SAN DIEGO REGIONAL EDC

The City of SAN DIEGO

SAN DIEGO'S CREATIVE ECONOMY

Introduction

The Creative Economy plays a key role in creating vibrant communities and creating a thriving region. We define the Creative Economy as the non-profit and for-profit businesses and individuals involved in producing cultural, artistic and design goods or services, and intellectual property. The goal of this study is to define and quantify San Diego's Creative Economy. This includes employment, the number of firms, as well as the available talent pool of creative professionals. This report outlines the economic impact of creative industry and workers on the regional economy. Spanning 71 industries and 77 unique occupations, the Creative Economy's impact is far and deep in San Diego.

> ***"We bought this old building, we fixed it up, and then we painted it with a mural. And the effect it had on the surroundings was pretty massive. Ever since we did this mural, there hasn't been any graffiti, because it creates a sense of place, community, and pride. And what that does is it has a positive effect on the entire neighborhood."***
> ***- Alexander "Sasha" Favelukis, CoPlace San Diego***

Key Takeaways

Key Takeaways

Competing for talent

- The overwhelming majority of creative firms value experience and technical training over traditional 4-year degrees.
- The top degree program for creative workers is computer science.
- Computer science degree-holders are in high demand across industries.
- For-profit firms have a harder time finding the talent they need, as they compete with higher paying industries.

> ***We also get lucky I think because we're San Diego. Every summer, a handful of people call me and say 'I'm tired of the snow; do you have an art teaching job?' We've picked up some great people just because of the location."***
> ***-Russ Sperling, San Diego Unified School District***

Key Takeaways

Resource Assistance

- While overall perceptions of doing business in San Diego are positive, there are areas where additional support could benefit both for-profit and non-profit creative firms.
- Specifically, contracting assistance and additional physical space for theaters and art studios are all in demand by creative firms.
- Additionally, there is demand for augmenting the awareness of local arts and culture and differentiating the region from Los Angeles by better promoting and marketing existing assets and through the establishment of a Film Commission.

> ***I've seen firsthand how creative spaces can literally change entire communities. Thoughtfully planned creative collaborations, both public and private, have the ability to become epicenters for cultural and economic vibrance. Not only do these collaborations support local artists, they can also help sustain surrounding restaurants, shops, and other ancillary businesses."***
> ***– Susanna Peredo Swap, Vanguard Culture***

Key Takeaways

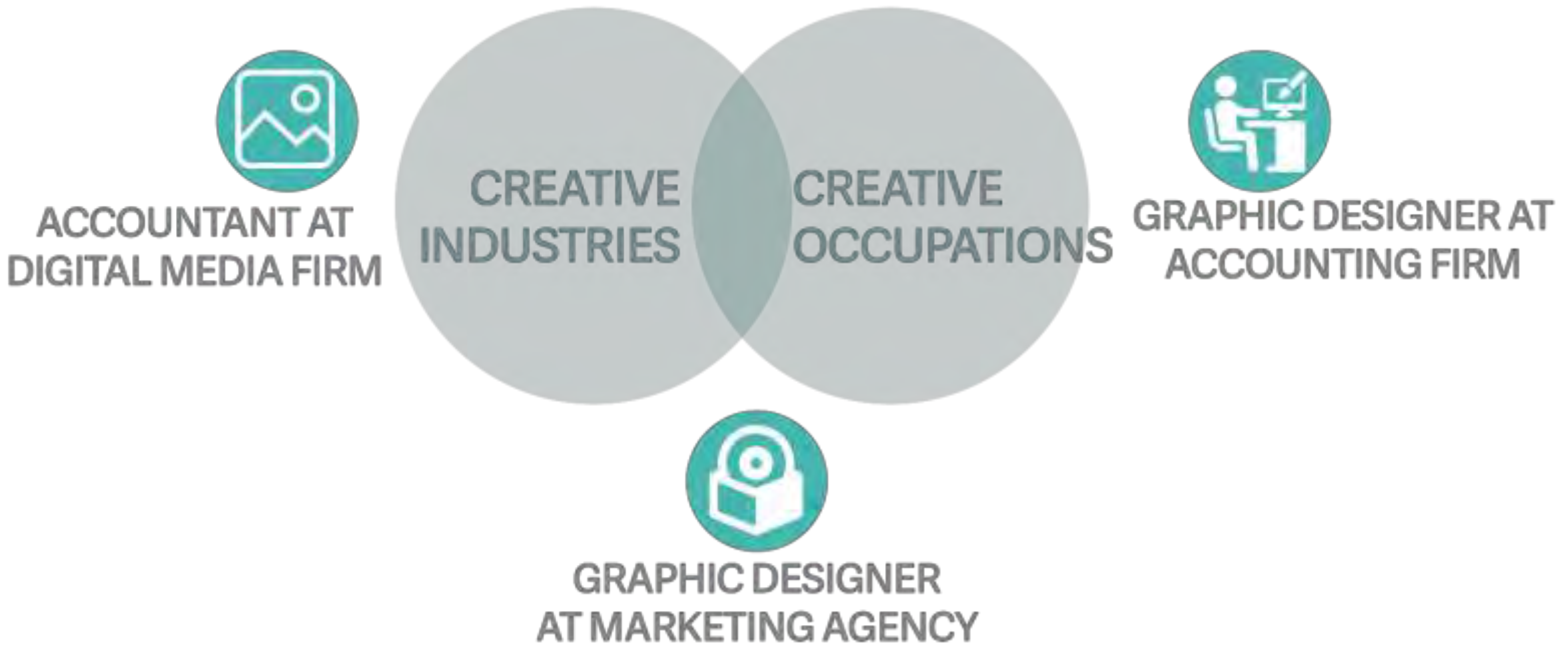
Affordability

- The most cited challenge to doing business in the region is the high cost of living.
- Ensuring San Diego is an attractive and affordable place for talent and business is critical to maintaining its regional competitiveness.
- This is particularly true for the nearly 13,000 self-employed creative workers which are growing in numbers but lagging in earnings.

> ***The cost of living makes it difficult for creatives to thrive here. If San Diego truly values it's artists and cultural institutions, it should be investing in their success."***
> ***– Anonymized Survey Respondent***

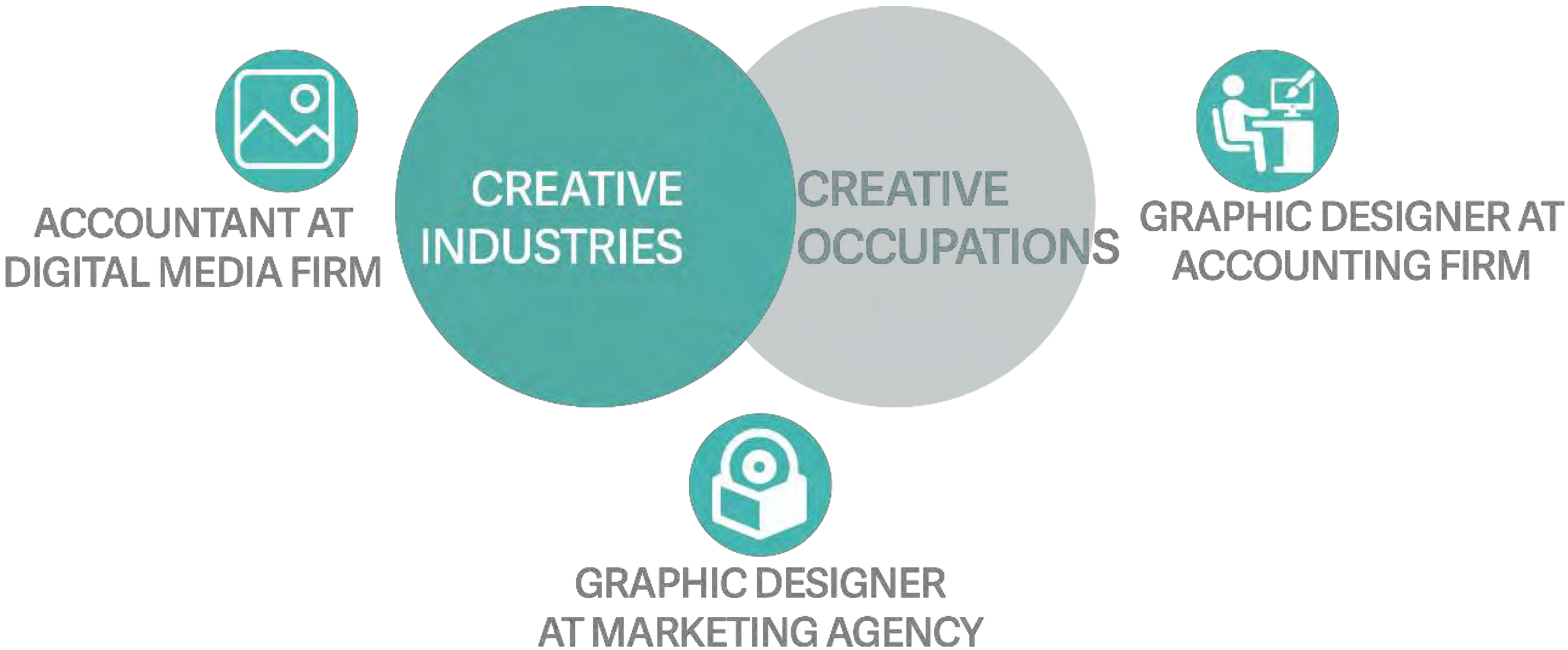
Industries & Occupations

Industry classifications describe the activities of businesses while occupational classifications describe the activities of workers. Industries generally employ people in many different occupations. Similarly, many occupations are found in many different industries. The following graphic provides a framework for thinking about creative industries and occupations.



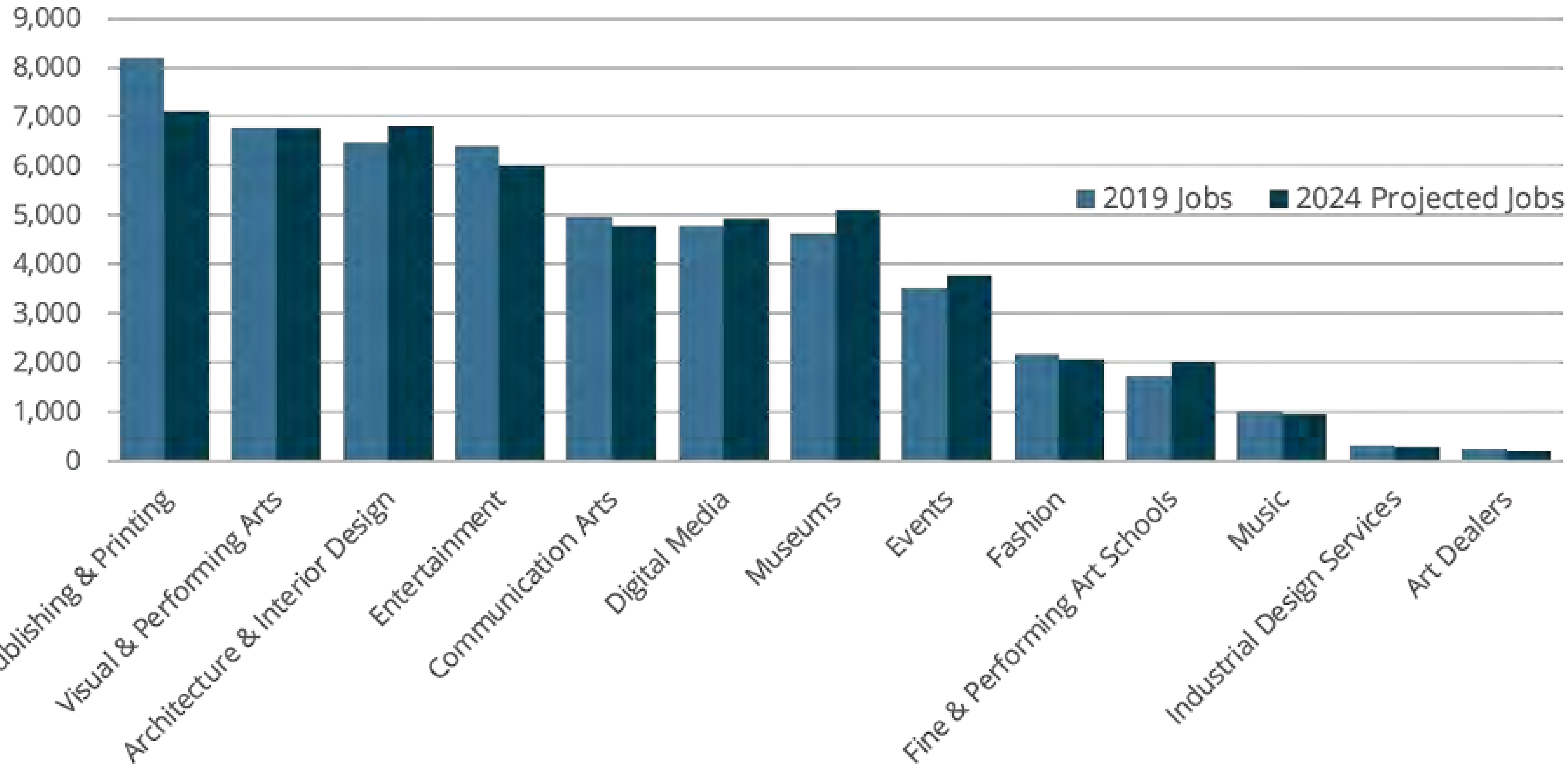
Industry Trends

Creative Industry



Industry Employment

With more than 8,200 jobs, Publishing and Printing leads all industry groups, but it has shed 13 percent during that same period and is projected to lose another 13 percent of jobs over the next five years.

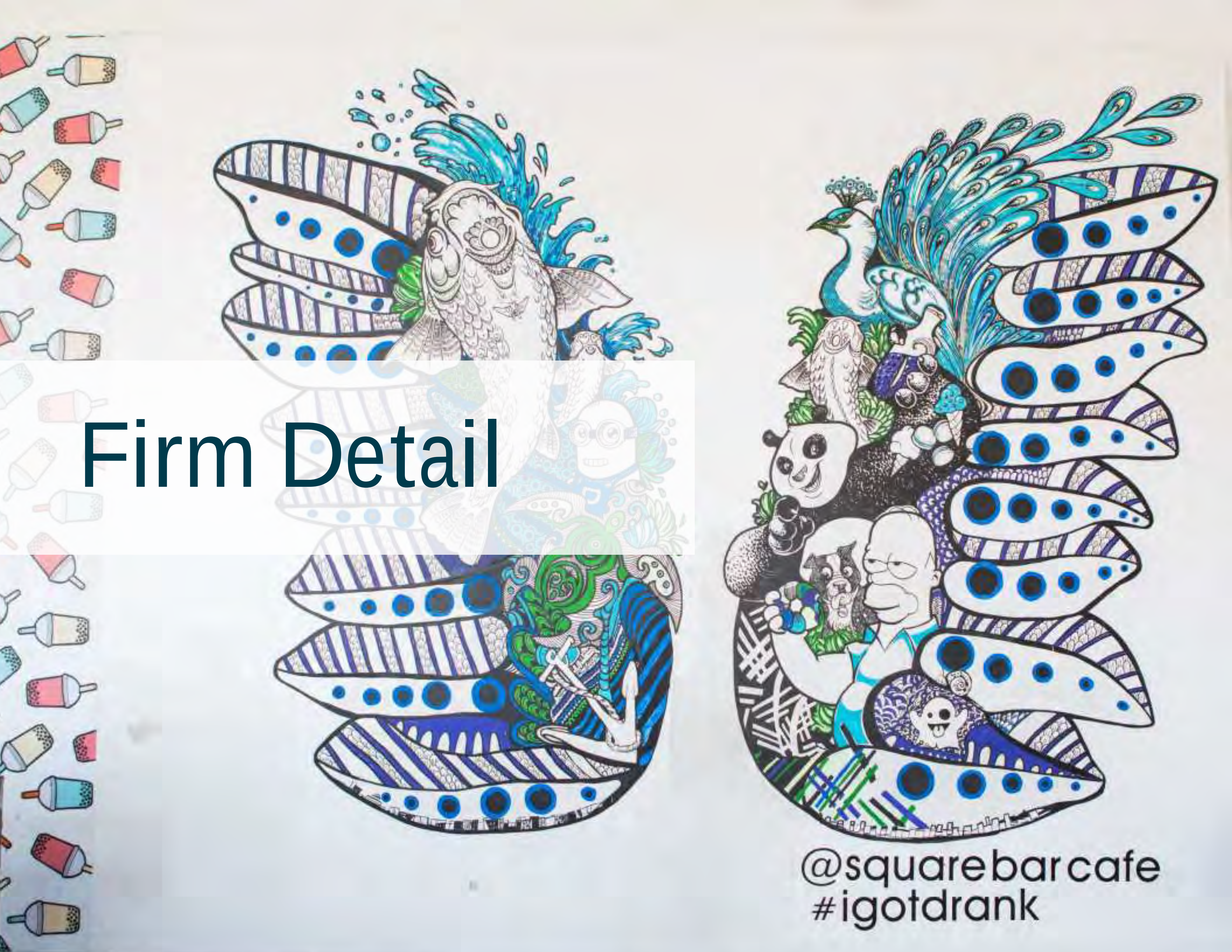


Industry Job Growth

Nine of the 13 groups have added jobs since 2014; only five of the groups are projected to add jobs over the next five years.

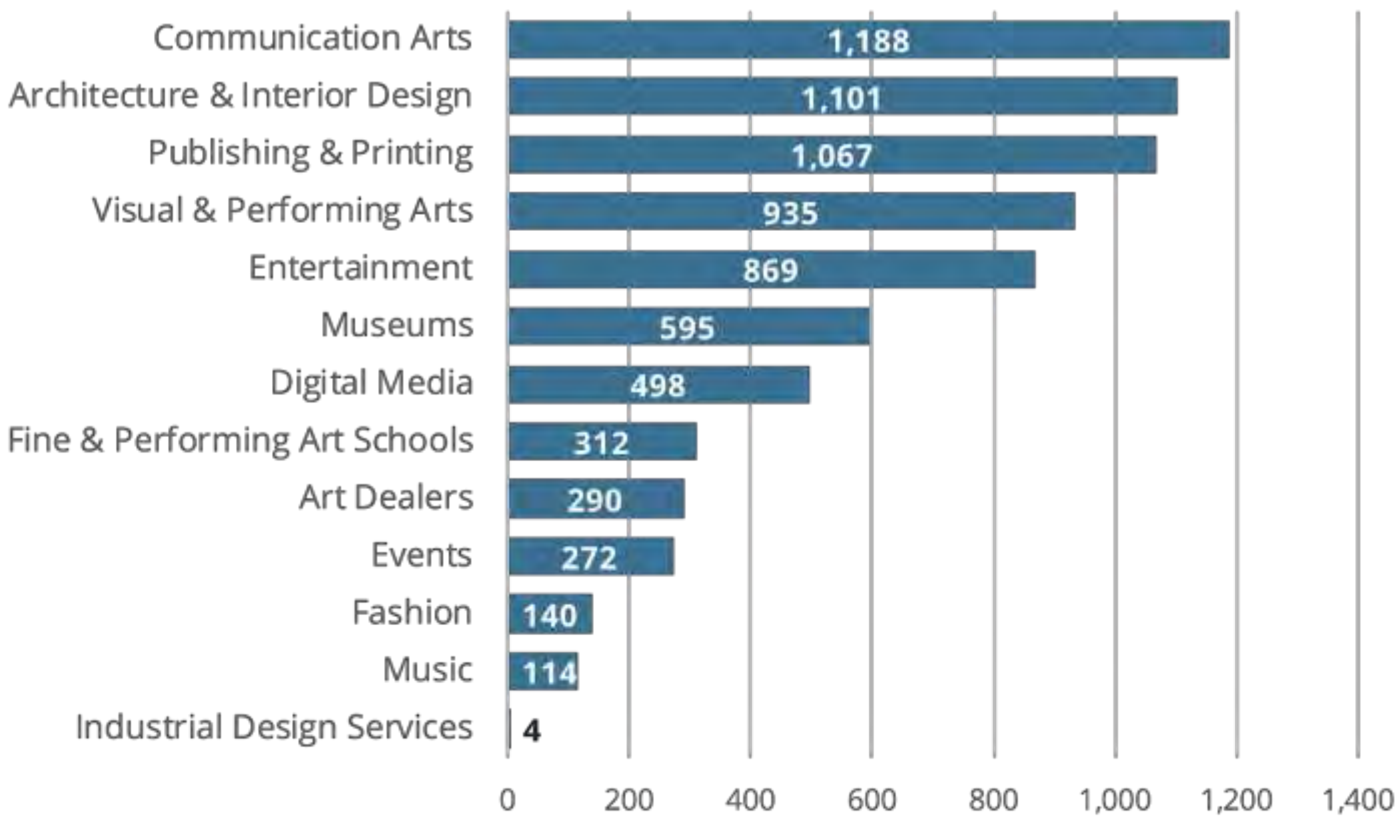
Industry Group	2014-2019 Percent Change	2019-2024 Projected Percent Change	2019 Jobs	2024 Projected Jobs
Architecture & Interior Design	13.93%	4.96%	6495	6817
Art Dealers	-15.49%	-24.63%	260	196
Communication Arts	0.63%	-3.85%	4953	4762
Digital Media	13.17%	2.95%	4783	4924
Entertainment	-0.94%	-6.26%	6389	5989
Events	20.74%	7.48%	3493	3754
Fashion	8.41%	-5.18%	2167	2055
Fine & Performing Art Schools	20.34%	17.39%	1729	2030
Industrial Design Services	-10.38%	-12.65%	313	273
Museums	20.61%	10.74%	4611	5106
Music	-0.73%	-7.64%	1020	942
Publishing & Printing	-13.41%	-13.41%	8204	7104
Visual & Performing Arts	2.67%	-0.15%	6776	6766

Firm Detail



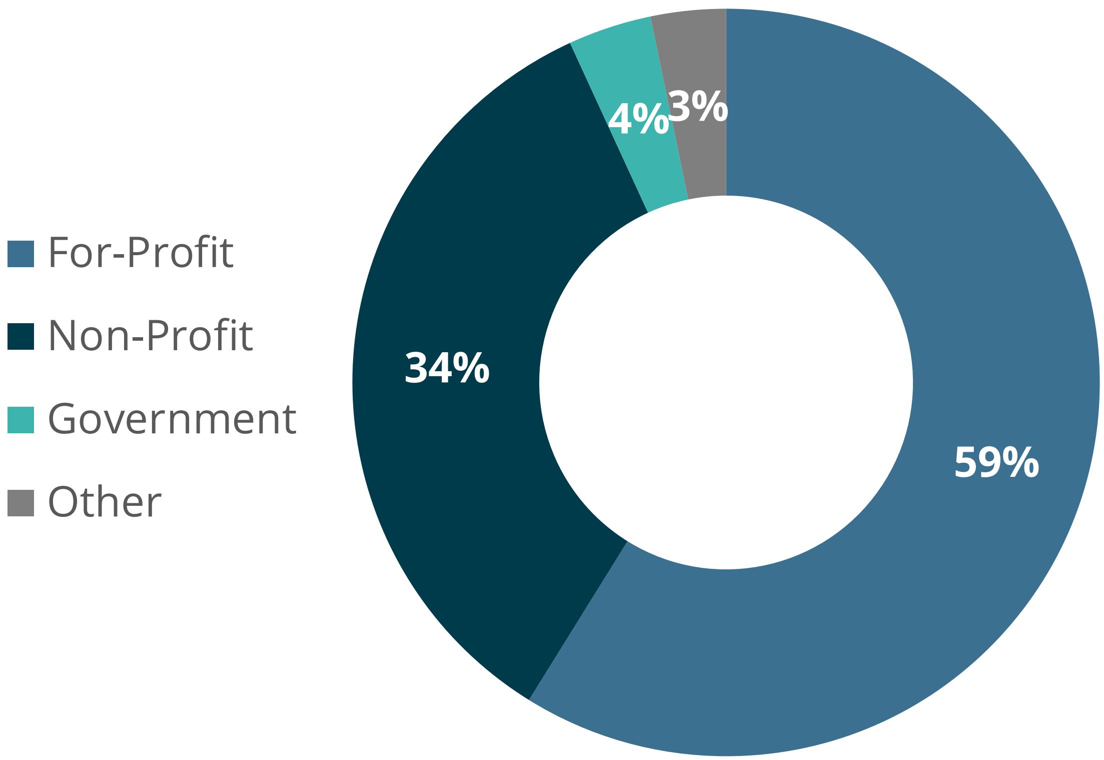
Firms by Industry

There are 7,386 non-profit and for-profit creative firms in the region. Again, business formation and growth dynamics differ across the thirteen industry groups. While not as large in terms of overall employment, communication arts leads in terms of number of firms with 1,188 across the county.



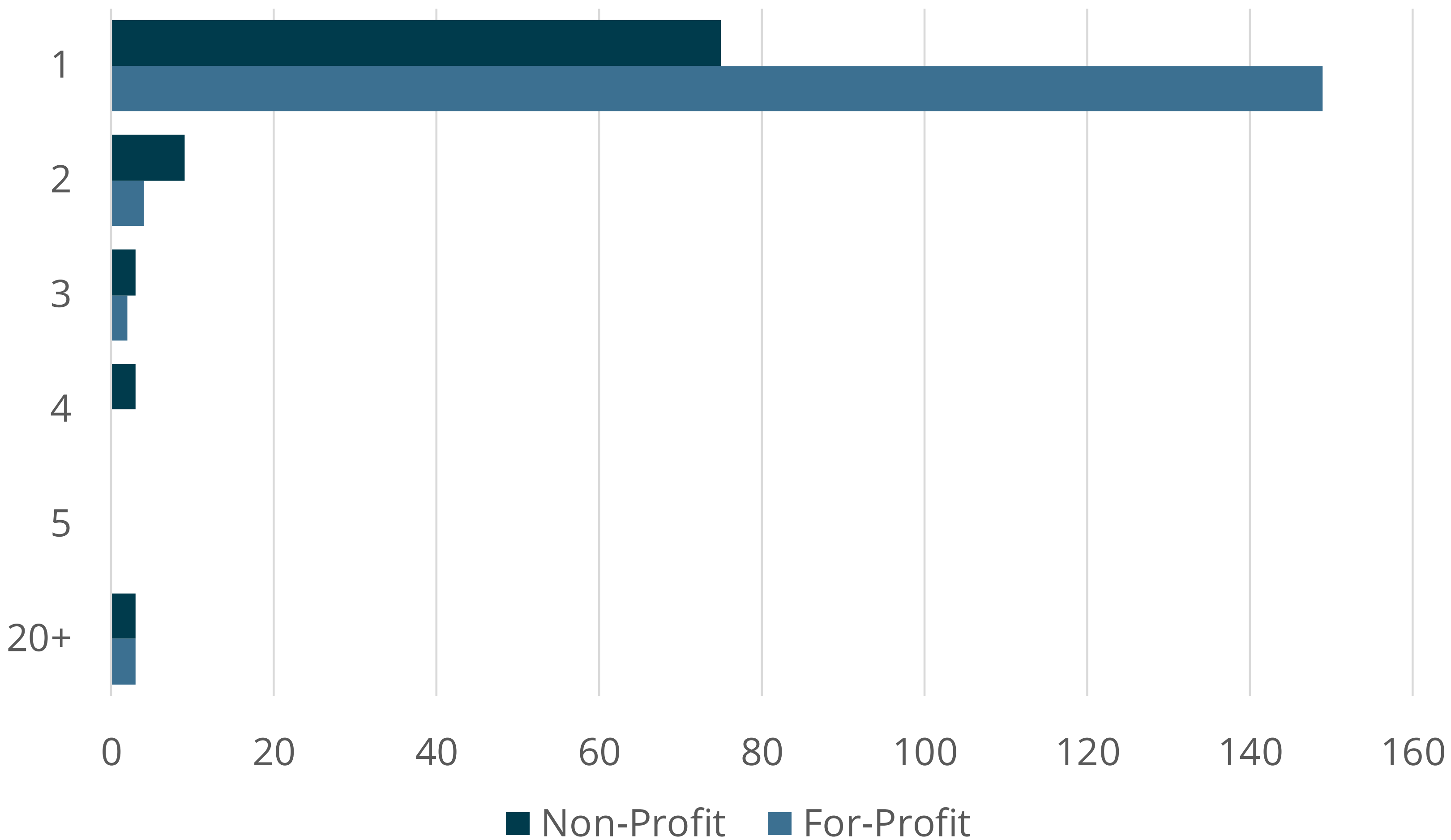
Firms by Sector

The majority of respondents of the Creative Economy survey consisted of for-profit (59% or 163 respondents) and non-profit (34% or 95 respondents) entities. There were other types of organizations, which included government employers, independent contractors (such as freelance writers and artists).



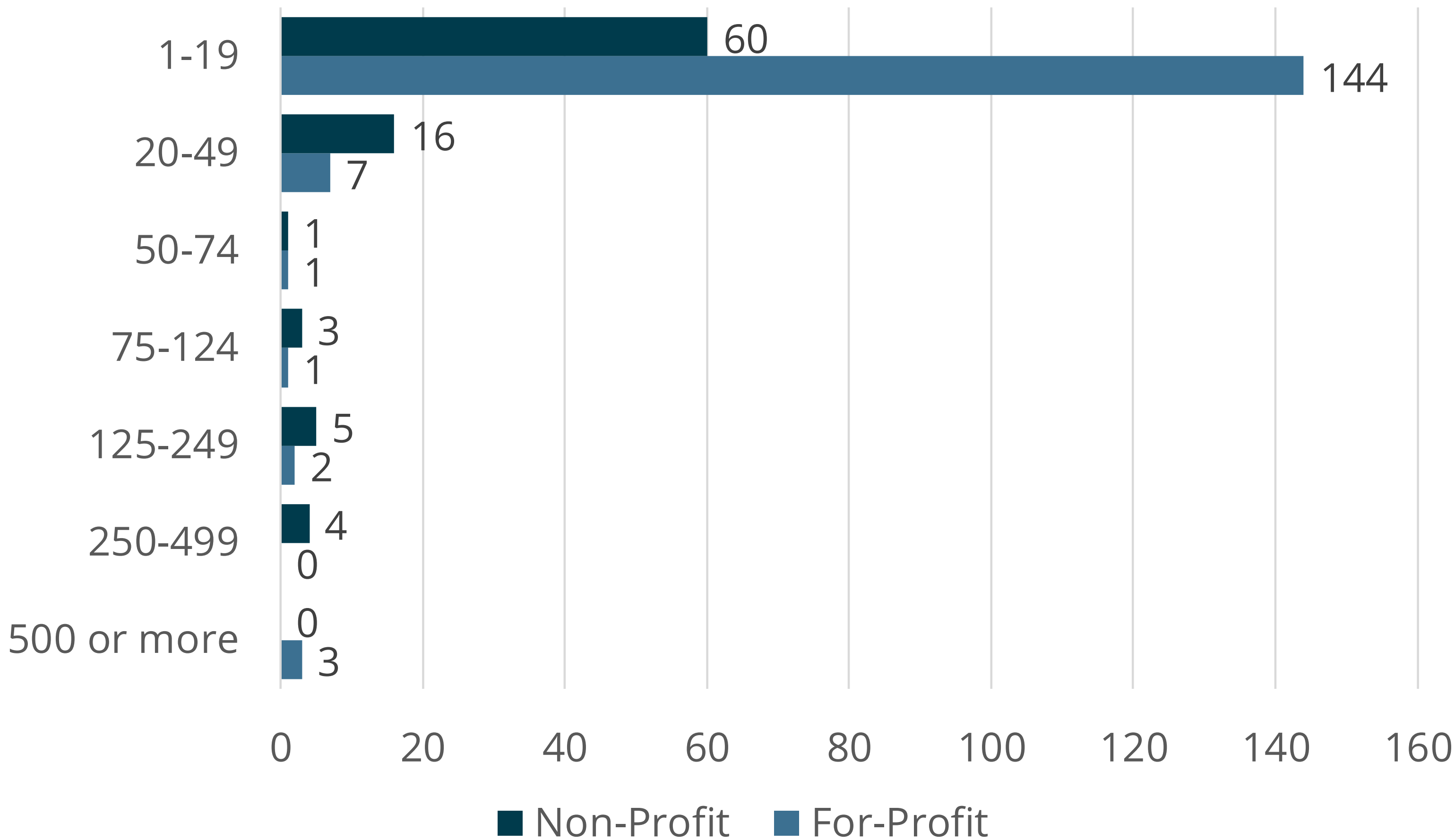
Number of Locations

The majority of respondents from all categories came from smaller entities with only one business location in San Diego County.



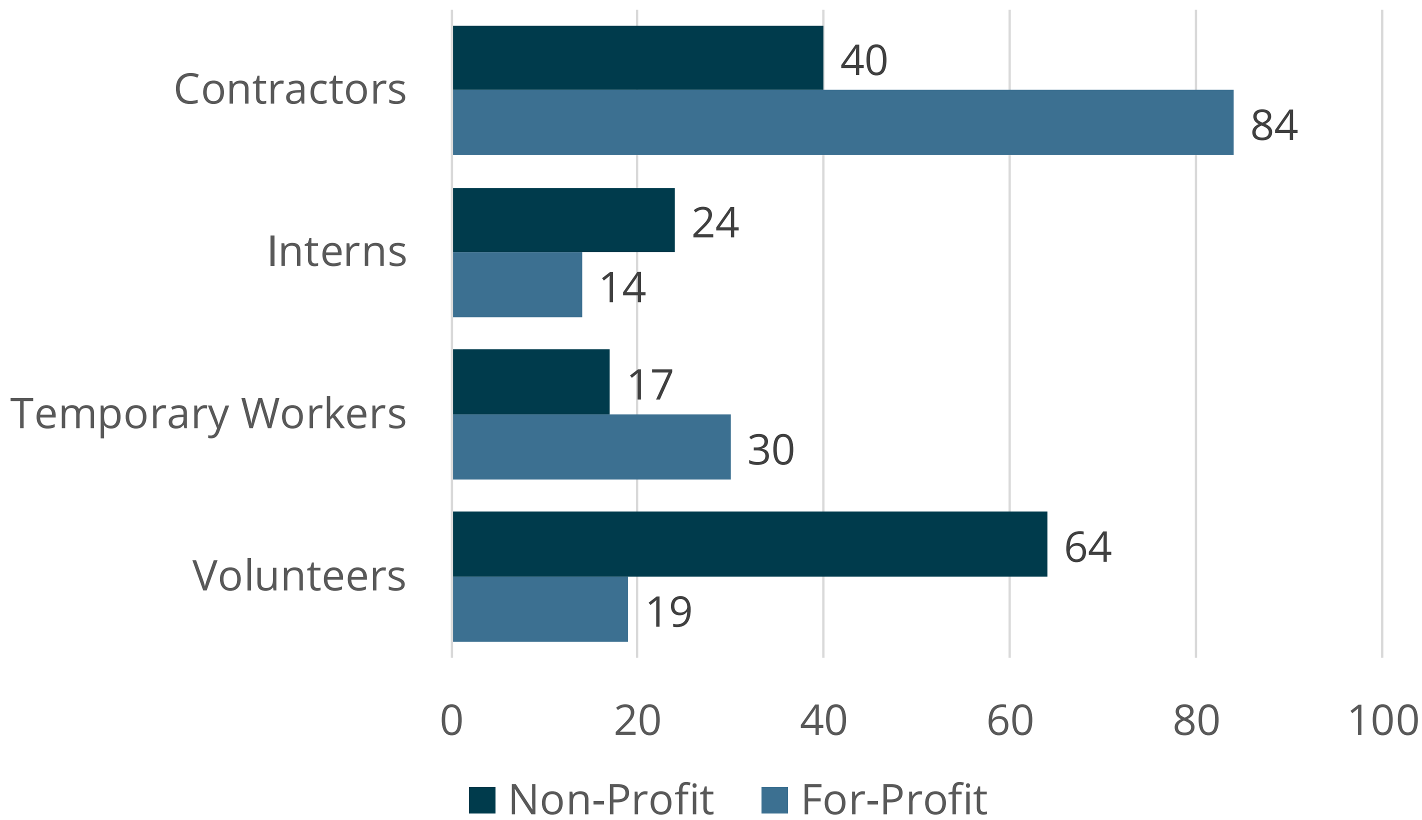
Firm Size by Employment

The majority of the entities are small in size, with 1 to 19 employees working at their location. Non-profit entities have a wider distribution of employees at their sites, with 18 percent reporting 20 to 49 employees and 10 percent reporting having more than 125 employees at their sites.



Flexible Employment

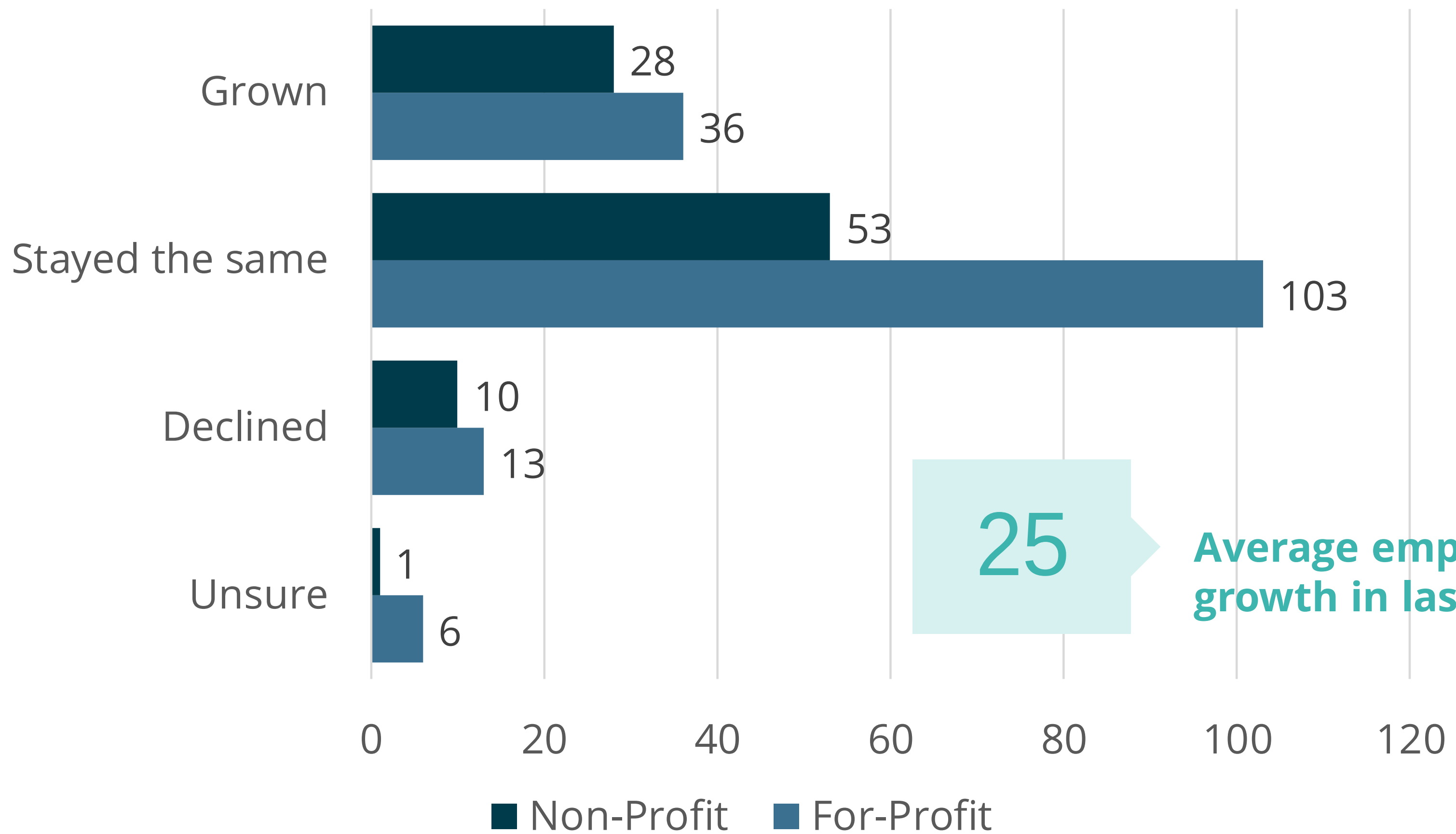
Overall, a significant number (41%) of the creative industry employers hire a large number of contractors. The practice of hiring contractors is more common in for-profit entities, with nearly 60% having contractors comprise a substantial component of their workforce.



Employment Trends

Historical Growth

In the last three years, the majority of creative industry entities report their organization has stayed the same in terms of permanent employment at their locations. Non-profit entities (30%) have reported slightly more growth than for-profit (23%) companies. Interestingly, a higher percent of non-profit organizations (11%) also reported having a decline in permanent employment.



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Average employment growth in last three years

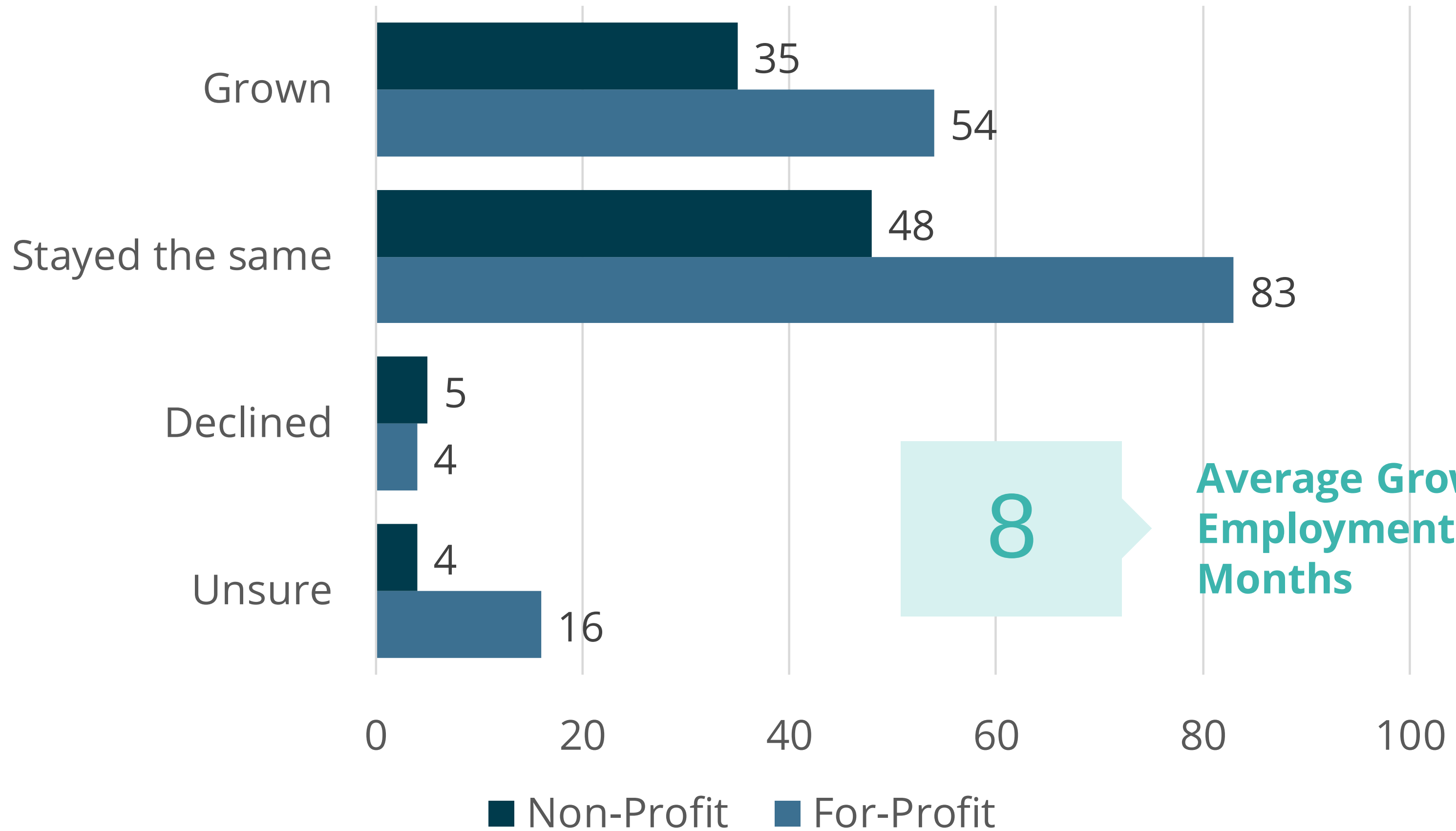
Historical Decline in Workforce

- For-profit agencies reported their primary reasons for a declining workforce as also being a decline in revenue (53%), followed by a significant increase in expenses (21%). Other reasons varied from retirements to change in market conditions
- Non-profits reported their primary reasons as also being a decline in revenue (46%), followed by a change in employment structure (38%)
- Overall, the most common reason reported for a decline in the workforce was a decline in revenue (50%), followed by a change in employment structure (19%)

24 — **Average employee decline in the last three years**

Projected Growth

Over the next 12 months, the majority of organizations (54%) reported expecting their workforce to stay the same. For-profit and non-profit agencies reported similarly, with a slightly higher percentage of non-profits expecting to grow (38%) or decline (5%). Ten percent of for-profit companies were unsure of their workforce outlook in the next 12 months.



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Average Growth in Employment in Next 12 Months

Projected Decline in Workforce

- Overall, the primary reason for an expected decline in the workforce over the next 12 months was a change in employment structure (38%)
- For-profits and non-profits had slightly different primary reasons
- Both similarly reported a shift in their employment structure
- However, for-profits reasons primarily included an expected decline in revenue (60%)
- Two non-profits detailed in “other” that California’s Assembly Bill 5 (AB5) was going to be the reason they anticipated a decrease in their workforce
- 2 job average decline in employment in next 12 months

Economic Impact

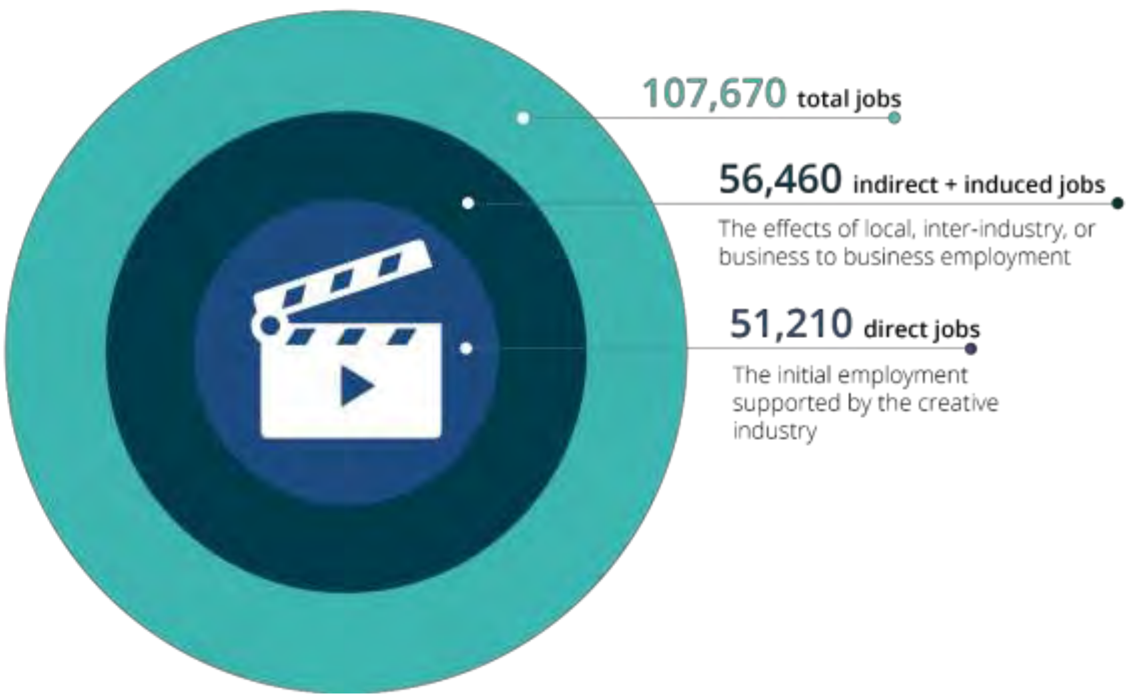
Creative Industries' Ripple Effect

San Diego's creative industries have a ripple effect in the broader economy. Every job in creative industry supports another 1.1 jobs.

107,673 TOTAL IMPACTED JOBS

7,386 TOTAL CREATIVE FIRMS

$11.1B TOTAL ECONOMIC IMPACT



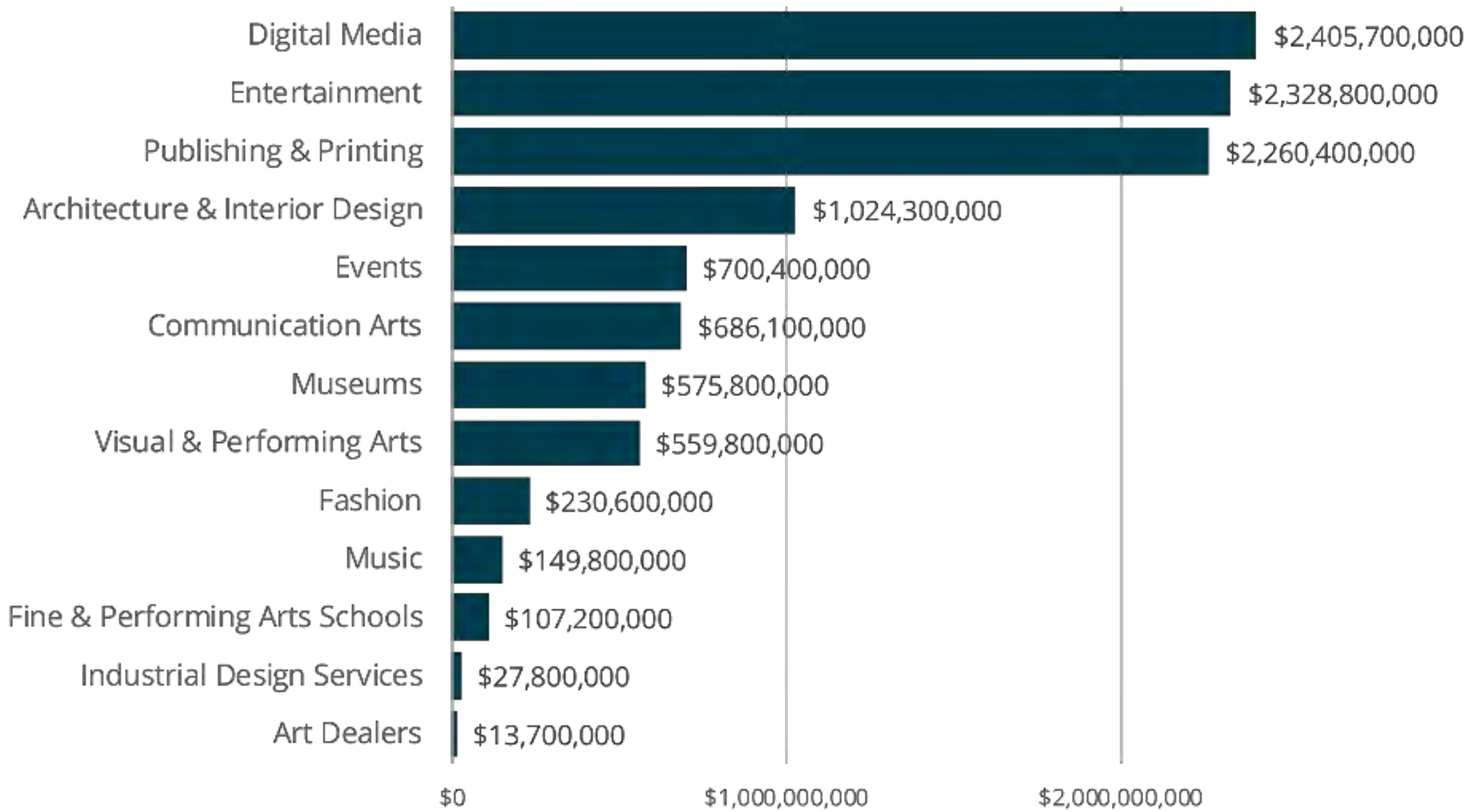
Economic Linkages

Creative industries serve a wide range of customers and depend on a diverse set of suppliers. All of this activity amounts to an $11.1 billion regional economic impact, which represents 4.5 of the regional economy.

LOCAL SAN DIEGO PURCHASE/OUTSOURCE	FOR-PROFIT	NON-PROFIT
Catering, event space, and event planning	42%	67%
Financial/Accounting services	54%	48%
Marketing/Graphic design services/Communications/PR	45%	54%
Furniture, office supplies, and equipment	40%	44%
Audio, Video Production	42%	46%
Legal services	45%	38%
Facilities/Construction/Architecture & Engineering services	17%	30%
Human resource management services	9%	20%
Other	10%	20%

Total Value Added by Industry Group

Digital Media, Entertainment, and Publishing & Printing are responsible for nearly two-thirds of the total economic value added by creative industries.



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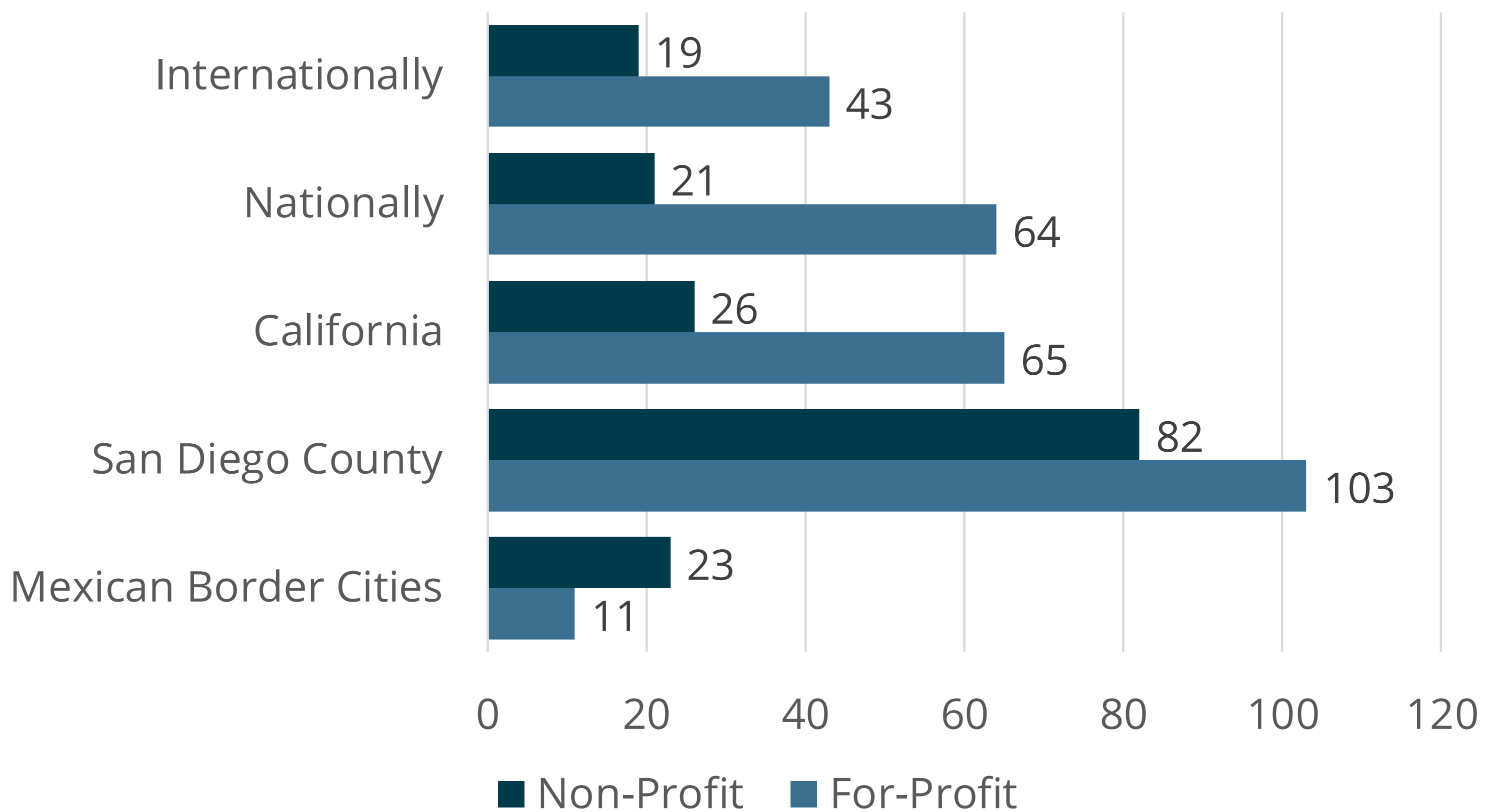
Contributions to the Local Economy

To get an understanding of the impact the creative economy businesses have on the local San Diego economy, respondents identified the services which their organizations purchased or outsourced locally. For-profit companies primarily outsourced financial, accounting, marketing, graphic design, communications, PR, and legal services to San Diego businesses. Non-profit businesses mainly outsourced their catering, event space, event planning, marketing, graphic design, communications, PR, financial, and accounting services locally.

Local San Diego Purchase/Outsource	**For-Profit**	**Non-Profit**
Catering, event space, and event planning	42%	67%
Financial/Accounting services	54%	48%
Marketing/Graphic design services/Communications/PR	45%	54%
Furniture, office supplies, and equipment	40%	44%
Audio/Video Production	42%	46%
Legal services	45%	38%
Facilities/Construction/Architecture & Engineering services	17%	30%
Human resource management services	9%	20%
Other	10%	9%

Customers, Patrons, or Attendees Located

Creative economy businesses' customers, patrons, or attendees are located mainly in San Diego County (40%). The majority of for-profits customers are in San Diego County, followed by within California and Nationwide (23% and 22%, respectively). Non-profit's top constituents are mostly in San Diego County (48%) and California, though they have some reliance on border cities as well (13%).



Customers, Patrons, or Attendees Located

Businesses identified the types of customers that utilize their services. Respondents could select more than one option. Overall, the majority of for-profit's customers were other for-profit businesses (80%), followed by direct to consumer (58%), and non-profit organizations (48%). Non-profit's customers primarily consist of direct to consumer (64%), community organizations (61%), and education entities.

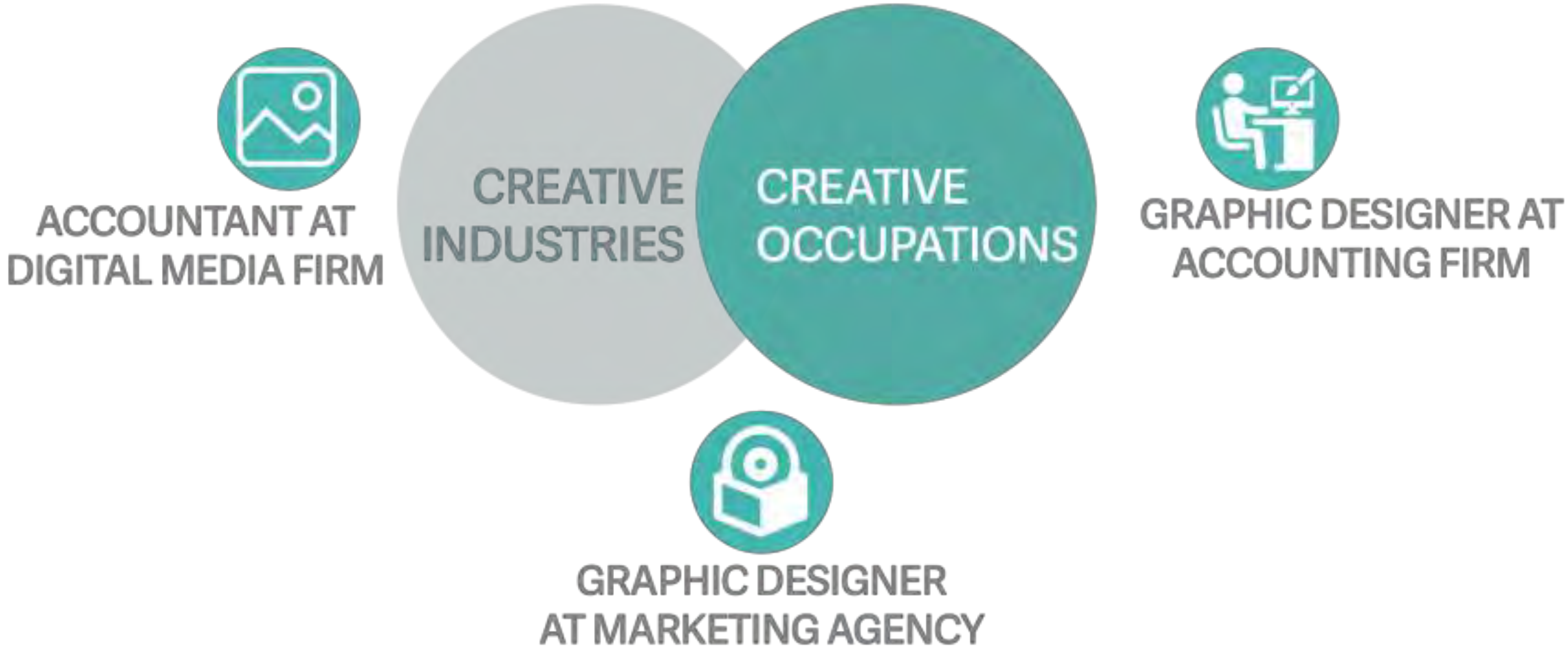
54% Of For-Profit firms are hired by Arts, Entertainment, Events and Recreation firms

40% Of Non-Profit firms are hired by Arts, Entertainment, Events and Recreation firms

Customers, Patrons, or Attendees	For-Profit	Non-Profit
For-profit businesses	80%	37%
Direct to Consumer	58%	64%
Community organizations	41%	61%
Nonprofit businesses	48%	52%
Education	34%	55%
Government	32%	28%
Attendance-based services	3%	43%
Other	2%	7%

Occupational Trends

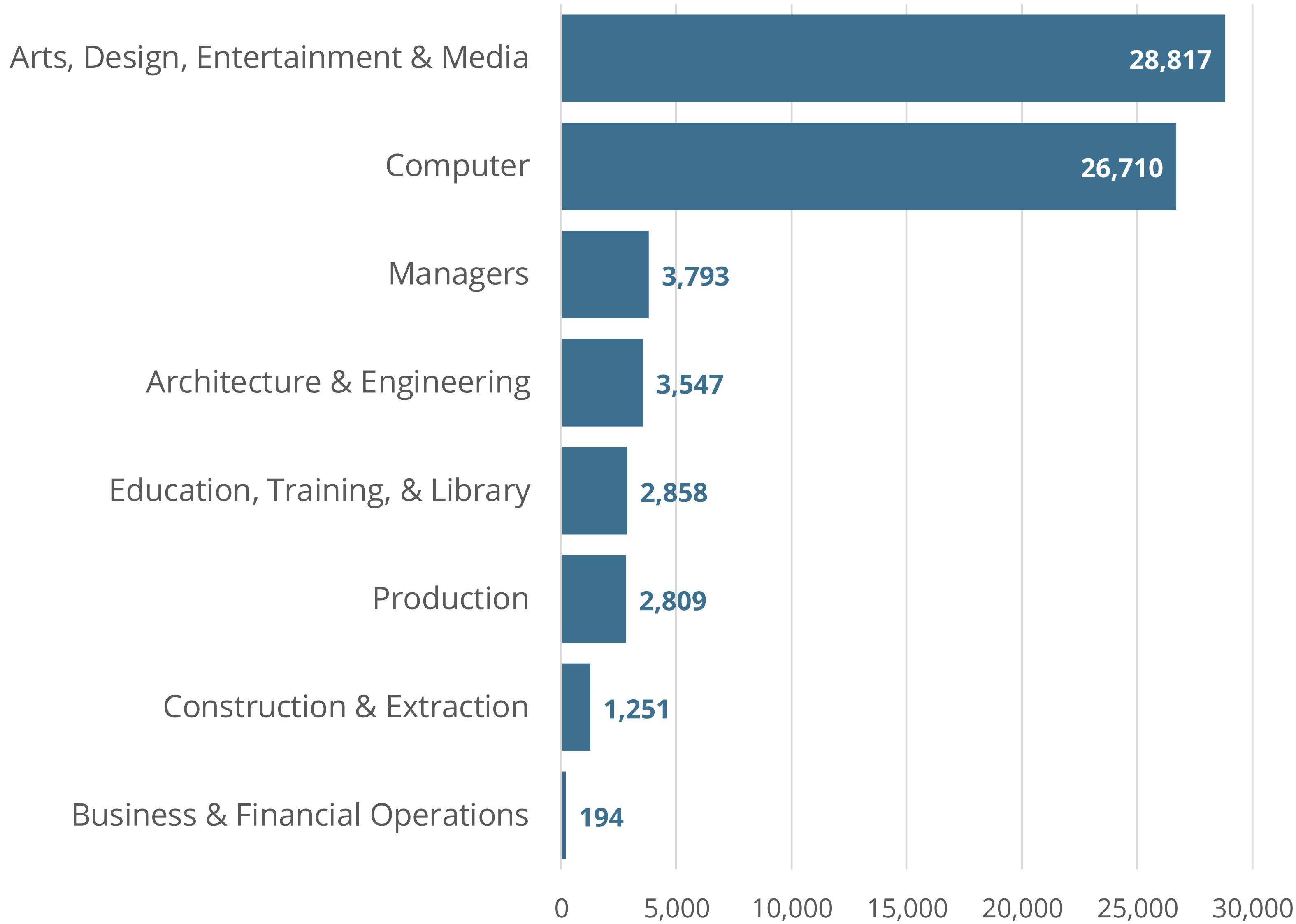
Occupations



Creative Occupations

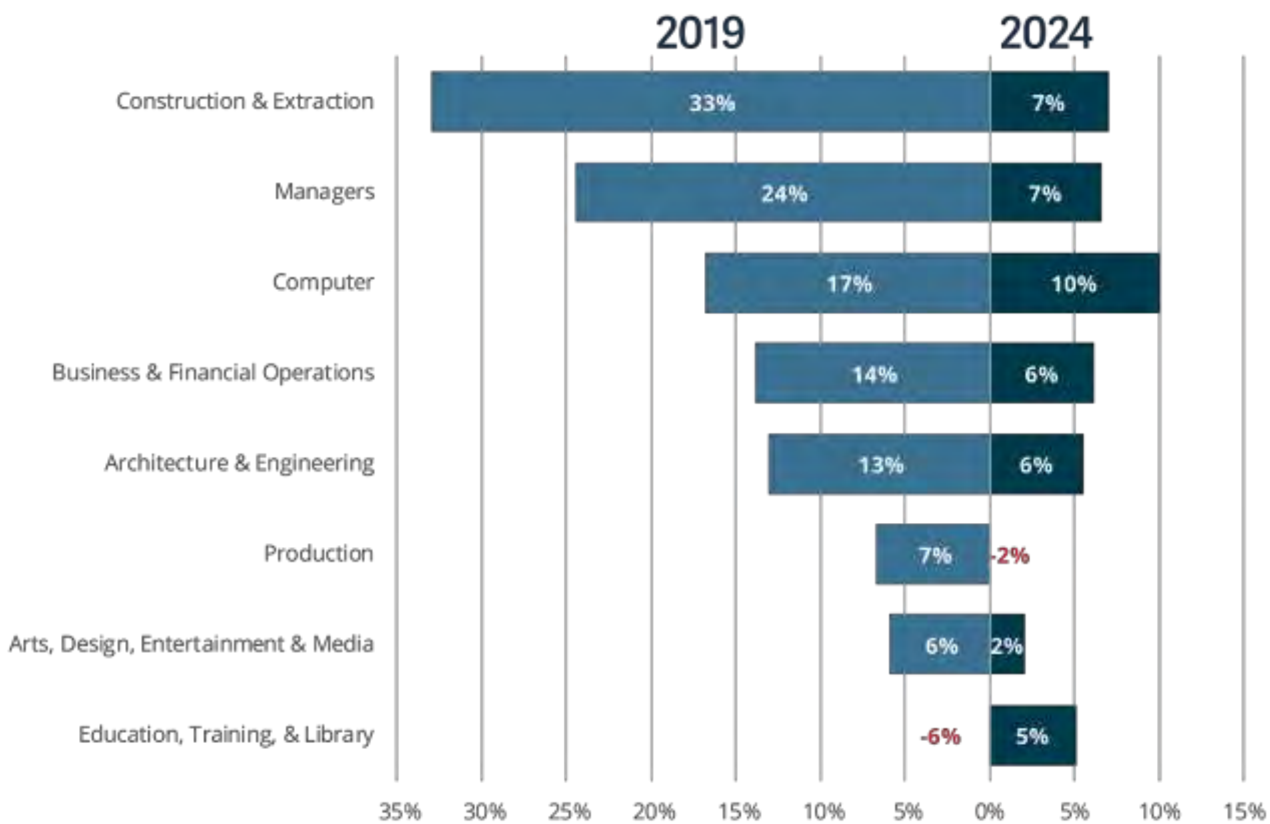
San Diego has 77 unique creative occupations that fit into eight occupational groups with similar skill, knowledge, and ability requirements. In 2019, most jobs were concentrated in either the Arts, Design, Entertainment, & Media or Computer professions. Together, these two occupational groups represent 79 percent of the nearly 70,000 creative jobs in the region.

Occupation Concentration



Past & Projected Growth

Since 2014, creative occupational employment increased by eleven percent, better than the regional growth rate of nine percent. Going forward, Computer-related occupations will lead job growth. Demand for software developers and computer programmers will continue to rise across the economy, which are the top three creative occupations in San Diego.



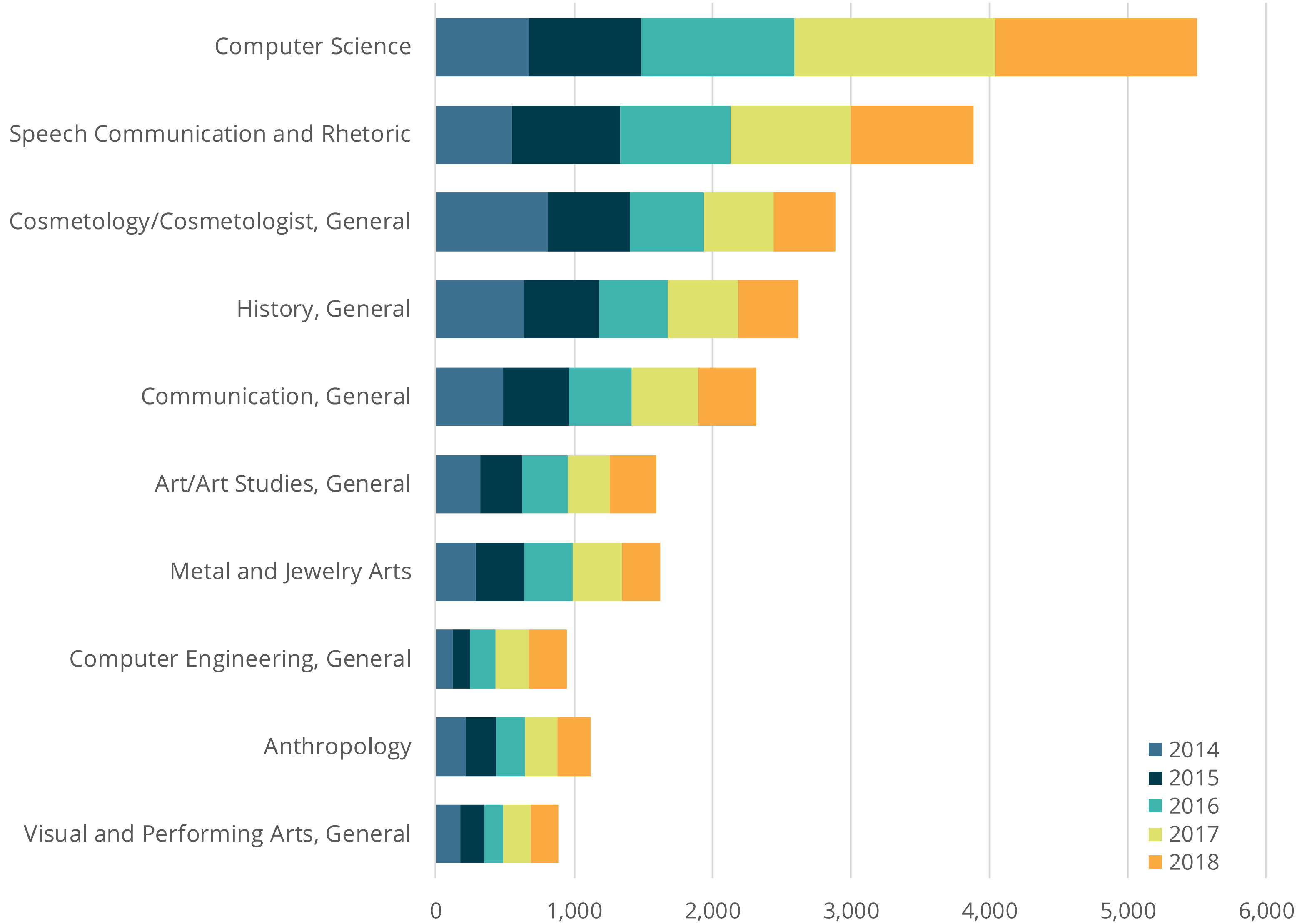
Median Annual Income

$75K Median annual income for all creative occupations

OCCUPATION GROUP	MEDIAN ANNUAL INCOME
Architecture & Engineering	$69,408
Arts, Design, Entertainment & Media	$51,616
Business & Financial Operations	$54,013
Computer	$106,573
Construction & Extraction	$52,996
Education, Training, & Library	$49,416
Managers	$124,412
Production	$35,605

Educational Pipeline

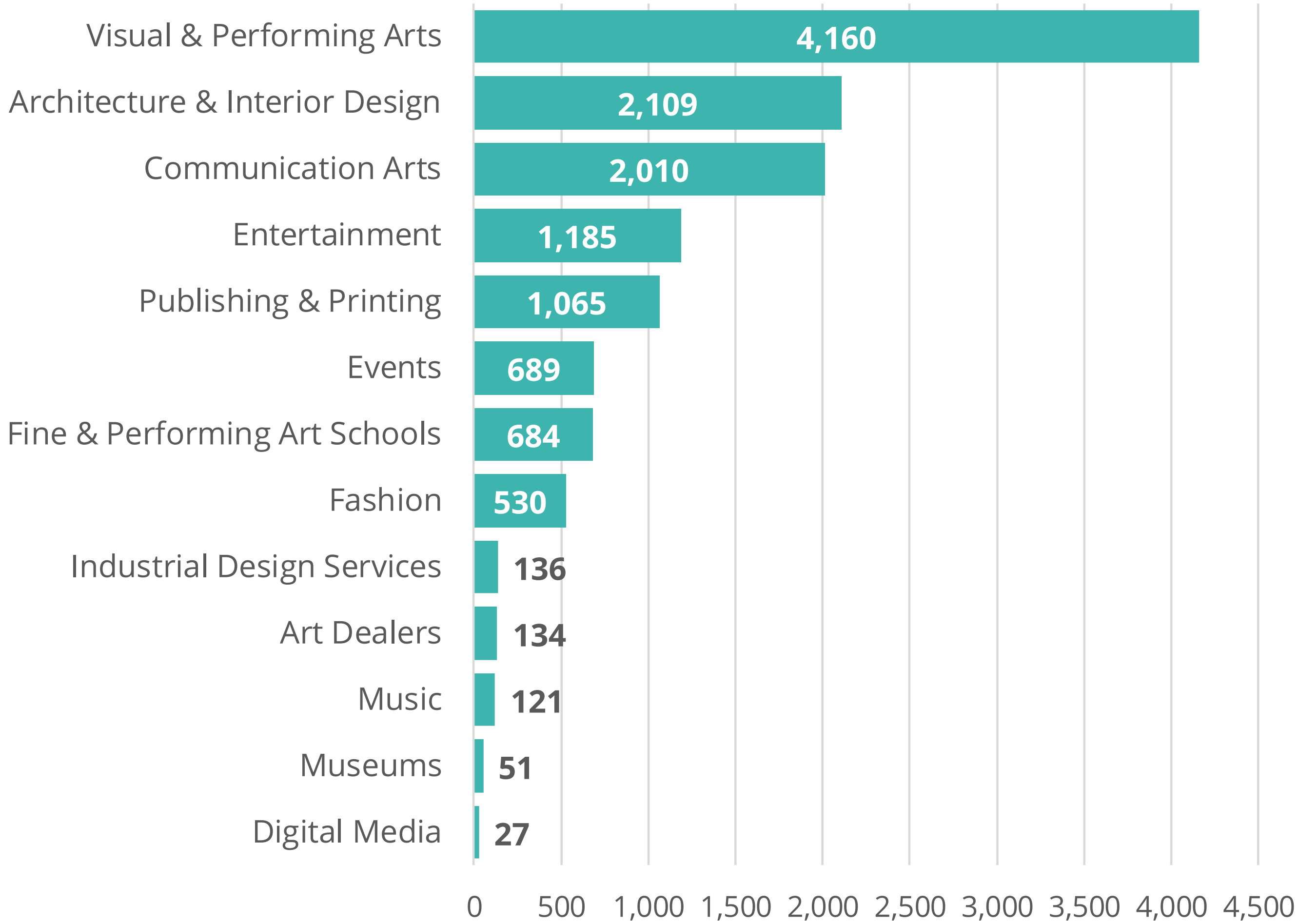
The top academic program for producing creative professionals is Computer Science, with nearly 5,500 completions in the region since 2014.



Self-Employed

Self-Employed

Self-employed workers are crucial to the creative economy. There are nearly 13,000 self-employed creatives in the region, with a third in the Visual & Performing Arts industries.



Self-Employed

6.0%
SELF-EMPLOYED CREATIVE JOB GROWTH IN LAST 5 YEARS

4.1%
TOTAL CREATIVE JOB GROWTH IN LAST 5 YEARS

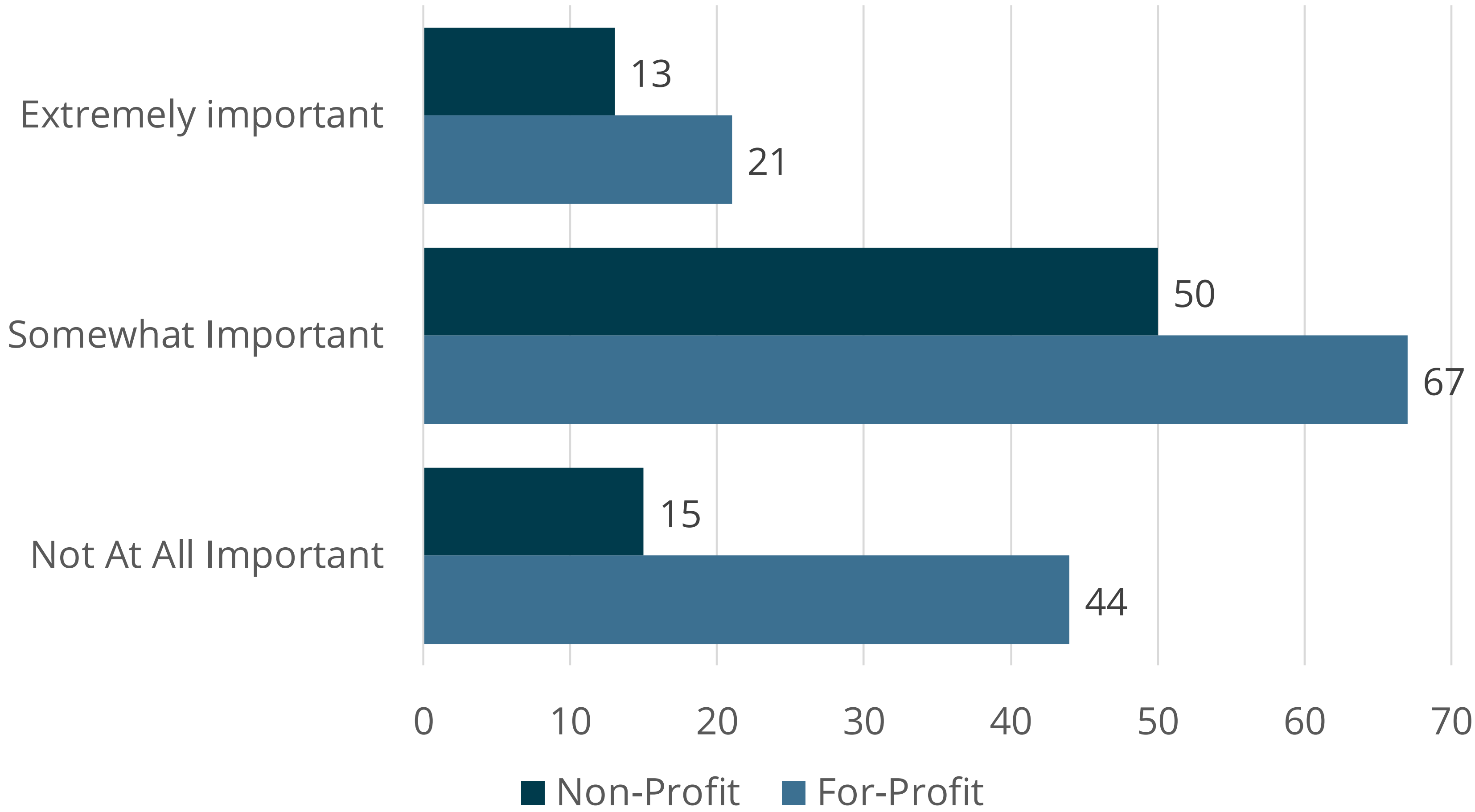
TOP 5 SELF-EMPLOYED CREATIVE INDUSTRY JOBS

1. Independent Artists, Writers, & Performers
2. Graphic Design Services
3. Interior Design Services
4. Motion Picture and Video Production
5. Fine Arts Schools

Talent Needs

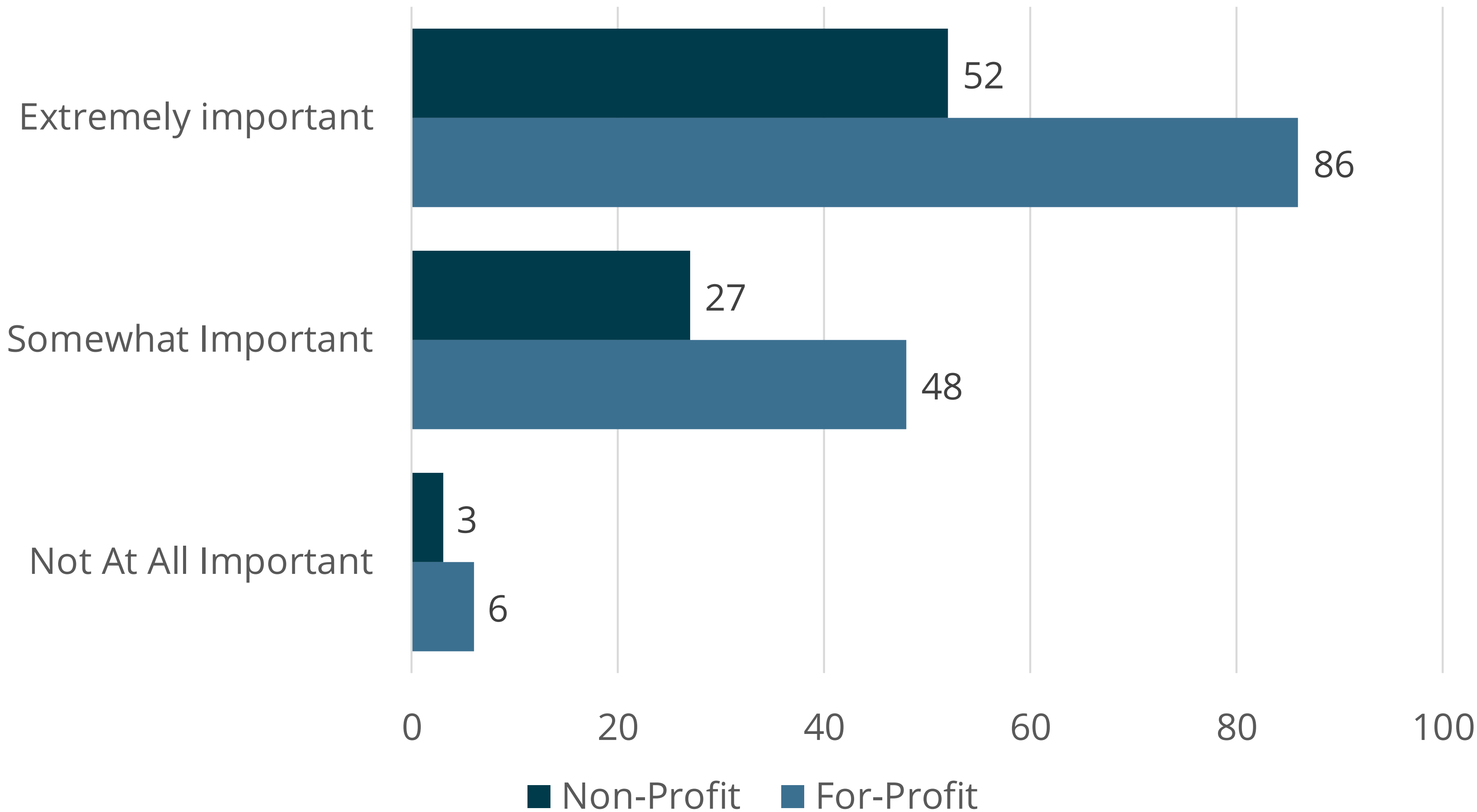
An Industry Recognized Credential

An industry-recognized credential is somewhat important for most employers. For-profit employers placed less emphasis on having a credential.



At Least One Year of Industry-Related Work Experience

A candidate's work experience is considered extremely important by both for-profit and non-profit employers, with both sets of employers answering almost identically.



Technical Training and Expertise

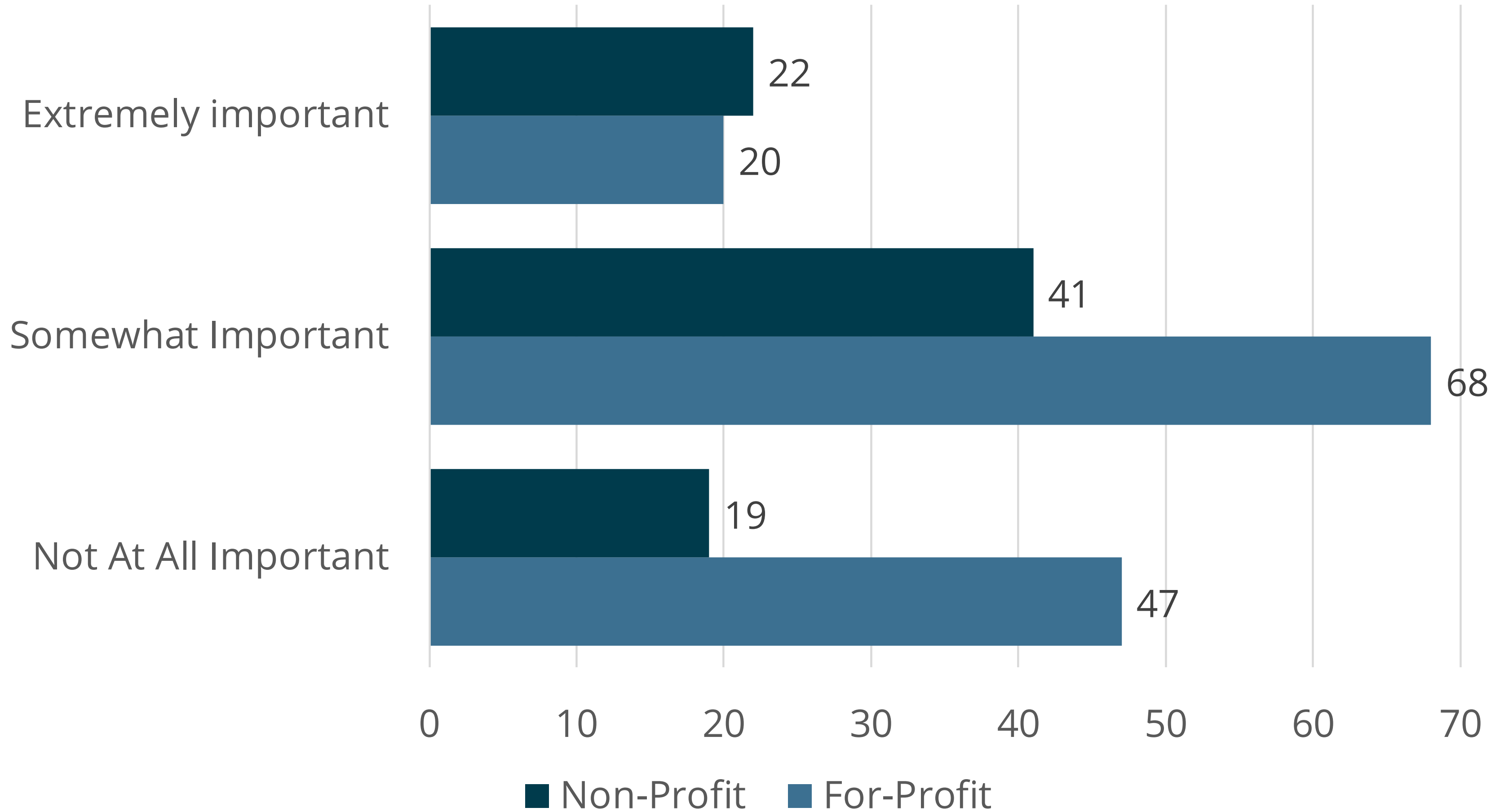
Similarly to work experience, respondents found it extremely important to have their workforce have the technical training and expertise specific to their jobs. With almost identical figures

67% Of For-Profit firms see technical training and expertise as extremely important

60% Of Non-Profit firms see technical training and expertise as extremely important

A Four-Year College Degree or Higher

A candidate's work experience is considered extremely important by both for-profit and non-profit employers, with both sets of employers answering almost identically.



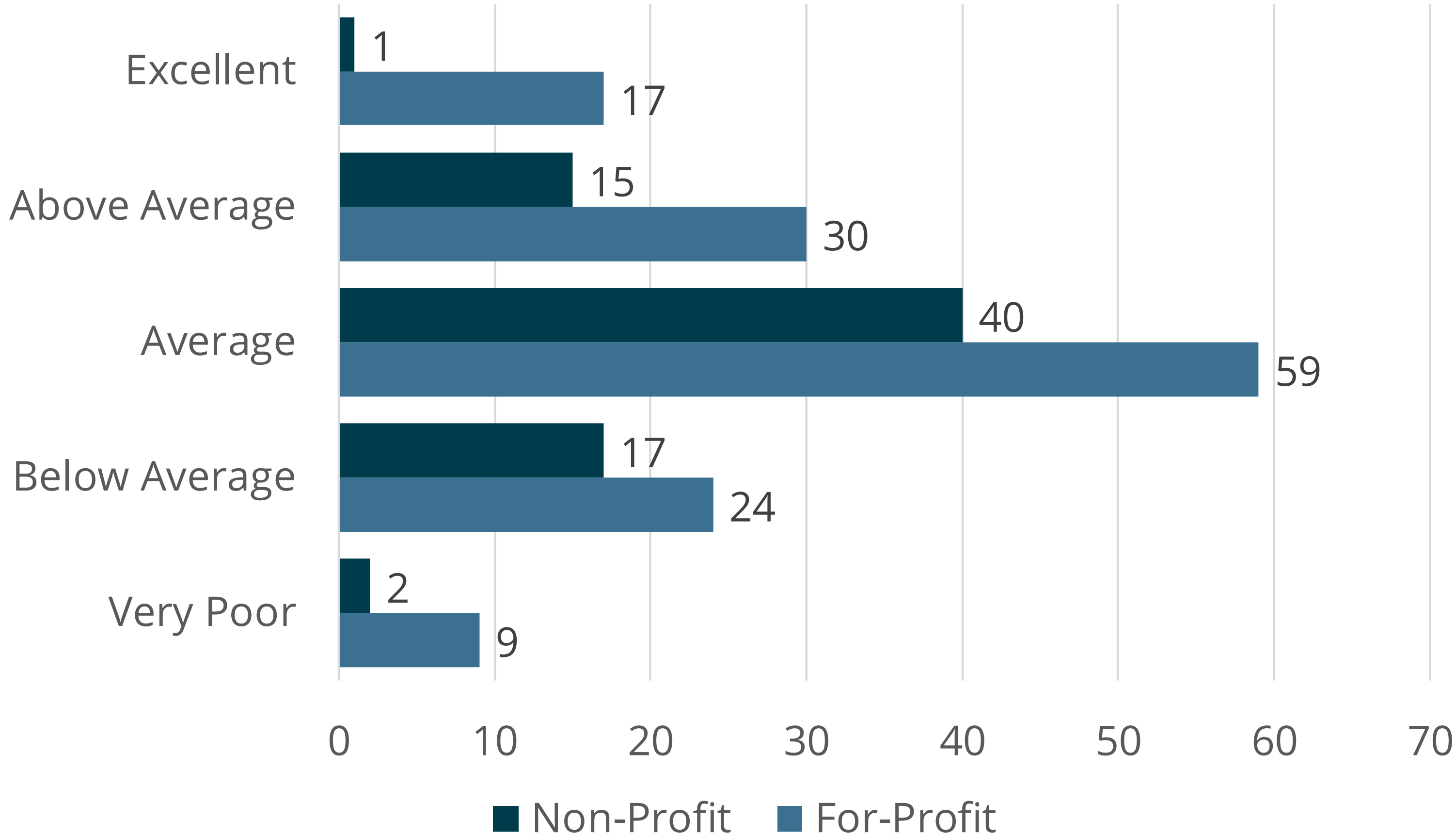
Business Climate

Ease of Starting/Operating a Business

The majority of respondents rated San Diego very well as a place to do business. With for-profit (76%), non-profits (74%), and overall (75%) rating ease of starting or operating a creative industry organization as average, above average, or excellent. This equates to almost 3 in 4 businesses giving a positive rating.

35% **Of For-Profits site "Regulations" as the top reason to rate below average**

50% **Of Non-Profits site "Resources" as the top reason to rate below average**

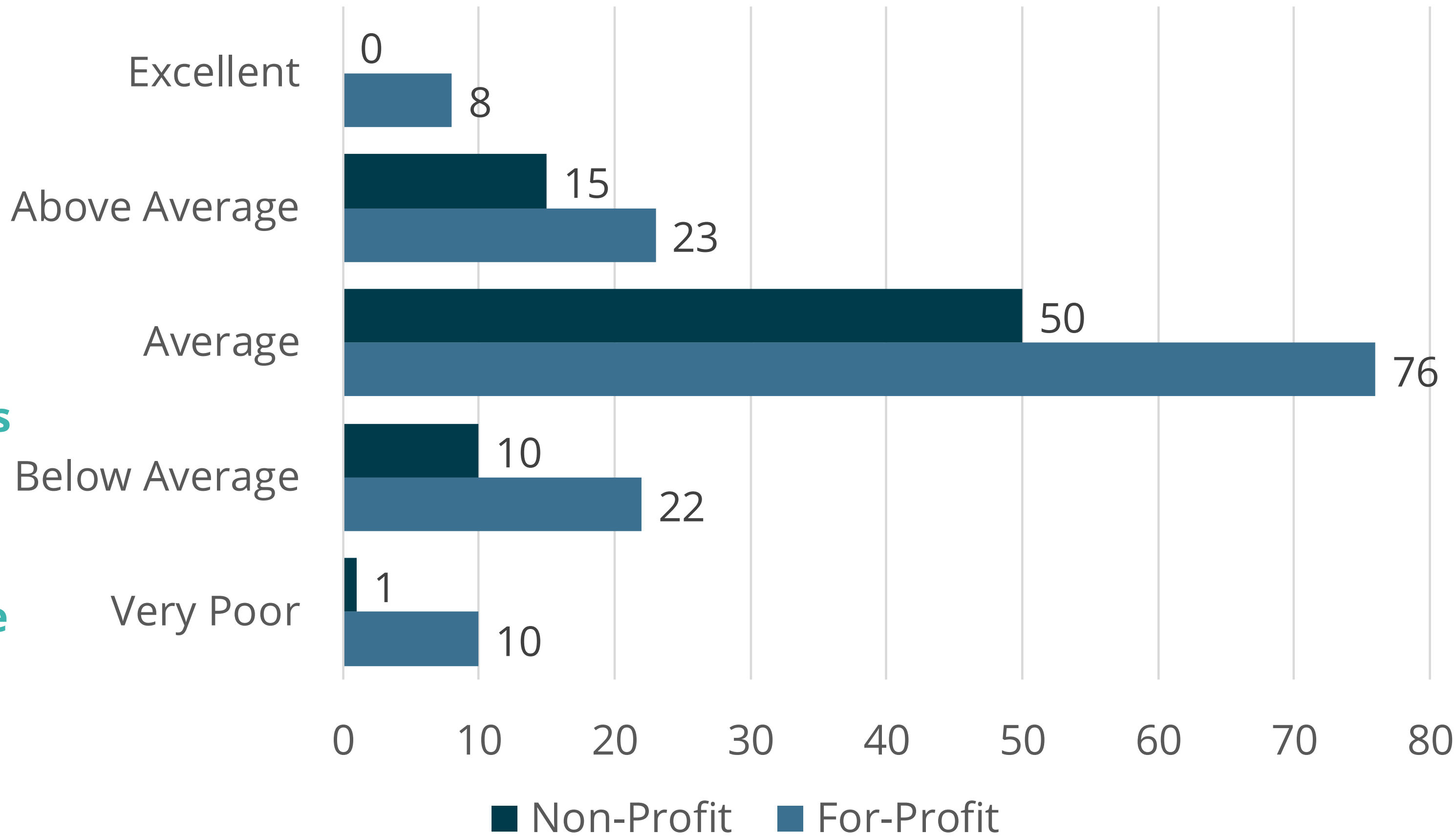


Ease of Hiring

Most creative economy businesses had positive experiences in hiring, with for-profit (78%), non-profit (86%), and overall (79%) of respondents rating as average, above average, or excellent in hiring in San Diego County.

39% **Of For-Profits site "AB 5" as the top reason to rate below average**

57% **Of Non-Profits site "Laborer Shortage" as the top reason to rate below average**

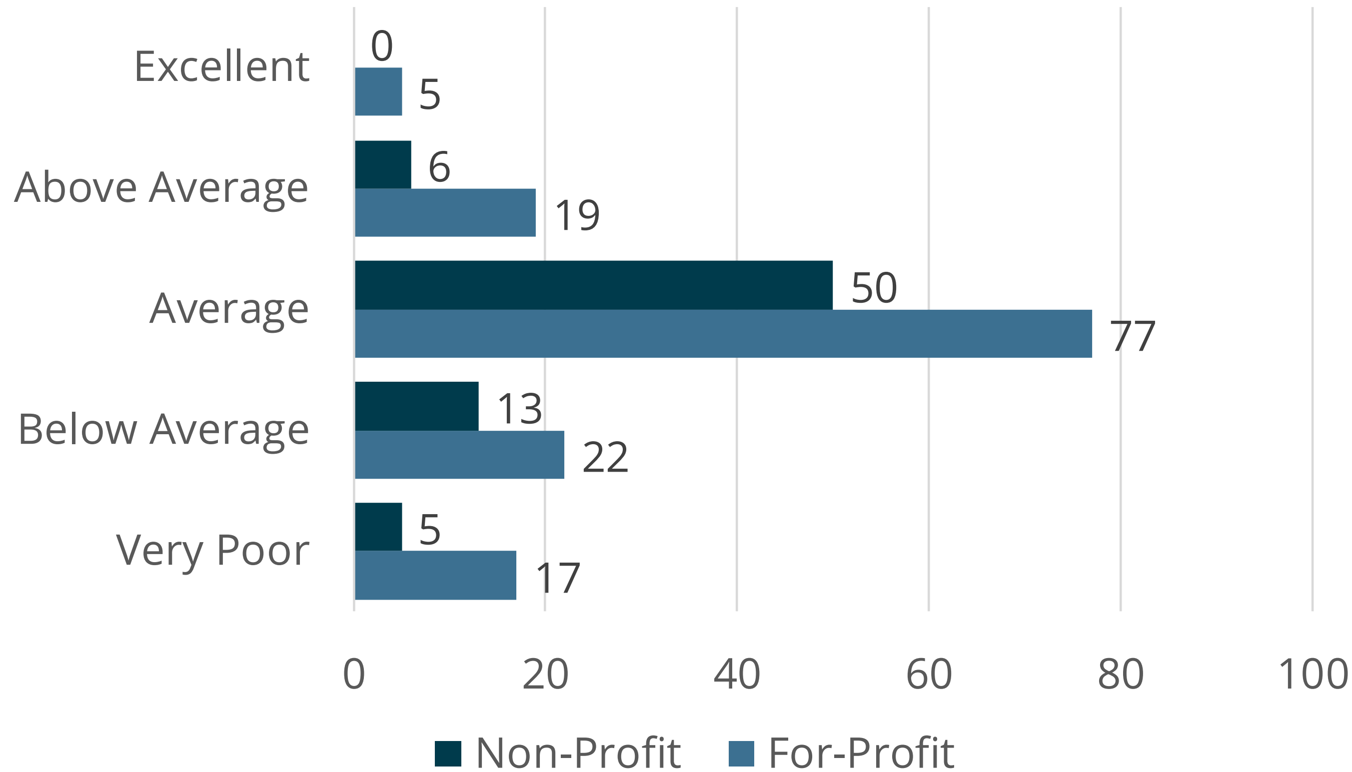


Ease of Business Regulations

Similarly to the prior figures, most creative economy businesses had positive ratings for the ease of business regulations in San Diego. Ratings from for-profit (73%), non-profit (76%), overall (73%) were generally positive with most rating average, above average, or excellent.

44% **Of For-Profits site "AB 5" as the top reason to rate below average**

25% **Of Non-Profits site "Administrative Difficulty" as the top reason to rate below average**

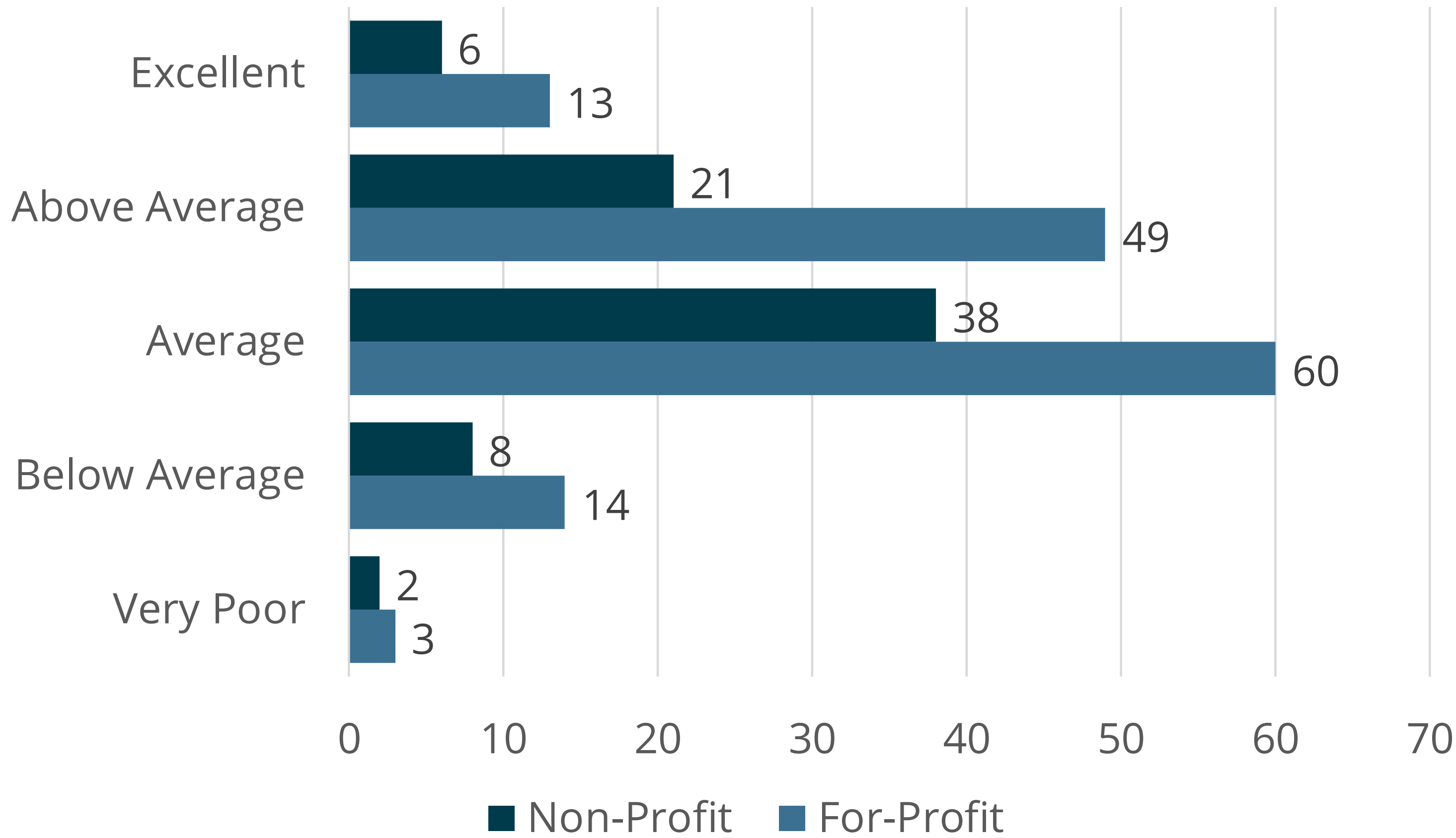


Skilled Workforce

Companies are overwhelmingly pleased with the skilled workforce in San Diego. For-profits (88%), non-profits (87%), overall (87%) of companies gave an average, above average, or excellent rating for San Diego having a skilled workforce.

55%

Of all creative firms site "Laborer Shortage" as the top reason to rate below average

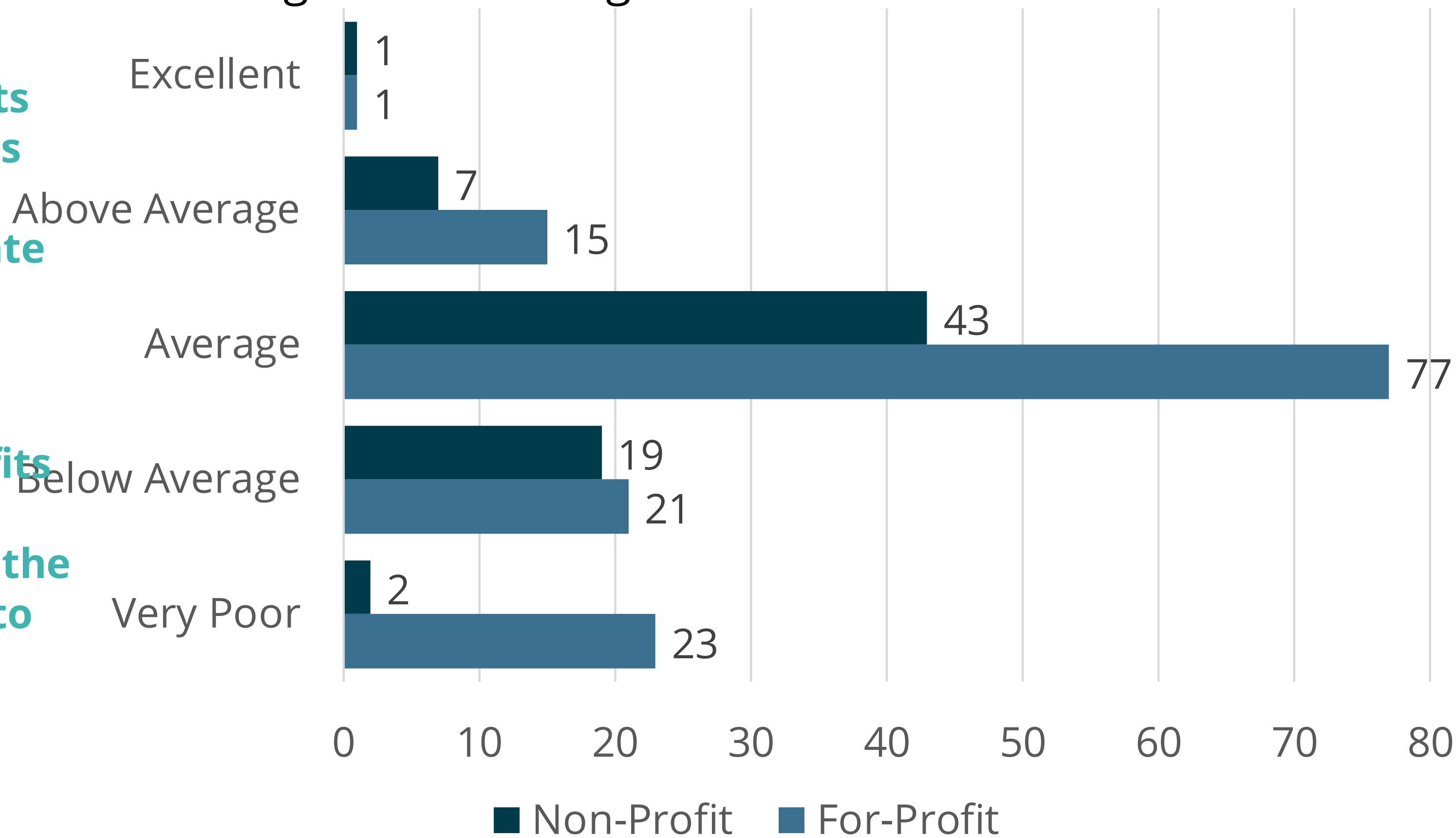


Government Regulation

Government regulation was rated lower than other questions, with for-profit (68%), non-profit (71%), overall (68%) rating average, above average, or excellent on government regulations. Although this is slightly lower ratings, overall, 2 in 3 businesses are satisfied with the government regulations.

48% **Of For-Profits site "AB 5" as the top reason to rate below average**

38% **Of Non-Profits site "Inhibit Success" as the top reason to rate below average**

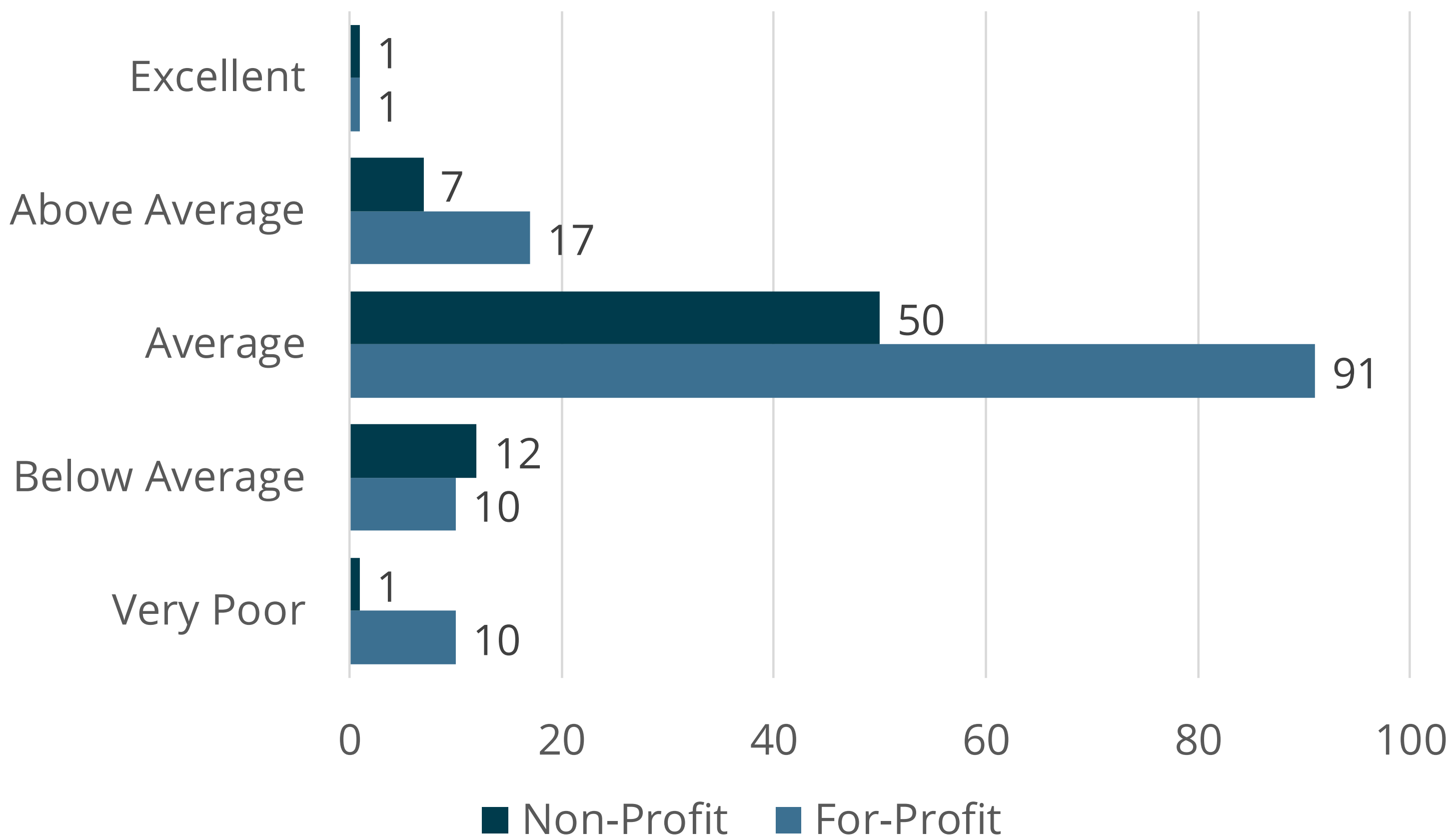


Contracting & Procurement

Respondents rated contracting and procurement highly, for-profit (85%), non-profit (81%), overall (81%) rating average, above average, or excellent.

28%

Of creative firms site "Difficult Process" as the top reason to rate below average

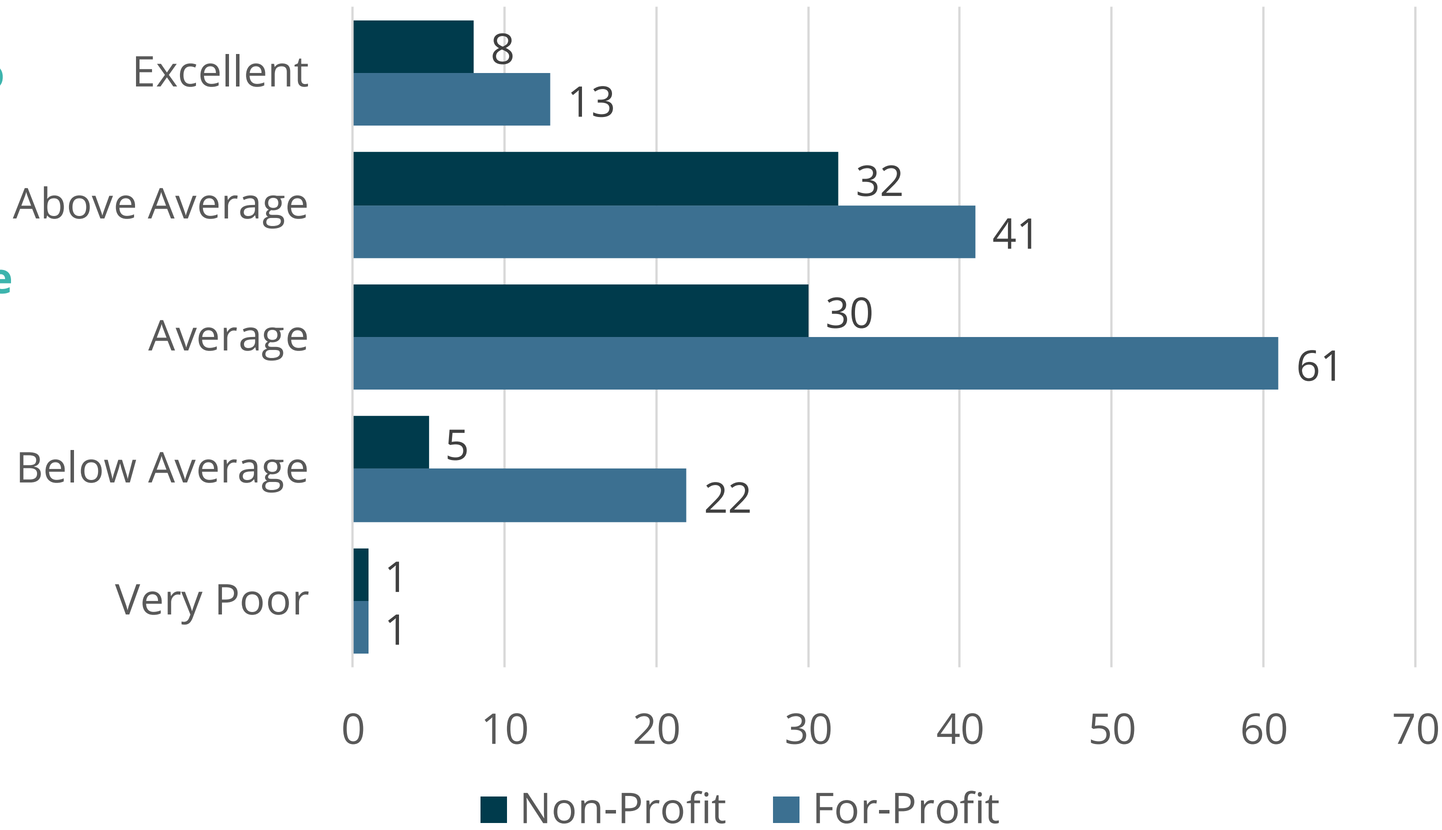


Training & Networking Opportunities

Creative economy industry businesses were overwhelmingly pleased with the training and networking opportunities in the San Diego region. For-profit (83%), non-profit (92%), overall (86%).

45%

Of creative firms site "No Local Options" as the top reason to rate below average

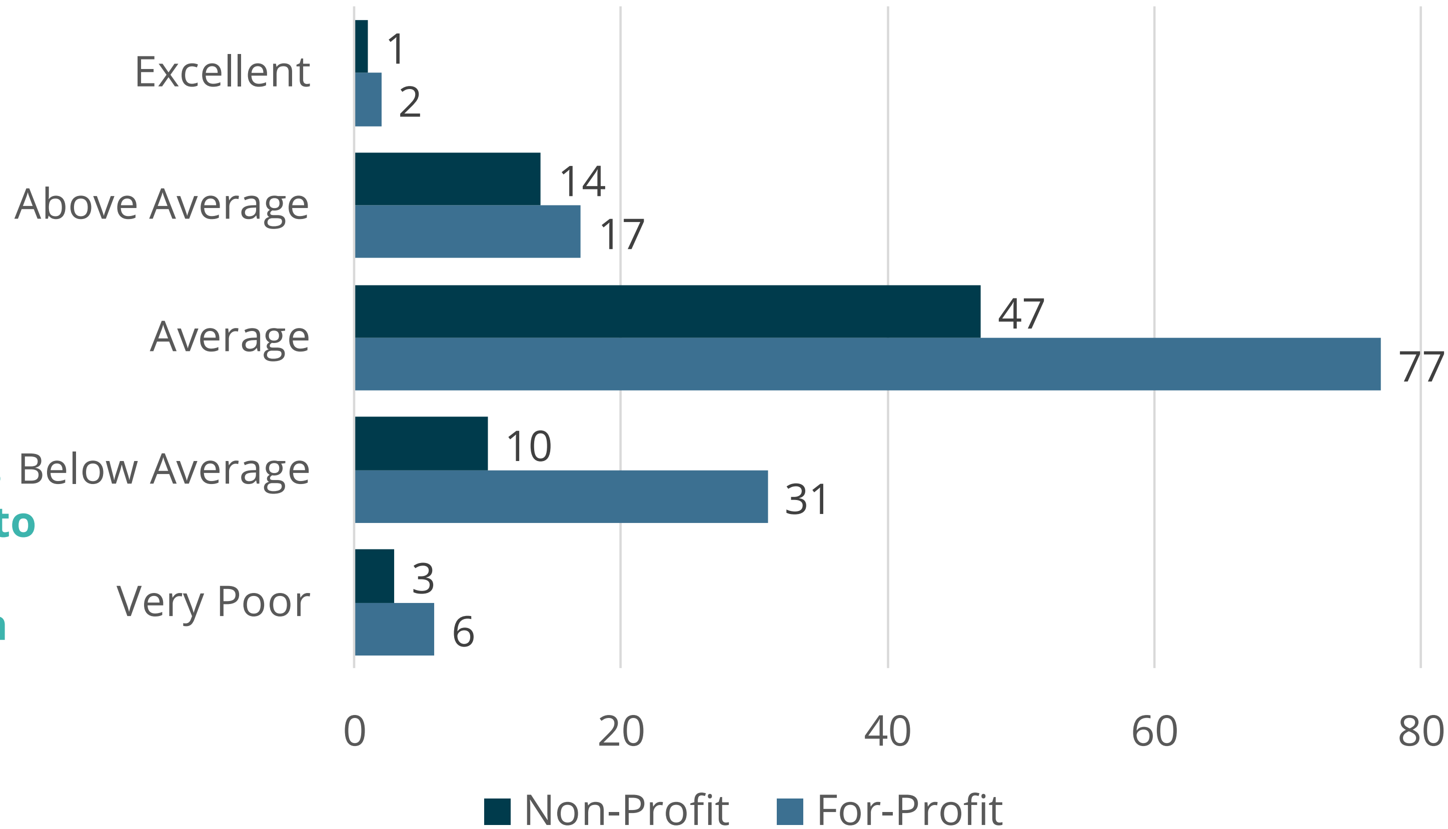


Government Websites for Business Assistance

The majority of creative economy businesses were satisfied with the existing government websites for business assistance. With for-profit (71%), non-profit (83%), overall (74%) rating the websites as average, above average, or excellent.

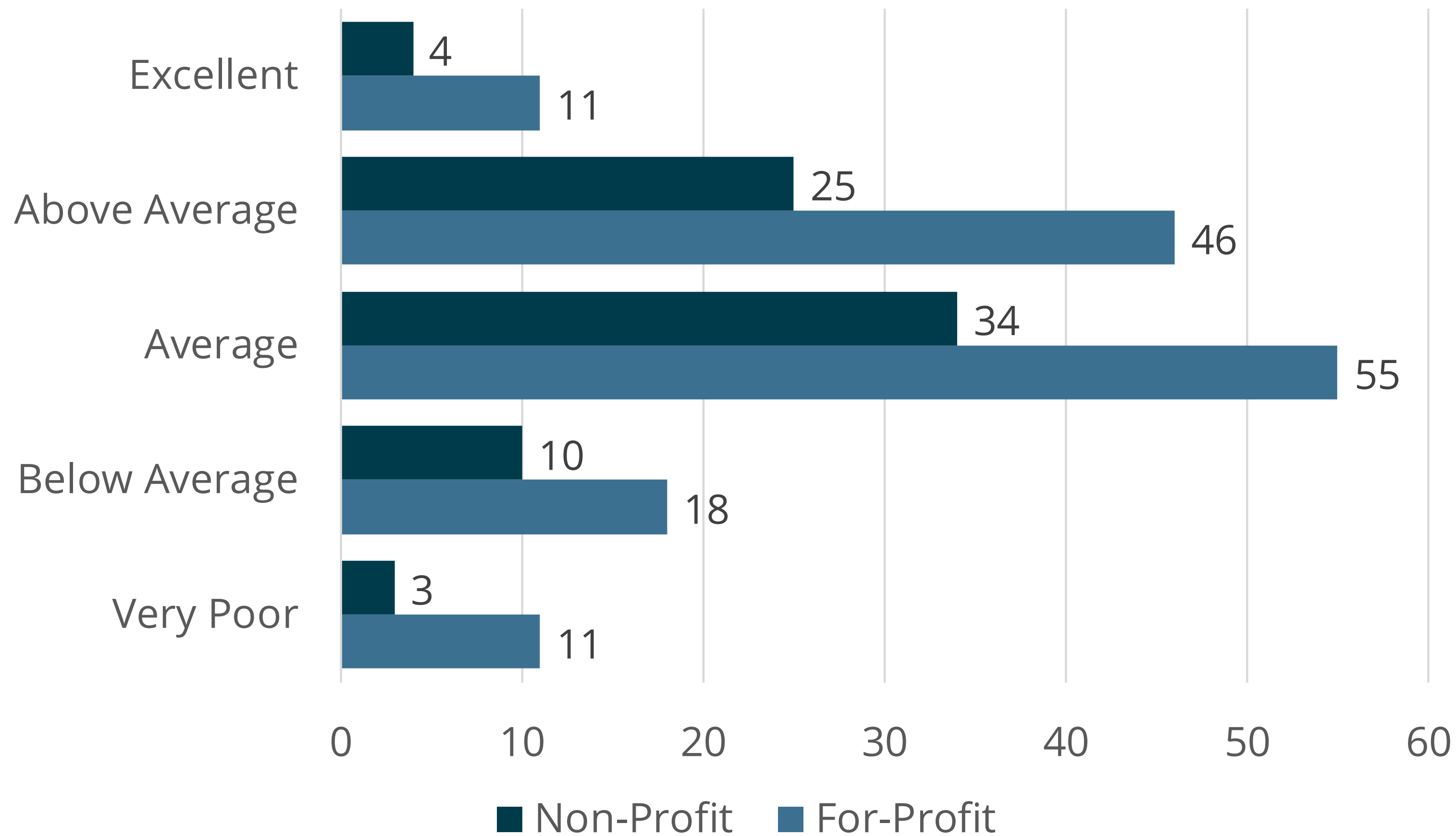
48% Of For-Profits site "Nonexistent" as the top reason to rate below average

43% Of Non-Profits site "Difficult to Maneuver" as the top reason to rate below average



Overall, as a Place to Conduct Business

A vast majority of creative firms rated San Diego as a good place to do business. With for-profits (80%), non-profits (83%), and overall (80%) rating average, above average, or excellent. It is worth calling out that this question had a high percentage of companies rating above average or excellent, with for-profits (41%), non-profits (38%), overall (38%) giving a higher than average rating.



Employer Perceptions

"It [government agencies] should be subsidizing artist spaces and venues to make it easier for creatives to not just survive, but thrive here."

"There are states that give tax incentives and are very supportive of production."

"Simply put, when traveling to other cities it becomes quickly apparent to recognize if the city is one that curates culture, or if that culture is curated by its citizens. "

Most Cited Challenges

29% Of For-Profits site “Lack of Resources” as the top challenge to do business in San Diego

32% Of Non-Profits site “Cost of Living” as the top challenge to do business in San Diego

Appendix

Survey Overview

Quantitative: Web-based survey // 277 total qualified respondents

+ 425 respondents: sourced from EDC, UCSD, and other partner organizations
+ 277 qualified respondents: including decision-makers that work in creative industries

Qualifying companies:

+ Decision makers within creative firms, operating in San Diego County
+ Excluded: outside of San Diego County, they were not a decision-maker, anyone that did not select their business type, *and* their industry *and* did not complete any questions after that

Survey distribution process:

+ EDC, UCSD Extension, and partner organization databases: Email from each organization with direct link

Questionnaire development, programming, and fieldwork management:

+ UCSD Extension drafted the questionnaire, programmed the online survey interface, and managed the fieldwork/distribution with help from EDC team

Advisory Committee

Ann Berchtold	MIG Design
Christina Biber	City of San Diego
Bastiaan Bouma	AIA San Diego
Kirby Brady	City of San Diego
John Eger	SDSU Creative Economy Initiative
Jonathon Glus	City of San Diego
James Halliday	A Reason to Survive (ARTS)
Jane Hare	San Diego Media Pros
Lee Ann Kim	Pacific Arts Movement
Georgia Kovacs	UCSD Extension
Barbara Cosio Moreno	San Diego Theatres
Angelo Outlaw	AIGA San Diego
Susanna Peredo Swap	Vanguard Culture
Mario Sanguinet	Arts Professional
Brandy Shimabukuro	City of San Diego
Russ Sperling	San Diego Unified School District

Produced by

SAN DIEGO REGIONAL EDC

Commissioned by

The City of SAN DIEGO

Produced March 2020

CREATIVE ECONOMY

IN THE SAN DIEGO REGION

CREATIVE INDUSTRY SNAPSHOT

SAN DIEGO REGIONAL EDC

Parameters

Industries

71 items selected. See Appendix A for details.

Regions

Code	Description
41740	San Diego-Chula Vista-Carlsbad, CA

Timeframe

2014 - 2019

Datarun

2019.4 – QCEW Employees, Non-QCEW Employees, and Self-Employed

Creative Economy Industries in San Diego-Chula Vista-Carlsbad, CA

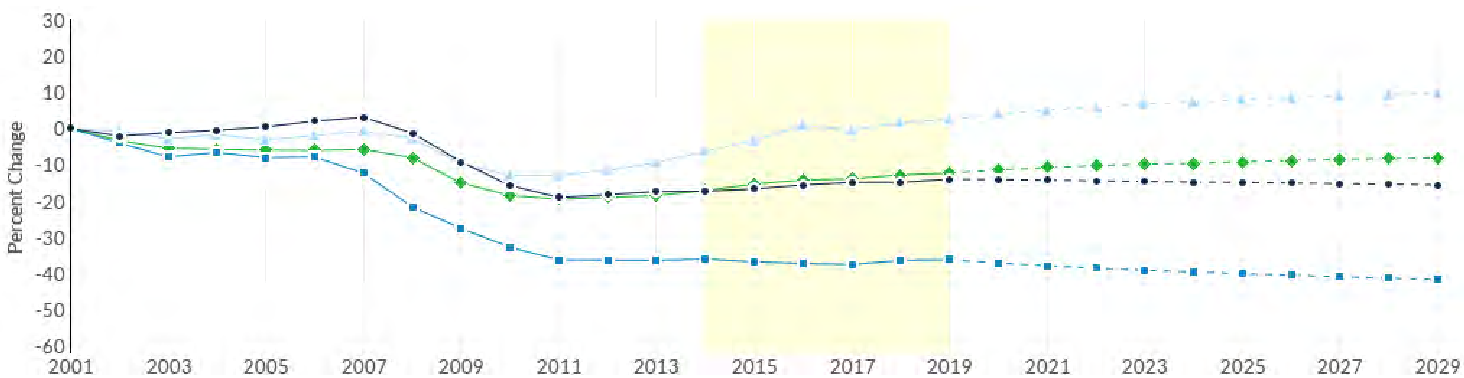
Industry Summary for Creative Economy Industries

51,206	+4.1%	$76,153
Jobs (2019)	**% Change (2014-2019)**	**Avg. Earnings Per Job (2019)**
2% below National average	Nation: +5.8%	Nation: $89,013

Industry Detail

Payrolled Business Locations (2019)	3,926
Jobs Multiplier	5
Unemployed	Only Available for 2-Digit

Regional Trends

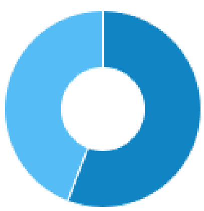


	Region	2014 Jobs	2019 Jobs	Change	% Change
●	Region	49,212	51,206	1,994	4.1%
■	San Marcos	952	950	-2	-0.2%
▲	State	846,317	926,401	80,084	9.5%
◆	Nation	4,630,088	4,898,295	268,207	5.8%

Occupations Employed by these Industries

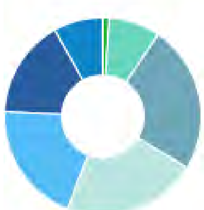
Description	Employed in Industry Group (2019)	% of Total Jobs in Industry Group (2019)
Graphic Designers	2,100	4.1%
Interior Designers	1,265	2.5%
Software Developers, Applications	1,250	2.4%
Writers and Authors	1,199	2.3%
General and Operations Managers	1,054	2.1%

Industry Gender Breakdown



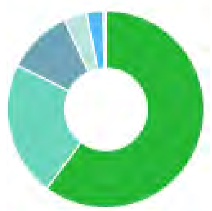
Gender	2019 Jobs	2019 Percent
Males	28,581	55.8%
Females	22,625	44.2%

Industry Age Breakdown



Age	2019 Jobs	2019 Percent
14-18	539	1.1%
19-24	4,345	8.5%
25-34	12,369	24.2%
35-44	11,341	22.1%
45-54	10,194	19.9%
55-64	8,257	16.1%
65+	4,160	8.1%

Industry Race/Ethnicity Breakdown



Race/Ethnicity	2019 Jobs	2019 Percent
White	30,818	60.2%
Hispanic or Latino	11,310	22.1%
Asian	5,504	10.7%
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Industry Requirements

Purchases from	In-region Purchases	Imported Purchases	Total Purchases
Motion Picture and Video Production	$32,459,307	$144,539,607	$176,998,914
Cable and Other Subscription Programming	$174,941,567	$286,941	$175,228,508
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Corporate, Subsidiary, and Regional Managing Offices	$68,434,827	$94,401,903	$162,836,729
Lessors of Residential Buildings and Dwellings	$153,730,816	$92,929	$153,823,745

Top Regional Businesses

Business Name	Industry Name	Business Size
Aarrow Sign Spinners	Advertising Agencies (541810)	950
Advanced Marketing Services Inc	Book Publishers (511130)	850
Union-tribune Publishing Co	Newspaper Publishers (511110)	850
The San Biego Union Tribune	Newspaper Publishers (511110)	600
Penny Saver	Advertising Agencies (541810)	550

Business Data by DatabaseUSA.com is third-party data provided by Emsi to its customers as a convenience, and Emsi does not endorse or warrant its accuracy or consistency with other published Emsi data.

Appendix A - Industries

Code	Description
315190	Other Apparel Knitting Mills
315210	Cut and Sew Apparel Contractors
315220	Men's and Boys' Cut and Sew Apparel Manufacturing
315240	Women's, Girls', and Infants' Cut and Sew Apparel Manufacturing
315280	Other Cut and Sew Apparel Manufacturing
315990	Apparel Accessories and Other Apparel Manufacturing
316210	Footwear Manufacturing
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
334614	Software and Other Prerecorded Compact Disc, Tape, and Record Reproducing
337212	Custom Architectural Woodwork and Millwork Manufacturing
339910	Jewelry and Silverware Manufacturing
339930	Doll, Toy, and Game Manufacturing
339992	Musical Instrument Manufacturing
423410	Photographic Equipment and Supplies Merchant Wholesalers
424920	Book, Periodical, and Newspaper Merchant Wholesalers
451140	Musical Instrument and Supplies Stores
451211	Book Stores
453920	Art Dealers
511110	Newspaper Publishers

Code	Description
512250	Record Production and Distribution
512290	Other Sound Recording Industries
515111	Radio Networks
515112	Radio Stations
515120	Television Broadcasting
515210	Cable and Other Subscription Programming
519110	News Syndicates
519120	Libraries and Archives
519130	Internet Publishing and Broadcasting and Web Search Portals
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)
532282	Video Tape and Disc Rental
541310	Architectural Services
541320	Landscape Architectural Services
541340	Drafting Services
541410	Interior Design Services
541420	Industrial Design Services
541430	Graphic Design Services
541490	Other Specialized Design Services
541810	Advertising Agencies
541921	Photography Studios, Portrait
541922	Commercial Photography
561920	Convention and Trade Show Organizers
611610	Fine Arts Schools
711110	Theater Companies and Dinner Theaters
711120	Dance Companies
711130	Musical Groups and Artists

511120	Periodical Publishers
511130	Book 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
512230	Music Publishers
512240	Sound Recording Studios
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

Appendix B - Data Sources and Calculations

Industry Data

Emsi industry data have various sources depending on the class of worker. (1) For QCEW Employees, Emsi primarily uses the QCEW (Quarterly Census of Employment and Wages), with supplemental estimates from County Business Patterns. (2) Non-QCEW employees data are based on a number of sources including QCEW, Current Employment Statistics, County Business Patterns, BEA State and Local Personal Income reports, the National Industry-Occupation Employment Matrix (NIOEM), the American Community Survey, and Railroad Retirement Board statistics. (3) Self-Employed and Extended Proprietor classes of worker data are primarily based on the American Community Survey, Nonemployer Statistics, and BEA State and Local Personal Income Reports. Projections for QCEW and Non-QCEW Employees are informed by NIOEM and long-term industry projections published by individual states.

Input-Output Data

The input-output model in this report is Emsi's gravitational flows multi-regional social account matrix model (MR-SAM). It is based on data from the Census Bureau's Current Population Survey and American Community Survey; as well as the Bureau of Economic Analysis' National Income and Product Accounts, Input-Output Make and Use Tables, and Gross State Product data. In addition, several Emsi in-house data sets are used, as well as data from Oak Ridge National Labs on the cost of transportation between counties.

Staffing Patterns Data

The staffing pattern data in this report are compiled from several sources using a specialized process. For QCEW and Non-QCEW Employees classes of worker, sources include Occupational Employment Statistics, the National Industry-Occupation Employment Matrix, and the American Community Survey. For the Self-Employed and Extended Proprietors classes of worker, the primary source is the American Community Survey, with a small amount of information from Occupational Employment Statistics.

DatabaseUSA.com Business-Level Data

Data for individual businesses is provided by DatabaseUSA.com, which maintains a database of more than 14 million U.S. business entities. Note that in aggregate it will not be consistent with Emsi labor market data due to differences in definitions, methodology, coverage, and industry/geographic classification.

State Data Sources

This report uses state data from the following agencies: Alabama Department of Industrial Relations; Alaska Department of Labor and Workforce Development; Arizona Department of Administration, Office of Employment and Population Statistics; Arkansas Department of Workforce Services; California Labor Market Information Department; Colorado Department of Labor and Employment; Connecticut did not provide us with a data source; Delaware Office of Occupational and Labor Market Information, Delaware Wages 2004; District of Columbia Department of Employment Services; Florida Department of Economic Opportunity; Georgia Department of Labor, Workforce Information and Analysis, Occupational Information Services Unit; Hawaii Department of Labor and Industrial Relations, Research and Statistics Office; Idaho Department of Labor; Illinois Department of Employment Security, Employment Projections; Indiana Department of Workforce Development; Iowa Workforce Development; Kansas Department of Labor, Labor Market Information Services, Kansas Wage Survey; Kentucky Office of Employment and Training; Louisiana Department of Labor; Maine did not provide us with a data source; Maryland Department of Labor, Licensing and Regulation, Office of Labor Market Analysis and Information; Massachusetts Executive Office of Labor and Workforce Development; Michigan Department of Labor and Economic Growth, Bureau of Labor Market Information and Strategic Initiatives; Minnesota Department of Employment and Economic Development; Mississippi Department of Employment Security; Missouri Department of Economic Development; Montana Department of Labor and Industry, Research and Analysis Bureau; Nebraska Workforce Development; Nevada Department of Employment, Training and Rehabilitation, Information Development and Processing Division, Research and Analysis Bureau; New Hampshire Department of Employment Security; New Jersey Department of Labor and Workforce Development; New Mexico Department of Labor, Bureau of Economic Research and Analysis; New York Department of Labor, Division of Research and Statistics; North Carolina Department of Commerce, Labor and Economic Analysis Division; North Dakota Job Service, Labor Market Information Center; Ohio Department of Job and Family Services, Labor Market

Information Division; Oklahoma Employment Security Commission; Oregon Employment Department, Oregon Labor Market Information System; Pennsylvania Department of Labor and Industry, Center for Workforce Information and Analysis; Rhode Island did not provide us with a data source; South Carolina Employment Security Commission, Labor Market Information Department; South Dakota Department of Labor, Labor Market Information Division; Tennessee Department of Labor and Workforce Development, Research and Statistics Division; Texas Workforce Commission; Utah Department of Workforce Services; Vermont did not provide us with a data source; Virginia Employment Commission, Economic Information Services; Washington State Employment Security Department, Labor Market and Economic Analysis Branch; West Virginia Bureau of Employment Programs, Research Information & Analysis Division; Wisconsin Department of Workforce Development, Bureau of Workforce Information; Wyoming Department of Employment, Research and Planning

CREATIVE ECONOMY

IN THE SAN DIEGO REGION

PROFILE ANALYTICS

SAN DIEGO REGIONAL EDC

Parameters

Regions

Code	Description
41740	San Diego-Chula Vista-Carlsbad, CA

Occupations

77 items selected. See Appendix A for details.

Education Level

Any

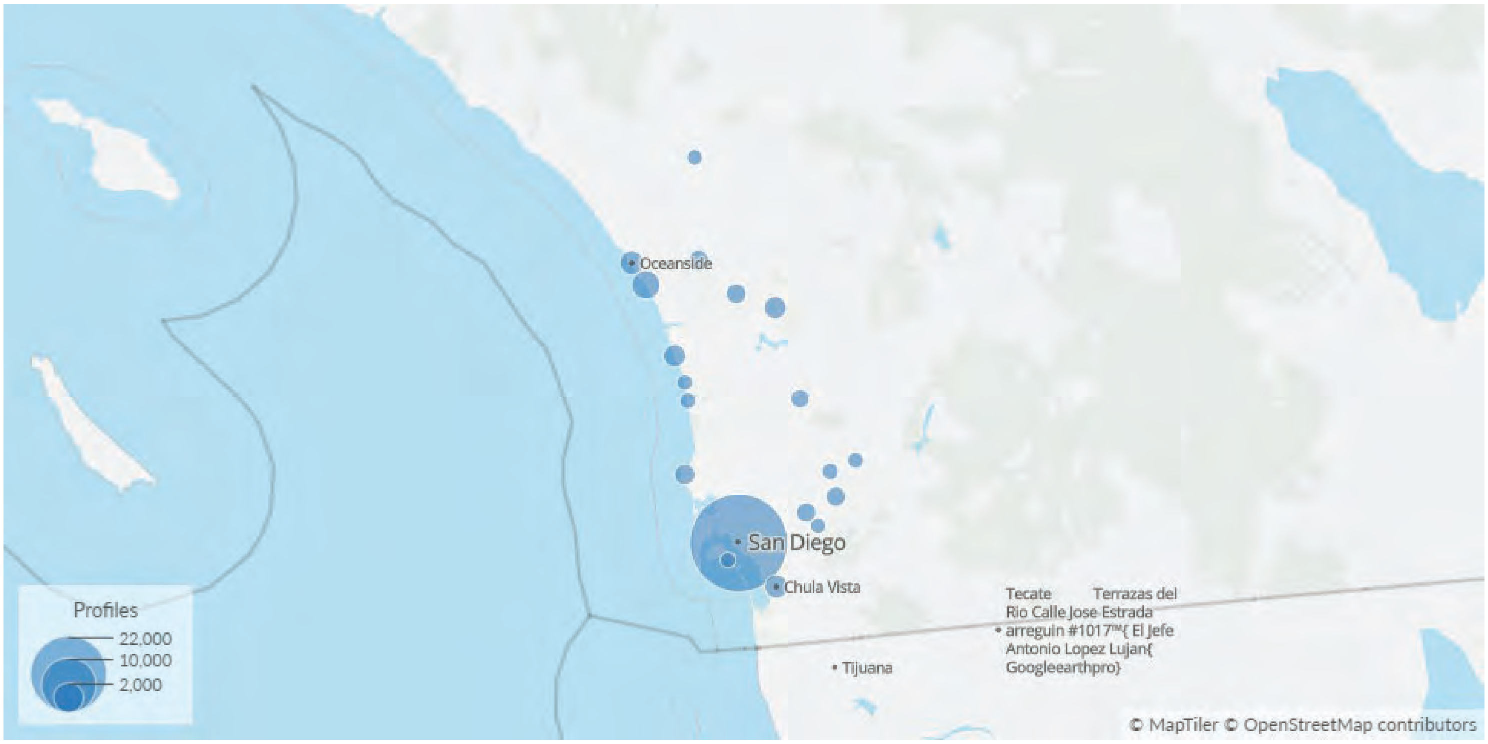
Keyword Search

Profiles in This Report Have Had Activity or Been Updated Since

2019

50,410

Profiles (updated since 2019)



Top Cities

City	Profiles	Percent
San Diego, CA	38,853	77.07%
Carlsbad, CA	1,781	3.53%
Oceanside, CA	1,058	2.10%
Chula Vista, CA	943	1.87%
Encinitas, CA	841	1.67%
Escondido, CA	803	1.59%
Vista, CA	598	1.19%
La Jolla, San Diego, CA	594	1.18%
San Marcos, CA	556	1.10%
El Cajon, CA	535	1.06%

Top Companies

Company	Profiles	Percent
Qualcomm Incorporated	1,217	2.41%
Intuit Inc.	467	0.93%
Northrop Grumman Corporation	343	0.68%
General Atomics	306	0.61%
University of California	284	0.56%
Illumina, Inc.	258	0.51%
Teradata Corporation	226	0.45%
Amazon.com, Inc.	215	0.43%
Viasat, Inc.	212	0.42%
Google Inc.	196	0.39%

Top Occupations

Occupation (SOC)	Profiles	Percent
Marketing Managers	12,228	24.26%
Software Developers, Applications	10,645	21.12%
Public Relations Specialists	3,496	6.94%
Graphic Designers	3,127	6.20%
Public Relations and Fundraising Managers	2,586	5.13%
Web Developers	2,114	4.19%
Software Developers, Systems Software	1,732	3.44%
Producers and Directors	1,515	3.01%
Editors	993	1.97%
Art Directors	954	1.89%

Top Job Titles

Job Title	Profiles	Percent
Software Engineer	3,804	7.55%
Marketing Director	1,086	2.15%
Marketing Manager	1,030	2.04%
Graphic Designer	907	1.80%
Business Development Manager (Management)	906	1.80%
Product Manager (Management)	769	1.53%
Creative Director	714	1.42%
Software Developer	660	1.31%
Photographer	607	1.20%
Designer	549	1.09%

Top Schools

School	Profiles	Percent
San Diego State University	5,624	11.16%
University of California, San Diego	4,367	8.66%
University of San Diego	1,090	2.16%
California State University, San Marcos	839	1.66%
University of California, Los Angeles	795	1.58%
Palomar College	782	1.55%
San Diego Mesa College	683	1.35%
The Art Institutes	646	1.28%
University of Southern California	641	1.27%
National University	588	1.17%

Top Programs

Program	Profiles	Percent
Computer Science	3,712	7.36%
Business Administration, Management and Operations	3,560	7.06%
Communication and Media Studies	2,665	5.29%
Marketing	2,421	4.80%
Design and Applied Arts	1,851	3.67%
Computer Engineering	1,391	2.76%
Electrical, Electronics and Communications Engineering	1,389	2.76%
Drafting/Design Engineering Technologies/Technicians	1,166	2.31%
Engineering, General	975	1.93%
Psychology, General	881	1.75%

Top Skills & Qualifications

Skill/Qualification	Profiles	Percent
Management	17,239	34.20%
Leadership	14,234	28.24%
Sales	14,162	28.09%
Customer Service	11,835	23.48%
Microsoft Office	11,790	23.39%
Research	9,948	19.73%
Microsoft Excel	9,184	18.22%
Public Speaking	8,433	16.73%
Social Media	8,285	16.44%
Marketing Strategies	8,051	15.97%

Appendix A - Occupations

Code	Description	Code	Description
11-2011	Advertising and Promotions Managers	27-2099	Entertainers and Performers, Sports and Related Workers, All Other
11-2021	Marketing Managers	27-3011	Radio and Television Announcers
11-2031	Public Relations and Fundraising Managers	27-3021	Broadcast News Analysts
13-1011	Agents and Business Managers of Artists, Performers, and Athletes	27-3022	Reporters and Correspondents
15-1131	Computer Programmers	27-3031	Public Relations Specialists
15-1132	Software Developers, Applications	27-3041	Editors
15-1133	Software Developers, Systems Software	27-3042	Technical Writers
15-1134	Web Developers	27-3043	Writers and Authors
17-1011	Architects, Except Landscape and Naval	27-3099	Media and Communication Workers, All Other
17-1012	Landscape Architects	27-4011	Audio and Video Equipment Technicians
17-1021	Cartographers and Photogrammetrists	27-4012	Broadcast Technicians
17-3011	Architectural and Civil Drafters	27-4013	Radio Operators
19-3091	Anthropologists and Archaeologists	27-4014	Sound Engineering Technicians
19-3093	Historians	27-4021	Photographers
25-4011	Archivists	27-4031	Camera Operators, Television, Video, and Motion Picture
25-4012	Curators	27-4032	Film and Video Editors
25-4013	Museum Technicians and Conservators	27-4099	Media and Communication Equipment Workers, All Other
25-4021	Librarians	39-3021	Motion Picture Projectionists

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

39-3092	Costume Attendants
39-5091	Makeup Artists, Theatrical and Performance
43-9031	Desktop Publishers
47-2044	Tile and Marble Setters
47-2161	Plasterers and Stucco Masons
49-9061	Camera and Photographic Equipment Repairers
49-9063	Musical Instrument Repairers and Tuners
51-6041	Shoe and Leather Workers and Repairers
51-6051	Sewers, Hand
51-6052	Tailors, Dressmakers, and Custom Sewers
51-6092	Fabric and Apparel Patternmakers
51-7011	Cabinetmakers and Bench Carpenters
51-7021	Furniture Finishers
51-7031	Model Makers, Wood
51-9051	Furnace, Kiln, Oven, Drier, and Kettle Operators and Tenders
51-9071	Jewelers and Precious Stone and Metal Workers
51-9123	Painting, Coating, and Decorating Workers
51-9151	Photographic Process Workers and Processing Machine Operators
51-9194	Etchers and Engravers

27-2041	Music Directors and Composers
27-2042	Musicians and Singers
51-9195	Molders, Shapers, and Casters, Except Metal and Plastic

Appendix B - Data Sources and Calculations

Emsi Profiles

Emsi profiles are collected from various public online sources and processed/enriched to provide information such as standardized company name, occupation, skills, and geography. Emsi performs additional filtering and processing to improve compatibility with Emsi data.

CREATIVE ECONOMY

IN THE SAN DIEGO REGION

DATA NOTES

DATABASE DEVELOPMENT

Industry and occupation data come from Emsi, economic modeling. Occupational data comes from emsi profiles that are collected from various public online sources and processed/enriched to provide information such as standardized company name, occupation, skills, and geography. Emsi performs additional filtering and processing to improve compadability with Emsi data. Emsi industry data have various sources depending on the class of worker. (1) For QCEW Employees, Emsi primarily uses the QCEW (Quarterly Census of Employment and Wages), with supplemental estimates from County Business Patterns. (2) Non- QCEW employees data are based on a number of sources including QCEW, Current Employment Statistics, County Business Patterns, BEA State and Local Personal Income reports, the National Industry-Occupation Employment Matrix (NIOEM), the American Community Survey, and Railroad Retirement Board statistics. (3) Self-Employed and Extended Proprietor classes of worker data are primarily based on the American Community Survey, Nonemployer Statistics, and BEA State and Local Personal Income Reports. Projections for QCEW and Non-QCEW Employees are informed by NIOEM and long-term industry projections published by individual states. Data was collected for 2014, 2019, and 2024. Historical data included 2014 data and projected data included 2024 data. The thirteen industry groups and eight occupation groups were modeled by the 2018 Otis Report industry and occupation groupings, and ultimately finalized by the Advisory Committee.

SAN DIEGO REGIONAL EDC

CREATIVE ECONOMY

IN THE SAN DIEGO REGION

DATA NOTES CONT.

SURVEY

The San Diego Regional Economic Development Corporation and the City of San Diego contracted the UC San Diego Extension Center for Research (CR+E) to conduct a comprehensive study that defined, profiled and quantified the economic impact of San Diego's Creative Economy. CR+E conducted a survey, reaching out to decision-makers in more than 3,500 entities that work in the creative industries. Researchers received 425 responses, of which 277 organizations qualified.

Survey results were analyzed using cross-tab analysis to see if there are any nuances on organizations' responses based on the type of entity they are. The following report is grouped by type of businesses that responded, for-profit, non-profit, and the overall respondents (which includes the preceding two).

UC San Diego Extension is the professional education and public service division of UC San Diego whose work focuses on the global trends, technological innovations, and industry trends shaping regional economics with a particular emphasis on workforce issues. The organization's mission is to be a major catalyst for the continued economic, intellectual, and cultural growth of the San Diego and Baja California region. The CR+E is Extension's research arm, which focuses on researching local and global trends and industry developments shaping regional economies. Furthermore, as a public institution, the organization partners with local non-profits to evaluate their impact.

WORKS CITED

1. 2017 San Antonio Creative Industry Growth & Prosperity Report
2. 2018 Otis Report on the Creative Economy of the Los Angeles Region
3. 2019 Otis Report on the Creative Economy
4. Analysis of Colorado's Creative Industries Cluster Employment and Occupations
5. Arts & Economic Prosperity 5: The Economic Impact of Nonprofit Arts & Cultural Organizations & Their Audiences
6. Boston's Creative Economy
7. Measuring Chicago's (Artistically) Creative Economy
8. There's Something About Seattle 2019 Creative Economy Report

PHOTO/ARTIST CREDIT

1. Christian Castaneda, Barrio Dogg mural
2. Clairemont Square Bar Cafe
3. Del Mar Plaza
4. Dustine Brane Hull, Solana Beach mural
5. Kara "KJ" Ashley, La Mesa mural
6. Mario Torero, Holy Ghost Barrior Logan mural

CREATIVE ECONOMY

IN THE SAN DIEGO REGION

CREATIVE INDUSTRY SNAPSHOT

SAN DIEGO REGIONAL EDC

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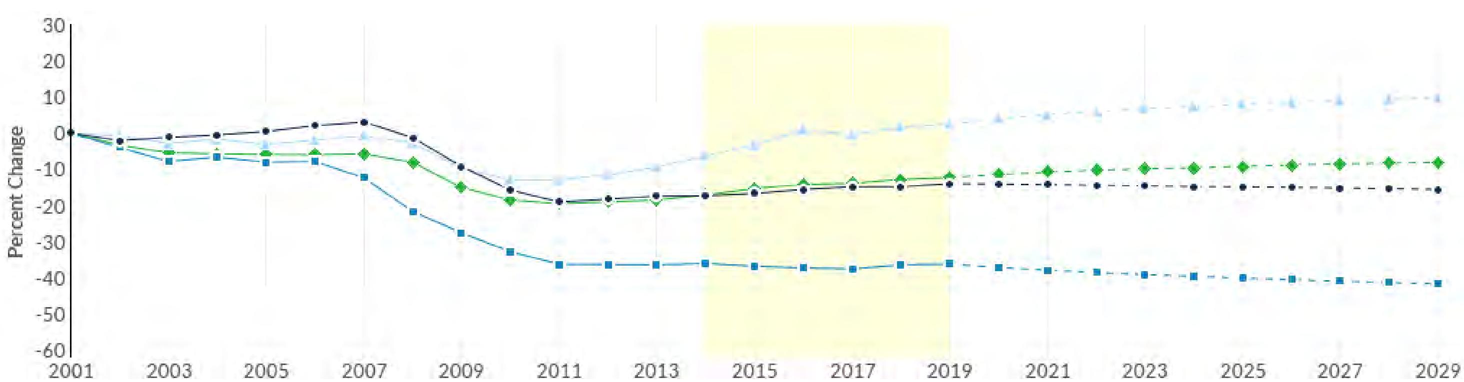

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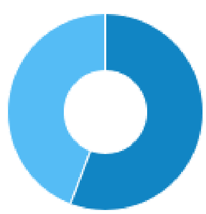

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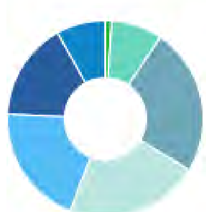

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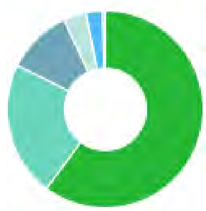

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Corporate, Subsidiary, and Regional Managing Offices	$68,434,827	$94,401,903	$162,836,729
Lessors of Residential Buildings and Dwellings	$153,730,816	$92,929	$153,823,745

Top Regional Businesses

Business Name	Industry Name	Business Size
Aarrow Sign Spinners	Advertising Agencies (541810)	950
Advanced Marketing Services Inc	Book Publishers (511130)	850
Union-tribune Publishing Co	Newspaper Publishers (511110)	850
The San Biego Union Tribune	Newspaper Publishers (511110)	600
Penny Saver	Advertising Agencies (541810)	550

Business Data by DatabaseUSA.com is third-party data provided by Emsi to its customers as a convenience, and Emsi does not endorse or warrant its accuracy or consistency with other published Emsi data.

Appendix A - Industries

Code	Description
315190	Other Apparel Knitting Mills
315210	Cut and Sew Apparel Contractors
315220	Men's and Boys' Cut and Sew Apparel Manufacturing
315240	Women's, Girls', and Infants' Cut and Sew Apparel Manufacturing
315280	Other Cut and Sew Apparel Manufacturing
315990	Apparel Accessories and Other Apparel Manufacturing
316210	Footwear Manufacturing
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
334614	Software and Other Prerecorded Compact Disc, Tape, and Record Reproducing
337212	Custom Architectural Woodwork and Millwork Manufacturing
339910	Jewelry and Silverware Manufacturing
339930	Doll, Toy, and Game Manufacturing
339992	Musical Instrument Manufacturing
423410	Photographic Equipment and Supplies Merchant Wholesalers
424920	Book, Periodical, and Newspaper Merchant Wholesalers
451140	Musical Instrument and Supplies Stores
451211	Book Stores
453920	Art Dealers
511110	Newspaper Publishers

Code	Description
512250	Record Production and Distribution
512290	Other Sound Recording Industries
515111	Radio Networks
515112	Radio Stations
515120	Television Broadcasting
515210	Cable and Other Subscription Programming
519110	News Syndicates
519120	Libraries and Archives
519130	Internet Publishing and Broadcasting and Web Search Portals
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)
532282	Video Tape and Disc Rental
541310	Architectural Services
541320	Landscape Architectural Services
541340	Drafting Services
541410	Interior Design Services
541420	Industrial Design Services
541430	Graphic Design Services
541490	Other Specialized Design Services
541810	Advertising Agencies
541921	Photography Studios, Portrait
541922	Commercial Photography
561920	Convention and Trade Show Organizers
611610	Fine Arts Schools
711110	Theater Companies and Dinner Theaters
711120	Dance Companies
711130	Musical Groups and Artists

511120	Periodical Publishers
511130	Book 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
512230	Music Publishers
512240	Sound Recording Studios

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

Appendix B - Data Sources and Calculations

Industry Data

Emsi industry data have various sources depending on the class of worker. (1) For QCEW Employees, Emsi primarily uses the QCEW (Quarterly Census of Employment and Wages), with supplemental estimates from County Business Patterns. (2) Non-QCEW employees data are based on a number of sources including QCEW, Current Employment Statistics, County Business Patterns, BEA State and Local Personal Income reports, the National Industry-Occupation Employment Matrix (NIOEM), the American Community Survey, and Railroad Retirement Board statistics. (3) Self-Employed and Extended Proprietor classes of worker data are primarily based on the American Community Survey, Nonemployer Statistics, and BEA State and Local Personal Income Reports. Projections for QCEW and Non-QCEW Employees are informed by NIOEM and long-term industry projections published by individual states.

Input-Output Data

The input-output model in this report is Emsi's gravitational flows multi-regional social account matrix model (MR-SAM). It is based on data from the Census Bureau's Current Population Survey and American Community Survey; as well as the Bureau of Economic Analysis' National Income and Product Accounts, Input-Output Make and Use Tables, and Gross State Product data. In addition, several Emsi in-house data sets are used, as well as data from Oak Ridge National Labs on the cost of transportation between counties.

Staffing Patterns Data

The staffing pattern data in this report are compiled from several sources using a specialized process. For QCEW and Non-QCEW Employees classes of worker, sources include Occupational Employment Statistics, the National Industry-Occupation Employment Matrix, and the American Community Survey. For the Self-Employed and Extended Proprietors classes of worker, the primary source is the American Community Survey, with a small amount of information from Occupational Employment Statistics.

DatabaseUSA.com Business-Level Data

Data for individual businesses is provided by DatabaseUSA.com, which maintains a database of more than 14 million U.S. business entities. Note that in aggregate it will not be consistent with Emsi labor market data due to differences in definitions, methodology, coverage, and industry/geographic classification.

State Data Sources

This report uses state data from the following agencies: Alabama Department of Industrial Relations; Alaska Department of Labor and Workforce Development; Arizona Department of Administration, Office of Employment and Population Statistics; Arkansas Department of Workforce Services; California Labor Market Information Department; Colorado Department of Labor and Employment; Connecticut did not provide us with a data source; Delaware Office of Occupational and Labor Market Information, Delaware Wages 2004; District of Columbia Department of Employment Services; Florida Department of Economic Opportunity; Georgia Department of Labor, Workforce Information and Analysis, Occupational Information Services Unit; Hawaii Department of Labor and Industrial Relations, Research and Statistics Office; Idaho Department of Labor; Illinois Department of Employment Security, Employment Projections; Indiana Department of Workforce Development; Iowa Workforce Development; Kansas Department of Labor, Labor Market Information Services, Kansas Wage Survey; Kentucky Office of Employment and Training; Louisiana Department of Labor; Maine did not provide us with a data source; Maryland Department of Labor, Licensing and Regulation, Office of Labor Market Analysis and Information; Massachusetts Executive Office of Labor and Workforce Development; Michigan Department of Labor and Economic Growth, Bureau of Labor Market Information and Strategic Initiatives; Minnesota Department of Employment and Economic Development; Mississippi Department of Employment Security; Missouri Department of Economic Development; Montana Department of Labor and Industry, Research and Analysis Bureau; Nebraska Workforce Development; Nevada Department of Employment, Training and Rehabilitation, Information Development and Processing Division, Research and Analysis Bureau; New Hampshire Department of Employment Security; New Jersey Department of Labor and Workforce Development; New Mexico Department of Labor, Bureau of Economic Research and Analysis; New York Department of Labor, Division of Research and Statistics; North Carolina Department of Commerce, Labor and Economic Analysis Division; North Dakota Job Service, Labor Market Information Center; Ohio Department of Job and Family Services, Labor Market

Information Division; Oklahoma Employment Security Commission; Oregon Employment Department, Oregon Labor Market Information System; Pennsylvania Department of Labor and Industry, Center for Workforce Information and Analysis; Rhode Island did not provide us with a data source; South Carolina Employment Security Commission, Labor Market Information Department; South Dakota Department of Labor, Labor Market Information Division; Tennessee Department of Labor and Workforce Development, Research and Statistics Division; Texas Workforce Commission; Utah Department of Workforce Services; Vermont did not provide us with a data source; Virginia Employment Commission, Economic Information Services; Washington State Employment Security Department, Labor Market and Economic Analysis Branch; West Virginia Bureau of Employment Programs, Research Information & Analysis Division; Wisconsin Department of Workforce Development, Bureau of Workforce Information; Wyoming Department of Employment, Research and Planning

CREATIVE ECONOMY

IN THE SAN DIEGO REGION

PROFILE ANALYTICS

SAN DIEGO REGIONAL EDC

Parameters

Regions

Code	Description
41740	San Diego-Chula Vista-Carlsbad, CA

Occupations

77 items selected. See Appendix A for details.

Education Level

Any

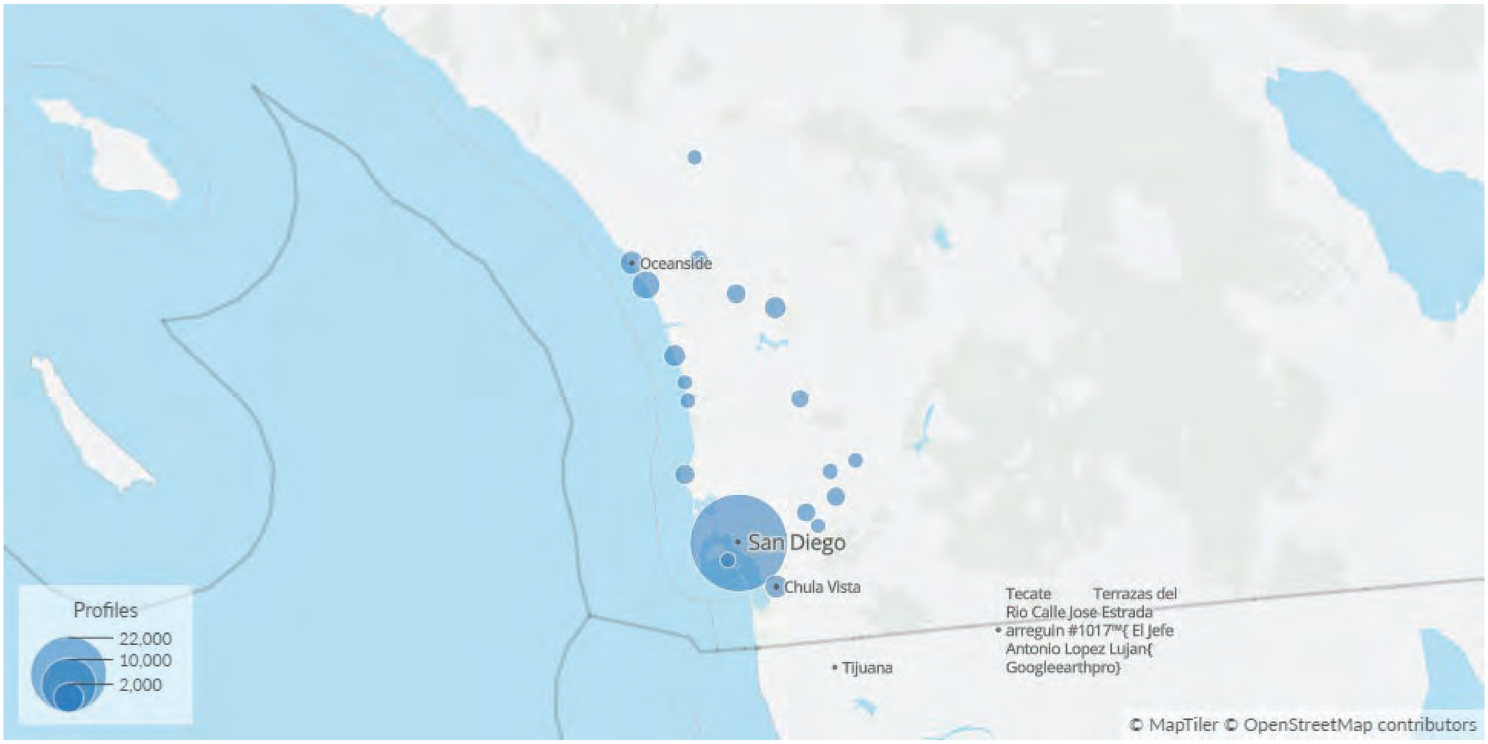
Keyword Search

Profiles in This Report Have Had Activity or Been Updated Since

2019

50,410

Profiles (updated since 2019)



Top Cities

City	Profiles	Percent
San Diego, CA	38,853	77.07%
Carlsbad, CA	1,781	3.53%
Oceanside, CA	1,058	2.10%
Chula Vista, CA	943	1.87%
Encinitas, CA	841	1.67%
Escondido, CA	803	1.59%
Vista, CA	598	1.19%
La Jolla, San Diego, CA	594	1.18%
San Marcos, CA	556	1.10%
El Cajon, CA	535	1.06%

Top Companies

Company	Profiles	Percent
Qualcomm Incorporated	1,217	2.41%
Intuit Inc.	467	0.93%
Northrop Grumman Corporation	343	0.68%
General Atomics	306	0.61%
University of California	284	0.56%
Illumina, Inc.	258	0.51%
Teradata Corporation	226	0.45%
Amazon.com, Inc.	215	0.43%
Viasat, Inc.	212	0.42%
Google Inc.	196	0.39%

Top Occupations

Occupation (SOC)	Profiles	Percent
Marketing Managers	12,228	24.26%
Software Developers, Applications	10,645	21.12%
Public Relations Specialists	3,496	6.94%
Graphic Designers	3,127	6.20%
Public Relations and Fundraising Managers	2,586	5.13%
Web Developers	2,114	4.19%
Software Developers, Systems Software	1,732	3.44%
Producers and Directors	1,515	3.01%
Editors	993	1.97%
Art Directors	954	1.89%

Top Job Titles

Job Title	Profiles	Percent
Software Engineer	3,804	7.55%
Marketing Director	1,086	2.15%
Marketing Manager	1,030	2.04%
Graphic Designer	907	1.80%
Business Development Manager (Management)	906	1.80%
Product Manager (Management)	769	1.53%
Creative Director	714	1.42%
Software Developer	660	1.31%
Photographer	607	1.20%
Designer	549	1.09%

Top Schools

School	Profiles	Percent
San Diego State University	5,624	11.16%
University of California, San Diego	4,367	8.66%
University of San Diego	1,090	2.16%
California State University, San Marcos	839	1.66%
University of California, Los Angeles	795	1.58%
Palomar College	782	1.55%
San Diego Mesa College	683	1.35%
The Art Institutes	646	1.28%
University of Southern California	641	1.27%
National University	588	1.17%

Top Programs

Program	Profiles	Percent
Computer Science	3,712	7.36%
Business Administration, Management and Operations	3,560	7.06%
Communication and Media Studies	2,665	5.29%
Marketing	2,421	4.80%
Design and Applied Arts	1,851	3.67%
Computer Engineering	1,391	2.76%
Electrical, Electronics and Communications Engineering	1,389	2.76%
Drafting/Design Engineering Technologies/Technicians	1,166	2.31%
Engineering, General	975	1.93%
Psychology, General	881	1.75%

Top Skills & Qualifications

Skill/Qualification	Profiles	Percent
Management	17,239	34.20%
Leadership	14,234	28.24%
Sales	14,162	28.09%
Customer Service	11,835	23.48%
Microsoft Office	11,790	23.39%
Research	9,948	19.73%
Microsoft Excel	9,184	18.22%
Public Speaking	8,433	16.73%
Social Media	8,285	16.44%
Marketing Strategies	8,051	15.97%

Appendix A - Occupations

Code	Description
11-2011	Advertising and Promotions Managers
11-2021	Marketing Managers
11-2031	Public Relations and Fundraising Managers
13-1011	Agents and Business Managers of Artists, Performers, and Athletes
15-1131	Computer Programmers
15-1132	Software Developers, Applications
15-1133	Software Developers, Systems Software
15-1134	Web Developers
17-1011	Architects, Except Landscape and Naval
17-1012	Landscape Architects
17-1021	Cartographers and Photogrammetrists
17-3011	Architectural and Civil Drafters
19-3091	Anthropologists and Archaeologists
19-3093	Historians
25-4011	Archivists
25-4012	Curators
25-4013	Museum Technicians and Conservators
25-4021	Librarians

Code	Description
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
27-3099	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
39-3021	Motion Picture Projectionists

25-4031	Library Technicians		39-3092	Costume Attendants
25-9011	Audio-Visual and Multimedia Collections Specialists		39-5091	Makeup Artists, Theatrical and Performance
27-1011	Art Directors		43-9031	Desktop Publishers
27-1012	Craft Artists		47-2044	Tile and Marble Setters
27-1013	Fine Artists, Including Painters, Sculptors, and Illustrators		47-2161	Plasterers and Stucco Masons
27-1014	Multimedia Artists and Animators		49-9061	Camera and Photographic Equipment Repairers
27-1019	Artists and Related Workers, All Other		49-9063	Musical Instrument Repairers and Tuners
27-1021	Commercial and Industrial Designers		51-6041	Shoe and Leather Workers and Repairers
27-1022	Fashion Designers		51-6051	Sewers, Hand
27-1023	Floral Designers		51-6052	Tailors, Dressmakers, and Custom Sewers
27-1024	Graphic Designers		51-6092	Fabric and Apparel Patternmakers
27-1025	Interior Designers		51-7011	Cabinetmakers and Bench Carpenters
27-1026	Merchandise Displayers and Window Trimmers		51-7021	Furniture Finishers
27-1027	Set and Exhibit Designers		51-7031	Model Makers, Wood
27-1029	Designers, All Other		51-9051	Furnace, Kiln, Oven, Drier, and Kettle Operators and Tenders
27-2011	Actors		51-9071	Jewelers and Precious Stone and Metal Workers
27-2012	Producers and Directors		51-9123	Painting, Coating, and Decorating Workers
27-2031	Dancers		51-9151	Photographic Process Workers and Processing Machine Operators
27-2032	Choreographers		51-9194	Etchers and Engravers

27-2041	Music Directors and Composers
27-2042	Musicians and Singers
51-9195	Molders, Shapers, and Casters, Except Metal and Plastic

Appendix B - Data Sources and Calculations

Emsi Profiles

Emsi profiles are collected from various public online sources and processed/enriched to provide information such as standardized company name, occupation, skills, and geography. Emsi performs additional filtering and processing to improve compatibility with Emsi data.

CREATIVE ECONOMY

IN THE SAN DIEGO REGION

DATA NOTES

DATABASE DEVELOPMENT

Industry and occupation data come from Emsi, economic modeling. Occupational data comes from emsi profiles that are collected from various public online sources and processed/enriched to provide information such as standardized company name, occupation, skills, and geography. Emsi performs additional filtering and processing to improve compadability with Emsi data. Emsi industry data have various sources depending on the class of worker. (1) For QCEW Employees, Emsi primarily uses the QCEW (Quarterly Census of Employment and Wages), with supplemental estimates from County Business Patterns. (2) Non- QCEW employees data are based on a number of sources including QCEW, Current Employment Statistics, County Business Patterns, BEA State and Local Personal Income reports, the National Industry-Occupation Employment Matrix (NIOEM), the American Community Survey, and Railroad Retirement Board statistics. (3) Self-Employed and Extended Proprietor classes of worker data are primarily based on the American Community Survey, Nonemployer Statistics, and BEA State and Local Personal Income Reports. Projections for QCEW and Non-QCEW Employees are informed by NIOEM and long-term industry projections published by individual states. Data was collected for 2014, 2019, and 2024. Historical data included 2014 data and projected data included 2024 data. The thirteen industry groups and eight occupation groups were modeled by the 2018 Otis Report industry and occupation groupings, and ultimately finalized by the Advisory Committee.

SAN DIEGO REGIONAL EDC

CREATIVE ECONOMY
IN THE SAN DIEGO REGION
DATA NOTES CONT.

SURVEY

The San Diego Regional Economic Development Corporation and the City of San Diego contracted the UC San Diego Extension Center for Research (CR+E) to conduct a comprehensive study that defined, profiled and quantified the economic impact of San Diego's Creative Economy. CR+E conducted a survey, reaching out to decision-makers in more than 3,500 entities that work in the creative industries. Researchers received 425 responses, of which 277 organizations qualified.

Survey results were analyzed using cross-tab analysis to see if there are any nuances on organizations' responses based on the type of entity they are. The following report is grouped by type of businesses that responded, for-profit, non-profit, and the overall respondents (which includes the preceding two).

UC San Diego Extension is the professional education and public service division of UC San Diego whose work focuses on the global trends, technological innovations, and industry trends shaping regional economics with a particular emphasis on workforce issues. The organization's mission is to be a major catalyst for the continued economic, intellectual, and cultural growth of the San Diego and Baja California region. The CR+E is Extension's research arm, which focuses on researching local and global trends and industry developments shaping regional economies. Furthermore, as a public institution, the organization partners with local non-profits to evaluate their impact.

WORKS CITED

1. 2017 San Antonio Creative Industry Growth & Prosperity Report
2. 2018 Otis Report on the Creative Economy of the Los Angeles Region
3. 2019 Otis Report on the Creative Economy
4. Analysis of Colorado's Creative Industries Cluster Employment and Occupations
5. Arts & Economic Prosperity 5: The Economic Impact of Nonprofit Arts & Cultural Organizations & Their Audiences
6. Boston's Creative Economy
7. Measuring Chicago's (Artistically) Creative Economy
8. There's Something About Seattle 2019 Creative Economy Report

PHOTO/ARTIST CREDIT

1. Christian Castaneda, Barrio Dogg mural
2. Clairemont Square Bar Cafe
3. Del Mar Plaza
4. Dustine Brane Hull, Solana Beach mural
5. Kara "KJ" Ashley, La Mesa mural
6. Mario Torero, Holy Ghost Barrior Logan mural