

## CREATIVE INDUSTRIES HAWAII OVERVIEW

The Department of Business, Economic Development, and Tourism's (DBEDT) **Creative Industries Division (CID)** is the lead agency dedicated to advocating for Hawaii's creative entrepreneurs, which in turn accelerates the growth of Hawaii's Creative Economy.

Comprised of the **Hawaii Film Office (HFO)** responsible for the overall management of the state's off-shore and local film industry development and **Arts & Culture Development Branch (ACDB)**, CID is responsible for initiatives, which support talent, infrastructure, policy development for the statewide creative industries spectrum, increasing the capacity for entrepreneurial success while maintaining the State's global reputation as a premiere location filming destination.

Through CID initiatives such as **Creative Lab Hawaii**, coupled with state-of-the-art infrastructure development, the division is further strengthening the State's creative clusters in film, arts, culture, music, design, literary arts, publishing, creative and interactive media – all integral components of Hawaii's creative and innovation economy.

### Hawaii's Creative Industries Metrics 2016:

- **52,063 jobs, 3,854 businesses**
- **6.1%** of the state **total civilian jobs**
- **\$3.6 billion Gross Domestic Product (GDP) = 4.3%** of total State of Hawaii **GDP**
- **+ 12.8% growth between 2006 and 2016**

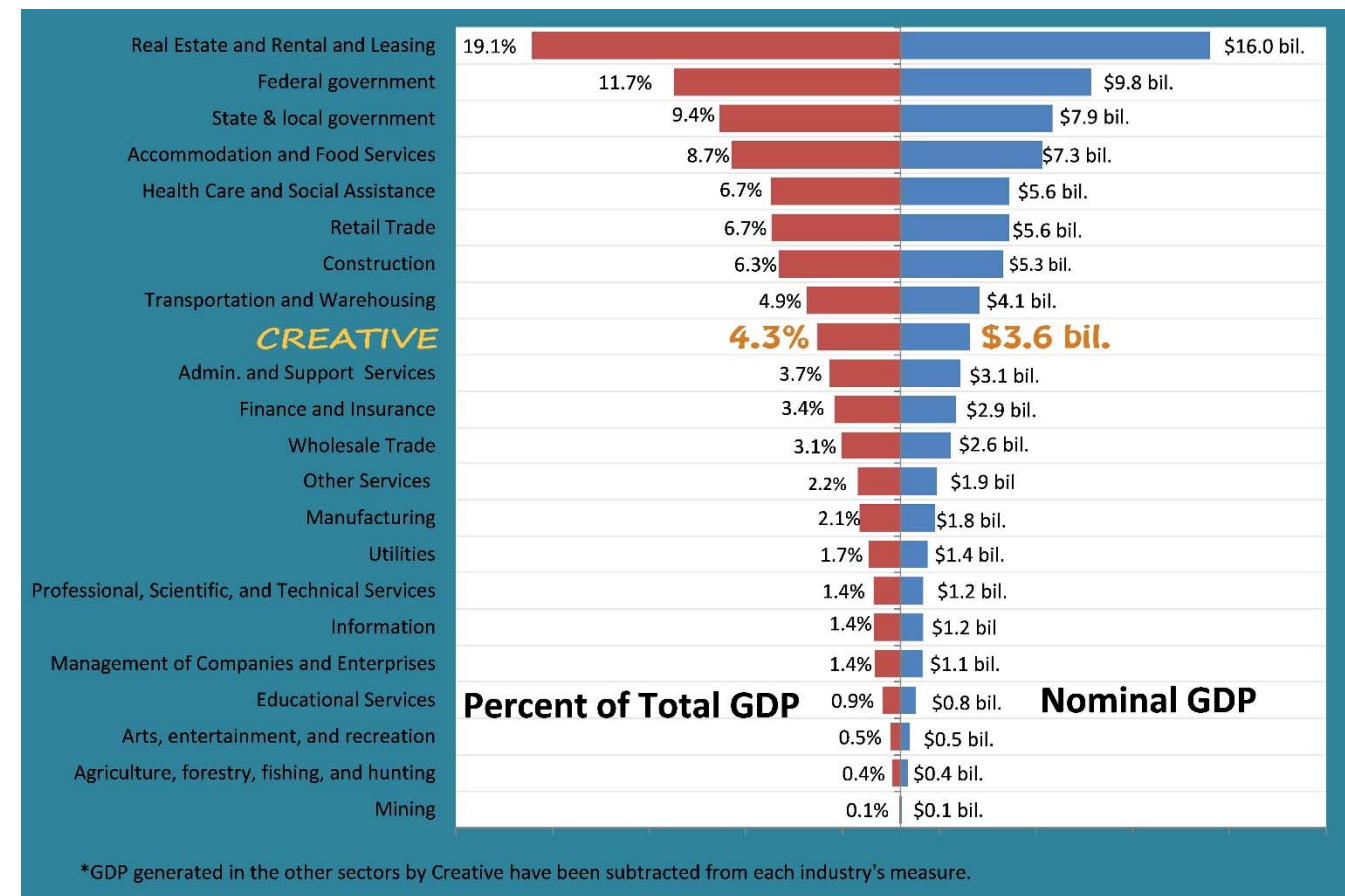
### Hawaii Film Industry Metrics:

- 2016 calendar year, **\$263.2 million** in estimated production expenditures generated **\$456.3 million** of total output, **\$28.9 million** in state taxes and **2,793 jobs** statewide.
- **\$500,000** per year in revenues generated through lease rents of **Hawaii Film Studio** deposited into the General Fund = **\$5.5 million** from **2006-2016**.

Through establishing these metrics in film and the creative sectors, CID and DBEDT's Research and Economic Analysis Division (READ) defined the base, emerging, declining and transitioning sectors performance from 2006-2016, helping to guide a statewide programmatic and overall policy direction.

**Hawaii's creative portfolio, coupled with its long standing reputation as a film production destination, is the foundation on which Hawaii's creative economy is built. CID is positioning the state to be a national and global leader in creative sector development as well as a hub for creative media and production in the Pacific.**

## CREATIVE GDP COMPARED WITH OTHER INDUSTRIES, 2016\*



## 2016 CREATIVE INDUSTRY JOBS BY SECTOR



Source: DBEDT Research and Economic Analysis Division 2016

\*Does not include part time or freelance production jobs.

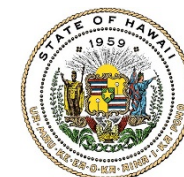
## APPENDIX: DETAILED INDUSTRY DATA

NAICS Code	Group & Industry	Hawaii Jobs and Earnings				Performance Metrics			US Comparable	
		2006	2016	Avg. Job Growth Rate, 06-16	Annual Earnings, 2016	Compet. Share 06-16	Location Quotient (LQ)	Change in LQ, 06-16	Avg. Job Growth Rate, 06-16	Annual Earnings, 2016
<b>TOTAL HAWAII CREATIVE INDUSTRY</b>										
	<b>Architecture</b>	2,184	1,983	-1.0%	78,410	0.00	1.24	-0.01	-0.7%	71,524
541310	Architectural Services	1,803	1,608	-1.1%	80,283	0.00	1.37	-0.02	-0.8%	80,330
541320	Landscape Architectural Services	382	375	-0.2%	66,980	0.00	0.90	0.04	-0.5%	46,734
<b>Art Education</b>										
611610	Fine Arts Schools (Private)	597	965	4.9%	8,484	0.01	0.71	0.05	4.4%	10,370
<b>Business Consulting</b>										
	<b>Admi. Management and General Manag. Consulting</b>	3,508	5,124	3.9%	61,907	0.00	0.57	0.03	3.5%	79,441
541611	Admi. Management and General Manag. Consulting	1,632	2,843	5.7%	59,169	0.01	0.60	0.05	4.9%	84,481
541612	Human Resources Consulting Services	321	322	0.0%	65,184	0.02	0.56	0.09	-1.5%	81,228
541614	Process, Physical Distri., and Logistics Consulting	194	301	4.5%	45,217	0.01	0.40	0.04	3.5%	69,843
541618	Other Management Consulting Services	119	149	2.3%	61,460	0.01	0.22	0.02	1.7%	80,793
541620	Environmental Consulting Services	622	710	1.3%	62,543	0.00	1.10	-0.02	1.7%	66,396
541690	Other Scientific and Technical Consulting Services	619	799	2.6%	64,010	-0.01	0.49	-0.03	3.4%	73,209
<b>Computer and Digital Media Products</b>										
	<b>Software Publishers</b>	4,833	4,997	0.3%	86,417	-0.04	0.41	-0.16	3.9%	118,609
511210	Software Publishers	189	256	3.1%	69,362	-0.01	0.13	-0.01	3.7%	159,703
541511	Custom Computer Programming Services	1,966	1,901	-0.3%	87,448	-0.04	0.37	-0.18	3.7%	110,478
541512	Computer Systems Design Services	2,678	2,839	0.6%	88,930	-0.04	0.55	-0.22	4.2%	111,308
<b>Cultural Activities</b>										
	<b>Museums</b>	1,603	3,639	8.5%	49,219	0.06	3.77	1.57	3.0%	53,316
712110	Museums	731	2,186	11.6%	27,429	0.09	4.75	2.76	2.4%	42,607
712120	Historical Sites	218	337	4.5%	38,641	0.03	4.39	1.18	1.4%	35,691
712190	Nature Parks and Other Similar Institutions	13	60	16.5%	38,750	0.13	1.18	0.81	4.0%	36,697
813211	Grantmaking Foundations	641	1,056	5.1%	92,096	0.01	2.79	0.30	4.1%	72,131
<b>Design Services</b>										
	<b>Drafting Services</b>	1,894	2,142	1.2%	28,653	0.00	0.93	0.01	1.3%	39,177
541340	Drafting Services	402	334	-1.8%	29,748	0.00	1.90	0.12	-2.3%	35,345
541410	Interior Design Services	510	533	0.4%	32,224	-0.01	0.69	-0.09	1.8%	34,261
541420	Industrial Design Services	34	62	6.3%	25,896	0.04	0.41	0.14	2.0%	67,520
541430	Graphic Design Services	881	1,193	3.1%	25,556	0.02	1.14	0.19	1.3%	37,809
541490	Other Specialized Design Services	67	20	-11.2%	26,363	-0.14	0.12	-0.40	3.0%	48,750
<b>Engineering and Research &amp; Development</b>										
	<b>Engineering Services</b>	5,279	5,466	0.3%	97,819	0.00	0.71	-0.02	0.7%	108,966
541330	Engineering Services	3,586	3,981	1.1%	100,500	0.01	0.79	0.05	0.5%	100,675
541712	R&D in the Physical, Engineering, and Life Sciences	1,263	1,212	-0.4%	104,352	-0.02	0.53	-0.09	1.3%	131,152
541720	R&D in the Social Sciences and Humanities	430	273	-4.4%	55,998	-0.04	0.86	-0.41	-0.5%	79,274
<b>Film, TV, Video Production/Distrib</b>										
	<b>Prerecorded Compact Disc, Tape, and Record Reprod.</b>	1,362	1,981	3.8%	65,033	0.03	0.99	0.28	0.5%	98,550
334612	Prerecorded Compact Disc, Tape, and Record Reprod.	6	16	9.6%	17,764	0.18	0.19	0.16	-8.4%	112,206
512110	Motion Picture and Video Production	1,250	1,845	4.0%	57,086	0.01	1.25	0.15	2.8%	92,634
512120	Motion Picture and Video Distribution	17	8	-6.7%	65,743	-0.05	0.20	-0.15	-1.2%	144,977
512191	Television and Other Postproduction Services	49	79	4.8%	40,243	0.03	0.67	0.19	1.5%	86,902
515210	Cable and Other Subscription Programming	41	33	-2.1%	46,048	0.02	0.11	0.02	-4.1%	122,423
<b>Marketing, Photography &amp; Related</b>										
	<b>Marketing Consulting Services</b>	10,104	12,116	1.8%	28,937	0.00	0.92	-0.02	2.2%	47,964
541613	Marketing Consulting Services	843	1,310	4.5%	44,138	-0.01	0.63	-0.09	6.0%	64,977
541810	Advertising Agencies	741	490	-4.1%	63,891	-0.05	0.38	-0.27	1.4%	92,758
541820	Public Relations Agencies	364	346	-0.5%	64,715	-0.03	0.68	-0.26	2.9%	81,231
541830	Media Buying Agencies	14	14	0.0%	36,715	-0.05	0.13	-0.08	4.8%	109,670
541840	Media Representatives	144	98	-3.7%	62,480	-0.01	0.63	-0.06	-2.7%	96,433
541850	Display Advertising	110	396	13.6%	34,332	0.12	1.62	1.12	1.1%	60,304
541860	Direct Mail Advertising	57	77	3.0%	43,619	0.06	0.28	0.13	-3.4%	59,699
541870	Advertising Material Distribution Services	58	20	-9.9%	42,911	-0.07	0.27	-0.30	-2.7%	47,640
541890	Other Services Related to Advertising	434	579	2.9%	21,374	0.00	0.89	0.04	2.6%	37,953
541910	Marketing Research and Public Opinion Polling	440	388	-1.3%	24,039	-0.02	0.55	-0.10	0.6%	64,995
541921	Photography Studios, Portrait	1,447	1,959	3.1%	22,977	0.01	1.95	0.22	2.0%	22,278
541922	Commercial Photography	237	440	6.4%	20,894	0.01	1.27	0.10	5.7%	27,943
541990	All Other Professional, Scientific, and Technical	5,215	5,999	1.4%	21,591	0.00	1.04	-0.03	1.8%	30,053
<b>Music</b>										
	<b>Musical Instrument and Supplies Stores</b>	1,093	1,317	1.9%	31,123	0.00	1.37	-0.04	2.3%	40,088
451140	Musical Instrument and Supplies Stores	159	168	0.6%	31,505	0.00	0.74	0.03	0.3%	32,375
512210	Record Production	16	27	5.5%	42,093	0.06	1.29	0.58	-0.4%	60,023
512220	Integrated Record Production/Distribution	29	11	-8.9%	32,030	-0.09	0.40	-0.64	0.3%	91,336
512230	Music Publishers	12	19	5.0%	26,074	0.04	0.50	0.16	1.0%	64,332
512240	Sound Recording Studios	58	27	-7.6%	33,965	-0.08	0.33	-0.38	0.0%	35,117
512290	Other Sound Recording Industries	13	17	2.4%	47,328	0.03	0.65	0.19	-1.0%	50,481
711130	Musical Groups and Artists	806	1,048	2.7%	30,022	-0.02	1.94	-0.32	4.4%	37,979
<b>Performing and Creative Arts</b>										
	<b>Art Dealers</b>	9,211	9,198	0.0%	21,850	-0.02	1.09	-0.25	2.2%	26,885
453920	Art Dealers	886	889	0.0%	40,538	-0.02	2.42	-0.52	2.1%	33,603
711110	Theater Companies and Dinner Theaters	554	454	-2.0%	26,594	-0.05	0.87	-0.52	2.9%	29,531
711120	Dance Companies	263	277	0.5%	15,762	-0.04	2.88	-1.40	4.8%	29,626
711190	Other Performing Arts Companies	29	51	5.8%	18,994	0.02	0.77	0.13	3.9%	36,810
711310	Prom. of Arts, Sports, and Similar with Facilities	252	325	2.6%	19,798	-0.02	0.55	-0.12	4.8%	36,314
711320	Prom. of Arts, Sports, and Similar without Facilities	399	403	0.1%	23,656	-0.04	0.95	-0.39	3.7%	37,941
711410	Agents and Managers for Artists, Athletes, Entertainer	410	320	-2.5%	15,016	-0.04	0.81	-0.41	1.8%	48,450
711510	Independent Artists, Writers, and Performers	6,418	6,479	0.1%	19,401	-0.02	1.09	-0.18	1.8%	22,937
<b>Publishing &amp; Information</b>										
	<b>Newspaper Publishers</b>	3,137	1,966	-4.6%	58,986	-0.03	0.52	-0.21	-1.2%	105,024
511110	Newspaper Publishers	1,775	807	-7.6%	70,077	-0.02	0.78	-0.16	-5.6%	52,548
511120	Periodical Publishers	599	615	0.3%	44,158	0.03	0.89	0.21	-2.3%	79,887
511130	Book Publishers	138	125	-1.0%	51,089	0.01	0.31	0.03	-1.7%	78,455
511140	Directory and Mailing List Publishers	147	69	-7.2%	79,188	-0.01	0.54	-0.05	-6.3%	76,798
511191	Greeting Card Publishers	44	4	-20.5%	38,092	-0.13	0.17	-0.56	-7.8%	67,211
511199	All Other Publishers	118	29	-13.2%	57,555	-0.10	0.36	-0.70	-3.0%	56,332
519110	News Syndicates	95	17	-16.0%	60,272	-0.13	0.24	-0.71	-3.4%	116,265
519130	Internet Pub. and Broad. and Web Search Portals	156	235	4.2%	67,830	-0.07	0.20	-0.19	11.6%	184,774
519190	All Other Information Services	65	65	0.0%	31,162	-0.01	0.50	-0.07	1.5%	74,461
<b>Radio and Television Broadcasting</b>										
	<b>Radio Networks</b>	1,363	1,169	-1.5%	60,741	-0.01	0.91	-0.11	-0.3%	83,239
515111	Radio Networks	177	93	-6.2%	75,581	-0.05	0.75	-0.46	-1.5%	66,576
515112	Radio Stations	536	526	-0.2%	40,349	0.01	1.08	0.12	-1.2%	55,472
515120	Television Broadcasting	650	551	-1.6%	81,668	-0.02	0.81	-0.20	0.6%	105,980

Source: DBEDT compilation based on EMSI data.



# 2016 UPDATE



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