For more than a year, the two have researched the history of performances at Jones Hall and designed a series of installations to enliven areas of the hall. Spare time? McGettigan is an associate professor of graphic design at the University of Houston, and Krathaus's photographs and installations have been exhibited nationally in venues including the Tang Teaching Museum (Saratoga Springs, N.Y.) and the Aldrich Museum of Contemporary Art (Ridgefield, Conn.). Both have exhibited work at the Museum of Fine Arts, Houston.

CREATIVE JOB NUMBERS

The good news is that Houston's creative community is growing; the bad news is that the growth is overdue. Of the six cities studied, Houston has the fewest number of individuals working in creative industries. After declining for a decade in each city but Houston and Dallas, creative jobs are expected to rebound in all six cities.

TOTAL CREATIVE ECONOMY JOBS 2001–2016





TONI WHITAKER

Toni Whitaker's mother taught her to sew when she was 6. "I had a little Singer machine that we would clamp to the dining room table next to hers." Driving through Texas in the '80s, after college and a short teaching stint in Phoenix, she fell in love with Houston, and never left. "I thought if I could make it anywhere in fashion, it would be Houston, because they were open to everything." From her first tiny shop in Rice Village, she became the grand doyenne of Houston style, dressing an influential clientele in her classic Audrey Hepburn- and Jackie O-inspired clothes. "These were women who were not interested necessarily in wearing a Chanel or a Valentino. They just wanted good clothes." And they wanted personality, which she brought in bolts. She credits her people and business savvy to her dad, a Camden, S.C., pharmacist. "What I bring to the table is that cottage industry. I'm not just the fashion designer. I'm the bookkeeper, accountant, entrepreneur. I do everything."

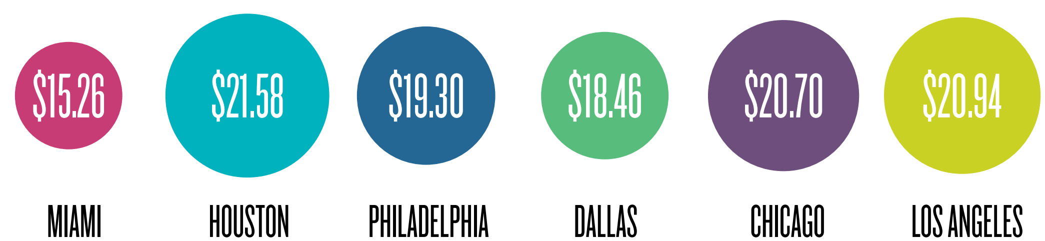
THE ACE IN THE HOLE : GOOD PAY

One notable figure arising from the comparative study deals with the median earnings per worker in creative fields. The results are encouraging and could prove advantageous as Houston attempts to attract creative workers and creative businesses in the future.

According to the study, Houston is number one in median earnings per creative worker.

This means that while Houston may have fewer creative workers, they are better paid than in any of the other cities included in the study. The figure becomes more impressive when you consider that Houston has a low cost of living.

MEDIAN EARNINGS PER WORKER



Houston could promote "higher wages, lower cost of living" in attracting creative workers.

GWENDOLYN ZEPEDA

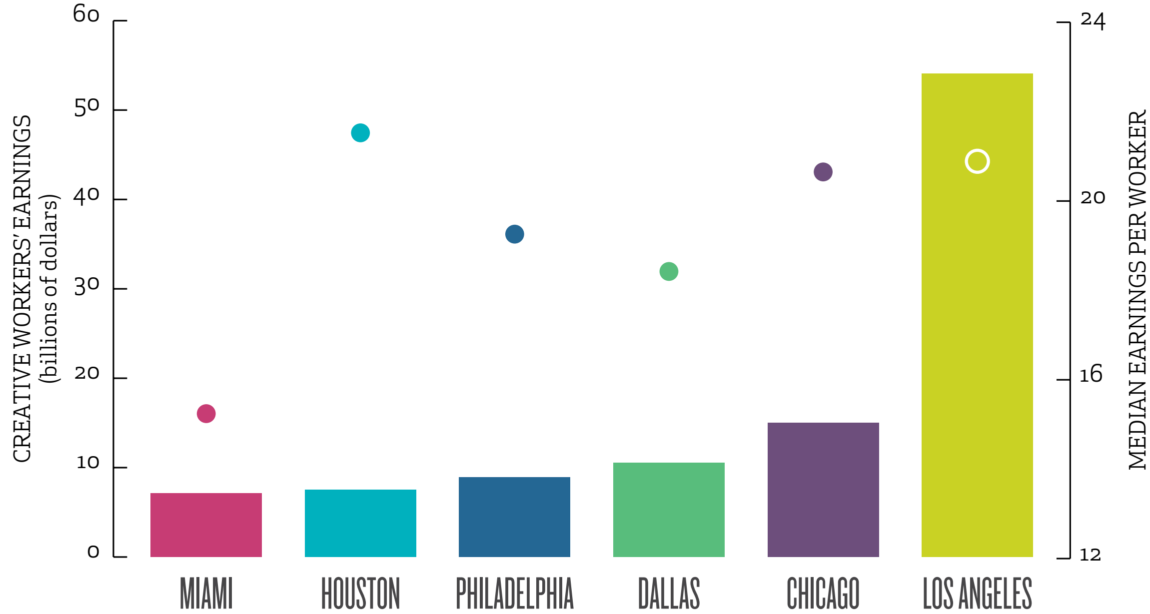
Gwendolyn Zepeda educated herself on British lit and science fiction. So it wasn't until she discovered Latina author Sandra Cisneros that she realized Mexican-Americans were "allowed" to write about themselves. "I grew up pretty poor in a bad neighborhood," says the quirky, introverted daughter of an IBM typewriter repairman. "So I don't think I ever thought I'd be a writer." Since 2004, Zepeda has published eight books, including her debut short-story collection (*To the Last Man I Slept with and All the Jerks Just Like Him*), two Texas-themed novels (*Lone Star Legend* and *Houston, We Have a Problema*) and four children's books. Often marketed as a regional author, Zepeda thinks her latest novel, *Better with You Here*, will find a mainstream following. A technical writer in the financial-services industry by day, the three-time Houston Arts Alliance New Works Fellowship recipient finds her hometown to be a warm and an embracing creative environment. "Sometimes I feel like I know every artist in this city, no matter what their discipline."

CREATIVE EARNINGS

What do "creative" jobs create?
Everything under the sun, but, from an economic standpoint, they create earnings.

Earnings are a key measure of the importance of creative industries. As with the total number of creative sector jobs, Houston's aggregate earnings are expected to continue to grow over the next five years.

REGIONAL EARNINGS IMPACT



MEDIAN EARNINGS PER WORKER

RANDY TWADDLE

Early in his career as a painter, Randy Twaddle held what he calls a "strident definition of what it means to be an artist." Over time, he mellowed. More expansive in his thinking, he merged art and business through creative collaborations. When he and music producer David Thompson started the multi-disciplinary, strategic communications and design consultancy ttweak in 1998, they provided their clients with innovative solutions to marketing conundrums always from an artist's perspective—from producing fund-raising videos to branding wind farms. In 2004, they uncovered Houstonians great affection for their "affliction"-ridden (cockroaches, heat, no mountains) city with a blog, which led to the photo exhibition and now legendary book *Houston. It's Worth It.* More recently, Twaddle joined forces with architect Joe Meppelink (see page 40) to create the non-profit It's Made in Houston. Combining their talents, the two plan to connect Houston's creative community with the city's unique manufacturing infrastructure, promoting the successful outcomes of these collaborations.

THE FUTURE OF HOUSTON'S CREATIVE ECONOMY

HOW **BIG** IS THE CREATIVE INDUSTRY ECONOMY?

THE BASICS

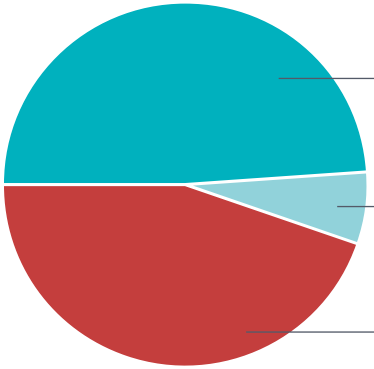
$12.18 BILLION
TOTAL SALES

$4.32 BILLION
TOTAL EARNINGS

Does not include creative workers in non-creative industries

THE DETAILS

$21.93 BILLION
TOTAL CREATIVE INDUSTRY SALES



$10.77 BILLION
PRODUCED & SOLD LOCALLY

$1.4 BILLION
PRODUCED LOCALLY & EXPORTED

$9.76 BILLION
IMPORTED

The creative industries in Houston's Metropolitan Statistical Area (MSA) drive significant value and output; however, almost **half** of the demand in the region is met through importing products and services from outside the region.

CREATIVELY SPEAKING, THERE'S ROOM TO GROW

Bottom line: Houston's demand for creative goods and services is greater than its supply of creative goods and services.

Currently, demand for creative goods and services in Houston is $20.53 billion. The amount of creative goods and services produced locally is $10.77 billion. So how do consumers and businesses get the additional products they need?

Imports. City residents import $9.76 billion in creative goods, sending the money to other communities. Houston's creative businesses export only about $1.4 billion in creative goods, so the amount of money coming into the city is considerably less than that leaving it.

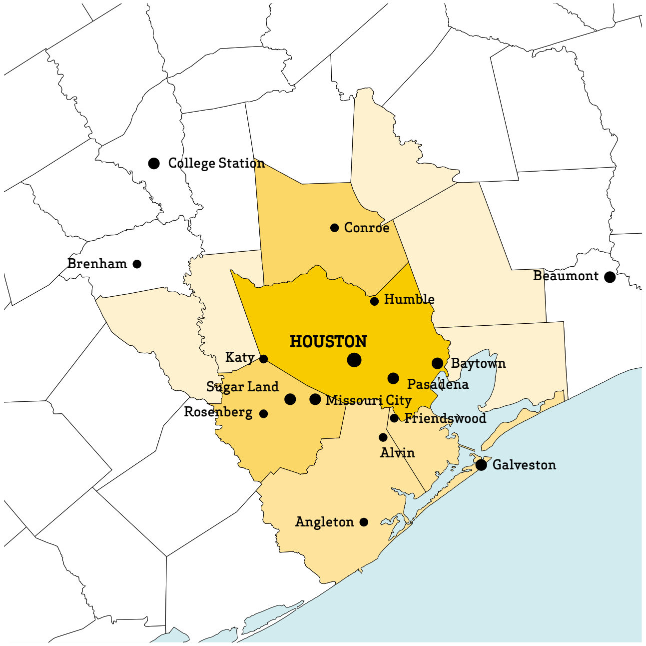
To illustrate, think of the city's economy as water in a tank. The dollars sent away from the city (import substitution) drain the tank. The loss of that money reduces the multiplier effect that happens when money remains in the city (resource depletion), causing a leak of possible revenue. And since imports of the goods exceed exports, the tank isn't being refilled as quickly as it is being emptied. A chart of multipliers by industry is available on page 44.

When money remains in a city, there is a multiplier effect, benefitting other local businesses across the economic spectrum.

When money remains in a city, it tends to benefit other local businesses across the economic spectrum. This is the multiplier effect. With this in mind, Houston could consider different ways to help creative businesses better meet local demand, including:

1. Targeting out-of-town businesses for relocation in fields where the city has an imbalance of supply and demand.
2. Targeting out-of-town creative entrepreneurs to relocate to Houston.
3. Seeking buyers in other communities for Houston's creative products, increasing local exports and bringing in new revenue.
4. Telling our story! Elevate the visibility of Houston as a creative hot-bed so that creators, producers and consumers look to Houston for their creative answers.
5. Keeping our creatives. Our universities and creative businesses produce more creative professionals than we retain in Houston. Invest in creative entrepreneurs. Keep them in Houston.
6. Training Houstonians. American creative businesses often have to import talent to get the job done. Support legislation that invests in K-12 arts education and high-quality university programs to train Houstonians in creative business.
7. Helping local firms expand in the regional marketplace to meet area demand. (Note: Organic growth, e.g. internal industry/economic expansion, is growing in economic development popularity. Also known as "economic gardening.")

2001–2016
CREATIVE JOB GROWTH



6720 to 13691
2324 to 6719
440 to 2323
73 to 439

2001–2016
% CREATIVE JOB GROWTH

71 to 96
56 to 70
32 to 55
23 to 31

CREATIVE LEAPS IN THE METRO AREA

The $10.77 billion in creative local activity generated by Houston's 10-county metro area would be equal to the 242nd spot on the 2012 list of Fortune 500 companies, ahead of HJ Heinz (Fortune #244) at $10.70 billion in revenues.

The Houston metro area covers ten counties: Harris, Fort Bend, Montgomery, Brazoria, Galveston, Liberty, Austin, Waller, Chambers and San Jacinto. With such a large geographic region, job growth in the surrounding area is of particular significance.

Between 2001 and 2011, nine of the ten counties increased their creative occupations employment. Only Austin County experienced creative job losses over that period, which were minimal at 75.

Each county in the area is expected to see creative job increases by 2016.

Since 2001, the greatest gain has occurred in Harris County, which added 3,908 jobs. It is expected to add another 5,147 jobs through 2016, giving the county an eight percent increase over the 15-year period. Fort Bend County is experiencing the highest percentage growth in employment of creative occupations with a 60 percent increase over the 15-year period.

TINA ZULU

Even as a child, Tina Zulu was into selling. "When I was a little kid, I used to play store all the time," says Zulu, the founder and self-described "chieftess" of Zulu Creative, a niche-marketing firm catering to fashion, music, art and hospitality clients. Like Manhattan party queen Susanne Bartsch, Zulu started out with a clothing boutique and soon was producing the coolest events in town. "I really like to think we were crucial in the revitalization of downtown," Zulu says of the DJ-driven fashion shows, record-release parties and themed events that formed her late '90s salad days. Eventually this daughter of Filipino immigrants earned a degree in marketing and entrepreneurship from University of Houston and after a stint at Continental Airlines started Zulu Creative in 2006. Today she gets paid to promote the things she loves—from jewelry designers to Cajun cooks. "It's just natural for me to spread the word," says Zulu, Houston's guru of hip.

THE CREATIVE JOBS LISTING

Jobs for painters, sculptors and illustrators in Houston are expected to grow by 13% through 2016.

The study indicates nearly 150,000 individuals hold creative-sector jobs in the Houston MSA. Those jobs come with a wide-range of titles, but they can be divided into three categories:

Creative Workers in Creative Industries
Example: Graphic artist working at an advertising agency

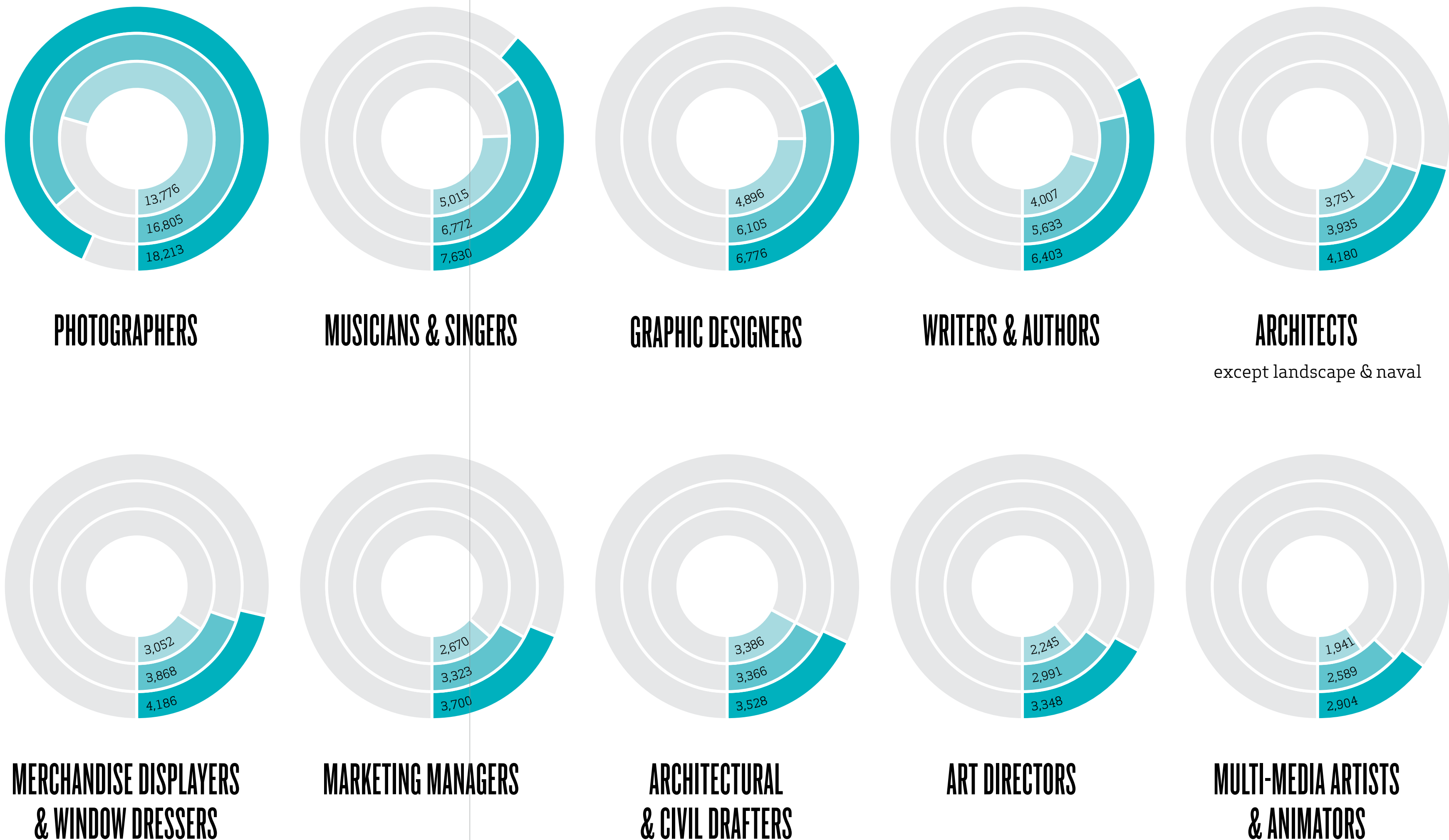
Creative Workers in Non-Creative Industries
Example: Musical director at a house of worship

Non-Creative Workers in Creative Industries
Example: Office manager at an architectural firm

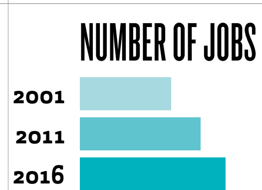
Who is the creative community?
The complete list of job titles are listed at the back of this report. They include video and film producers, graphic artists, architects, web designers, choreographers, photographers, fashion designers, novelists, and that's just the beginning. The creative community is a broad term that reaches far beyond the obvious sculptors, painters, dancers and musicians.

The study looked at individual professions within the creative sector and found expanding opportunities in each of the categories.

The bottom line: Houston's creative sector is a broad-based community on the rise. With the range of jobs included under the creative umbrella, the city has many opportunities to enlarge its creative profile.



TOP CREATIVE OCCUPATIONS BY YEAR

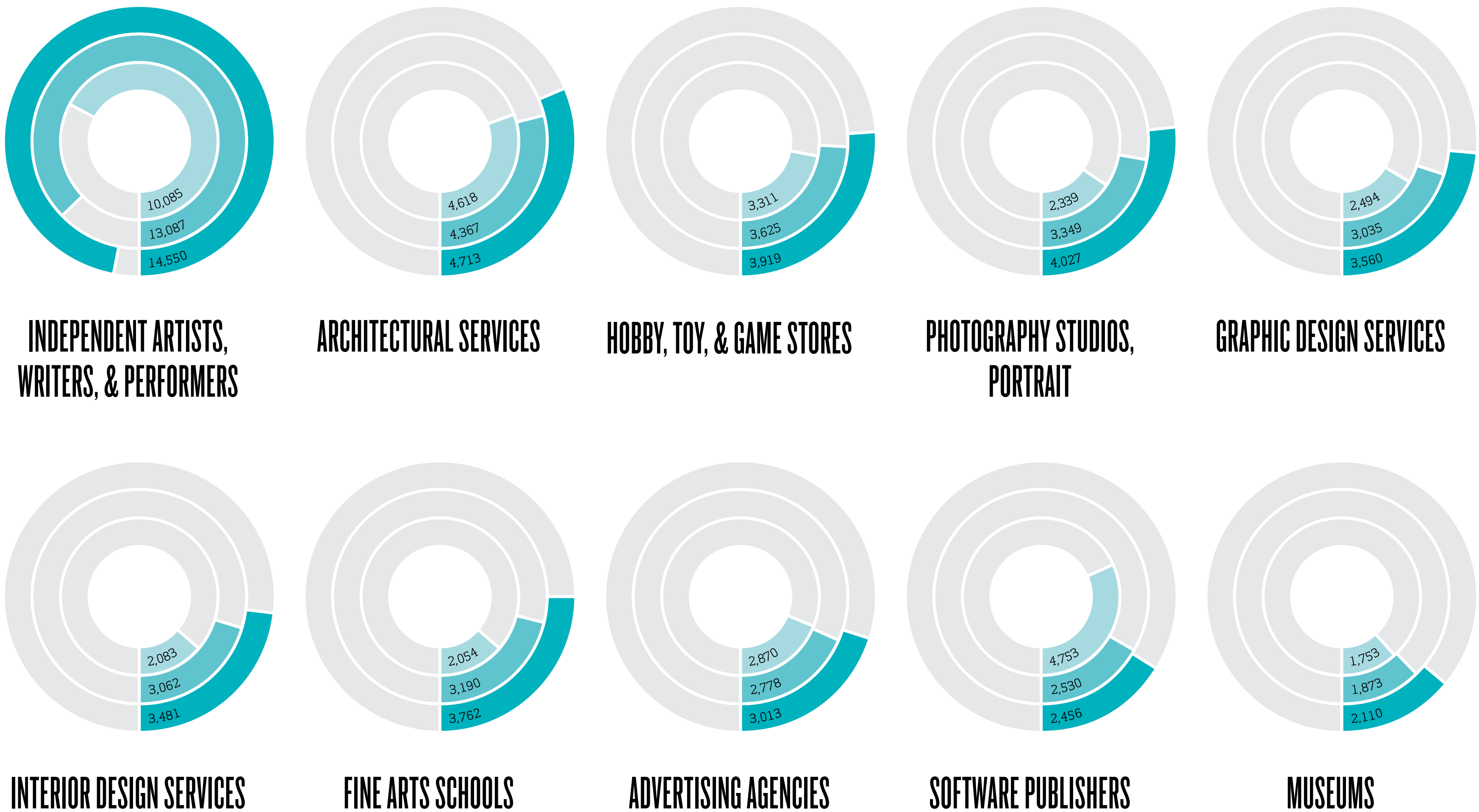


TOP CREATIVE OCCUPATIONS

As industries change, so do their occupations. The lamplighter, the typist, the newspaper typesetter, the switchboard operator—each saw his/her industry dwindle only to be replaced by something new and exciting. Industry employment figures change for a variety of reasons—new technologies, emerging trends, geographic shifts, cost benefits, economic conditions—which, depending upon the industry you happen to work in, can be a plus or minus.

For the past decade, employment of creative occupations has been a net positive for the Houston Metropolitan Area. Of the top ten creative occupations, all are projected to see their numbers grow by 2016.

Photography is the top creative occupation in Houston. The number of photographers in Houston is projected to grow over the next four years by 11% to more than 18,000 by 2016.



TOP CREATIVE INDUSTRIES BY YEAR

NUMBER OF JOBS

2001

2011

2016

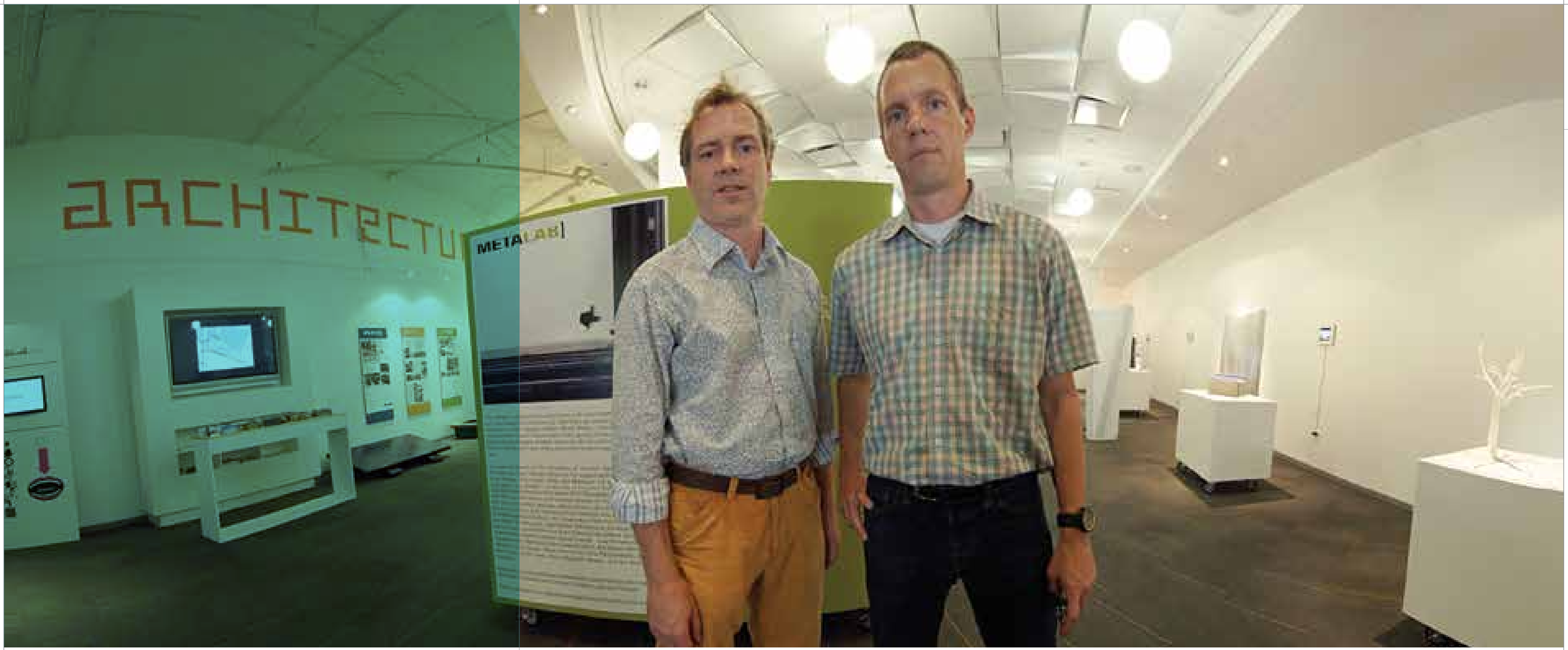
Examined by industry, eight of the top ten industries are expected to see growth by 2016.

Employment in film has declined significantly over the last 10 years, and production of big budget features has eroded due, in part, to the lack of financial incentives. However, the industry has stabilized with commercials, reality T.V. shows, music videos, industrials and documentaries as its primary markets.

For film, Houston's diversity provides its creative synergy: its greatest growth is within the indigenous industry of locally produced, low-budget films created by Indian, Latino, African-American and women filmmakers.

Creative Industries Growing Compared with National Figures

Overall, Houston's creative industries continue to grow at a faster rate than comparable cities across the nation. The region has a higher than average number of theater and dinner theater companies, and above average growth rates are expected to continue through 2016. Houston also boasts numbers of architectural services, record producers, museums and ornamental and architectural metal work manufacturing. Of those industries, only ornamental and architectural metal work manufacturing is projected to see job losses through 2016.



ANDREW VRANA AND JOE MEPPELINK

Innovation. Sustainability. Functionality. These elements are the trademarks of Andrew Vrana and Joe Meppelink's architectural practice Metalab Studio. With previous experience as metal fabricators and project managers, the principal partners have extensive knowledge of materials, processes and methods of construction with an emphasis on digital fabrication, which they also teach at University of Houston. They are equally at home working on civic art projects (such as Jaume Plensa's stainless-steel human figures, *Tolerance*); designing a mobile solar powered sales center for a green developer; or coming up with a better way to install solar panels on rooftops—a nifty improvement that won them *Architect Magazine's* 2012 Research & Development Award. An advocate for Houston's small manufacturing businesses, Meppelink is collaborating with artist Randy Twaddle to connect creatives with manufacturers through their non-profit, It's Made in Houston (see page 28) "Houston has the largest manufacturing workforce in North America," points out Meppelink. "From biomedical to shipping, oil and gas, and aerospace, our unique manufacturing environment just doesn't exist anywhere else in the country."

TAKEAWAYS AND CONSIDERATIONS

Creative-sector jobs are important to a city's economy, future growth and identity in the world community. Houston's creative job picture is big news, with more employees than the Medical Center and more than $12 billion in sales activity. It is on the rise, but it still lags behind cities with similar attributes.

The data in this report provides an overview of the current state of the city's creative economy. With it, community leaders can begin discussing a number of issues, such as:

- Are we preparing students for creative economy jobs?
- What resources are currently being used to expand the creative economy?
- Are we investing in creative industries like other cities—even Austin and Dallas?
- Does Houston actively recruit creatives that are looking to leave less business-friendly environments like California?
- Are tools available—tax incentives, small-business loans, subsidized space, incubators, public relations and promotional programs—that could grow the creative sector and provide additional benefits to the broader community?
- Are there existing assets—warehouse space, vacant storefronts—that can be converted into innovative venues, galleries or shared-use?
- Can Houston's attractive characteristics—climate, cost of living, educational facilities, unique neighborhoods—be promoted to creative industries that might consider relocating?
- What steps can Houston take to enhance its image as a "creative city" in the public eye?

Image matters. Houston has the opportunity to change its "brand" and promote itself as a creative center of the 21st century. Among the available options:

- Airport messaging touting Houston's creative growth
- An online presence targeting creative industries
- Advertising and public relations campaigns touting the city's creative side
- Affiliating a creative-centered "tagline" with Houston outreach initiatives
- Enhanced tourism promotions emphasizing the city's creative offerings such as tours of film sites, art galleries and artist studios
- Press junkets for business and travel writers focused on the creative business-side of Houston

What resources are currently being used to expand the creative economy?

ABOUT THE STUDY

The study was commissioned by Houston Arts Alliance and University of Houston. Information used in the findings was provided by EMSI (Economic Modeling Specialists, Inc.), a firm specializing in compiling high-quality employment data and economic analysis.

Before gathering the data, EMSI, with the clients, selected the industries to be studied. Since the term "creative industry" is subjective, EMSI narrowed the field by referencing creative reports prepared for similar cities, as well as a list of creative industries developed by Dunn & Bradstreet.

The list developed is based on the North American Industrial Classification System (NAICS), the primary coding system used by most federal and state government data sources.

The occupations selected for analysis are based on Standard Occupational Classification (SOC) codes. The competency categories of primary interest were "creativity" and knowledge of "fine arts," though other factors were considered in the selection process.

Comparison findings are based on data derived from creative economy analyses of Dallas, Philadelphia, Chicago, Miami and Los Angeles.

About EMSI

EMSI (Economic Modeling Specialists, Inc.), is an Idaho-based company specializing in compiling high-quality employment data and economic analysis. EMSI works with businesses, community colleges, universities, workforce boards, economic development groups and other organizations.

About Houston Arts Alliance

Houston Arts Alliance (HAA) is a 501(c)(3) nonprofit arts organization that exists to enhance the quality of life and tourism in the Houston region by supporting and promoting the arts through programs, initiatives and alliances. HAA distributes grants to more than 220 nonprofit arts organizations and individual artists on behalf of the City of Houston. In addition, HAA advances Houston's thriving creative community by cultivating business volunteers, commissioning the work of artists for public spaces, managing the city's civic art collection of 450 artworks, showcasing Houston's rich folklife traditions, and empowering arts organizations through capacity building. For information on all the arts, visit HAA's online resource at artshound.com.

About University of Houston

Founded in 1927, the University of Houston is the leading public research university in the vibrant international city of Houston. Each year, the University of Houston educates more than 39,800 students in more than 300 undergraduate and graduate academic programs, on campus and online. UH awards more than 7,800 degrees annually, with more than 200,000 alumni.

GLOSSARY OF TERMS

The following definitions may prove helpful in understanding the creative economy data included in the EMSI report:

Creative Industries: EMSI's customized list of 145 industries which are predominantly focused on producing artistic-creative goods and services. This is a compilation of public, non-profit, and for-profit businesses, categorized by 6-digit North American Industrial Classification System (NAICS) codes. Industries that require an element of creative thinking but are not artistic have been excluded.

Creative Occupations: EMSI's customized list of 51 occupations which are chiefly focused on the production and distribution of artistic goods and services. These occupations were selected from the Standard Occupational Classification (SOC) codes due to significantly higher than average knowledge in areas critical to the arts; these include fine arts, creative thinking, and original thinking.

Aggregate Earnings: This measure is the best simple approximation of the financial impact of the creative economy. Aggregate earnings for each industry and occupation are equivalent to the total amount of earnings paid to workers on an annual basis in the given category. For instance, the industry 711110: Theater Companies and Dinner Theaters pays its employees an average of $23,000/year and there are 1,900 workers employed by these companies. Therefore, the aggregate earnings for the industry on an annual basis is $43.7 Million ($23,000*1,900= $43.7 Million). The same calculation is performed for occupational categories.

Location Quotient: Several tables refer to a measurement often used in regional sciences called location quotient. Location quotient (LQ) is a way of comparing a region to a larger reference region according to some characteristic or asset. The process for deriving this number is to divide the percentage of the whole which that asset composes at the regional level by the percentage of the whole which that asset composes at the national level. For instance, if graphic designers make up 0.5% of the regional population and 0.3% of the national population, we divide the first quotient by the second to obtain the location quotient: (0.005/0.003 = 1.67).

These data are fairly simple to translate into everyday language. If the LQ score for any asset is above 1.00, then the region has a greater concentration of that asset than the nation. Conversely if the LQ score for any asset is below 1.00, then the region has a lower concentration of that asset than the nation. Using the previous example, if the regional LQ for graphic designers is 1.67, this means that the region is 67 percent more concentrated with such workers than the nation as a whole. Another way of saying this is that there are 67% more graphic designers, per capita, than the national average.

Shift Share Analysis: Shift share is a standard regional analysis method that attempts to determine how much of regional job growth can be attributed to national trends and how much is due to unique regional factors. This analysis is intended to answer the question "Why is employment growing or declining in this regional industry or occupation?" To do this, shift share analysis splits regional job growth into three components: the national change effect, industrial mix effect, and regional competitiveness effect. For the sake of simplicity, the following descriptions are restricted to the industry context but the same principles would apply in the occupational context.

National Change Effect: The national growth effect explains how much of the regional industry's growth is explained by the overall health of the national economy: if the nation's whole economy is growing, you would generally expect to see some positive change in each industry in your local region (the proverbial "a rising tide lifts all boats" analogy).

Industrial/Occupational Mix Effect: The industrial mix effect represents the share of regional industry growth explained by the growth of the industry at the national level. To arrive at this number, the national growth rate of the total economy is subtracted from the national growth rate of the specific industry, and this growth percentage is applied to the regional jobs in that industry.

Regional Competitiveness Effect: The regional competitiveness effect is the most important of the three indicators, as it explains how much of the change in a given industry is due to some unique competitive advantage that the region possesses, because the growth cannot be explained by national trends in that industry or the economy as whole. This effect is calculated by taking the total regional growth and subtracting the national growth and industrial mix effects. Note that this effect can be higher than actual job growth if national and/or industry mix effects are negative while regional growth is positive. This is because the regional competitiveness effect accounts for jobs "saved" from declining national trends as well as new jobs created.

PROJECTED OCCUPATIONAL GROWTH

SOC Code	Description	2011 Jobs	2016 Jobs	Change	% Change	Openings	% Openings	2011 Median Hourly Wage	2011 Avg Hourly Wage	2011 Aggregate Earnings	2016 Aggregate Earnings	Average Education Level
27-4021	**Photographers**	16,805	18,213	1,857	11%	3,088	18%	$21.12	$30.71	$1,073,449,624	$1,163,388,158	Long-term on-the-job training
27-2042	**Musicians and singers**	6,772	7,630	858	13%	1,541	23%	$8.38	$11.13	$156,774,509	$176,637,552	Long-term on-the-job training
27-1024	**Graphic designers**	6,105	6,776	671	11%	1,609	26%	$19.38	$23.89	$303,364,776	$336,707,571	Bachelor's degree
27-3043	**Writers and authors**	5,633	6,403	770	14%	1,360	24%	$11.37	$15.26	$178,795,926	$203,236,342	Bachelor's degree
11-9041	**Engineering managers**	4,623	4,950	327	7%	799	17%	$64.19	$68.54	$659,069,674	$705,687,840	Degree plus work experience
27-1026	**Merchandise displayers and window trimmers**	3,868	4,186	318	8%	913	24%	$12.84	$15.56	$125,187,046	$135,479,053	Moderate-term on-the-job training
17-1011	**Architects, except landscape and naval**	3,935	4,180	245	6%	576	15%	$35.41	$43.20	$353,583,360	$375,598,080	Bachelor's degree
11-2021	**Marketing managers**	3,323	3,700	377	11%	735	22%	$46.44	$52.87	$365,428,981	$406,887,520	Degree plus work experience
17-3011	**Architectural and civil drafters**	3,366	3,528	162	5%	523	16%	$24.88	$25.83	$180,843,062	$189,546,739	Postsecondary vocational award
27-1011	**Art directors**	2,991	3,348	357	12%	690	23%	$15.24	$21.97	$136,681,522	$152,995,565	Degree plus work experience
27-1014	**Multi-media artists and animators**	2,589	2,904	315	12%	605	23%	$15.31	$19.87	$107,002,334	$120,021,158	Bachelor's degree
25-4021	**Librarians**	2,555	2,900	345	14%	680	27%	$25.53	$26.11	$138,758,984	$157,495,520	Master's degree
27-2041	**Music directors and composers**	2,257	2,478	221	10%	449	20%	$9.65	$12.20	$57,273,632	$62,881,728	Degree plus work experience
27-3041	**Editors**	2,243	2,396	153	7%	446	20%	$19.37	$22.33	$104,179,275	$111,285,574	Bachelor's degree
27-1025	**Interior designers**	1,938	2,106	168	9%	466	24%	$21.55	$25.22	$101,662,829	$110,475,706	Associate's degree
41-3011	**Advertising sales agents**	1,818	1,930	109	6%	291	16%	$20.76	$29.11	$110,077,718	$116,859,184	Moderate-term on-the-job training
51-9071	**Jewelers and precious stone and metal workers**	1,548	1,625	(17)	(1%)	237	15%	$25.70	$29.48	$94,920,883	$99,642,400	Postsecondary vocational award
27-1023	**Floral designers**	1,489	1,566	77	5%	307	21%	$11.09	$12.73	$39,426,338	$41,465,174	Moderate-term on-the-job training
27-2099	**Entertainers and performers, sports and related workers, all other**	1,327	1,497	170	13%	330	25%	$12.71	$18.30	$50,510,928	$56,981,808	Long-term on-the-job training
27-2012	**Producers and directors**	1,283	1,356	73	6%	274	21%	$18.74	$23.01	$61,405,406	$64,899,245	Degree plus work experience
27-2011	**Actors**	1,178	1,311	133	11%	275	23%	$8.09	$16.20	$39,693,888	$44,175,456	Long-term on-the-job training
27-3011	**Radio and television announcers**	1,108	1,182	74	7%	230	21%	$13.41	$18.79	$43,304,186	$46,196,342	Long-term on-the-job training
11-2011	**Advertising and promotions managers**	916	962	46	5%	154	17%	$32.04	$34.25	$65,255,840	$68,532,880	Degree plus work experience
25-4031	**Library technicians**	794	908	114	14%	291	37%	$12.34	$12.59	$20,792,637	$23,777,978	Postsecondary vocational award
27-1013	**Fine artists, including painters, sculptors, and illustrators**	772	876	104	13%	190	25%	$9.62	$12.68	$20,361,037	$23,103,974	Long-term on-the-job training
27-3099	**Media and communication workers, all other**	787	873	86	11%	179	23%	$19.10	$24.80	$40,596,608	$45,032,832	Long-term on-the-job training
27-4011	**Audio and video equipment technicians**	784	852	68	9%	186	24%	$17.03	$18.59	$30,315,085	$32,944,454	Long-term on-the-job training
27-1021	**Commercial and industrial designers**	746	837	91	12%	206	28%	$23.45	$29.85	$46,317,648	$51,967,656	Bachelor's degree
27-1019	**Artists and related workers, all other**	713	799	86	12%	166	23%	$10.27	$13.41	$19,887,566	$22,286,347	Long-term on-the-job training
27-3022	**Reporters and correspondents**	812	799	(13)	(2%)	122	15%	$14.06	$18.77	$31,701,779	$31,194,238	Degree plus work experience
17-2121	**Marine engineers and naval architects**	739	794	55	7%	133	18%	$39.82	$45.08	$69,293,370	$74,450,522	Bachelor's degree
27-2032	**Choreographers**	519	595	76	15%	195	38%	$22.00	$22.42	$24,202,838	$27,746,992	Work experience in a related field
51-9195	**Molders, shapers, and casters, except metal and plastic**	532	567	4	1%	169	32%	$16.65	$19.35	$21,411,936	$22,820,616	Moderate-term on-the-job training
27-1012	**Craft artists**	456	512	56	12%	107	23%	$10.83	$13.89	$13,174,387	$14,792,294	Long-term on-the-job training
17-1012	**Landscape architects**	456	491	35	8%	74	16%	$28.69	$34.10	$32,343,168	$34,825,648	Bachelor's degree
27-3012	**Public address system and other announcers**	414	464	50	12%	107	26%	$12.51	$15.36	$13,226,803	$14,824,243	Long-term on-the-job training
27-4012	**Broadcast technicians**	417	418	1	0%	74	18%	$18.71	$21.30	$18,474,768	$18,519,072	Associate's degree
27-1022	**Fashion designers**	304	352	48	16%	95	31%	$16.21	$21.40	$13,531,648	$15,668,224	Associate's degree
27-1027	**Set and exhibit designers**	305	340	35	11%	81	27%	$18.38	$19.42	$12,320,048	$13,733,824	Bachelor's degree
43-9081	**Proofreaders and copy markers**	308	332	19	6%	49	16%	$13.67	$16.63	$10,653,843	$11,484,013	Short-term on-the-job training
27-2031	**Dancers**	272	304	32	12%	94	35%	$13.35	$15.83	$8,955,981	$10,009,626	Long-term on-the-job training
27-4031	**Camera operators, television, video, and motion picture**	259	275	18	7%	48	19%	$15.73	$21.51	$11,587,867	$12,303,720	Moderate-term on-the-job training
27-4032	**Film and video editors**	241	241	1	0%	39	16%	$15.52	$19.76	$9,905,293	$9,905,293	Bachelor's degree
27-1029	**Designers, all other**	212	235	23	11%	56	26%	$18.54	$24.92	$10,988,723	$12,180,896	Bachelor's degree
25-9011	**Audio-visual collections specialists**	138	160	22	16%	37	27%	$19.17	$20.38	$5,849,875	$6,782,464	Moderate-term on-the-job training
27-4014	**Sound engineering technicians**	145	160	14	10%	37	26%	$11.38	$14.58	$4,397,328	$4,852,224	Postsecondary vocational award
27-3021	**Broadcast news analysts**	109	117	8	7%	23	21%	$16.11	$26.35	$5,974,072	$6,412,536	Degree plus work experience
27-4099	**Media and communication equipment workers, all other**	105	113	8	8%	21	20%	$24.64	$26.34	$5,752,656	$6,190,954	Moderate-term on-the-job training
25-4012	**Curators**	92	108	16	17%	29	32%	$18.72	$23.09	$4,418,502	$5,186,938	Master's degree
39-5091	**Makeup artists, theatrical and performance**	70	80	9	13%	15	21%	$12.00	$16.17	$2,354,352	$2,690,688	Postsecondary vocational award
27-4013	**Radio operators**	14	15	1	7%	4	29%	$23.06	$27.15	$790,608	$847,080	Moderate-term on-the-job training
	Total	**89,807**	**97,880**	**8,073**	**9%**	**19,405**	**22%**	**$21.58**	**$26.66**	**$5,056,231,149**	**$5,503,611,942**	

Source: EMSI Complete Employment - 2011.4

CREATIVE INDUSTRY MULTIPLIERS

This table contains the multiplier values for creative industries. These figures can be used to get a feel for the additional job and value creation in the economy. For example, an earnings multiplier of 2.2 means that for every $1 of earnings generated in the representative industry sector, another $1.20 (for a total of $2.20) is created elsewhere in the regional economy.

NAICS Code	Description	Jobs Mult	Earnings Mult	Sales Mult	2011 Earnings	2011 Jobs	2011 Sales
512210	**Record Production**	6.321	3.232	1.968	$125,516	205	$165,244,483
511210	**Software Publishers**	4.791	2.532	2.050	$132,858	167	$1,280,701,001
337212	**Custom Architectural Woodwork and Millwork Manufacturing**	4.334	4.631	1.792	$51,225	270	$187,371,957
325620	**Toilet Preparation Manufacturing**	4.091	3.650	1.766	$62,803	700	$580,458,767
711310	**Promoters of Performing Arts, Sports, and Similar Events with Facilities**	4.058	2.296	2.226	$108,382	1,403	$429,059,231
512290	**Other Sound Recording Industries**	3.892	3.234	1.968	$69,527	95	$45,342,183
511199	**All Other Publishers**	3.565	3.097	1.978	$66,079	10	$63,960,246
515210	**Cable and Other Subscription Programming**	3.495	2.337	1.853	$72,404	53	$16,942,692
515120	**Television Broadcasting**	3.268	2.184	1.951	$104,980	1,637	$559,099,064
512230	**Music Publishers**	3.260	3.242	1.971	$68,230	125	$45,328,920
325992	**Photographic Film, Paper, Plate, and Chemical Manufacturing**	3.022	2.500	1.918	$77,067	95	$43,975,544
512120	**Motion Picture and Video Distribution**	2.964	2.077	1.855	$80,578	786	$6,228,693
511120	**Periodical Publishers**	2.912	2.680	2.034	$62,380	2,587	$548,343,233
515112	**Radio Stations**	2.754	2.168	1.939	$79,968	1,165	$311,228,329
515111	**Radio Networks**	2.732	2.146	1.921	$73,399	511	$138,179,997
511130	**Book Publishers**	2.671	3.061	1.965	$45,919	2,038	$128,694,754
512199	**v**	2.374	2.066	1.847	$65,597	96	$23,350,346
541310	**Architectural Services**	2.343	1.781	2.093	$90,612	4,367	$745,681,794
337121	**Upholstered Household Furniture Manufacturing**	2.327	1.851	1.813	$80,436	306	$93,401,871
327212	**Other Pressed and Blown Glass and Glassware Manufacturing**	2.281	1.889	1.947	$81,993	35	$7,611,188
423920	**Toy and Hobby Goods and Supplies Merchant Wholesalers**	2.271	1.719	1.851	$92,249	141	$58,109,253
332323	**Ornamental and Architectural Metal Work Manufacturing**	2.249	2.169	1.861	$60,286	983	$221,184,634
313230	**Nonwoven Fabric Mills**	2.242	2.206	1.755	$53,468	36	$12,784,124
511110	**Newspaper Publishers**	2.238	2.130	1.939	$58,046	748	$502,594,391
423410	**Photographic Equipment and Supplies Merchant Wholesalers**	2.224	1.716	1.848	$85,441	1,826	$28,217,636
423940	**Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers**	2.140	1.723	1.855	$83,088	306	$247,523,154
339992	**Musical Instrument Manufacturing**	2.109	1.740	1.812	$73,687	14	$18,847,248
711410	**Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures**	2.047	2.283	2.214	$39,297	1,174	$121,034,553
512110	**Motion Picture and Video Production**	2.04	2.078	1.857	$48,685	2,530	$137,252,383
423210	**Furniture Merchant Wholesalers**	2.039	1.722	1.854	$74,497	93	$210,327,588
711130	**Musical Groups and Artists**	2.039	2.154	2.183	$40,461	1,054	$101,098,532
337910	**Mattress Manufacturing**	2.035	2.310	1.970	$43,452	516	$88,158,989
512240	**Sound Recording Studios**	2.003	3.247	1.974	$24,012	201	$32,161,831
512220	**Integrated Record Production/Distribution**	1.987	3.25	1.975	$20,791	38	$6,247,903
541840	**Media Representatives**	1.986	1.688	1.950	$67,485	420	$61,172,158
541810	**Advertising Agencies**	1.982	1.694	1.959	$69,323	2,778	$377,101,286
335129	**Other Lighting Equipment Manufacturing**	1.980	1.895	1.742	$63,069	236	$50,659,770
339911	**Jewelry (except Costume) Manufacturing**	1.957	1.867	1.685	$66,655	238	$49,965,282
424310	**Piece Goods, Notions, and Other Dry Goods Merchant Wholesalers**	1.948	1.720	1.851	$68,210	1,405	$57,986,199
335122	**Commercial, Industrial, and Institutional Electric Lighting Fixture Manufacturing**	1.947	1.890	1.740	$60,862	265	$50,712,900
424340	**Footwear Merchant Wholesalers**	1.937	1.72	1.852	$66,836	1,100	$33,907,426
337124	**Metal Household Furniture Manufacturing**	1.936	2.132	1.938	$46,756	110	$18,511,460
512191	**Teleproduction and Other Postproduction Services**	1.931	2.074	1.854	$44,416	21	$13,309,649
541420	**Industrial Design Services**	1.914	1.594	1.901	$77,077	310	$41,398,105
541490	**Other Specialized Design Services**	1.910	1.594	1.900	$79,424	212	$30,997,851
424920	**Book, Periodical, and Newspaper Merchant Wholesalers**	1.904	1.721	1.853	$63,069	216	$94,520,920
423220	**Home Furnishing Merchant Wholesalers**	1.897	1.719	1.852	$64,543	1,289	$263,604,346
323115	**Digital Printing**	1.884	2.071	1.960	$45,864	555	$76,887,210
337110	**Wood Kitchen Cabinet and Countertop Manufacturing**	1.873	1.889	1.956	$53,053	737	$100,614,802
541850	**Display Advertising**	1.850	1.687	1.948	$61,841	533	$64,192,436
337127	**Institutional Furniture Manufacturing**	1.848	1.902	1.791	$52,958	139	$25,871,641
327999	**All Other Miscellaneous Nonmetallic Mineral Product Manufacturing**	1.843	2.015	1.846	$47,752	337	$57,393,549
337215	**Showcase, Partition, Shelving, and Locker Manufacturing**	1.810	1.847	1.922	$53,042	160	$23,175,485
541830	**Media Buying Agencies**	1.801	1.674	1.930	$59,403	211	$23,240,009
333315	**Photographic and Photocopying Equipment Manufacturing**	1.793	1.530	1.841	$82,359	<10	$337,049
339942	**Lead Pencil and Art Good Manufacturing**	1.792	1.788	1.827	$52,042	86	$2,321,377
541320	**Landscape Architectural Services**	1.788	1.767	2.074	$53,282	1,571	$154,354,047
711320	**Promoters of Performing Arts, Sports, and Similar Events without Facilities**	1.778	2.288	2.219	$29,445	1,388	$109,054,050
337125	**Household Furniture (except Wood and Metal) Manufacturing**	1.752	2.119	1.927	$40,264	17	$2,449,363
541430	**Graphic Design Services**	1.743	1.609	1.925	$61,098	3,135	$349,437,985
337129	**Wood Television, Radio, and Sewing Machine Cabinet Manufacturing**	1.735	2.058	1.874	$44,682	110	$15,149,735
711120	**Dance Companies**	1.717	2.121	2.151	$28,709	429	$29,455,291
519120	**Libraries and Archives**	1.700	2.013	1.886	$36,761	212	$24,556,516
541860	**Direct Mail Advertising**	1.698	1.693	1.956	$50,158	1,078	$105,076,059
339914	**Costume Jewelry and Novelty Manufacturing**	1.690	1.870	1.688	$53,347	24	$9,699,823
314991	**Rope, Cordage, and Twine Mills**	1.684	1.772	1.676	$46,905	35	$7,161,710
424320	**Men's and Boys' Clothing and Furnishings Merchant Wholesalers**	1.679	1.719	1.850	$47,682	382	$65,514,385
337122	**Nonupholstered Wood Household Furniture Manufacturing**	1.670	1.857	1.853	$41,646	274	$32,412,866
511191	**Greeting Card Publishers**	1.670	2.940	1.901	$21,323	489	$1,168,055
541922	**Commercial Photography**	1.669	1.705	1.925	$47,869	629	$61,724,311
339932	**Game, Toy, and Children's Vehicle Manufacturing**	1.640	1.793	1.786	$51,172	19	$10,827,968
314992	**Tire Cord and Tire Fabric Mills**	1.640	1.765	1.668	$57,994	18	$1,718,714

NAICS Code	Description	Jobs Mult	Earnings Mult	Sales Mult	2011 Earnings	2011 Jobs	2011 Sales
712110	**Museums**	1.637	1.889	2.116	$36,024	1,873	$156,756,158
711110	**Theater Companies and Dinner Theaters**	1.607	2.153	2.182	$23,855	2,044	$116,093,180
424330	**Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers**	1.602	1.723	1.855	$42,890	614	$106,236,722
451140	**Musical Instrument and Supplies Stores**	1.597	1.740	1.894	$41,849	3,625	$62,385,330
541890	**Other Services Related to Advertising**	1.592	1.687	1.949	$41,552	1,490	$123,651,390
335121	**Residential Electric Lighting Fixture Manufacturing**	1.584	1.914	1.760	$34,277	48	$6,262,973
314129	**Other Household Textile Product Mills**	1.563	1.778	1.580	$36,288	204	$31,112,164
339931	**Doll and Stuffed Toy Manufacturing**	1.562	1.794	1.788	$40,274	63	$2,162,380
313320	**Fabric Coating Mills**	1.559	1.950	1.882	$33,641	82	$7,775,145
541410	**Interior Design Services**	1.556	1.607	1.922	$44,665	3,062	$253,419,771
337920	**Blind and Shade Manufacturing**	1.553	1.892	1.913	$32,752	408	$38,084,201
313311	**Broadwoven Fabric Finishing Mills**	1.550	1.878	1.700	$30,431	47	$6,216,009
313111	**Yarn Spinning Mills**	1.548	1.865	1.571	$35,214	13	$2,050,246
448310	**Jewelry Stores**	1.538	1.748	1.905	$37,304	136	$267,937,827
314121	**Curtain and Drapery Mills**	1.536	1.755	1.564	$31,365	207	$30,478,300
443130	**Camera and Photographic Supplies Stores**	1.504	1.724	1.876	$38,952	651	$10,497,107
711190	**Other Performing Arts Companies**	1.494	2.078	2.109	$23,533	131	$6,105,731
313210	**Broadwoven Fabric Mills**	1.488	1.809	1.722	$33,989	38	$3,743,900
314912	**Canvas and Related Product Mills**	1.486	1.664	1.788	$39,071	243	$22,352,573
451220	**Prerecorded Tape, Compact Disc, and Record Stores**	1.482	1.744	1.899	$38,320	485	$23,671,179
453920	**Art Dealers**	1.474	1.742	1.898	$33,454	302	$54,642,082
313312	**Textile and Fabric Finishing (except Broadwoven Fabric) Mills**	1.461	1.848	1.677	$25,562	68	$8,946,891
314911	**Textile Bag Mills**	1.453	1.658	1.782	$36,159	164	$13,684,870
315228	**Men's and Boys' Cut and Sew Other Outerwear Manufacturing**	1.444	1.599	1.760	$44,433	160	$12,463,606
314110	**Carpet and Rug Mills**	1.441	1.991	1.520	$24,651	<10	$1,241,746
314999	**All Other Miscellaneous Textile Product Mills**	1.435	1.765	1.67	$28,006	396	$38,346,147
315232	**Women's and Girls' Cut and Sew Blouse and Shirt Manufacturing**	1.423	1.726	1.763	$28,929	<10	$271,588
316992	**Women's Handbag and Purse Manufacturing**	1.413	1.398	1.936	$51,238	22	$1,349,869
451212	**News Dealers and Newsstands**	1.408	1.709	1.856	$29,106	1,876	$31,020,831
337214	**Office Furniture (except Wood) Manufacturing**	1.405	1.379	1.965	$52,590	65	$3,571,438
337211	**Wood Office Furniture Manufacturing**	1.402	1.379	1.964	$49,476	147	$8,097,700
327112	**Vitreous China, Fine Earthenware, and Other Pottery Product Manufacturing**	1.396	1.682	1.801	$32,135	128	$10,054,985
712120	**Historical Sites**	1.368	1.840	2.053	$18,051	22	$787,001
451120	**Hobby, Toy, and Game Stores**	1.332	1.742	1.898	$22,931	3,404	$183,744,614
451211	**Book Stores**	1.323	1.741	1.896	$22,676	673	$94,525,219
541921	**Photography Studios, Portrait**	1.317	1.708	1.929	$22,172	3,349	$159,573,838
315223	**Men's and Boys' Cut and Sew Shirt (except Work Shirt) Manufacturing**	1.292	1.602	1.763	$28,964	27	$1,252,280
711510	**Independent Artists, Writers, and Performers**	1.270	1.648	2.125	$21,516	13,087	$427,384,752
315211	**Men's and Boys' Cut and Sew Apparel Contractors**	1.269	1.493	1.889	$21,065	193	$7,368,602
315291	**Infants' Cut and Sew Apparel Manufacturing**	1.263	1.386	1.963	$49,799	28	$907,505
316213	**Men's Footwear (except Athletic) Manufacturing**	1.249	1.415	1.904	$29,267	26	$1,044,648
315191	**Outerwear Knitting Mills**	1.247	1.490	1.828	$25,450	40	$1,817,555
315239	**Women's and Girls' Cut and Sew Other Outerwear Manufacturing**	1.238	1.720	1.758	$19,576	20	$879,817
315222	**Men's and Boys' Cut and Sew Suit, Coat, and Overcoat Manufacturing**	1.213	1.599	1.760	$20,030	85	$3,169,297
316214	**Women's Footwear (except Athletic) Manufacturing**	1.202	1.420	1.917	$38,610	<10	$59,482
315234	**Women's and Girls' Cut and Sew Suit, Coat, Tailored Jacket, and Skirt Manufacturing**	1.195	1.718	1.755	$14,789	12	$413,024
313241	**Weft Knit Fabric Mills**	1.192	2.203	1.728	$8,408	<10	$205,680
313113	**Thread Mills**	1.173	1.830	1.547	$12,915	<10	$128,591
315225	**Men's and Boys' Cut and Sew Work Clothing Manufacturing**	1.171	1.598	1.758	$15,686	<10	$287,816
316219	**Other Footwear Manufacturing**	1.160	1.411	1.895	$22,340	12	$255,519
315212	**Women's, Girls', and Infants' Cut and Sew Apparel Contractors**	1.151	1.502	1.903	$16,589	308	$7,183,515
315233	**Women's and Girls' Cut and Sew Dress Manufacturing**	1.144	1.697	1.734	$12,107	55	$1,622,971
611610	**Fine Arts Schools**	1.139	1.708	1.995	$10,049	3,190	$60,956,265
315299	**All Other Cut and Sew Apparel Manufacturing**	1.130	1.388	1.967	$19,145	94	$1,832,791
313222	**Schiffli Machine Embroidery**	1.126	1.602	1.692	$12,555	<10	$99,684
315999	**Other Apparel Accessories and Other Apparel Manufacturing**	1.123	1.442	1.898	$16,383	84	$1,539,472
315111	**Sheer Hosiery Mills**	1.113	1.496	1.836	$11,993	<10	$41,973
315991	**Hat, Cap, and Millinery Manufacturing**	1.112	1.443	1.901	$13,023	35	$602,654
315119	**Other Hosiery and Sock Mills**	1.102	1.468	1.787	$10,467	55	$1,081,658
315224	**Men's and Boys' Cut and Sew Trouser, Slack, and Jean Manufacturing**	1.072	1.604	1.765	$5,475	<10	$49,614
315231	**Women's and Girls' Cut and Sew Lingerie, Loungewear, and Nightwear Manufacturing**	1.060	1.726	1.763	$4,021	<10	$80,382
316993	**Personal Leather Good (except Women's Handbag and Purse) Manufacturing**	1.051	1.394	1.928	$7,004	13	$96,680
315192	**Underwear and Nightwear Knitting Mills**	1.015	1.497	1.837	$1,500	<10	$8,008
313112	**Yarn Texturizing, Throwing, and Twisting Mills**	1	1	1	$0	0	$-
313221	**Narrow Fabric Mills**	1	1	1	$0	0	$-
313249	**Other Knit Fabric and Lace Mills**	1	1	1	$0	0	$-
315221	**Men's and Boys' Cut and Sew Underwear and Nightwear Manufacturing**	1	1	1	$0	0	$-
315292	**Fur and Leather Apparel Manufacturing**	1	1	1	$0	0	$-
315992	**Glove and Mitten Manufacturing**	1	1	1	$0	0	$-
315993	**Men's and Boys' Neckwear Manufacturing**	1	1	1	$0	0	$-
316212	**House Slipper Manufacturing**	1	1	1	$0	0	$-
327111	**Vitreous China Plumbing Fixture and China and Earthenware Bathroom Accessories Manufacturing**	1	1	1	$0	0	$-

ACKNOWLEDGEMENTS

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18—clothing by Tootsies; styled by Melissa Aron;
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shot at the gorgeous nest of Brenda and Arthur Fant

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