



Cornell University
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EMPIRE STATE'S CULTURAL CAPITAL AT RISK?

Assessing Challenges to the Workforce and Educational Infrastructure
of Arts and Entertainment in New York



REPORT TO NEW YORK
EMPIRE STATE DEVELOPMENT
CORPORATION

BY
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EXECUTIVE SUMMARY

New York State is a world center for the arts and entertainment industry and its vast and uniquely diversified workforce is its main competitive advantage. Commissioned by the New York Empire State Development Corporation, this report examines the strengths and the challenges facing this industry and its workforce in the state, providing an assessment of the education and training infrastructure that supports this vital industry, and identifying issues that offer a potential role for public and private policy. Key findings follow.

NEW YORK'S ARTS AND ENTERTAINMENT INDUSTRY

KEY FINDING: *Arts and entertainment has been an engine of growth for New York's economy.*

- New York is a world leader in the production and export of arts and entertainment, one of the United States' strongest export-growth industries.
- This industry, encompassing live performing arts (theatre, music, and dance), electronic media (film, broadcast, sound recording, and internet,) and visual arts (museums, galleries, and art dealers) is a historically critical segment of the New York economy. It generates 222,000 jobs and has an estimated impact of \$25.7 billion on the state economy.
- The multiplier effect of arts and entertainment on economic development includes its impetus to technological innovation, attraction to tourism, and lure to the in-migration of jobs and population.

KEY FINDING: *Currently New York's arts and entertainment industry faces a number of critical challenges which threaten its continued growth.*

- Financial sustainability clouds the future of nonprofit performing and visual arts.
- Film and television production faces increasing competition from other states and countries which offer ever larger tax subsidies.
- Sound recording is challenged by the dramatic growth of digital distribution resulting in illegal file sharing and piracy.
- Interactive games, a potential growth sector for New York, lacks support structure.

ARTS WORKFORCE

KEY FINDING: *The 259,000 arts professionals, including performers, designers, artists, and specialized crafts, have distinctive characteristics as compared with other working New Yorkers.*

- Arts professionals reside throughout the state, clustering in New York City and five other centers (a Buffalo case study illustrates the regional arts infrastructure).

- Arts workers are disproportionately young, suggesting age-related occupational attrition.
- Most are highly educated, equipped with four year or graduate degrees.
- Minorities and women, constituting important segments of the work force, are under-represented in higher paid skilled and professional jobs and at the executive level in firms.

KEY FINDING: *New York's skilled arts workforce, which is its key competitive advantage in attracting and retaining producers and consumers, may be at risk as a result of unstable employment, low income, high cost of living, and lack of adequate support services.*

- Contingent employment is characteristic of this industry where most workers are hired by multiple employers on a project by project basis. The proportion of self-employment is four times higher than the pattern for the New York workforce as a whole. Part-time and part-year employment in arts occupations results in moonlighting and multiple job holding.
- Median income for this workforce is low in relation to educational and skill requirements. There are wide disparities in income with three percent reporting incomes above \$500,000 and 33 percent earning \$20,000 a year or less.
- Performing arts workers are highly unionized. For unionized workers, negotiated contracts set terms and conditions of employment. Irregularity of income is partially offset by pension and health care coverage, as well as payments for reuse of product which fill in the income gap between jobs. Work in small organizations and in the new media is less likely to be covered by union contracts and unionization is rare in the visual arts sector.
- Lack of a social safety net, including affordable housing and healthcare, access to workspace, and absence of support systems for job search are formidable challenges facing the arts workforce. Non-profit administrative and managerial personnel experience burnout and high turnover.

EDUCATION AND TRAINING

KEY FINDING: *New York's wealth of educational and training facilities for arts related occupations is a vital component of its creative infrastructure.*

- New York's 815 post-secondary degree and certificate offerings in the arts encompass a wide variety of disciplines and are geographically dispersed throughout the state.
- In 2006, more than 25,000 individuals completed programs in arts and media disciplines. This represented 11 percent of the total for the United States.
- In addition to the training offered by educational institutions, unions and large employers provide training to upgrade work-related skills, particularly in relation to new technology and in preparation for leadership.

KEY FINDING: *The growth in the number of graduates from education and training programs exceeds the rise in employment in New York based arts and entertainment organizations.*

- This surplus of graduates over job opportunities is notable for music and dance (where employment has been declining), as well as for fine arts, suggesting that New York may be a net exporter of trained talent for the arts.
- Growth of graduates in animation, interactive and video graphics has averaged 135 percent per year since 2002, reflective of extraordinary technological and market developments.

KEY FINDING: *While executives of arts organizations and unions are generally appreciative of the quantity and quality of training available in New York, some question the link between education and employment.*

- For technical and craft occupations, classroom training may not match job requirements.
- Courses in management and administration may not be sufficient or well-tailored to the needs of this industry.
- Training institutions rarely assist in placement or trace the careers of their graduates.
- Affordability is a key concern for artists who are expected to fund their own education before entering the field and continuously throughout their careers.

FUTURE EMPLOYMENT OUTLOOK

KEY FINDING: *Arts and entertainment is one of the major industries in which employment is expected to grow.*

- The Bureau of Labor Statistics projects overall growth in arts and entertainment employment of New York State (2006-2016).
- Occupations for which major growth is predicted include multi-media artists and animators, curators, designers, entertainers and performers.

KEY QUESTION: *Will New York's workforce support and training infrastructure sustain this growth?*

QUESTIONS FOR PUBLIC POLICY

- How do public subsidies and incentives for motion picture and TV production in New York State compare with those offered by other states and nations?
- What is the impact of cultural institutions and the arts infrastructure on population retention and industry attraction for upstate communities?

- Which policies should New York State pursue to encourage entrepreneurship in the arts, particularly in growth sectors of new media and video games?
- How does New York support for the arts compare with subsidies given to sports and other industries with comparable impact on economic development for New York State?
- What are the best practices from other states or from other countries for addressing the vulnerabilities of this workforce through social policy or public investment?
- How can New York State educational institutions improve career services and liaison with arts and entertainment employers to enhance job opportunities for graduates?

KEY QUESTION: *Should New York State support a center for data collection and analysis comparable to the Entertainment Economy Institute in California?*

OVERVIEW OF ARTS AND ENTERTAINMENT IN NEW YORK STATE

Arts and entertainment is a dynamic driver of the New York State economy, generating \$25.7 billion per year (including both direct and indirect economic impact)¹ and more than 222,000 jobs. New York is a leading center for arts and entertainment industries in the United States and globally, with twice the number of live performing arts companies as the national average and the second highest concentration of electronic media in the country (after California). New York is also the top sound recording center in the country; and in the visual arts, the state boasts world renowned museums, art galleries, and dealers.

From the global media hub of the Big Apple to rural regions and mid-sized upstate cities, economic development is increasingly linked to the vitality of arts, entertainment, and cultural activity. Existing research has found that the arts and entertainment industry is a driving factor for regional and state economies, not only generating employment within its boundaries, but also attracting highly skilled professionals who work in other key industries. Leading scholars in the field of regional economics view the growth of metropolitan areas and of regions as being dependent on the expansion of innovative industries, which results from the concentration of a creative class.² Coined by Richard Florida, the concept of the creative class involves a wide range of occupations, including but not limited to artists and other arts and entertainment professionals. Professor Ann Markusen emphasizes the local consumption impacts and import substituting effects of the concentration of arts and entertainment establishments. The clustering of arts and entertainment increases the visibility of the industry, promoting local patronage of artists and cultural and entertainment enterprises. In the absence of arts and entertainment in a local economy, consumers travel to other localities or pursue other type of leisure opportunities. Additionally, Markusen contends that as arts and entertainment involve highly concentrated and labor intensive activities, spending in this industry results in higher multiplier effects within a region.³

New York's position in this industry, as well as the depth and breadth of its labor pool, provide the state with unique opportunities to leverage its cultural capital for fostering economic development. This report examines the components of New York State's arts and entertainment industry, current challenges to its survival and future growth, and the socio-economic characteristics of this industry's workforce, identifying issues that offer a potential role for public and private policy.

For the purpose of this study, the arts and entertainment industry encompasses three broad categories: the performing arts (theatre, music, and dance), electronic media (film, TV, sound recording, and internet), and the visual arts (museums, galleries, and art dealers). Together these

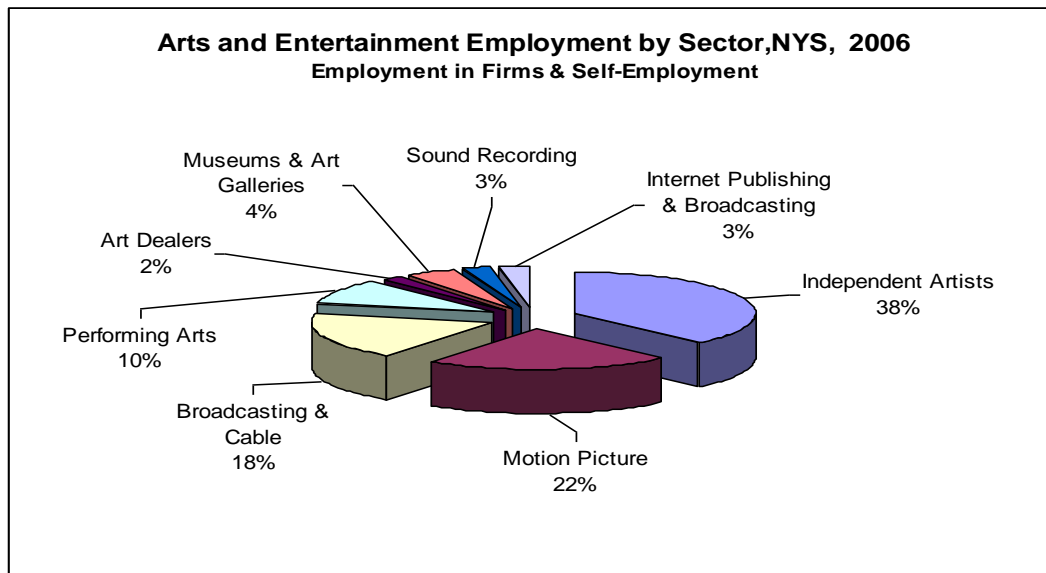
¹ Alliance for the Arts, *Arts as an Industry*, 2006.

² Richard Florida, *The Rise of the Creative Class and How It's Transforming Work, Leisure, Community and Everyday Life*, 2002.

³A. Markusen and D. King, *The Artistic Dividend: The Arts' Hidden Contributions to Regional Development*, 2003; A. Markusen, "Urban Development and the Politics of a Creative Class: Evidence from the Study of Artists," 2006.

sub-sectors generated direct employment of over 222,000, and more than \$13 billion in direct incomes in New York in 2006. The chart below depicts the share of total employment of each of the sub-sectors.

Chart 1



Sources: US BLS- QCEW and US Census Bureau, Non-Employer Series

ELECTRONIC MEDIA

This industry category includes film and TV content production, broadcasting and cable, sound recording, and new media (including internet and video games). Factors affecting these sectors internationally and of special concern to New York State include technological change, rapid growth, high risk, geographic mobility, and globalization. The shift to digital technology is the technological change that has had the greatest impact on this industry. Electronic media is one of the most dynamic sectors of the United States economy, but it is also characterized as financially risky as it requires high levels of investment on products that may not provide immediate returns or profits.⁴ Content production for electronic media outlets has always been geographically mobile, but this trend has intensified as a result of digital technology and the increasing globalization of production and distribution.

Trends and Challenges

Key challenges facing electronic media in New York State include the following:

- **Domestic and international competition:** Increasing competition from other states and locations outside the United States particularly affects film and TV production, but it also has a wide ranging impact on sound recording, video games, and other new media.

⁴ Gray, L., Seeber, R. (1996). *Under the Stars: Essays on Labor Relations in Arts and Entertainment*. ILR Press.

- **Labor-displacing technology:** Digital technology has impacted employment negatively because of its labor-saving effects. This has been particularly the case in radio and TV broadcasting, where new equipment and software have replaced crews and editors, and systems that centralize stations eliminate technical and administrative positions. In both the recorded and live music sectors, labor-displacing technologies include synthesizers, digital mixing, and track layering.
- **The digital distribution threat to revenues and intellectual property rights:** Digital technology has challenged all forms of electronic media to re-think existing business models in order to avoid the loss of control over product distribution. This new technology facilitates content distribution through new platforms, particularly the internet, thus creating challenges for content producers and distributors to capture the new revenue streams, and exacerbating threats to intellectual property rights. Consequently, record labels and artists, as well as film and TV producers, are being forced to adjust their business models to stay competitive.

Feature Film and Television Production

Twenty-five hundred New York establishments are engaged in film and TV production. Including distribution, film and video industries generated more than 48,000 jobs in the state in 2006. New York State has the second largest concentration, after California, of film and TV production in the United States accounting for 16.2 percent of total industry employment in 2006.⁵ This sector includes major commercial and nonprofit companies, and hundreds of smaller organizations producing content for film, broadcast and cable TV, as well as for industrial (business) clients. TV production is by far the largest sub-sector, accounting for nearly twice the expenditures as for-profit film production and almost all of the nonprofit production in the state.

While film and TV production concentrates in New York City, there is significant activity, particularly involving smaller budget productions, in suburban counties of New York City and in Rochester, Buffalo, and Syracuse. The main factor attracting film production to New York is the unique pool of talent and technical professionals resulting from the wide range of arts and entertainment sectors clustering in the state. Talent is widely available because of the presence of large employers such as Broadway, TV production at studios in New York City and on locations around the state, and the musical centers. These industry anchors also yield a large pool of highly skilled and experienced technical professionals able to work in film and TV production. The scenery for film shooting and New York City's ranking as a world entertainment center are also considered important factors for location decisions by film producers.

Film and TV production in New York State has been particularly impacted by competition from other U.S. states and from foreign countries. Tax incentives instituted by New York State and New York City beginning in 2004 and 2005 have helped reverse a declining trend that started in 2000. Other positive recent developments for film makers in the state are the building of studio facilities and a weak dollar, which strengthens the ability to compete with foreign locations and attract producers from abroad. Film and TV production is highly mobile, hence the importance of these positive locational developments. However, the state's gains are being challenged by

⁵ Authors' calculations based on BLS Quarterly Census of Wages and Employment.

intensifying national competition, which now includes neighboring states such as Connecticut offering tax and workforce incentives to attract production.

New York City's high infrastructure costs and living expenses particularly affect independent filmmakers. According to Michelle Byrd, executive director of the Independent Features Project, high costs are a deterrent to producing in New York, but for many producers they are offset by the lure of opportunity. There is constant turnover of independent film makers, although the exact number of those living and working in New York is unknown. Upstate New York cities attract an increasing number of independent and documentary film makers. In recent years, financial (or investment) support has focused on stars and blockbusters, which further disadvantages the independents. The talent pool in New York State, according to the Independent Features Project, needs a place for networking with other producers, technicians, talent, and vendors, i.e., the equivalent of a few key gathering places in Hollywood.⁶

As noted above, another key challenge facing firms and employees in film production is the changing technology, which can have negative impacts on employment (displacing workers in some jobs while creating new occupations) and on protections for intellectual property rights.

Broadcasting and Cable

Comprising radio and TV stations, as well as cable networks, this sector generates about 41,500 jobs in the state, including both employment in 524 establishments and the self-employed. The New York metropolitan area ranks first among the top TV and radio markets. It has 21 TV stations and 26 radio stations. All major TV networks (ABC, CBS, NBC, Fox), and leading cable networks such as HBO, MTV, and Nickelodeon have studios in New York City. Upstate cities are home to local and regional broadcast outlets. Public radio and television stations are located both upstate and downstate.

A major challenge for broadcasting and cable is the increasing competition from new media, including digital and satellite radio, the internet, and mobile devices. Firms have responded to this challenge by acquiring or partnering with new media outlets. Additionally, employers have introduced new labor-saving technologies, which constitute a threat to jobs particularly in radio and TV broadcasting. IBEW Local 1212, which represents radio and TV broadcasting technical professionals in the New York City area, has seen whole engineering crews being replaced by new camera equipment and editors being displaced by new software.

Examples of new labor saving technology include the system called hubbing, which consists of centralizing operations of multiple stations in one location. In terms of the overall employment statistics, losses resulting from new technology in broadcasting have been compensated by job gains in cable. This explains the sector's relative stability, with employment in broadcasting and cable firms staying close to 40,000 in New York State during the last six years.⁷

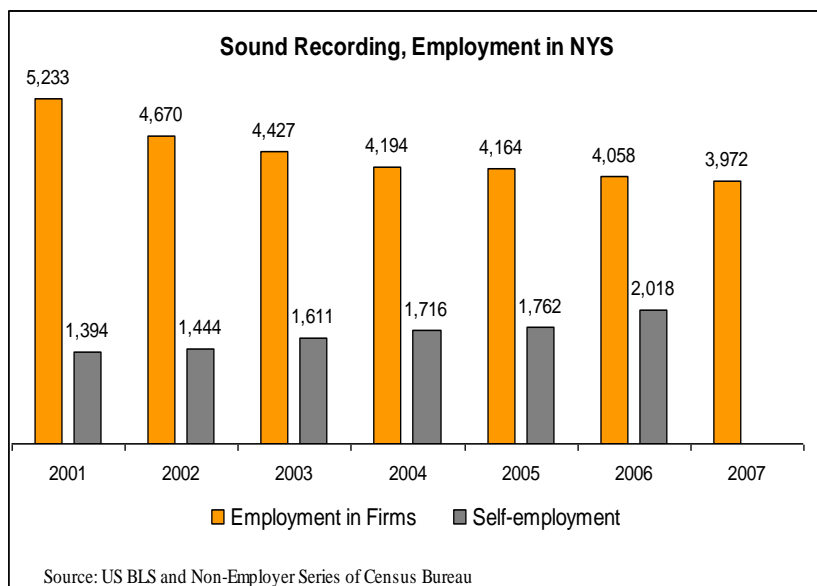
⁶ Interview with Michelle Byrd, Executive Director of the Independent Features Project.

⁷ US BLS, Quarterly Census of Employment and Wages.

Sound Recording

The sound recording sector in New York State generates employment of more than 6,000, including 4,058 jobs in 604 establishments and 2,018 self-employed individuals. Most of the activity concentrates in New York City, which is the major recording center in the country and the center for business decision makers, according to Cary Sherman, president of the Recording Industry Association of America (RIAA).⁸ New York State holds 15.2 percent of the total US employment in sound recordings, second only to California which holds 23 percent. Employment in New York State has been relatively stagnant since 2001, with employment in firms actually declining by 22 percent from 2001 to 2006 and self-employment increasing by 45 percent during the same period. State employment trends closely match the national.

Chart 2



In addition to publishing and distributing recorded music in both physical and digital formats, this sector is also involved in producing taped programming for radio and providing services to the film, TV, and cable sectors. Overall sales for recorded music have declined by 38 percent since 1998, with digital units holding a growing share of total sales. The value of digital shipments now represent 32 percent of total recorded music sales,

more than triple their share of 9 percent in 2005. The dramatic growth of digital distribution constitutes one of the main challenges facing firms, artists, and technical professionals in recorded music, as it has resulted in the increase of illegal file sharing and has contributed to the already serious challenge of piracy. The RIAA maintains that record label companies have lost control over the product as a result of digital distribution and need to change their business model to remain profitable in this new environment.

To address the digital challenge, the industry is currently experimenting with new business models and marketing innovations, including new types of subscriptions and ad-supported free music. Music labels, artists, and unions are also cooperating on initiatives to stem the violation of copyright laws. These initiatives include lobbying and legal challenges to individuals and companies that engage in illegal file sharing and content piracy.

Interactive Games

Interactive games is the fastest growing segment of the entertainment industry, capturing a \$10 billion market in 2006 and growing at a rate of 17 percent per year from 2003 to 2007. New

⁸ Interview, Cary Sherman, President, Recording Industry Association of America.

York State employs approximately 1,500 people and ranks fourth among the top employer states in this sector behind California, Washington, and Texas.⁹ One of the top seven companies in the sector is based in New York: Take Two Interactive, which accounts for approximately 6 percent of total national sales. These large game software companies generally employ core groups of creative and technical professionals and also hire game development companies to work on specific projects. Game software companies employ crews of programmers, artists, animators, scriptwriters, actors, musicians and songwriters, and sound and special effects experts. According to Walker White, Director of the Game Design Initiative at Cornell University, this is a highly competitive and demanding field, requiring long hours of work and involving high turnover of the workforce.¹⁰

A study by the Center for an Urban Future (CUF) found that this sector employs approximately 1,200 people in New York City and involves 30 game development companies, as well as another 55 businesses operating in other aspects of game software production and distribution.¹¹ New York City has become one of the nation's leaders in casual games and mobile games, and is well positioned to compete in these and the serious games segment – which involves games used in education, simulation, and military training. However, the most significant challenges for the game software companies in New York City are the shortage of technical workers and the high salaries that these workers demand, as well as the lack of a major gaming studio and a “critical mass of small and medium-sized game development” companies, which result in the out-migration of entrepreneurs and skilled workers to other cities. The findings of the CUF study are consistent with Walker White's account that Cornell's top game design students leave for employment at leading companies on the west coast.¹²

Factors contributing to the shortage of technical talent, according to the CUF study, are the lack of degree granting programs in video game programming by the city's universities, as well as the absence of linkages between schools and businesses to place students into local companies.¹³ After the publication of the CUF study in 2008, New York University launched the NYU Game Center, becoming the first university in New York City to offer a degree in video games.

The video game sector offers potential for synergies between upstate and downstate employers and educational institutions to address the shortage of technical talent experienced by New York City companies. Upstate New York has nationally known programs in game design at the Rochester Institute of Technology and at Cornell University (Game Design Initiative). Existing research and information gathered through interviews in the study did not reveal any evidence of linkages between video programs and employers in NYC.

The New York State Office of Film and TV Production had identified the field of digital production as a promising area for economic development in upstate New York because it does not require a local supply of crews trained in traditional skills of film making, and upstate

⁹ Entertainment Software Association, *Video Games in the 21st Century*, 2007.

¹⁰ Interview, Walker M. White, Director, Game Design Initiative at Cornell University, Department of Computer Science.

¹¹ Center for an Urban Future, *Getting in the Game*, 2008.

¹² Interview, Walker White, Cornell Game Design Initiative.

¹³ Center for an Urban Future, *Ibid.*

universities could provide the needed talent pool. The hope was to secure state tax incentives for this sector, but fiscal cutbacks prevented it from happening.¹⁴ Video games is another new medium which does not call for typical crews and might fit within these projections. A model for this could be Quebec, which developed this industry with substantial tax subsidies, linking producers and local universities.¹⁵ In July of this year, New York City launched a program to foster employment and entrepreneurial efforts in new media companies.¹⁶

LIVE PERFORMING ARTS

Live performing arts comprise both the commercial (for-profit) and the nonprofit segments of theatre, music, and dance. There are more than 5,600 establishments and companies generating more than 22,000 jobs in the performing arts in New York State. The sector includes a wide range of organizations, including such long established centers as the Chautauqua Institution in Southern New York, Shea's Performing Arts Center in Buffalo, the Glimmerglass Opera in Cooperstown; in addition to New York City's Metropolitan Opera, Lincoln Center, Broadway, and hundreds of clubs and other venues. There are festivals and cultural events in virtually all of the 62 counties in the state.

Trends and Challenges

The main challenges facing live performing arts in New York State, particularly in the nonprofit segment, include financial sustainability, economic pressures on the workforce, audience development, and scarce affordable workspace.

- **Financial Sustainability:** Most pressing is the fact that performing arts companies in every discipline face rising costs and limited avenues for increasing income. Both union and employer representatives agree that the reduction in government funding has heavily impacted nonprofit performing arts. In addition, private foundations are shifting away from supporting cultural activities, and income from corporations is threatened by mergers and headquarters relocations outside New York. This leaves organizations to compete for funds from a shrinking pool of contributors and makes them ever more dependent on earned income.

The issue of financial sustainability is changing the whole character of organizations of all sizes. Mary Schmidt Campbell, former chair of the New York State Council on the Arts (NYSCA), stressed the need for organizations to look to their strategic strengths to develop increased revenues or allay costs in order to manage what she termed "a harrowing business model." As Barry Grove, executive producer of the Broadway nonprofit Manhattan Theatre Club put it: "Ten or fifteen years ago, I could get budget numbers from my business development and marketing departments on the revenue side, and general management department on the expense side, and the numbers would come back not that far apart. I'd have to work with the managers, but we could pull the numbers into alignment. Now there is no way to do this. A whole new revenue stream is needed."

¹⁴ Interview, Pat Kaufman, Governor's Office of Motion Picture and Television.

¹⁵ Interview, Sean Vesce, producer of video games.

¹⁶ *New York Times*, "City Starts Program to Foster Entrepreneurial New Media," July 8, 2009.

Performing arts organizations are accomplishing this through different means including partnering with universities for real estate, seeking commercial transfers and enhancement funds, pooling costs, and developing other sources of earned income such as restaurants in the theaters.

According to a survey by the Theatre Communications Group, 15 of 100 nonprofit groups surveyed reported enhanced income in 2005.¹⁷ In addition to a direct subsidy, the nonprofit theatre gets the chance to draw royalties from a possible commercial run. The commercial producers benefit from being able to test shows at smaller venues. This phenomenon has become commonplace in recent years as sources of funding for nonprofits have become increasingly scarce.

Other production companies curtail costs by “piggybacking,” a practice of sharing stages, lighting, sound equipment and crew.¹⁸ Symphony orchestras, operas, and musical theatres partner with recording companies to secure supplemental income for their organizations and performers through sale of the recordings of their productions.

- **Retaining and Attracting Audiences:** A key challenge for the nonprofit performing arts is the graying audience and the consequent need for new business models. As asserted by Robert Zukerman, NYSCA Theatre Department head, “the subscription model is dead.” Subscribers have long been the essential core of audience development. They are important because it is much more efficient to sell a series of tickets to the same people year after year than to sell one single ticket at a time; moreover, subscribers often become donors.¹⁹

The challenge of audience development extends from subscription versus single-ticket buyer to stagnation in the overall number of tickets sold. The National Endowment for the Arts (NEA) has surveyed public participation in various arts since 1982 and found no growth in this area, despite increases in leisure time, real income, and levels of education among the general population.²⁰ Even connecting with the traditional audience for the performing arts has become a challenge. The days when the season’s marketing efforts for the Boston Symphony Orchestra consisted of sending subscribers the dates of the next season’s concert series are over.²¹ Administrators, who once worried about the graying of the audience, now wonder where the graying baby boomers are, as they fail to replace their parents’ generation. Atul Kanagat of the League of American Orchestras estimates that the demand for orchestral performances is only half of the capacity of the nation’s symphonies.²²

¹⁷ Robertson, Campbell. (March 18, 2007). “Nonprofit Show, But Money’s Riding on it.” *The New York Times*.

¹⁸ “Shows Survive by Sharing a Stage.” *The New York Times*.

¹⁹ Cahill, Brooklyn Philharmonic.

²⁰ National Endowment for the Arts, 2004. *2002 Survey of Public Participation in the Arts*. Research Division Report No. 45. Washington, D.C.

²¹ Jesse Rosen, League of American Orchestras.

²² Atul Kanagat, League of American Theatres.

Peter Gelb, general manager of the Metropolitan Opera, recently introduced controversial initiatives to reach new audiences through simulcasts of live productions into movie theaters, schools, and public spaces along with streaming on the internet and an opera channel on Sirius satellite radio. The short-term result has been an increase in box office revenues as well as costs. Plans include on-demand performances, internet sales of DVD's, and foreign broadcasts.²³

- **Scarcity of Affordable Space:** The real estate boom of recent years has had an enormous impact on both performing arts organizations and individual performing artists. Organizations that do not own their performing and rehearsal space have seen rents climb steeply. *Where Can We Work?*, a survey of performing artists in New York City conducted by Performing Arts Spaces, found that affordable performance and rehearsal space is a key concern of musicians, actors, and dancers in the city. Susan Rothchild, general counsel to the New York City Department of Cultural Affairs, observed that the benefits of dedicated rehearsal/performance space and real estate costs have often led performing arts groups to mixed-use development only to find themselves hostage to the larger purpose of that real estate project. The upstate cities of Buffalo, Rochester, and Syracuse offer greater advantages in affordable living and performing space and, as a result, are increasingly attractive to performing artists and organizations.

Individual performing artists must scramble for space, coping with the logistical difficulties of transporting instruments to changing locations. Several arts service organizations are working to help ease this crisis. For example, Performing Arts Spaces makes its detailed inventory of space available to performers and their companies, and ART/NY and New 42nd Street have developed performance, rehearsal, and office space for performing arts companies.

Theatre

Theatre in New York State runs the gamut from large-production musicals to one-person plays. In dollar terms, Broadway is dominant, especially when the impact of returns to the New York economy from Broadway touring companies is considered. But the nonprofit theatre is critical to the health of theatre in New York. The nonprofit and commercial/Broadway and Off Broadway theatre in New York City share the workforce of creative, technical, and administrative talent, and a network of specialized suppliers. In addition, the boundaries between these sub-sectors are very porous. Productions may start out in nonprofit Off Broadway theatre and end up in commercial Broadway theatre, and it is not uncommon for commercial producers to help subsidize nonprofit productions through “enhancement deals.” The line between commercial and nonprofit theatre is also blurred outside New York City where Broadway touring productions play exclusively in nonprofit or government venues.

Broadway theatre comprises 39 theatres with 500 or more seats in Manhattan's theatre district. During the 2008-09 season, Broadway made record-breaking gross revenues and had the highest number of new shows since 1983 despite the economic downturn. Over the last eight years Broadway grosses have consistently increased. A challenge facing Broadway shows, according to employer representatives, is rising costs and the consequent need for longer running times to

²³ *Wall Street Journal*, “A Knight at the Opera: Big Plans: Large Bills,” April 24, 2008.

recoup the investment. In addition, family shows and other forms of live performance outside of the traditional theatre and Broadway format (e.g., Cirque du Soleil, Urban Circuit) have experienced significant growth and profitability.

Of all the arts and entertainment industry segments in New York, Broadway theatre has the most significant measurable effect on tourism. Unlike Off and Off-Off Broadway theatre and other live performing arts, most of the Broadway audience comes from outside of New York City. During the 2004-2005 season, 3.25 million visitors came to New York City specifically to go to the Broadway theatre. Another 1.1 million people extended a trip made for another purpose in order to see a Broadway show; they made ancillary expenditures associated with these trips of \$2.1 billion in New York City, generating a total economic impact of \$3.1 billion.²⁴

Another way Broadway contributes to the economy of New York City is through returns from Broadway touring companies. In the 2004-2005 season, 17.8 million people across the United States went to a Broadway show in one of 253 venues. It is estimated that about \$189 million was returned to the New York City economy from that season, in the form of royalties and the portion of salaries of the touring New York workforce that is brought back to the city.

Off Broadway is defined by smaller theatres with 100-500 seats, and puts on smaller-scale, sometimes experimental productions for a largely local audience.²⁵ Off Broadway theatres are predominantly nonprofit, but include several commercial productions at any given time. Off-Off Broadway is defined as productions in theatres of fewer than 100 seats and is entirely nonprofit. In terms of expenditures, Off and Off-Off Broadway theatre is dwarfed by Broadway theatre, but nonprofit theatre constitutes an important cluster in its own right. On a per capita basis, nonprofit theatre spending in New York City is more than six times the national average.²⁶

Outside New York City, theatre is primarily nonprofit. There are 113 nonprofit theatres across New York State outside of New York City, with significant clusters in Westchester, Suffolk, and Onondaga (in and around Syracuse) counties, and an especially dense concentration of eighteen theatre companies in the city of Buffalo. Live theatre attracts more local audiences in these areas. The expansion of cultural tourism is both a current economic reality and the hope of future revitalization for upstate cities. Interestingly, *American Style* magazine's 2008 ranking of top 25 arts destinations lists New York City at the top spot for large cities and Buffalo at number one for mid-sized cities. Buffalo, characterized as a "rising giant," outranked such notable arts communities as Scottsdale, Pittsburgh, Savannah, and Atlanta.

On the commercial side, Broadway tours account for 65 percent of the dollar volume of activity with productions playing at nonprofit or government venues in Binghamton, Buffalo, Rochester, Schenectady, and West Point. The remaining commercial productions are quite small with ticket sales averaging \$350,000.²⁷

²⁴ The Broadway League, *Broadway's Economic Contribution to New York City 2004-2005*.

²⁵ ART/NY.

²⁶ Based on Theatre Communications Group, *Theatre Facts 2005* analysis of IRS 990 filings for 1,490 nonprofit theatres in the U.S.

²⁷ *Arts as an Industry*, p.76. The Alliance for the Arts.

Music

Music includes opera, symphony, other classical music forms as well as jazz, popular music, and a myriad of other styles. For-profit live music is a growing sector in New York State and the country as a whole. It involves a wide range of performances in large venues such as sports arenas along with intimate jazz and independent music venues. While symphony orchestras and other classical music groups struggle to maintain their audiences, for-profit concerts and live performances at club venues have experienced new growth over the last eight years with industry giants Live Nation and A.E.G. Live, as well as medium size presenters such as the Bowery Presents, investing in new and renovated venues. The clubs sector now boasts 246 venues across the New York City area and has turned neighborhoods such as Williamsburg and Dumbo into nightlife destinations.²⁸ Of unknown size and impact is the proliferation of musicians and musical performances in the informal economy throughout the state.

According to the analysis of NYSCA and IRS 990 records conducted for *Arts as an Industry*, there were 448 nonprofit music organizations across New York State with budgets totaling \$470 million in 2004. Half of the organizations are located in New York City and the other half in the rest of the state. New York City organizations account for 87 percent of total expenditures. This is a sector whose organizations span a wide range of budget sizes. The Metropolitan Opera at Lincoln Center accounts for 43 percent of spending by all 448 music organizations in the state.²⁹ Together with the three next largest New York City organizations – the New York Philharmonic, the New York City Opera, and Jazz at Lincoln Center, which join the Metropolitan as residents of Lincoln Center—63 percent of total spending by music organizations in New York State is accounted for. These Lincoln Center constituents present a startling concentration of expenditures in New York City, but the dominance of large-scale organizations in this sector extends to the rest of the state as well. Adding the major orchestras in Buffalo, Rochester, and Syracuse and the Glimmerglass Opera in Cooperstown brings the percentage accounted for by these eight largest organizations to 73 percent.

Dance

There are 192 nonprofit dance organizations in New York State with annual operating budgets that totaled \$185 million in 2004. The two largest, New York City Ballet and American Ballet Theatre, account for half of the budgetary dollars of all of these organizations statewide. Most nonprofit dance companies are very small. One-third of all the dance organizations have annual operating budgets of less than \$50,000, and only a few have budgets greater than \$500,000.

The median expenditure of New York State dance companies is \$78,000. Wages and benefits account for 42 percent of dance expenditures and another 11 percent of budgets go to outside artistic fees. Dance/USA and its New York chapter Dance/NYC are the primary advocacy groups in this discipline.

²⁸ *Time Out New York* Website; Ben Sisario, “New Club Twins Rock ‘N’ Bowl,” *The New York Times*, 7/31/2008; Ben Sisario, “Neither Arenas Nor Dives, New Clubs Hope to Succeed With More Style,” *The New York Times*, 8/30/2007.

²⁹ This calculation does not include the 21 percent increase in the Metropolitan Opera’s budget over the last two years to a projected \$268.3 million in FY2008.

VISUAL ARTS

Visual arts encompass museums, art galleries, and art dealers; and employ a range of occupations, which for the purpose of this study include fine artists (painters and sculptors), photographers, and designers. New York State is home to world-renowned museums, including the Metropolitan Museum of Art, the Museum of Modern Art, the Guggenheim Museum, and Albright Knox; as well as major auction houses such as Christie's and Sotheby's. Although the majority of the museums and galleries concentrate in New York City, there are important visual arts centers in Buffalo, Syracuse, the Mid-Hudson Valley, Westchester, and Long Island. The nonprofit and commercial visual arts sector had an impact of about \$3.1 billion in the economy of New York State, according to the Alliance for the Arts.³⁰ Museums, art galleries, and art dealers generated direct employment of approximately 14,000 in 2006 (including both employment in firms and self-employment).³¹

Key challenges facing the visual arts include increased competition among artists and arts organizations, and the reduction in funding from both government and private donors. The workforce shares the same challenges of unstable employment and income as the workforce of other arts and entertainment sectors. In addition, visual artists face insufficient and costly work/live space, particularly in the New York City area. As in other arts and entertainment sectors, the labor market in visual arts is highly stratified, with a few superstars at the top, the so called bestsellers in the next tier, and the majority of visual artists who are more likely to struggle to make a living from the sale of their work at the bottom. According to the RAND Corporation, this stratification has increased as a result of the structure and trends of the visual arts sector, including the presence and rise of the superstar museums as well as the expanding arts market that has become a multibillion dollar business.³²

³⁰ Including a \$1.6 Billion impact of art galleries and auction houses, plus \$1.5 billion impact of museums. Source: Alliance for the Arts.

³¹ US BLS, Quarterly Census of Employment and Wages; and Non-employer Series of the US Census Bureau.

³² *A Portrait of the Visual Arts*. (2005). Rand Corporation.

WORKFORCE ANALYSIS

The arts workforce is New York’s key competitive advantage in attracting arts and entertainment producers and consumers. According to a study by the National Endowment for the Arts, New York is second only to California in terms of number of artists by state.³³ While the deep talent pool is a key factor for attracting employers, the state’s uniquely diversified arts industry also represents an advantage for employees who have more opportunities to work across multiple sectors here than in California – where employment concentrates predominantly in film and television production.³⁴

The arts and entertainment industry is labor intensive, i.e., labor accounts for a major portion of the cost of production (see Table 1). This has important implications for both business locational decisions and for public policy. Thus, the availability and cost of labor are major factors in location decisions for mobile sectors of the industry such as the electronic media, particularly film and TV production. For this sector, New York labor costs roughly compare with those in California despite the higher cost of living experienced in New York, especially in New York City.³⁵

Table 1

Labor as a Percent of Total Production Costs	
Motion Picture and Television	63
Commercial theatre	54
Live Music	69
Dance	42
Art Galleries and Auction Houses	38
<small>Source: Arts as an Industry: Their Economic Impact on New York City and New York State, Alliance for the Arts, 2006.</small>	

According to a study by the Center for an Urban Future, New York cannot take this large pool of talent “for granted” because of the many challenges it faces, including but not limited to high costs of living and lack of affordable workspace.³⁶ The analysis presented in this section reveals the assets and vulnerabilities of this workforce, as well as the areas that offer a potential role for social policy to assist in addressing the key issues. The analysis, drawn primarily on data from the U.S. Census Bureau’s American Community Survey (ACS),³⁷ reveals that artists and entertainment professionals in New York State experience high levels of contingent employment and extreme disparities in income. Additionally, this workforce tends to be younger and much more highly educated than the overall New York State workforce.

Although the arts and entertainment industry employs a number of workers and professionals in administrative, clerical, and service occupations, these do not constitute the majority of the workforce in this industry and their skill sets are not specific to arts and entertainment. This study focuses on those occupations whose skill sets directly relate to arts and entertainment and

³³ NEA, *Artists in the Workforce 2003-2005*; M. Dolfman, R. Holden, *The Economic Impact of the Creative Arts Industries*.

³⁴ Cultural Capital, op.cit.

³⁵ Christopherson, et al., *New York’s Big Picture: Assessing New York’s Position in Film, Television and Commercial Production, 2005*.

³⁶ *Creative New York*, op. cit.

³⁷ The ACS, together with the Current Population Survey (CPS), are household surveys (as opposed to employer surveys) and are generally used for workforce studies. Studies that have used the ACS and the CPS as sources for examining the workforce in the arts industry include: National Endowment for the Arts, *Artists in the Workforce: 1990-2005*; Rand Corporation, *A Portrait of the Visual Arts, 2005*.

are not easily transferable to other industries. In New York State, there are approximately 259,000 individuals that identify themselves as artists or entertainment professionals (Table 2). By far the largest occupational group is designers, which includes graphic designers, set and exhibit designers, and all other commercial, industrial, and artistic designers (33.5 percent of the total). The second largest group is artists and related workers, which in addition to fine artists includes multi-media artists and animators, art directors, and craft artists (11 percent). Third and fourth largest groups are writers and authors (10.7 percent), and producers and directors (9.6 percent).

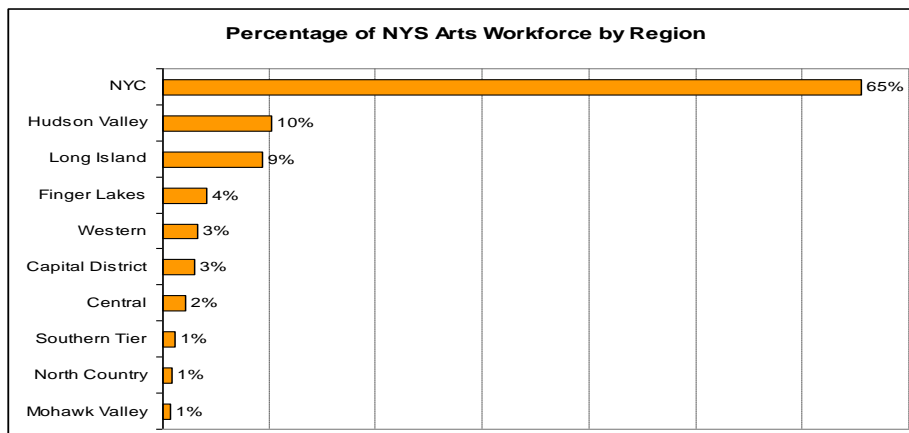
Table 2

NYS Arts, Media and Entertainment Workforce		
Selected Occupations	Number of Individuals	Percent of Total
Designers	86,902	33.5
Artists and Related Workers	28,787	11.1
Writers and Authors	27,790	10.7
Producers and Directors	25,011	9.6
Musicians, Singers & Related	19,423	7.5
Photographers	17,835	6.9
Actors	11,662	4.5
News Analysts, Reporters & Correspondents	11,308	4.4
Broadcast & Sound Technicians, Radio & Media Equipment Operators	9,868	3.8
Miscellaneous Media & Communication Workers	7,652	3.0
TV & Film Camera Operators & Editors	5,357	2.1
Dancers and Choreographers	4,163	1.6
Announcers	3,591	1.4
Total All Occupations	259,349	100.0

Source: American Community Survey 2005-2007, Census Bureau

Chart 3 shows place of residence of the New York State arts workforce by region, with 65 percent of the workforce living in New York City. A map of the workforce data by county (see Chart 4) reveals at least five other major arts hubs, including the counties in Long Island, the Hudson Valley, and the counties of Erie (Buffalo), Monroe (Rochester), and Onondaga (Syracuse).

Chart 3



Source: Census Bureau, American Community Survey 2005-2007.

Chart 4



EMPLOYMENT PATTERNS

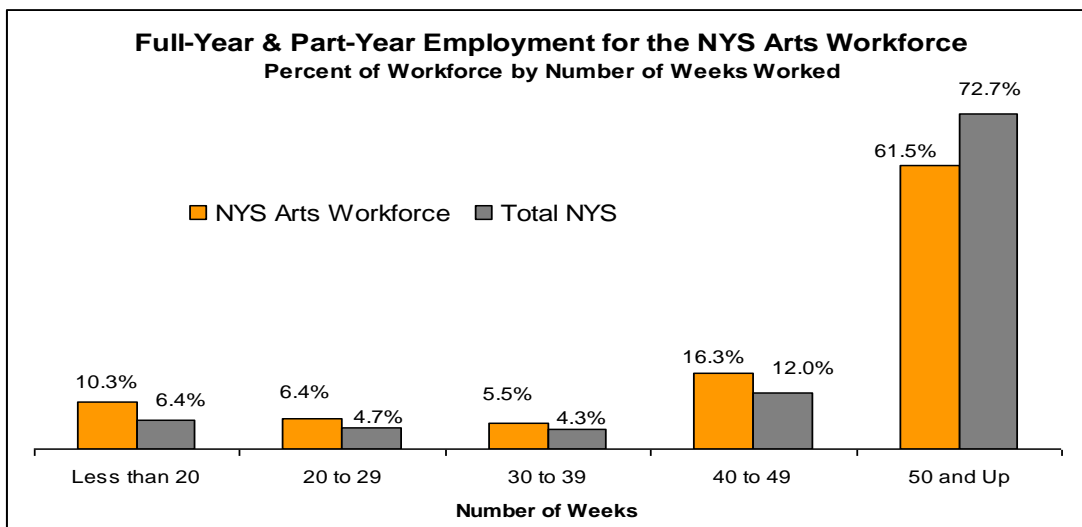
The New York State arts workforce is less likely to be employed year-round, and more likely to be self-employed, than the overall state workforce. About 62 percent of all artists and entertainment professionals are employed year-round (50 weeks and up), compared to about 73 percent of the overall New York State workforce (Chart 5); and about 39 percent of the arts workforce is self-employed, compared to 10 percent of the workforce as a whole (Chart 6). These nontraditional employment patterns have significant consequences for income levels and stability, as well as access to health and welfare benefits (including unemployment insurance and pensions).

Overall, contingent employment is characteristic of this industry. Artists and entertainment professionals move from project to project throughout the year and are likely to experience prolonged unemployment between projects. In its report on artists at the national level, the National Endowment for the Arts (NEA) found that about 33 percent of the national arts workforce (excluding technical professionals) worked less than 50 weeks out of the whole year.³⁸ Based on census data from 1940 to 2000, another national study of artists found that labor market outcomes for this workforce were consistently inferior to those in occupations of comparable educational levels such as professional and technical workers; artists work

³⁸ NEA, *Artists in the Workforce, 1990-2005*, op. cit.

consistently fewer weeks per year than professionals and technical workers, and their unemployment rates are two or three times higher.³⁹

Chart 5



Source: Census Bureau, American Community Survey 2005-2007

To compensate for the contingent nature of their employment and the consequent unstable or low income levels, artists and entertainment professionals often engage in multiple job-holding and cross over between the commercial and nonprofit sectors and work outside of the arts and entertainment industry. “Moonlighting”, or holding a second regular job in addition to one’s main job, is an employment pattern characteristic of artists occupations. The National Endowment for the Arts reports that artists have higher rates of moonlighting than other occupations. Artist occupations are also common choices for second jobs for many with primary jobs in other lines of work.⁴⁰ Arts industry leaders have noted the need for in depth studies of employment patterns of artists, including employment in occupations outside of the arts and entertainment industry.⁴¹

As shown in Table 3 below, which portrays New York arts employment patterns by occupation, actors tend to experience the lowest levels of full-year employment among all the arts and entertainment occupations examined. Only 20.8 percent of actors work for the full-year, and 29 percent of them (the highest percentage among all occupations) work less than 20 weeks per year. Other occupations showing significantly low levels of full-year employment include miscellaneous media and communication workers, TV-film camera operators and editors, musicians, photographers, and dancers and choreographers.

³⁹ N. Alper and G. Wassall, “Artists’ Careers and their Labor Markets.” In Ginsburg and Throsby, *Handbook of the Economics of Art and Culture*, 2006.

⁴⁰ Neil O. Alper and Gregory H. Wassall, *More than Once in a Blue Moon: Multiple Job Holdings by American Artists*, Research Division Report #40, 2000.

⁴¹ Interviews, Michelle Byrd, Director of Independent Feature Project; Anthony Bregman, Film Producer; and Dean Ara Guzelimian, The Juilliard School.

Broadcast technicians, and news analysts and correspondents, show the highest percentages of full-year employment, 70.6 and 72 percent respectively (see Table 3). These occupations are linked to TV and radio broadcasting, which is one of the few sectors (together with long running Broadway productions) that tend to offer steady employment. Other occupations with high percentages of full time employment are designers (67.8 percent) and announcers (65.9 percent).

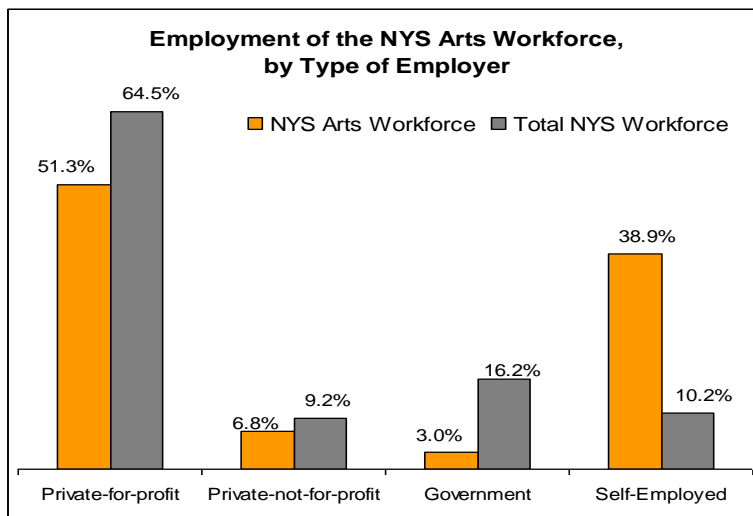
Table 3

NYS Arts Workforce: Full-year & Part-year Employment, Percentage by Occupation					
Selected Occupations	Weeks worked past 12 months				
	Less than 20	20 to 29	30 to 39	40 to 49	50 and Up
Actors	29.1	10.7	13.8	25.6	20.8
Miscellaneous Media & Communication Workers	16.3	11.3	7.1	21.7	43.5
TV-Film Camera Operators & Editors	10.6	12.4	6.0	20.9	50.0
Musicians, Singers, & Related	14.8	6.8	7.4	19.3	51.7
Photographers	14.5	9.4	5.3	14.6	56.3
Dancers and Choreographers	3.2	5.8	15.0	16.9	59.1
Artists and Related Workers	8.5	6.6	4.8	17.4	62.6
Writers and Authors	8.9	6.1	5.9	16.3	62.7
Producers and Directors	7.1	8.4	4.7	16.8	63.1
Announcers	9.9	0.0	3.9	20.3	65.9
Designers	9.1	4.7	4.2	14.2	67.8
Broadcast & Sound Technicians, Radio & Media Equipment Operators	5.8	6.5	6.2	10.9	70.6
News Analysts, Reporters, & Correspondents	6.1	3.8	2.6	15.5	72.0

Source: American Community Survey 2005-2007, Census Bureau

Self-employment is another key characteristic of the labor market in arts and entertainment. The NEA study found that 35 percent of artists nationwide are self-employed. In New York State, the percentage of self-employment for the arts workforce (38.9) is almost four times that of the overall workforce (Chart 6).

Chart 6



Source: Census Bureau, American Community Survey 2005-2007

For those who are not self-employed, a slim majority work for private for-profit employers (51.3 percent). Relatively few arts workers are employed by nonprofit private employers (6.8 percent) and by government (3 percent).

By specific occupation, self-employment is over 50 percent among photographers, musicians, singers, writers, and visual artists (Table 4). Employment in the commercial sector (private for-profit) is over 70 percent for news analysts, reporters and correspondents, broadcast technicians, and announcers. Compared with other arts occupations, musicians, singers, and related workers are more likely to be employed in the nonprofit sector (24 percent), reflecting such major employers as symphony orchestras and opera companies.

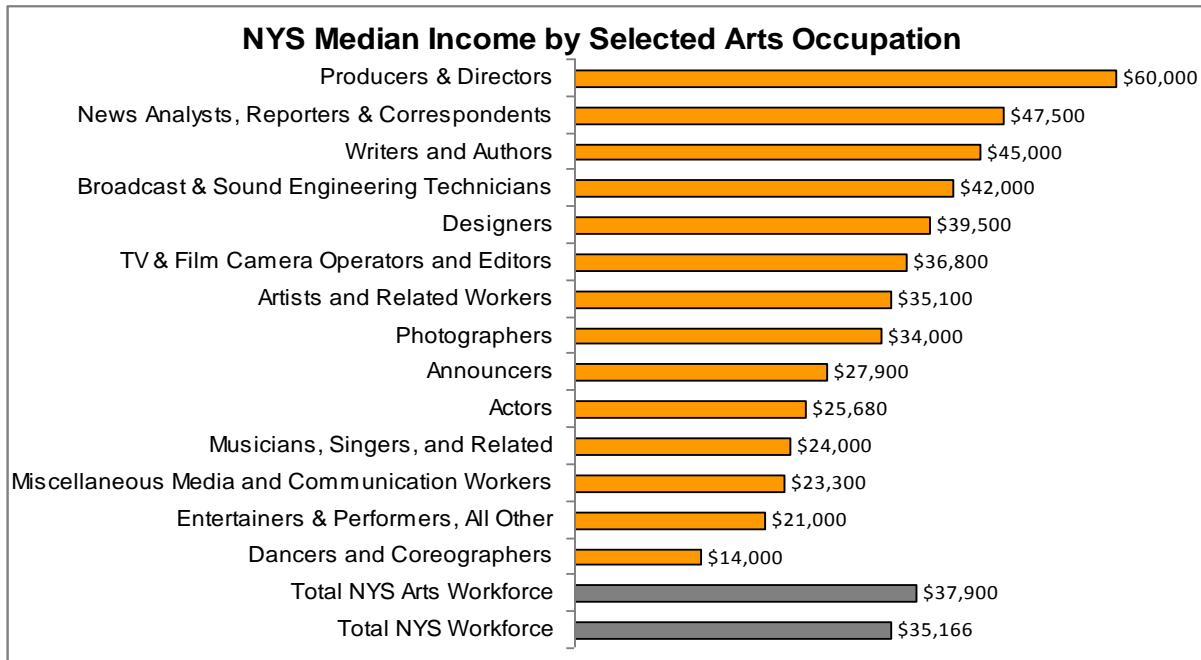
Table 4

NYS Arts Workforce: Employment by Type of Employer, Percentage by Occupation				
Selected Occupations	Private-for-profit	Private-not-for-profit	Government	Self-Employed (1)
Photographers	35.9	2.8	2.2	59.2
Musicians, Singers & Related Workers	16.3	24.2	1.1	58.4
Writers and Authors	30.9	9.1	3.6	56.5
Fine Artists and Related Workers	40.8	2.6	1.3	55.3
Dancers and Choreographers (2)	43.0	12.6	0.5	43.9
Actors	44.8	12.9	0.7	41.6
TV & Film Camera Operators & Editors	57.2	1.5	2.1	39.2
Producers and Directors	56.2	8.5	1.0	34.4
Designers	67.5	3.0	1.7	27.8
Miscellaneous Media & Communication Workers	31.9	13.2	31.1	23.8
Announcers	71.7	8.6	1.2	18.5
Broadcast & Sound Technicians, Radio & Media Equipment Operators	72.5	2.2	8.2	17.0
News Analysts, Reporters & Correspondents	78.0	4.9	6.0	11.2
Notes: (1) Self-Employed includes "Works with Family Without-Pay."				
(2) According to leaders in the arts and entertainment industry, dancers are mostly employed in the non-profit sector.				
Source: Census Bureau, American Community Survey 2005-2007				

INCOME

The employment patterns of the New York State arts workforce, as described above, have adverse effects on incomes, which are highly unstable. Median income of the New York State arts workforce is around \$37,000, which is higher than the New York State median of \$35,000; but for most occupations, median incomes fall below the norm. This is the case of dancers and choreographers, musicians, actors, entertainers and performers, and miscellaneous media and communication workers. At the high end of the income spectrum are producers and directors, who register median incomes that are more than five times higher than those of dancers and choreographers.

Chart 7

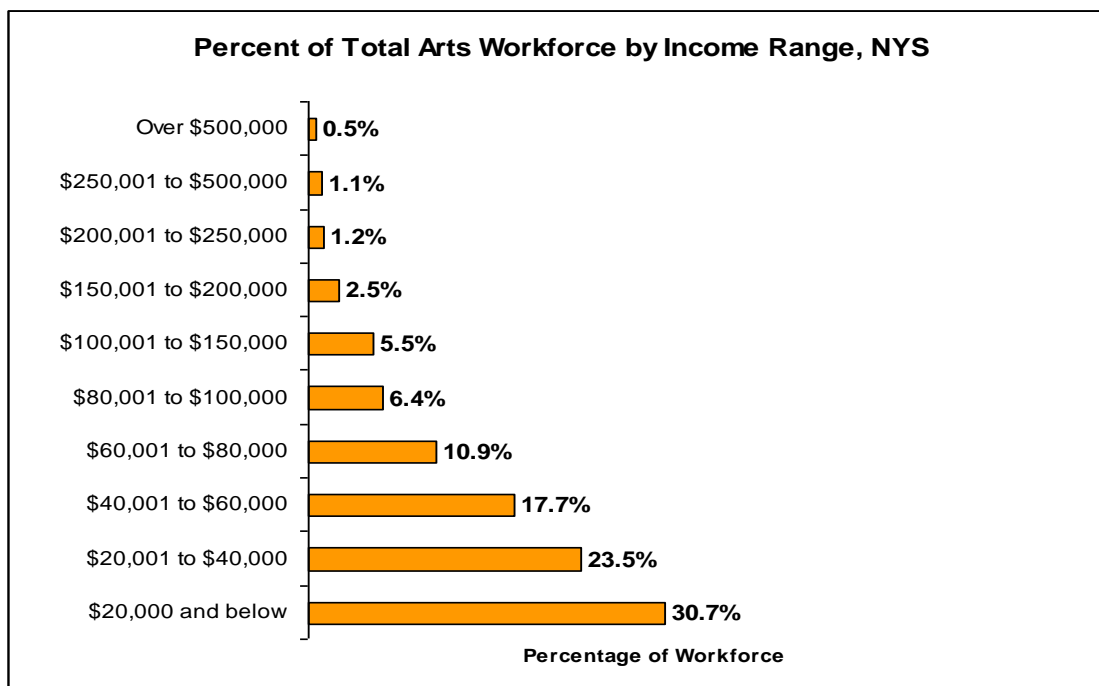


Source: Census Bureau, American Community Survey 2005-2007

The income distribution of the New York State arts workforce as a whole is skewed toward the bottom income levels, with almost one out of three earning \$20,000 or less annually and only 3 percent reporting annual incomes above \$500,000 (see Chart 8). This income distribution pattern applies to all occupations (Charts 9 to 20). Extreme cases include dancers and choreographers with 59.2 percent making \$20,000 and less, and musicians with 47.3 percent making \$20,000 and less. For most occupations only a tiny percentage, and none of the dancers, make it to the top of the income distribution (income ranges above \$200,000). The highest percentages for incomes of more than \$200,000 are news analysts (6.1 percent), and producers and directors (6.2 percent).

The uneven distribution of income in this workforce is explained by the stratification of the industry's labor market, which in turn reflects the structure and dynamics of arts and entertainment. Most of this industry's sub-sectors tend to be stratified and bifurcated, with large budget productions (e.g., blockbuster films and TV shows, Broadway shows) on the high end and small budget productions (e.g., independent films, Off-Off Broadway, and regional theatre) on the low end. In the case of the visual arts, the rise of the superstar museums during the 1970s and 1980s has been associated with the increase in income disparity in that sector. The outcome for artists and entertainment professionals is high income concentration at the top, and crowding at the low end, with the vast majority earning less than 40,000.

Chart 8



Source: Census Bureau, American Community Survey 2005-2007

The combination of excess supply and income disparity is described and analyzed in *The Winner Take All Society*, of which cultural markets are a leading example. This type of market is “one in which the value of what gets produced depends on a few top performers who are paid accordingly.” One consequence of a “winner take all market” is the attraction of too many contestants; for example, 90 percent of actors never make a living at their craft. Continuing attraction to a market with high rewards for a few, according to this theory, is the well documented human frailty of over estimating one’s chances of winning (as illustrated by lottery sales). Losers may get nothing. The authors cite aspiring rock musicians who are willing to pay the full cost of producing and distributing their first albums. Other motives for free and low paid labor are aspirations for fame and devotion to one’s craft or profession.⁴²

⁴² Robert H. Frank and Phillip J. Cook, *The Winner Take All Society*, 1995.

Chart 9

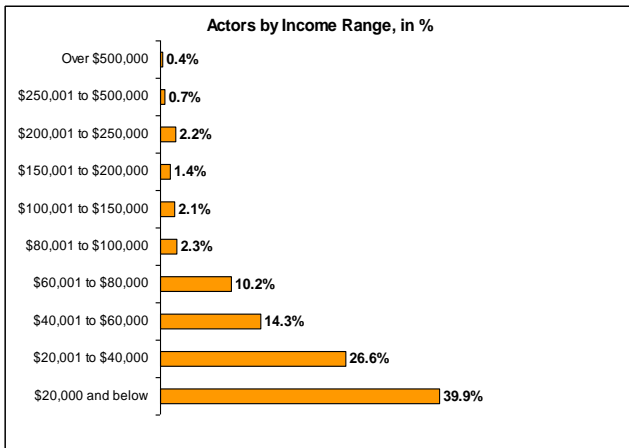


Chart 10

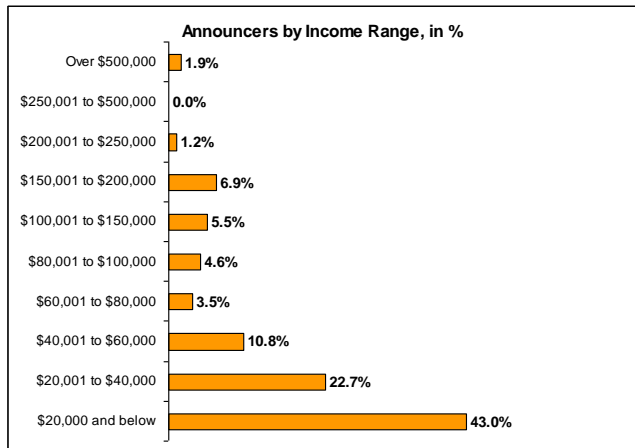


Chart 11

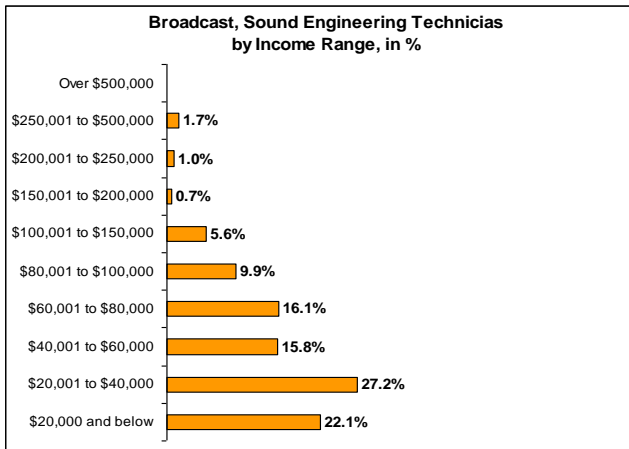


Chart 12

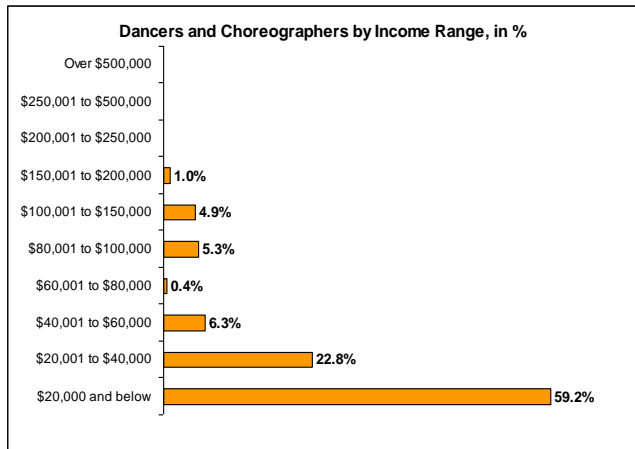


Chart 13

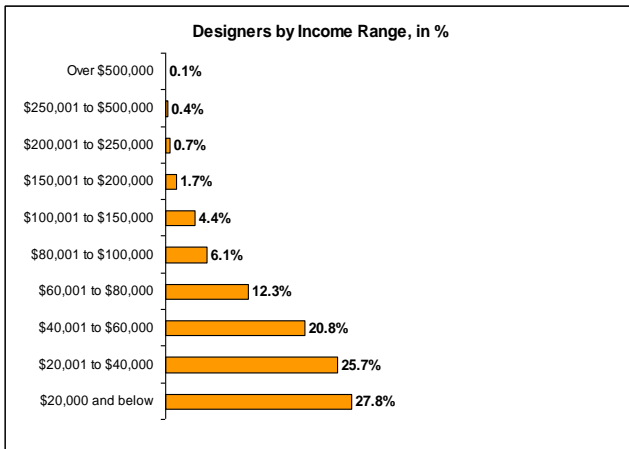
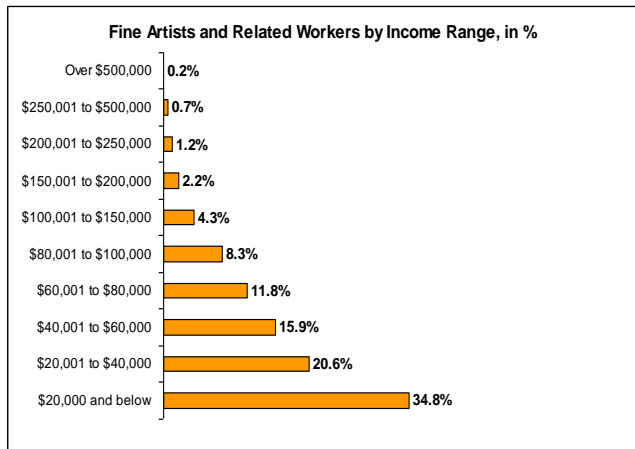


Chart 14



Source: Census Bureau, American Community Survey 2005-07

Chart 15

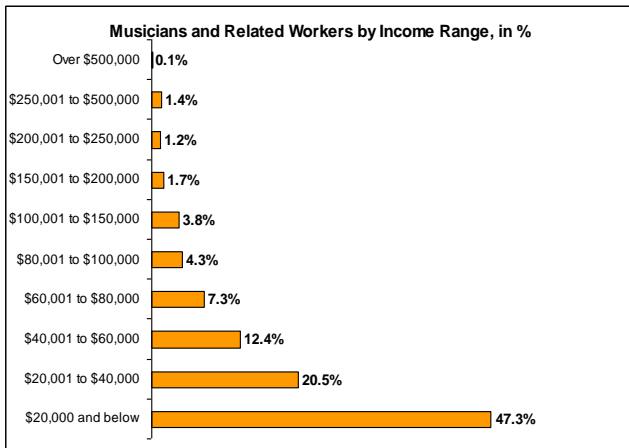


Chart 16

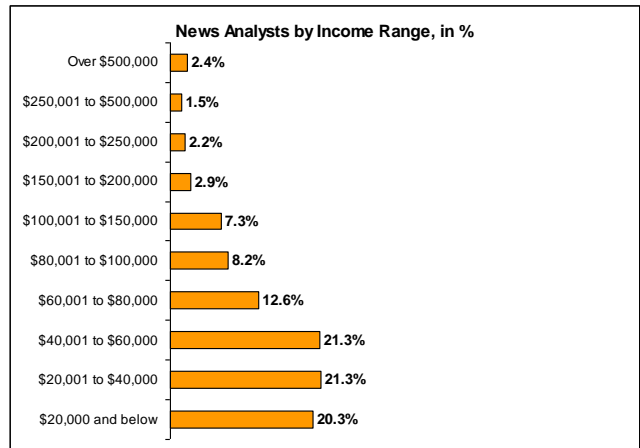


Chart 17

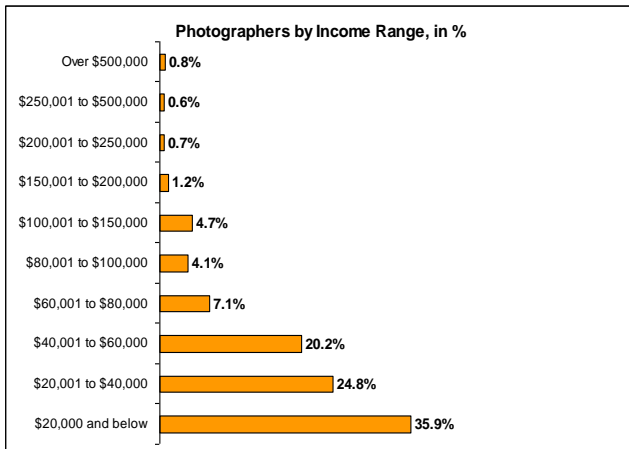


Chart 18

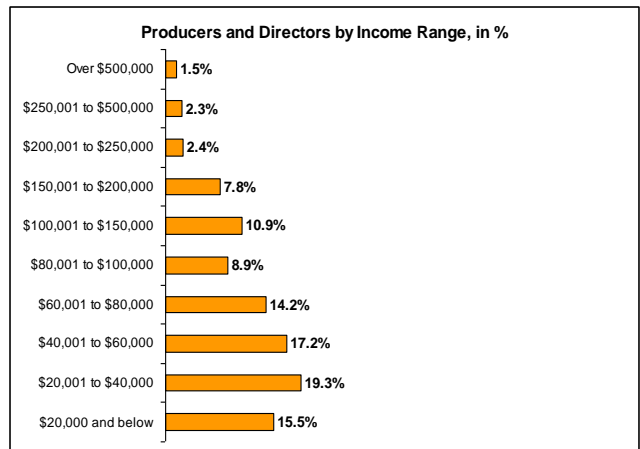


Chart 19

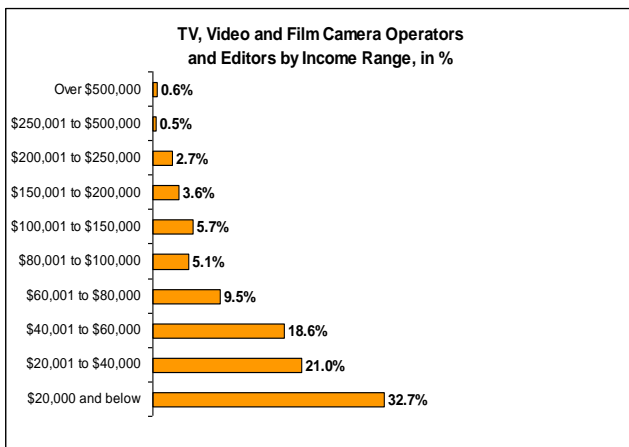
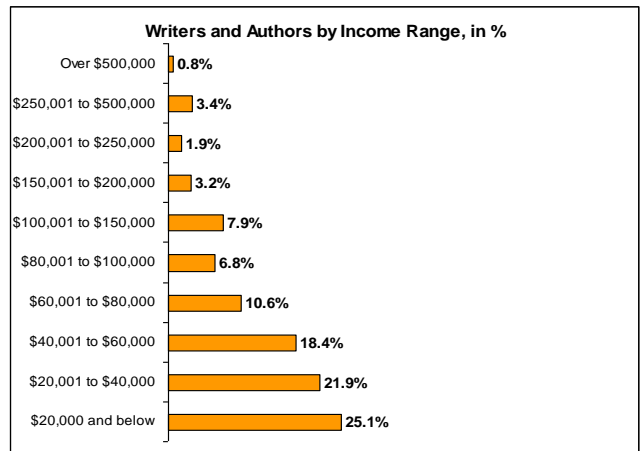


Chart 20



Source: Census Bureau, American Community Survey 2005-07

DEMOGRAPHIC COMPOSITION

Women and minorities are a major component of the arts workforce but are under-represented in higher paying jobs. Arts workers tend to be younger and more highly educated than the average for New York State’s workforce.

Gender

Women comprise 44 percent of the arts workforce, as shown in Table 5. As compared with their representation in the general workforce of the state (48 percent), they are less likely to be employed in performing arts (36 percent) and more likely to have jobs in museums and historical sites (52 percent).

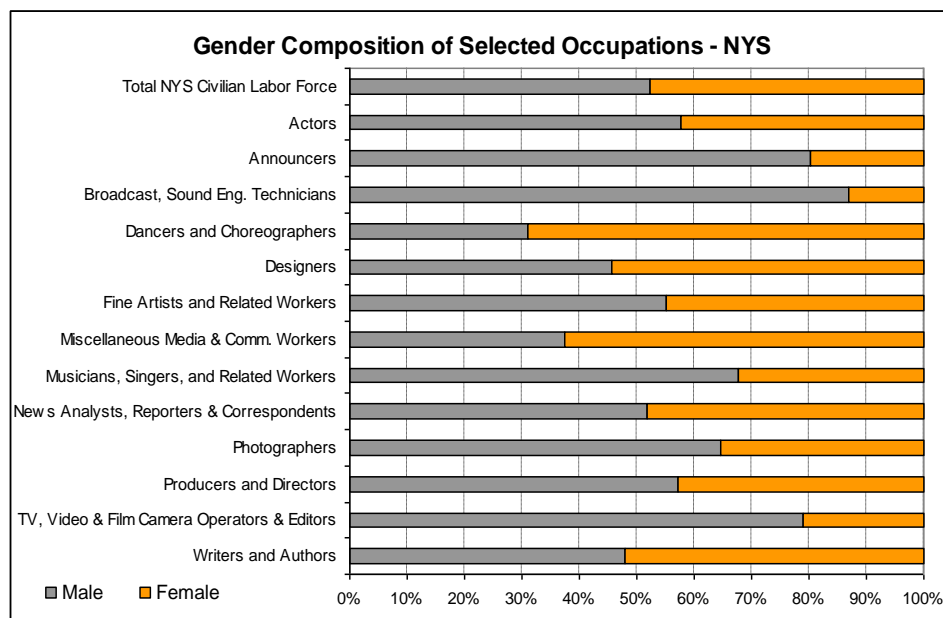
Table 5
Gender Composition of NYS Arts, Entertainment and Recreation Employment by Sector, 2007

	Male	Female
All Arts Sectors	55.7	44.3
Motion Picture	56.8	43.2
Broadcasting	55.35	44.65
Performing Arts	64.0	36.0
Museums	48.0	52.0

Source: US EEOC Aggregate Report for New York Arts and Entertainment, 2007

Female representation equals or exceeds the average for the total workforce in the following occupations: writers, designers, dancers and choreographers; and miscellaneous media and communications workers, but falls below in share of jobs as actors, photographers, producers and directors, and musicians. In technician positions including broadcast sound engineers and technicians; TV, video, and film camera operators and editors; announcers – the percentage of women is 20 percent or less (see Chart 21).

Chart 21



Source: Census Bureau EEOC Files

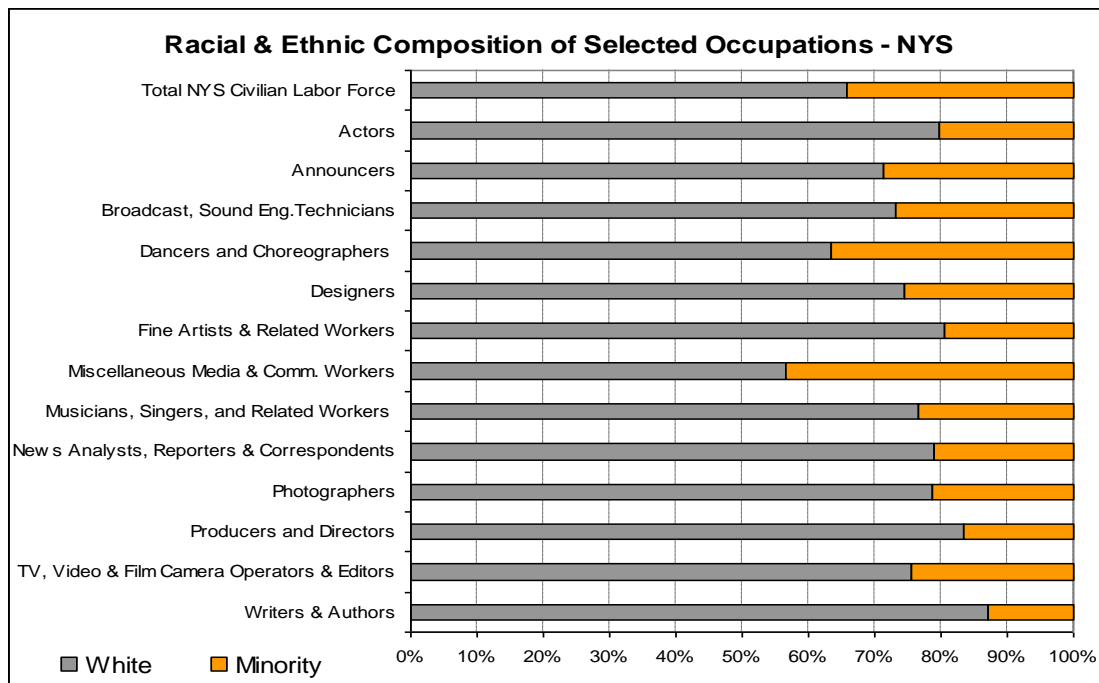
The gender differential is even more pronounced when analyzed by rank in organizational hierarchies. For arts workers employed in firms, men predominate among arts and entertainment executives and senior managers, as well as in craft and operative jobs, while clericals are mainly female.⁴³

Ethnicity

Racial and ethnic minorities in the arts professions (Chart 22), are under-represented (relative to their percentage of the workforce), in all occupations except dancers and choreographers, and miscellaneous media and communication workers.

When employment is analyzed by organizational positions, minorities are rarely found at the top and are heavily grouped in service and office work at the low end of the status and income spectrum. African Americans and Latinos hold only 13 percent of the executive positions and less than 20 percent of the technician and craft jobs.⁴⁴

Chart 22



Source: Census Bureau EEOC Files

Diversity in the arts workforce and equal opportunity for advancement has been a matter of expressed concern to employers, unions, and legislators.⁴⁵ What are the barriers to employment and upward mobility for women, minorities, and the disabled in this industry? An in-depth study of this question in the London audio-visual sector attributed the lack of diversity to the training and employment process which prevails in this sector, i.e. job search through social networking and job entry through mostly free labor, a process which tends to

⁴³ U.S. EEOC, 2007, Aggregate Report for New York Arts, Entertainment and Recreation.

⁴⁴ Ibid.

⁴⁵ For example, Edward Wyatt, “No Smooth Ride on TV Networks’ Road to Diversity”, *New York Times*, March 18, 2009. Also see websites of corporations and unions.

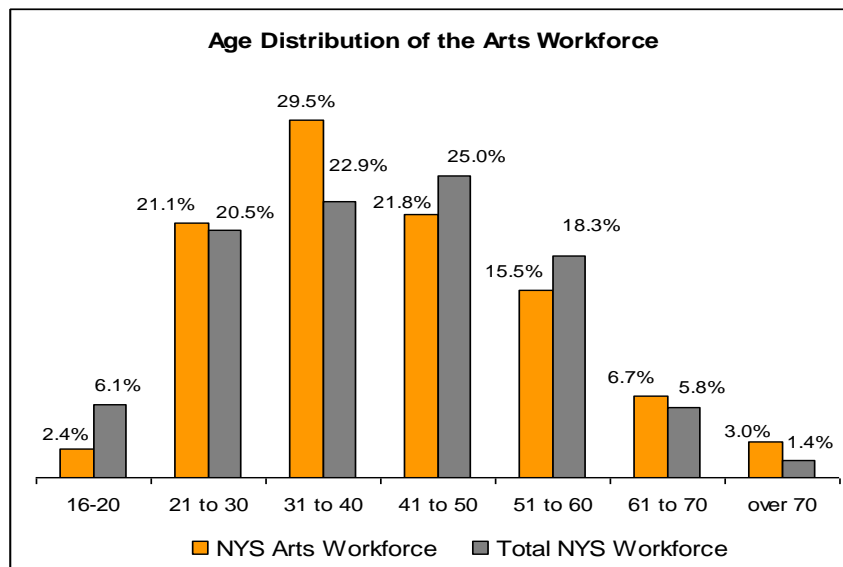
exclude individuals from low income and less socially connected families.⁴⁶ A recent article focusing on media employment patterns in the United States makes a similar point about “exclusionary networks” which restrict women and minorities.⁴⁷

Several organizations are attempting to address disparities in media employment. These include diversity departments in corporations and diversity committees in unions. For example, NBC Universal provides extra money for shows that add minority members to their staff and the Screen Actors Guild offers incentives to film makers that employ a diverse workforce. In 2005 the mayor of New York City appointed a diversity task force to increase minority representation in film crews. Results of these efforts remain to be seen.

Age

Arts workers tend to be younger than the overall New York State workforce. As shown on Chart 23, 50.6 percent of the arts workforce is between the ages of 21 and 40, compared to 43.4 percent of the overall New York State workforce. When analyzed by occupation, the age disparity is even greater. More than half of the New York workforce is over 40 years old. For the arts workforce in general, this percentage is 47 percent. For dancers, only 12 percent; camera operators, 33 percent; and announcers, 39 percent (Table 6). The fact that arts workers are underrepresented in the 41-60 age group suggests the possibility that many change occupations in their middle years as a response to their experience with low incomes and unstable work prospects. On the other hand, Chart 23 and Table 6 indicate that arts professionals, notably visual artists, actors, musicians, writers and media workers, are more likely to continue working in their chosen occupations after age 60 as compared to others in the state workforce.

Chart 23



Source: Census Bureau, American Community Survey 2005-2007

⁴⁶ Jane Holgate and Sonia McKay, *Institutional Barriers to Recruitment and Employment in the Audio Visual Industries: The Effect on Black and Minority Ethnic Workers*, 2007.

⁴⁷ Susan Christopherson, “Beyond the Self Expressive Creative Worker. An Industry Perspective on Entertainment Media,” *Theory, Culture and Society*, vol. 25, 2008.

Table 6

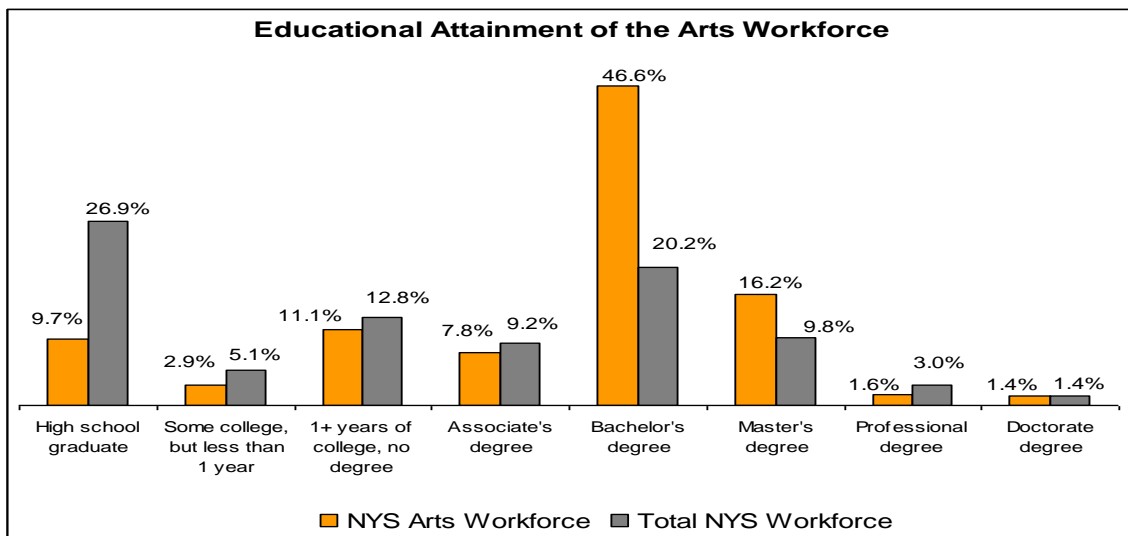
NYS Arts Workforce: Age Distribution, Percentage by Occupation							
Selected Occupations	16-20	21-30	31-40	41-50	51-60	61-70	over 70
Artists and Related Workers	2.0	15.7	24.7	21.0	21.3	10.0	5.2
Actors	3.0	25.1	28.8	17.3	12.4	6.3	7.0
Producers and Directors	0.4	20.2	34.2	26.3	12.3	5.2	1.4
Dancers and Choreographers	11.8	37.1	39.3	9.6	1.3	0.0	0.9
Musicians, Singers & Related Workers	2.7	12.2	27.5	23.8	19.0	9.6	5.4
Announcers	6.3	21.8	33.1	25.0	9.4	2.5	1.9
News Analysts, Reporters, Correspondents	2.3	24.8	29.7	20.8	16.6	4.1	1.6
Writers & Authors	1.8	15.1	25.4	21.0	20.8	9.6	6.4
Miscellaneous Media & Communication Workers	3.5	17.3	22.2	22.4	17.0	11.8	5.9
Broadcast & Sound Engineering Tech's, Radio & Media Equipment Operators	4.7	21.0	28.8	25.0	15.6	4.4	0.6
Photographers	3.7	24.9	29.0	20.9	14.3	5.7	1.6
TV & Motion Picture Camera Operators & Editors	4.4	20.9	41.3	19.3	8.1	5.1	0.8
Designers	1.8	24.8	31.1	21.7	13.7	5.6	1.4

Source: Census Bureau, American Community Survey 2005-2007

EDUCATIONAL ATTAINMENT

Arts and entertainment workers have levels of educational attainment well above the average for the New York workforce.

Chart 24



Source: Census Bureau, American Community Survey 2005-2007

As shown in Chart 24 and Table 7, two thirds have completed a bachelor or post graduate degree, almost twice the percentage for the workforce as a whole. Among the arts occupations, writers and authors register the highest levels of education (87.7 percent with

bachelor degrees) followed by producers and directors (83.2 percent) and news analysts (83.7 percent). Less likely to have college and graduate degrees are dancers and choreographers (43.6 percent) and broadcast engineers (36.8 percent) but still above the average compared with other New York workers. Rand Corporation reports that there has been an increased emphasis on credentialization for emerging visual artists. This may be reflected in the New York statistics showing 70.7 percent of fine artists have bachelor and graduate degrees.

Table 7

NYS Arts Workforce: Educational Attainment, Percentage by Occupation								
Selected Occupations	% High school graduate	% Some college, less than 1 year	% 1+ years of college, no degree	% Associate degree	% Bachelors degree	% Masters degree	% Professional degree	% Doctorate degree
Fine Artists and Related Workers	7.8	1.7	10.1	7.3	49.7	18.6	2.0	0.4
Designers	10.9	2.9	10.7	12.2	47.5	11.1	1.3	0.4
Actors	11.5	2.8	16.4	6.8	46.5	10.1	0.1	0.0
Producers and Directors	3.8	1.0	6.8	5.2	62.2	18.2	2.0	0.8
Dancers and Choreographers	22.1	8.5	12.9	5.0	36.7	6.9	0.0	0.0
Musicians, Singers & Related Workers	11.8	3.4	15.4	3.9	32.0	23.3	3.4	2.7
Announcers	23.3	5.1	19.8	7.4	34.8	6.0	0.0	2.1
News Analysts, Reporters & Correspondents	2.3	1.1	7.7	4.4	46.7	32.5	2.0	2.5
Writers and Authors	3.0	1.6	3.8	2.1	49.3	29.6	2.7	6.1
Miscellaneous Media and Communication Workers	12.0	1.9	12.8	10.8	28.0	23.7	2.9	3.9
Broadcast & Sound Engineering Tech's, Radio & Media Equipment Operators	19.6	7.5	23.2	10.9	31.5	5.3	0.0	0.0
Photographers	15.5	6.7	14.3	6.2	46.2	8.5	0.5	0.1
TV & Motion Picture Camera Operators & Editors	9.0	1.7	18.2	3.0	52.0	9.0	1.7	0.2
Source: Census Bureau, American Community Survey 2005-2007								

UNION-MANAGEMENT RELATIONS

New York’s electronic media and performing arts labor force is highly unionized. Actors, dancers, musicians, singers, writers, directors, and choreographers, as well as skilled technicians, stagehands, cinematographers, electricians, costumers, and carpenters belong to unions that negotiate terms and conditions of employment for their members. Union density in this industry far exceeds the pattern for all industries⁴⁸ and, in contrast to the trend for most other industries, membership in arts unions continues to grow.⁴⁹ The table below lists major unions for this industry along with the occupations each represents. As noted, the majority of these national unions are headquartered in New York State.

Table 8

Major Unions in Electronic Media and Performing Arts		
Union	Represents	Headquartered in NY
Actors Equity Association (AEA)	Actors, singers, dancers, and stage managers in theatrical live performances	X
American Federation of Musicians (AFM)	Musicians in all forms of entertainment, except concerts	X
American Federation of Television and Radio Artists (AFTRA)	Actors, announcers, & newscasters in live and taped shows for television and radio	
American Guild of Musical Artists (AGMA)	Singers and dancers in opera and dance; and all solo artists	X
American Guild of Variety Artists (AGVA)	Performers in night clubs, circuses and variety shows	X
Screen Actors Guild (SAG)	Actors in motion pictures & filmed TV productions	
Directors Guild of America (DGA)	Directors in movies, radios, and TV	
Writers Guild of America East (WGAE)	Writers for television, movies, & radio.	X
Writers Guild of America West (WGAW)	Writers for television, movies, & radio.	
Society of Stage Directors and Choreographers	Live Performances	X
International Alliance of Theatrical and Stage Employees (IATSE)	Skilled production and technical workers and scenic designers in movies, TV production and theaters.	X
International Brotherhood of Electrical Workers (IBEW)	Broadcast technicians in radio and television, sound technicians in sound recording.	
National Association of Broadcast Engineers and Technicians (NABET)	Technicians in radio and television	
International Brotherhood of Teamsters (IBT)	Drivers and productions workers in motion pictures and television productions	
Other Basic Crafts (AFL-CIO Building Trades Unions)	Construction crafts in motion picture production	

Source: Gray and Seeber. 1996. *Under the Stars* (updated).

Unions impact the arts workforce by influencing terms and conditions of employment. If these negotiated terms bring labor costs above those in other locations, New York’s competitive positions may be undermined. A team of researchers examined this question in a study of motion picture and broadcasting and concluded that New York’s labor costs were

⁴⁸ Barry Hirsch and David A. McPherson, “Union Membership and Coverage,” Database from the Current Population Survey, UnionStats.com.

⁴⁹ Lois Gray, “Entertainment Unions Tune up for Turbulent Times,” *New Labor Forum*, Fall-Winter 2001.

roughly comparable to (and in some cases lower than) those of its leading competitor California, but exceed aspiring states like Florida, Louisiana, North Carolina, and New Mexico.⁵⁰ On the positive side, union negotiated benefits provide much needed health and pension coverage for this contingent workforce. Arts unions also provide their members with training, career counseling, job posting, and paths to supplemental employment, advocacy, and other support services.

Employers in the unionized sector are mostly affiliated with associations which represent them in negotiating the union contracts which set basic terms and conditions of employment in their sector including minimum compensation and work rules, as well as health and pension benefits. Reflecting patterns of ownership, contracts in electronic media (motion picture, TV, and recording), are negotiated nationally with uniform provisions that apply across the United States, but many are supplemented by local agreements adapted to local circumstances. In contrast, contracts for live performing arts are negotiated locally with associations or individual employers. Table 9 describes the arts industry bargaining structure by sector.

Divergent interests between unions and employers with respect to issues of compensation and working conditions sometimes erupt in bitter disputes and work stoppages. The record of days lost through strikes for entertainment unions greatly exceeds the pattern for other industries in recent years.⁵¹

In the live theatre sector, employer-union interests clashed in 2005 when the Broadway League attempted to substitute synthesizers for live music and reduce the contractually agreed upon minimum number of live musicians to be employed, and again in 2007 when the League and Stage Hands Local 1 disagreed over work rules, darkening Broadway theatres. A long standing dispute continues to divide the League of Off Broadway Theatres and the Association of Press Agents and Managers. Outside New York City, Actors Equity and the touring companies have struggled over union recognition as performances leave Broadway for other cities.

⁵⁰ Christopherson, et al., *New York's Big Picture: Assessing New York's Position in Film, Television and Commercial Production*, 2006.

⁵¹ Maria Figueroa and Lois Gray, "The Effects of Technology and Organizational Changes on Employment and Labor-Management Relations in the Electronic Media Industry", paper presented at the Sloan Industry Studies Annual Conference, May 2008.

Table 9

Bargaining Structure in the Electronic Media and Performing Arts Industry		
Employer Groups	Scope of Agreements	Unions
Motion Pictures		
Production		
Alliance of Motion Pictures and Television Producers (AMPTP) (represents studios, suppliers, payroll, and post-production houses)	National, multi-employer	SAG, AFM, DGA, WGA, IATSE, IBEW ¹ , Basic Crafts ² , IBT ³
Independents (those not affiliated with AMPTP)	Single-employer	SAG, AFM, DGA, WGA, IATSE, IBEW, Basic Crafts, IBT
Recorded Music		
Recording Industry Association of America (RIAA)	National, multi-employer	AFM, IBEW, AFTRA
Television and Radio		
AMPTP	National, multi-employer	SAG, AFM, DGA, WGA, IATSE, IBEW, Basic Crafts, IBT
Networks		
ABC	National, single-employer	NABET, AFTRA, IATSE, WGA, DGA
CBS	National, single-employer	IBEW, IATSE, WGA, DGA, AFTRA
NBC	National, single-employer	NABET, AFTRA, DGA, IATSE
Local Radio/Television	Local, single-employer	AFM, AFTRA, NABET, IBEW
Commercials		
Association of National Advertisers (ANA) & American Association of Advertising Agencies (AAAA)	National	AFTRA, SAG
Association of Independent Commercial Producers (AICP)	Local	IATSE, DGA
Theatre		
Broadway League (BL)	Producers, Theatre Owners	AEA, IATSE, AFM, SSDC
League of Off-Broadway Theatres and Producers (LOBTP)	Multi-employer	AEA, IATSE, AFM, SSDC
League of Resident Theatres (LORT)	Multi-employer	AEA, IATSE, AFM, SSDC
Individual Theatres	Local, Single-Employer	AEA, IATSE, AFM, SSDC
Association of Not-for-Profit Theatre Companies (ANTC)	Multi-employer	AEA, IATSE, AFM, SSDC
Opera		
Individual Companies	Local, Single-Employer	AGMA, AFM, IATSE
Symphony		
Individual Orchestras	Local, Single-Employer	AFM, IATSE
Ballet		
Individual Companies	Local, Single-Employer	AGMA, AFM, IATSE
Solo Concerts		
	Local, Single-Employer	AGMA
Night Clubs/Variety/Arena Concerts		
	Local, Single-Employer	AGVA, AFM, IATSE
Source: Gray and Seeber. 1996. <i>Under the Stars</i> (updated)		

All of the major symphony orchestras in New York State are represented by AFM and the venues in which they play are mostly under contract with IATSE. While employment in symphony orchestras is one of the few avenues for stable employment for musicians, labor relations in this sector is generally contentious.⁵²

The Metropolitan Opera and New York City Opera negotiate with multiple craft unions; the two major ballet companies in New York City are represented by the American Guild of Musical Artists, while Glimmerglass Opera in Cooperstown and small opera and ballet companies around the state are nonunion. In 1997 AGMA struck the Dance Theatre of Harlem over the use of temporary workers and apprentices – an issue of job protection for dancers.

Most New York based work in traditional electronic media (broadcast, motion picture, and recording) is covered by contracts negotiated with the Association of Motion Picture and Television Producers and the Recording Industry Association of America (see Table 9). A notable union-management dispute in the motion picture segment occurred in 1990-1991 when Hollywood based producers boycotted New York City to protest the overtime contract provisions in the IATSE contract for cinematographers. Newer media sectors are largely nonunion. Overall, unions representing electronic media workers are challenged by the growth of new media (primarily the internet and other digital media such as interactive games) which have yet to be organized. Inter-union relations are plagued by jurisdictional disputes about which union will represent workers in the new sectors.

Continuing conflict between unions and producers in electronic media results from rapid technological changes that threaten existing jobs while creating new job classifications. Proliferating platforms of product distribution raise questions about dividing the revenue. Thus, pay for reuse of product has been a leading issue in electronic media collective bargaining negotiations for the past sixty years.⁵³ As technology creates new systems of distribution, those who produce the original product contend for a share of the proceeds, as when films are replayed on TV and DVDs and in foreign markets. The Writers Guild strike (in 2007-2008) focused on sharing the revenue from replay on the internet, an issue which continues to be in dispute between AMPTP and SAG. IATSE and AFM also negotiate their members share from the revenue of technological advances; IATSE, through pension enhancement and AFM, through a fund which creates jobs for members who provide free performances.

In the broadcast industry, unions representing technicians and craft workers struggle with technological changes which threaten to eliminate and/or combine jobs. For example, hand held cameras, which made it possible to combine the reporter and camera operator functions, became the focus of a strike at CBS in 1971 and at NBC in 1986. Of current concern in broadcast negotiations is the trend to substitute daily hires for year round workers.

The visual arts sector—composed of museums, art galleries, and auction houses—is almost entirely nonunion. Exceptions are a few museums in New York City. Maintenance

⁵² Interviews with employer and union representatives.

⁵³ Paul Alan and Archie Kleingartner, *Industrial and Labor Relations Review*, 1994.

employees in several not-for-profit museums are represented by the Service Employees International Union (SEIU) and the International Union of Operating Engineers (IUOE). White collar and maintenance workers employed by city supported museums (including The Metropolitan Museum of Art and the Brooklyn Museum of Art) are represented by locals affiliated with District 37, the American Federation of State, County, and Municipal Employees (AFSCME). Clerical and professional employees (including conservators and assistant curators) of the Museum of Modern Art and the Bronx Museum of Art work under contracts negotiated by the United Automobile Workers Union (UAW). In these museums, working conditions, overtime hours, and pay rates are issues of continuing negotiation.

While occasional work disruptions grab headlines, common interests in the health and well being of the arts industry more typically bring cooperation between unions and employers. Long standing collective bargaining relationships in the arts industry have resulted in a generally stable system of union-management relations. For example, in the 1990s Actors Equity funded a study of theatre production costs in an effort to strengthen marketing of Broadway productions. Later, in the wake of 9/11, the union cooperated with the Broadway League in a variety of programs to revive box office demand. In the film sector, New York based craft unions responded to the producer's competitive needs by founding an East Cost Council to negotiate concessionary contracts and subsequently joined forces with employers to promote state and city tax incentives for their industry.⁵⁴ NABET (representing broadcast technicians) assists small employers, particularly upstate, by providing training to enable their members to update skills required by changing technology. Recording companies partner with AFM and IATSE in programs designed to wipe out piracy of their products. In Buffalo, a dramatic example of union-management cooperation took place in 1994 when, after years of stormy relations, the Buffalo Philharmonic Orchestra and AFM Local 52 reached an agreement on revenue sharing which saved the orchestra from extinction.⁵⁵ In all of the unionized sectors, unions and employers jointly administer pension and welfare funds, and collaborate on a number of other issues.

KEY WORKFORCE ISSUES AND SUPPORT STRUCTURES

The arts and entertainment workforce confronts a range of pressing issues and needs, many of which result directly from the employment and income instability that is characteristic of this industry. Some of these key issues include the lack of health and pension benefits, job placement assistance, networking structures, affordable housing and workspace; along with the high cost of training and education, and the need for financial assistance. Also resulting from the irregular and contingent nature of employment in this industry, professionals do not receive the legal protection afforded to other members of the New York workforce.

Health and Pension Benefits

Because of the nontraditional employment patterns that predominate in the arts and entertainment industry, health insurance coverage and pension benefits provided through

⁵⁴ Christopherson, et al., *New York's Big Picture*, op. cit.

⁵⁵ Fleron, L.J., et al. (2000). *Champions @ Work: Employment, Workplace Practices and Labor-Management Relations in Western New York*.

employers or unions are not available to a large proportion of the arts workforce in New York State. Art and entertainment unions were able to obtain special provisions under COBRA to address the irregularity of employment of this workforce, but affordability remains an issue, particularly in view of the low and unstable incomes earned by many workers in this industry.

A study by the UCLA Center for Health and Policy Research found that artists are twice as likely as the general population to purchase their own insurance – at higher premiums and often with lower and more unstable incomes than other employees with comparable education.⁵⁶ The percent of the New York State arts workforce that is covered by employer/union health plans was an estimated average of 46.6 percent for the 2004-2007 period.⁵⁷ But the actual extent and adequacy of their coverage is unknown, and self-employed, who constitute a high percentage of this workforce, are not included in these figures. Most arts professionals nominally covered by union health and pension plans fail to accumulate the required number of weeks worked to receive benefits. A 2005 online survey conducted by the Freelancers Union found that 75 percent of New York City’s creative workers (including artists and other professionals) avoided seeking medical care when uninsured, and 58 percent saved nothing for retirement each month.⁵⁸

Affordable housing and workspace

The lack of affordable housing and workspace is a key challenge for the arts workforce particularly in New York City. Skyrocketing prices of real estate have forced many artists to leave the city for more affordable locations.⁵⁹ The need for home ownership programs and other initiatives linked to neighborhood revitalization are also mentioned as a need in Western New York.⁶⁰

Job placement assistance/career support and networking structures

Throughout the state, artists and entertainment professionals experience the need for job placement structures. This is particularly important because of the highly contingent nature of employment in the industry and the need of artists and entertainment professionals to continuously look for projects to stay employed. To search for job openings, arts professionals employ agents who charge for this service. Networking with peers and potential employers is key to success and even survival in this industry. According to Celeste Lawson of the Buffalo and Erie County Arts Council, these challenges facing artists and entertainment professionals are exacerbated in Western New York by the lack of national exposure: “the limited opportunities to be in contact with professionals capable of advancing careers, i.e., agents, directors, publishers, etc.,” and “the general opinion by funders and other industry professionals that the best talent is found in major cities such as New York City, Chicago, Los Angeles, etc.”⁶¹

⁵⁶Shana A. Lavarreda and E. Richard Brown, UCLA Center for Health Policy Research, *Health Insurance Among Working Artists in the United States*, April 2008.

⁵⁷ Authors’ estimates based on data from the Current Population Survey.

⁵⁸ Freelancers Union, *Creative Workers Count, New York City’s Arts Funding Overlooks Individual Artists’ Needs*, 2006.

⁵⁹ Jennifer Steinhauer, “The Place to Be for Arts, Until the Bills Pile Up,” December 18, 2005.

⁶⁰ Interview, Florine Luhr, Executive Director, Advancing Arts and Culture, Buffalo Niagara.

⁶¹ Interview, Celeste Lawson, Arts Council of Buffalo & Erie County.

Legal Protection

The self-employed arts workforce (39 percent of the total) fall outside the protection of New York State's unemployment insurance and workers compensation laws. Moreover, reflecting their constantly changing and ambiguous employment patterns, many who have this coverage are unaware of their legal rights.

Access to training/education

Most artists and entertainment professionals need to continuously obtain training to upgrade or adjust their skill sets to industry changes, including new technologies. But, as noted elsewhere in this report, the high cost of available training is a key challenge across disciplines and throughout the state.⁶²

Support Organizations

In addition to labor unions and guilds, New York is home to many organizations that assist the arts and entertainment workforce with the above issues and needs. However, much existing government and foundation support is geared toward organizations, not individual artists and professionals, and with a few exceptions there is no assistance for bread and butter issues such as health insurance, pension, housing, and workspace. The following profiles of selected organizations provide an overview of resources available to individual artists in the areas reviewed above.

- **The Actors' Fund** is a national organization that provides artists and entertainment professionals with a variety of services, including health insurance information, employment and training programs to supplement artists' income, housing support, and emergency assistance. Through a partnership with Leveraging Investments in Creativity (a project funded by the Ford Foundation), the Actors' Fund has recently relaunched the AHIRC online directory, which provides information to artists on affordable health insurance and health care resources throughout the country.
- **The Freelancers Union** is a nonprofit organization representing 100,000 independent workers nationwide (with 70,000 members in New York), including artists, consultants, temporary and part-time workers, independent contractors, and other self-employed individuals. This organization offers group rate health insurance to its members, as well as dental, life, and disability insurance. The Freelancers Union has also recently made a 401k plan available to its members.
- **Independent Features Project (IFP)** is an organization of independent filmmakers representing 10,000 members in New York and abroad. IFP provides workshops, seminars, mentorships, conferences, and networking opportunities for individual independent filmmakers. In collaboration with other cultural organizations, it promotes independent features through the Gotham Awards and through screenings.
- **The New York State Council for the Arts (NYSCA)** provides over 2,500 grants to arts organizations in every discipline throughout the state. While NYSCA does not

⁶² Interviews, Celeste Lawson, and Tom Miller of Actors' Equity Association.

offer resources to individual artists, some of the organizations in its vast network do. The **New York Foundation for the Arts** awards fellowships to New York based artists for career development and provides information about resources for emergency assistance, employment services, unions, and training programs. The **Volunteer Lawyers for the Arts** provides free or low-cost legal assistance for artists and arts groups. And the **Artist Workspace Consortium** (which established art centers in a number of communities) provides peer learning, networking, and technical assistance to individual artists.

- Other organizations that provide services to theatre artists and professionals include the **Theatre Communications Group (TCG)**, which offers grant and fellowship programs for actors as well as for aspiring playwrights, designers, and directors; and the **Theater Resources Unlimited**, which focuses on networking through monthly educational panels, regular playwriting series, and other events. **Performing Arts Space** deals with real estate issues relating to work and performance space for artists. The **Alliance of Resident Theatres/NY**, the service and advocacy organization for nonprofit theatres in New York City, provides technical assistance workshops, low interest loans, and affordable office, performance, and meeting space to its affiliates. And for women visual and performing artists, the **Women's Inter Art Center** offers assistance with workspace and marketing.
- Organizations that provide services to new media workers such as multi-media artists and web designers include the **Alliance for Downtown New York**, the **New York New Media Association**, and the **East Coast Digital Consortium**, which provide information about jobs, how to acquire skills, and changes in the market for media skills.⁶³
- Among local government initiatives to support the arts workforce with housing and other resources is **Artspace Buffalo Lofts**. This project was developed by the City of Buffalo to provide affordable housing and work space for artists and commercial space for arts organizations. The site includes 60 live/work units and 9,000 square feet of commercial space.

⁶³R. Batt, S. Christopherson, N. Rightor, D. Van Jaarsveld, *Net Working, Work Patterns and Workforce Policies for the New Media Industry*, 2001.

EDUCATION AND TRAINING

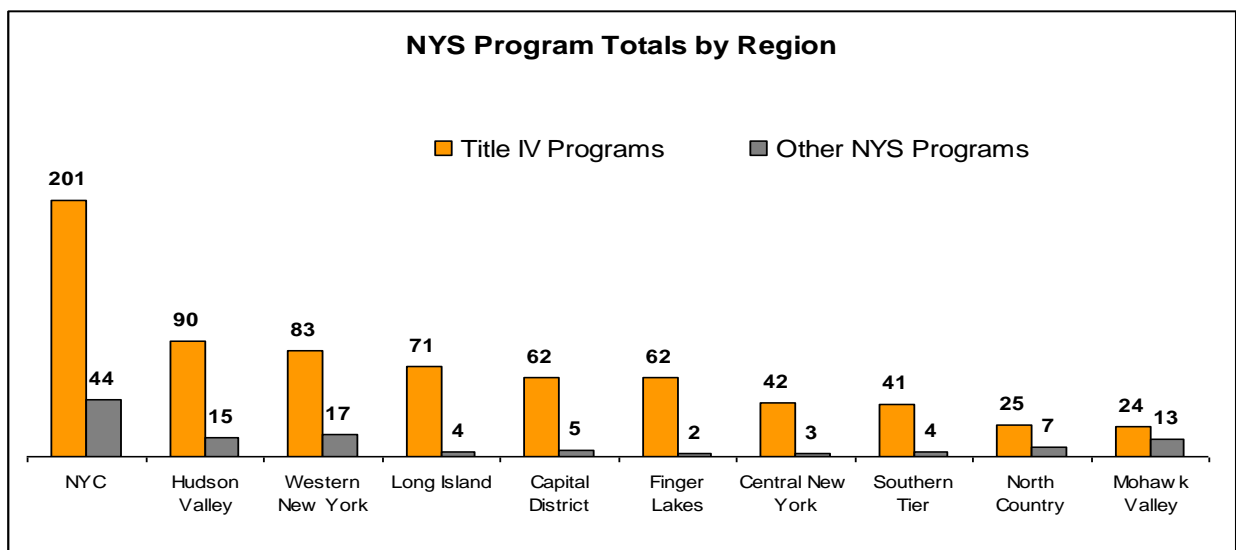
The large number of top flight educational and training institutions specialized in arts is one of the key components of New York’s creative infrastructure.⁶⁴ These include a number of the nation’s premier arts schools such as Juilliard and the Tisch School of the Arts at New York University, along with many private colleges and universities, including Ivy League Columbia and Cornell universities and the expansive statewide SUNY system, attracting arts faculty and students from around the world.

This section discusses New York State’s education and training infrastructure for the arts and entertainment industry, including programs offered by post-secondary institutions as well as employer and union-based training; and provides an assessment (based on industry leaders’ perceptions and on workforce and employment statistics) of the degree to which the mix of program offerings matches the skill needs of the industry.

POST-SECONDARY INSTITUTIONS

Eight hundred and fifteen higher education programs offer arts education throughout the state, including offerings by post-secondary institutions that participate in federal student financial aid programs (Title IV Programs) and other degree or certificate granting institutions that were identified through an internet search. As shown in Chart 25, there are 245 programs in New York City with other major concentrations in Western New York, Hudson Valley, Long Island, Capital District, and Finger Lakes Regions.

Chart 25



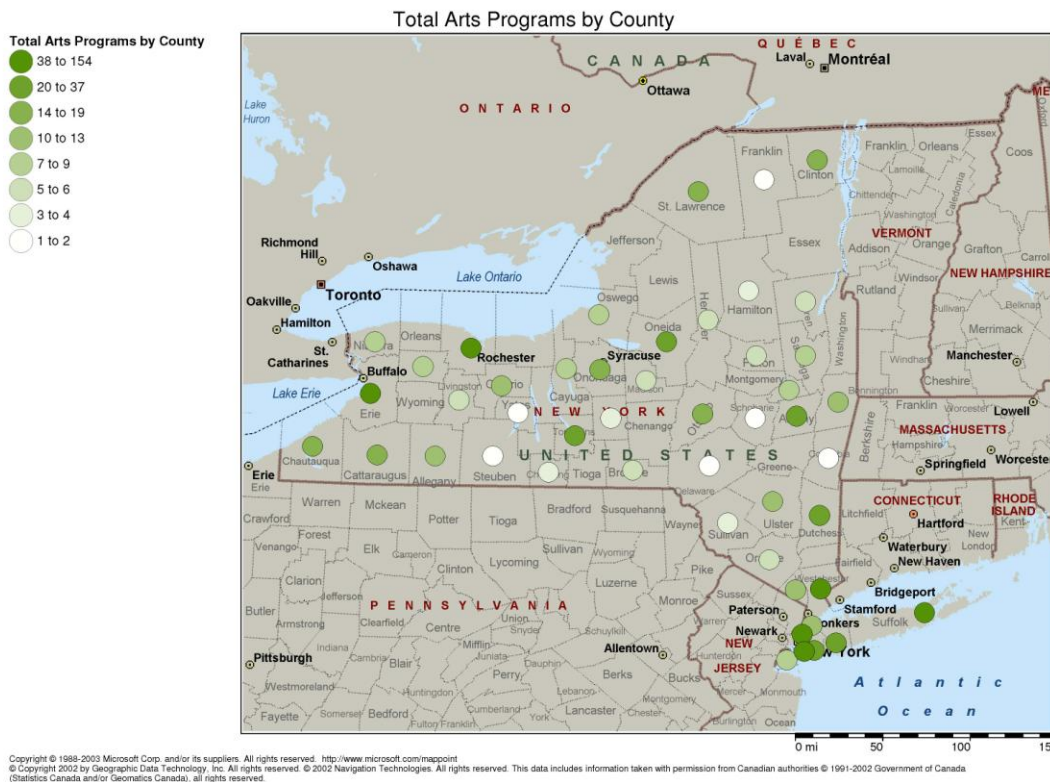
Source: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2006; and Internet Based Research by Cornell ILR

⁶⁴ Center for an Urban Future, *Creative New York*, op. cit.

The opportunities for training and education of the arts workforce are more dispersed geographically throughout the state than the workforce itself. While 65 percent of the arts workforce live in the New York City region (see Chart 3), only 30 percent of the arts and entertainment education and training programs are offered there.

The map below (Chart 26), which shows the number of program offerings by county, reveals similar patterns to the data by region (Chart 25): high concentrations in the areas of New York City, Buffalo, Rochester, and Syracuse, as well as significant clustering of programs in the counties of Oneida, Tompkins, Albany, Nassau, and Suffolk (Appendix C maps data for each individual subject or discipline). Most of the state’s counties either have program offerings in arts and entertainment fields within their own boundaries or are in close proximity to counties that have such programs, indicating plentiful opportunities for the state’s population to access this type of training.

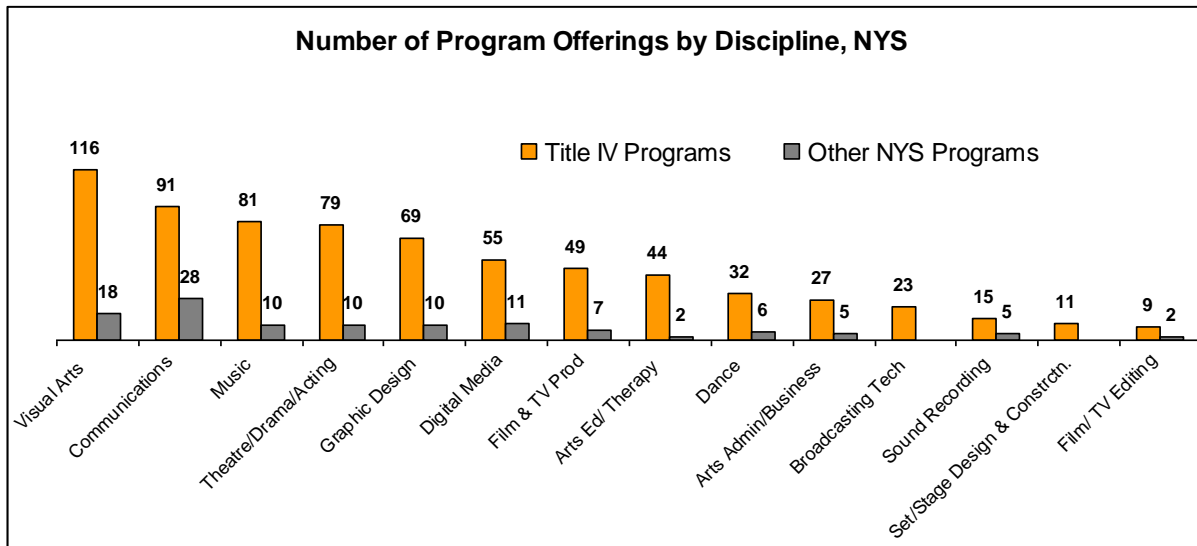
Chart 26



A wide variety of disciplines are offered, covering major subjects and skills needed by current and potential members of New York’s arts workforce. For potential technicians, there are programs specializing in digital media, film and TV production, broadcast technology, set and stage design, sound recording, and film and TV editing. For visual artists, offerings include both visual arts and graphic design; for performing artists, dance, music, and drama. Additional courses are targeted to teachers and arts therapists. And for the business side of the arts, there are programs dealing with administration, business,

marketing, and management. Visual arts, communications, music, theatre, graphic design, and digital media have the largest number of offerings (over 50 each) (Chart 27).

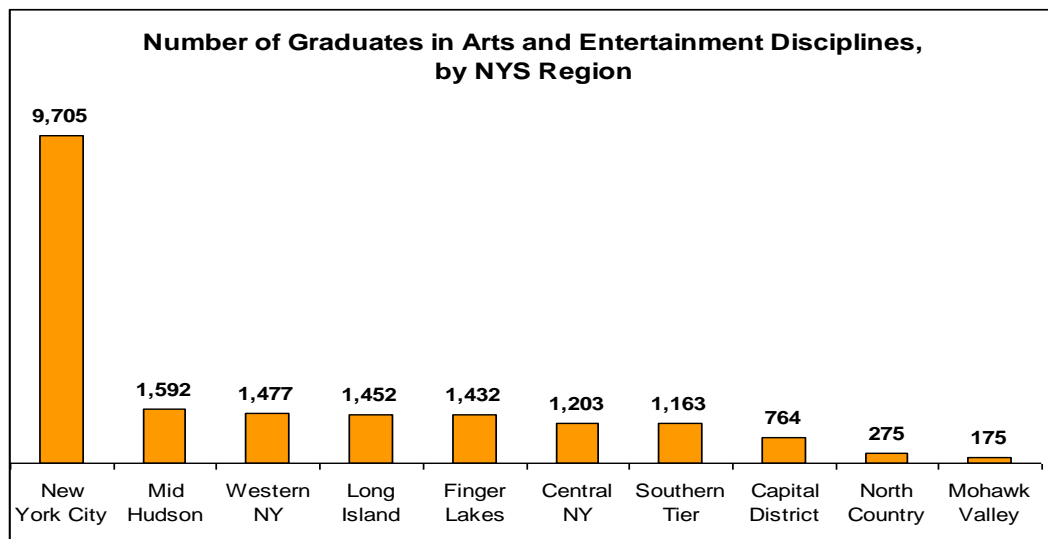
Chart 27



Source U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2006; and Internet Based Research by Cornell ILR

More than 19,000 individuals completed arts education programs in 2006. When the field of journalism is included, the total number of graduates rises to 25,800 (see Table 10). While New York City accounted for slightly over half of the total, thousands of arts graduates were dispersed throughout the state (Chart 28).

Chart 28



Source: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2006.

In relation to the national output of degree graduates in the arts, New York accounts for 14 percent of the total in communications technologies (highest in the United States) and 12.1 percent in visual and performing arts (exceeded only by California) (See Table 10).

Table 10
Number of Completions in Arts, Media and Entertainment Fields: Top 10 States

	Visual and Performing Arts	Communications Technologies/ Technicians and Support Services	Communication, Journalism, and Related Programs	Total Completions in All Arts and Media Programs	Percent of U.S. Total
California	22,861	1,216	8,315	32,392	14.0
New York	16,202	1,528	8,075	25,805	11.1
Florida	7,900	338	3,791	12,029	5.2
Pennsylvania	7,394	350	4,715	12,459	5.4
Illinois	6,902	495	3,925	11,322	4.9
Texas	5,827	295	5,522	11,644	5.0
Ohio	4,873	142	4,101	9,116	3.9
Massachusetts	5,434	355	3,153	8,942	3.9
Michigan	3,602	809	3,118	7,529	3.2
Arizona	3,839	272	1,679	5,790	2.5
All Other US States & Territories	49,400	5,144	40,533	95,077	41.0
Total	134,234	10,944	86,927	232,105	100.0
Source: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System, 2006					

New York training institutions not only cover the state with a wide variety of course offerings but contribute to its cultural wealth by sponsorship of arts and entertainment events open to the public in their communities. Arts faculty in higher education are often also practicing performers, directors, and artists who link students and their educational mission with both profit and nonprofit arts industries. They build arts venues, host museums and play important, varied enrichment roles in regional arts, culture and tourism.

EMPLOYER SPONSORED TRAINING

In the arts industry, reflecting the reality that a high percentage of the workforce is self-employed and/or employed on a project by project basis, employers recruit individuals with the requisite job skills and rarely provide formalized training. The burden of funding and paying for training falls on those who aspire to arts related work. According to economic theory, general occupational training is not worth the investment for employers in a competitive industry, because if employers paid the training costs they would suffer a capital loss when their trained workers left to work for other employers. Employers for whom this

investment is worthwhile are those who dominate an industry sector (monopsonistic) and have long term labor contracts.⁶⁵

The above theory fits the practice in the arts industry. Live performing arts companies and independent film producers, where most employers are small and employ a constantly changing workforce, provide little or no formal training. On the other hand, employers in less competitive sectors, i.e., multinational corporations in broadcast, recording, and motion picture production, offer some formal training particularly for those whom they expect to remain in their organizations. For example, NBC Universal sponsors an Accelerated Digital Management Program which is described as “exposing participants to the digital world from creation to sale” and designed to build a “talent pipeline for future senior leadership roles.”⁶⁶ Time Warner, another multinational, sponsors training classes on managerial skills. Large broadcast network companies train their supervisors in new technologies and cooperate with educational institutions to design training for jobs which are created by these technologies. For example, broadcast companies collaborate with the New York Film Academy in specialized training for the position of “content producer” which combines functions performed by writers, camera operators, and editors. ABC cooperates with the Newhouse School of Communications at Syracuse University in training programs designed to enhance the news gathering function. Currently, many employer sponsored programs are cutting back in response to the economic downturn.

Other examples of employer training in the arts include the Walt Disney Company’s professional internships for college students interested in careers in its arts and entertainment operations. Steiner Studio in Brooklyn recruits students from area colleges for internships which prepare them to become production assistants. And Sotheby’s and Christie’s auction houses have developed an educational program which combines academic and vocational training to prepare adult students with arts experience for jobs in the arts market.⁶⁷

Many associations and professional organizations offer executive and managerial workshops for their affiliates covering such topics as audience development, financial management, fund raising, and marketing. For example: ART/NY teams with the Harold and Mimi Steinberg Theatre Leadership Institute in a mentoring program which pairs theatre administrators with consultants to address issues pertaining to organizational development. Dance/New York conducts workshops on a variety of topics relating to organizational effectiveness. In Western New York, The Road Less Traveled Productions trains aspiring playwrights through its New Play Workshop, a year long intensive experience for aspiring writers, and Leadership Buffalo provides professional skills development. The Arts and Business Council of Americans for the Arts enlists the expertise of business executives for training and technical assistance on marketing and leadership.⁶⁸ Notwithstanding these examples, employer and association sponsored training programs continue to be exceptional in New York’s art

⁶⁵ Gary Becker, *Human Capital: A Theoretical and Empirical analysis with Special Reference to Education*, 1993.

⁶⁶ NBC – Universal Website.

⁶⁷ Nazanin Lankarani, “The Science of Selling Art: A Booming Market has Heightened Demand for Arts Business Degrees: International Education,” *International Herald Tribune*: Special Report, 2007.

⁶⁸ Interview, Gary Steuer, Arts and Business Council, April 8, 2008.

industry. Educational institutions are the main source of trained personnel, and members of this workforce usually acquire continuing education on their own initiative, funded from their own resources.

UNION BASED TRAINING

For arts professionals: actors, musicians, singers, dancers, writers, and directors, acceptance into union membership is regarded as a certification of professional recognition in one's field of specialization.⁶⁹ Since members are expected to have acquired the requisite skills for their professions prior to joining, talent unions rarely provide further training. Actors Equity, for example, maintains a membership candidate program which enables entry level actors and stage managers to earn work credits toward acceptance into union membership and offers seminars which help members prepare for auditions and deal with talent agents, but continuing education in acting skills is the member's own responsibility. The Screen Actors Guild helps new members by supporting the Conservatory where volunteers conduct seminars in film and commercials techniques (such as voice-overs, monologues, and the use of teleprompters) as well as job related business skills. The Directors Guild trains prospective assistant directors, focusing on administrative and managerial skills. AGMA and AFM, which represent dancers, singers, and musicians, do not sponsor any type of training.

Organizations representing technicians, e.g., editors, cinematographers, stage hands, and costume designers, also expect members to acquire basic skills before applying for membership but typically provide training in skills which qualify them for job retention and upgrading. For example, New York City's Stage Hands Local 1 (IATSE) offers a year-round program of formal classes for its members, covering the skills of lighting and rigging along with updates on new equipment. Wardrobe workers represented by Local 764 (IATSE) have the opportunity to upgrade their skills in sewing techniques and computer skills, as well as take courses which help them transition from work in live theatre to jobs in motion pictures and TV. IATSE locals, representing cinematographers and editors, insure that members are prepared to handle the rapidly changing technologies in motion pictures and TV. Studio Mechanics Local 52 provides training in such job related skills as fire arms handling for set dressers, color temperature for electricians, and food care and preparation for members employed in prop departments. NABET, representing broadcast technicians at NBC and ABC, and IBEW at CBS, provide extensive programs of training in new technologies in what they view as a defensive strategy for protection of members' jobs. The union contends that as new technology is introduced, employers attempt to replace job classifications covered by the union contract with new classifications which fall outside the bargaining unit and/or to substitute full time workers with daily hires. In response to the job loss threatened when computers replaced tape in the late 1990s, NABET and IBEW joined together to sponsor training in the skills required for this new technology, incorporating an educational institution (501C) to receive discounts on supplies and materials and subsidizing members to attend classes. Currently these training activities have been updated to meet the challenges of digitalization. NABET's national training program serves upstate New York locals

⁶⁹ While AFM has no prerequisites for membership, SAG, AFTRA, AGMA, AE and DGA require evidence of professional experience.

through a mobile laboratory with laptop computers and software which can move from area to area. Online training for skills needed by broadcast engineers has recently become available so that members can educate themselves in their own place and on their own timetable in editing, graphic arts, and digital video theory.

Opportunities for education and training in the knowledge and skills relevant to work in arts occupations are widely available at institutions throughout New York State and through some associations, employers, and unions. In this constantly changing industry, acquisition of knowledge and updating of skills is a never ending process, for which responsibility falls on individual members of the workforce.

TRAINING AND LABOR SUPPLY ANALYSIS

Education, workforce, and employment statistics suggest that the growth in the number of graduates in arts, media, and entertainment disciplines has contributed to the increase in the industry's labor pool and exceeded employment opportunities in the state for many occupations. This section of the report provides data that can help in assessing whether the mix of educational offerings in New York State match the skills that are in demand in the arts and entertainment industry. Table 11 below compares the total number of graduates by discipline with the changes in the workforce and employment (excluding self-employment) to help identify fits and possible mismatches between the number of people being trained and employment opportunities in the state.

As shown on Table 11, the number of graduates from New York-based post-secondary institutions from 2000 to 2006 was 110,684, which exceeded the increase of 61,286 in the arts and entertainment workforce for the same period. This indicates that there were 49,000 more graduates than individuals joining the state's professional arts workforce for the period of study. Although it is not known how many of those 49,000 graduates left the arts and entertainment industry or pursued an arts and entertainment career in other states and even foreign countries, the significant size of this surplus suggests that New York State is a net exporter of human capital in this field.⁷⁰ However, further research such as longitudinal studies would be needed to yield conclusive results about the effects of formal training on the workforce and employment.

⁷⁰ Interpretation of the data shown on Table 11 requires the following qualifications:

A direct cause-effect relation between the number of graduates and the size of the NYS arts workforce cannot be assumed, as there are many other factors affecting the latter that are not accounted for in this analysis. Such factors include, but may not be limited to, migration of graduates from other states, out-migration of arts and entertainment professionals from New York state, retirement, and changes in people's careers (resulting in employment outside of the arts and entertainment industry).

Table 11

Graduates by Discipline			Workforce and Employment by Occupation			
DISCIPLINES	Total Graduates 2002-06	Annual Average Growth %	OCCUPATIONS	WORK FORCE Increase/Decrease 2000-06	WORK FORCE Annual Average Growth %	EMPLOYMENT in Firms, Annual Average Growth % 2002-06
Fine and Studio Art	18,931	5.3	Fine Artists and Related Workers, including Multi-Media Artists	5,935	4.1	1.9
Animation, Interactive, Video Graphics & Special Effects	666	134.5				
Digital Communication and Media/Multimedia	760	8.2				
Design and Applied Arts	23,668	4.5	Designers	21,847	5.6	9.5
Acting and Directing	1,154	7.1	Actors	3,697	7.7	n/a
Cinema Studies & Other Film/Video Photographic Arts	1,307	25.1	Announcers	-195	-1.0	
Drama/Theatre Arts, General(1)	9,333	5.6	Producers and Directors	6,897	5.7	12.7
Cinematography and Film/Video Production	3,468	-3.1				
Technical Theatre/Set Design and Technology	211	-1.9				
Communication/Media Studies, Journalism	24,847	5	News Analysts, Reporters & Correspondents	930	1.6	3.8
Radio and TV Communications	3,475	3.4	Miscellaneous Media & Communication Workers	2,071	6.5	1.9
Communications, Audiovisual, Recording/Technician	194	0.5	Broadcast & Sound Engineering Technicians, Media Equipment Operators	2,193	4.0	4.8
Radio and TV Broadcasting Technology/Technician	2,682	-4.7	TV & Film Camera Operators & Editors	2,018	9.9	6.6
Photographic and Film/Video/Technician	644	11.5				
Dance	1,561	-1.8	Dancers and Choreographers	1,132	7.2	-11.6
Music	10,790	6.1	Musicians, Singers & Related	2,151	2.2	-4.4
Photography	2,149	3.4	Photographers	5,016	7.3	n/a
All Arts, Media, & Entertainment Disciplines(2)	110,684	4.6	All Arts, Media, & Entertainment Occupations(3)	61,286	5.1	

(1). *Drama/Theatre Arts, General* also includes management, playwriting and screenwriting.

(2). Also includes *Visual and Performing Arts, General*, which was not listed separately.

(3). Also includes *Writers and Authors*, which was not listed separately.

Source: U.S. Department of Education, National Center for Education Statistics, Integrated Post-Secondary Education Data System, 2006

Note: Graduates from institutions not participating in federal financial aid programs as well as from high school programs are not included.

The surplus of graduates over additions to the workforce is striking for fine artists and musicians. In fine and studio arts, 19,000 individuals were trained but the increase in the number of fine artists and related workers was less than 6,000. For music, there were 10,790 graduates between 2002 and 2006, while over the same time, professional musicians increased in numbers by only 2,151.

In contrast, for acting and photography the additions to the workforce exceed the number of graduates. This may indicate that many new actors do not have post-secondary training or that they acquired it out-of-state.

In comparing graduates and jobs, the most significant mismatch between the growth in number of graduates and employment growth occurs in the music sector, where employment in firms has experienced negative growth while the number of graduates has grown at 6.1 percent over the same period (Table 11). Growth in number of graduates also exceeds employment growth in fine arts and related sectors, such as multi-media and video graphics. Two factors might explain this divergence: one is that self-employment is predominant in these occupations, and the other is that multi-media and interactive professionals tend to seek employment in other states, particularly California and Washington.⁷¹

Overall, the average annual growth of graduates for all arts, media, and entertainment disciplines is 4.6 percent, which exceeds the 1.4 percent annual average growth of employment in the industry as a whole, as shown in Table 12.

Table 12
NYS Arts and Entertainment Employment Trends by Industry Sector
(in firms and self-employment)

Industry Sector	2002	2003	2004	2005	2006	Average Annual Growth %
Motion Picture	51,422	46,738	45,791	47,775	48,484	-1.3
Sound Recording	6,114	6,038	5,910	5,926	6,076	-0.1
Broadcasting	40,610	39,783	39,714	40,532	41,174	0.4
Internet Publishing	3,926	4,322	4,432	4,843	5,948	11.2
Performing Arts Companies	20,936	20,820	21,532	21,236	22,066	1.3
Independent Artists	74,121	75,063	78,643	83,122	84,836	3.4
Museums & Art Galleries	9,385	9,242	9,495	9,519	9,753	1.0
Art Dealers	4,338	4,302	4,337	4,234	4,298	-0.2
TOTAL	210,852	206,308	209,854	217,187	222,635	1.4

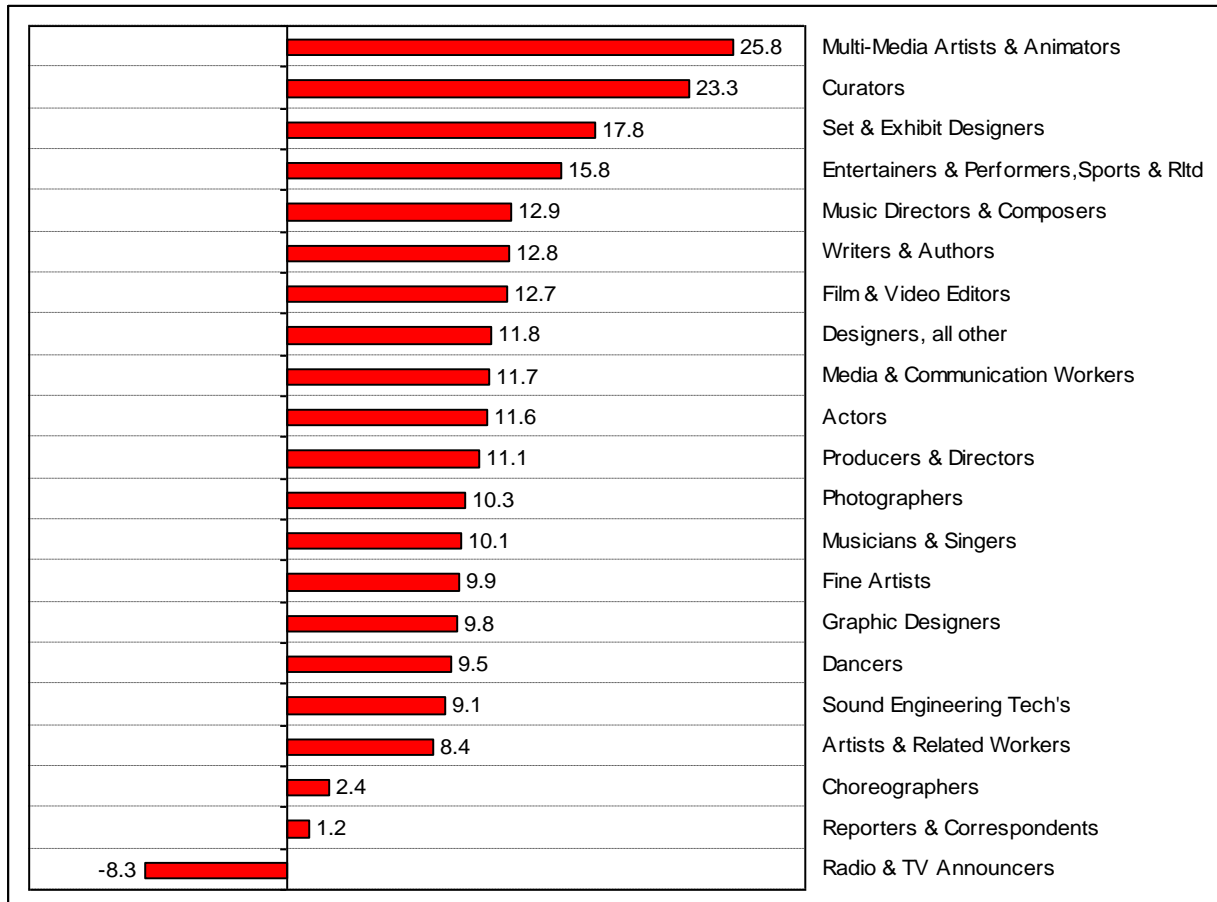
Source: BLS QCEW and US Census Bureau

Looking ahead, arts and entertainment employment is projected to grow for most occupations, according to the Bureau of Labor Statistics (BLS). Multi-media artists and

⁷¹ Center for an Urban Future, "Getting in the Game" and Interview with Walker White, Cornell Game Design Initiative.

animators are expected to experience the largest employment growth, while radio and TV announcers will experience negative growth.⁷²

Chart 29
NYS Projected Employment Changes by Occupation, 2006-2016
In Percentages



Source: BLS, Occupational Employment Statistics.

TRAINING ISSUES

Despite the wide range and high quality of the educational program offerings in this field, industry leaders express uncertainty about whether available training matches existing jobs and whether there are sufficient affordable training opportunities to enable creative workers to adapt their products and skills to market changes. Other questions include: What happens to graduates of New York's training programs? Do high costs exclude potential talent?

⁷² Bureau of Labor Statistics, *Employment Projections, Projections Methodology*, bls.gov/emp/empnth01.htm#occupational_employment. These projections estimate demand for labor, taking into account projected changes in consumer demand and changes in occupational staffing patterns resulting from new technology and work reorganization.

These were among the concerns raised in our interviews with leaders in New York's arts sector. Kate Levin, Commissioner of New York City's Department of Cultural Affairs, suggested need for a study of the role played by various educational resources with an emphasis on what happens to their graduates: Are they working in the arts? Do they serve other sectors of the economy? Do they attract new industries like video games? Or are artists trained here leaving for other centers because they are unable to cope with high cost of living and sparse employment opportunities in New York?⁷³ Rosemary Scanlon, author of three decades of *New York Arts Industry* studies, underlined the need to evaluate New York based education and training facilities and compare them with what is available in other major arts centers, e.g. Toronto and London.⁷⁴ Randy Bourscheidt, Executive Director of Alliance for the Arts, recommended a state supported assessment of public support for training of arts and arts managers.⁷⁵ Pat Kaufman, Executive Director of the New York State Governor's Office for Motion Picture and Television Development, recommends public support for training that would attract digital and game production to upstate locations.⁷⁶

Employer and union officials interviewed for this study also agree that New York is blessed with an outstanding supply of educational and training resources, but many question the linkage between classroom and workplace: Does training prepare for existing jobs? And from the workforce point of view, does completion of a degree actually count in the search for employment?

Abundance of Talent

Executives of performing arts organizations point to a huge oversupply of talent for choice jobs. For example, Atul Kanagut, Vice President of the League of American Orchestras, reports that major conservatories graduate 2,000 - 3,000 students each year seeking jobs in professional orchestras which have 150 openings a year.⁷⁷ Our study of New York State based institutions also suggests that supply exceeds demand here. The number of graduates in each of the arts disciplines in New York State has been growing at rates from 2.4 percent to 10.9 percent per year, growth rates which exceed the percentage increase in the numbers of jobs in these occupations. Professor Randy Martin of the Tisch School of the Arts, New York University, notes that actors and dancers who complete university classes are less likely to get jobs in these fields than film majors, who are better positioned to succeed in connecting with film companies because of the "industrialization" of this work.⁷⁸ He contrasts the employment opportunities provided by the large scale film production organizations which maintain recruiting and internship programs with those in project by project employment in the live performing arts. A report in the New York Times, "So many Acting BA's; So Few Paying Gigs," contrasts the explosion in the number of degree programs specializing in theatre with the modest growth in the number of acting parts available on stage and TV. Faculty engaged in arts education say there is need for more easily accessible information and referrals to programs available,⁷⁹ as well as an enhanced

⁷³ Interview, Kate Levin, NYC Department of Cultural Affairs.

⁷⁴ Interview, Rosemary Scanlon, Author.

⁷⁵ Interview, Randy Bourscheidt, Alliance for the Arts.

⁷⁶ Interview, Pat Swinney Kaufman, Governor's Office for Motion Picture and Television Development.

⁷⁷ Interview, Atul Kanagut, League of American Orchestras.

⁷⁸ Interview, Professor Randy Martin, New York University.

⁷⁹ Bruce Weber, *New York Times*, December 7, 2005.

collaborative effort between employers and universities to establish viable career paths through internships.⁸⁰

Art educators point out that the movement from school to employment requires connections or relationships necessary to make the transition to a career possible. The advantage to enrollment in a top rated educational program is the opportunity it affords to develop these relationships with faculty drawn from the professions who maintain connections with decision makers in their fields of specialization, thereby creating the required linkage between education and employment.

Despite impressions of oversupply in some occupations, it is not possible to access the long term impact of arts education without further data about what happens to the graduates. Currently very few educational institutions compile this information. The fact that graduates exceed reported jobs openings may be explained in part by New York's role as exporter of trained arts specialists who find work in other parts of the United States and in other countries. In addition, many arts graduates carve out careers as entrepreneurs, managers, instructors, and coaches in arts related work. Additional value to the New York State economy may accrue from the supply of arts educated individuals who work full time or part time in other occupations and industries.

To answer questions about the match between the output of training and demand for knowledge and skills would require an in-depth study of long term career patterns of this workforce – a priority focus for future research.

Affordability

Another concern to users of education and training is high cost and the paucity of sources for financial support. Industry observers point to rising education and training requirements along with accelerating costs. Tuition at top private schools such as Cornell, Columbia, and Syracuse universities, Juilliard, and the Tisch School of the Arts, is more than \$30,000 per year plus costs of room and board and incidentals. Programs at public institutions are more affordable, with tuition in the SUNY system in the range of \$7,000 to \$9,000 per year, and around \$3,000 per year in community colleges. Generally, few scholarships are available. When student loans are involved, these tuition costs can become a heavy burden for arts and entertainment professionals with low income. An important component of the educational process is the opportunity to work at the profession or craft through an internship with an employer. In most cases, these opportunities add to the expense because interns receive no salary and pay their own cost of living in the area where they work.

Additionally, arts and entertainment professionals need to invest in their professional development throughout their careers by taking courses and workshops which, according to officials of entertainment unions, can be costly and often unaffordable. Arts organizations in Western New York have sought public funding to assist artists and organizations in accessing training, but found that the arts sector does not qualify for county workforce monies.

⁸⁰ Interview, Florine Luhr, Advancing Arts and Culture, Buffalo Niagara.

Connection between Classroom and Job Content

While a wide variety of subjects are offered in New York based institutions, employers of technicians note a disconnect between formal education for technical positions and the actual work performed, particularly with respect to jobs involving emerging technologies.

New media professionals surveyed in 2001 identified better access to training as their most significant policy issue, urging training providers to work with employers to insure that their offerings reflect industry requirements.⁸¹ Video game producers surveyed in 2008 revealed that this need continues, contending that university degree programs focus on the creative side of video games with little or no coverage of the technical side of the trade.⁸²

Employers say that schools are not always equipped with the technology and level of expertise needed. “Classes are not specific enough” or “up-to-date with demands of the market.”⁸³ Video game makers cite Carnegie Mellon in Pittsburg as an ideal training facility because students have the opportunity to participate in projects which simulate the reality of production, combining design with implementation.⁸⁴

Potential synergies between leading upstate programs in game design and downstate employers are identified by Walker White of Cornell’s Game Design Initiative, who sees employment (and/or internship) opportunities for his students at companies that currently experience a shortage of technical professionals.⁸⁵

Training for Managers of Arts Organizations

Burnout and turnover among managers and administrators was cited as a leading challenge in interviews with executives of arts organizations.⁸⁶ Referred to as a “crisis in leadership,” interviews referred to a traditional mode of management development in which administrators came up through the ranks in an apprenticeship-like process, which has been replaced by a recruitment system in which managers are found in the corporate world or imported from abroad. Arts organizations look to educational institutions for management and administrative training but some question whether sufficient attention is given to this need in the curricula of existing programs. This study identified approximately 32 program offerings in arts management throughout the state (see Chart 26 above), including the recently established and highly praised program at the University of Buffalo.

Nonetheless, arts educators agree on management training as a priority need. Mary Schmidt Campbell, Dean of the Tisch School of the Arts, points out that “people are not born administrators or managers, much less leaders; and they need training in management and communication skills.”⁸⁷ Dean Ara Guzelimian of The Julliard School emphasizes the

⁸¹ Rosemary Batt, et al., *Networking Work Patterns and Workforce Policies for the New Media Industry*, 2001. op. cit.

⁸² Center for Urban Future, 2008, *Getting in the Game*, Op. cit.

⁸³ Interview, Ben Pocari, IBC Digital.

⁸⁴ Interview, Sean Vance, Crystal Dynamics.

⁸⁵ Interview, Walker M. White, Director, Game Design Initiative at Cornell University.

⁸⁶ Interviews, Catherine Cahill, Brooklyn Philharmonic Orchestra, Robert Zuckerman, Theatre Program, New York State Council on the Arts, and Michelle Burkhardt, Dance/NYC.

⁸⁷ Interview, Dean Mary Schmidt Campbell, Tisch School of the Arts.

importance of training in entrepreneurial skills which would enable artists to start their own businesses.⁸⁸ Gregory Moser, Director of Columbia University Arts Initiative, reports that Columbia has made a conscious effort to increase the number of courses dealing with business skills but is limited by the number of other requirements in a tightly designed curriculum.⁸⁹ Practitioners add that there is a need not only for more business preparation in formal degree programs but for specially designed continuing education outreach to current and potential arts managers. As noted earlier, the Arts and Business Council and various professional associations provide workshops designed to train arts managers in business skills, marketing, fund raising, and public relations. But interviewees from arts organizations, particularly but not exclusively in the nonprofit sector, want more intensive programs of training which would adapt what is known about managerial leadership to the specialized needs of the arts sector. They cite as examples of successful past efforts Ford Foundation and N.E.A. funded programs which included mentoring and consultations as well as training.

In assessment of existing training and education programs, priority questions for further study are the match between class room instruction and job requirements, affordability, and effective approaches to training managers.

⁸⁸ Interview, Dean Ara Guzelimian, The Juilliard School.

⁸⁹ Interview, Gregory Moser, Columbia University.

RESEARCH PRIORITIES

NEED FOR MORE ACCURATE AND MEANINGFUL DATA

Leaders in New York's arts and entertainment industry and scholars researching this industry complain about the lack of accurate and meaningful statistics on the workforce. The contingent nature of employment, irregular work patterns, and the blurred lines between self-employment and employment in firms render some government statistics relatively useless for pinpointing the size, patterns of employment, and annual income of the arts workforce and the career prospects of individual artists. All agree on the need for in-depth studies and original data collection. Comprehensive original data collection and analysis are exemplified in reports on labor markets and occupational analysis for the film industry prepared by California's Entertainment Economy Institute. The cultural data base for New York's non-profit arts sector recently inaugurated under the sponsorship of the Alliance for the Arts is a major step in the needed direction.

PRIORITY QUESTIONS FOR RESEARCH

In interviews with key leaders and through this research, several priority questions with significant policy implications have emerged, suggesting the need for further research.

Economic Challenges to the Industry

- How do public subsidies and incentives for motion picture and TV production in New York State compare with those offered by other states and nations?
- What is the impact of cultural institutions and the arts infrastructure on population retention and industry attraction for upstate communities?
- How does public support for the arts compare with subsidies given to sports and other industries with comparable impact on economic development for New York State?

Employment and Income

- What is the size of the core and the peripheral workforce? What other types of jobs do arts professionals hold? How many individuals are able to make a living working in this industry? What is their impact on other industries in which they are employed?
- How do patterns of employment differ in various segments of the industry (live performing arts, electronic media, visual arts), and their subsections by occupation? How many arts professionals are employed full time and how many part-time by industry segment?
- How many arts professionals are currently covered by health and retirement benefits? By unemployment insurance and workers compensation? By other systems of social

and entrepreneurial support? What changes are needed to strengthen the social safety net for this segment of the workforce?

- What are the best practices from other states or from other countries for addressing the vulnerabilities of this workforce through social policy or public investment?

Unionization

- What percentage of the arts workforce (by segment) is currently covered by union contracts? How has this changed over the past decade? What are the implications for labor costs, the workforce's living standards, and the overall economic health of the industry?
- What are the socio-economic and fiscal impacts of unionization in the arts and entertainment industry? Do unions contribute to savings in public spending on social programs, by providing residuals and health and pension benefits for their members?

Education and Training

- What are the career patterns of graduates from educational and training institutions offering specialized degrees in arts-related occupations? What percentage remains in their fields of study? What alternative occupations do they pursue?
- How can New York State educational institutions improve career services and liaison with arts and entertainment employers to enhance job opportunities for graduates?

Diversity

- What are the barriers to successful pursuit of a career in arts and entertainment for minorities, women, and disabled individuals?
- Which are the best organizational practices of employers, unions, and government for facilitating diversity, and how can these be disseminated for wider application?

CLOSE-UP: THE GEOGRAPHY OF ARTISTS IN GREATER BUFFALO

VALUING SPACE AND PLACE IN THE ARTS

The arts community is a vital part of any vibrant metropolitan region. Not only do those working in arts-related jobs provide creativity and uniqueness to a city, they also create what Ann Markusen calls an “artistic dividend,” generating current income streams and greater returns on past investments. Active arts communities enhance the quality and sale-ability of products and services of other businesses in the region.⁹⁰ They serve as a drawing factor for new businesses, employees, and other artists.⁹¹ They enhance the loyalty of current residents and businesses to a region and help to stem the “brain drain” of young, well-educated residents. Investments in the arts have been shown to help stabilize and revitalize urban neighborhoods,⁹² while art venues dispersed across a region amplify the variety of distinct districts and encourage the interaction of people from all parts of a city.

Driven by the higher costs of big cities such as New York, Los Angeles, and Chicago, many artists are turning to smaller tier cities such as Buffalo because of their affordability and amenities. As Markusen puts it, “Affordable loft space in historical buildings in an older city’s bar, comedy club and gallery-rich neighborhoods can anchor [artists] there, while a beautiful natural environment beckons to others.”⁹³ Artists, who as found in this study generally earn lower incomes, are seeking affordable, creative spaces where they can interact and engage with other members of the creative economy.

All of these amenities that artists seek are readily available in Greater Buffalo. As the eighth largest city in the country over a century ago, Buffalo possesses an arts infrastructure of a city of 600,000 rather than one of its current population, fewer than 300,000. This rich cultural infrastructure has the stature and historical roots of a more affluent, larger city and draws artists from all over the northeast, the mid-west, and southern Ontario. It is vital, if this sector is to be properly capitalized, that measures be taken to promote these assets and support the creative economic activities they generate. Currently, a number of initiatives and policies are underway to attract and retain this vital population to the Buffalo region.

Completed in 2008, the Artspace Buffalo Lofts is a prime example of efforts within the city to encourage and develop the arts community. The project is an affordable housing development for artists located on Main Street, a few blocks from downtown. It includes 60 live/work units, with commercial space on the ground floor meant to provide a venue for the arts community to gather, network, and host events and showings.

⁹⁰ Markusen and Schrock (2006) p. 1662

⁹¹ Florida (2002)

⁹² Metropolitan Council and Regional Arts Council, 1985; Stern and Seifert, 1998; Stern, 2003; Strom, 2001; Centre for an Urban Future, 2002; Walker, 2002

⁹³ Markusen and Schrock (2006) p. 1683

The recently opened Burchfield-Penney Art Center is another institution designed to nurture the arts in Western New York. This new museum, affiliated with Buffalo State College, showcases the work of Charles Burchfield and distinguished artists of Buffalo, Niagara and Western New York. It is meant to act as a catalyst for cultural vitality and creativity in the region.

In both 2008 and 2009, Buffalo was ranked by American Style Magazine as the number one arts destination for a mid-sized city (100,000-499,999 population). Local economic development professionals have identified cultural tourism as one of three areas with the most potential for regional growth.

Americans for the Arts ranked Western New York’s 28th congressional district 14th in the nation in the number of arts-related jobs in 2005, with 19,163 arts-related jobs. In 2008, this number was found to have shrunk to 15,951, a net loss of about 3,200 jobs in three years.⁹⁴ However, in all three congressional districts in Western New York, the number of arts businesses grew over this time period. These numbers indicate how vital it is for the City of Buffalo, Erie County, and New York State to continue to promote policies that work to retain and build upon the existing arts community.

Table 13

Congressional District	Total Arts Businesses (2005)	Total Arts Businesses (2009)	% Change Arts Businesses 2005-2009	Total Arts Employees (2005)	Total Arts Employees (2009)	% Change Arts Employees 2005-2009
NYS 26th	1,112	1,182	6.29%	4,326	4,641	7.28%
NYS 27th	1,022	1,122	9.78%	4,567	4,521	-1.01%
NYS 28th	1,263	1,282	1.50%	19,163	15,951	-16.76%
Total:	3,397	3,586	5.56%	28,056	25,113	-10.49%

Source: Americans for the Arts. *Creative Industries 2005: The Congressional Report*, and *Creative Industries 2009: The Congressional Report*

CASE STUDY METHODOLOGY

This case study of artists in the Buffalo region was undertaken in cooperation with Beyond/In Western New York, an invitational exhibition of the work of regional artists collaboratively presented by twelve major galleries. Representatives of those institutions were interested in the economic geography of visual artists as producers – questions about proximity to exhibition and sales venues; housing, studio and neighborhood attractions; and the existence of artists clusters in urban areas. This mapping of artists’ specific locations provides strongly suggestive evidence of the value of the physical, economic and social infrastructure in Greater Buffalo.

To better understand the spatial distribution of visual artists, and compared with all arts and entertainment workers within the Western New York region, ArcGIS software was utilized. This software also taps census occupational and demographic data, drawing a more

⁹⁴ Americans for the Arts (2009). “The Creative Industries in New York Congressional District 28 U.S. Representative Louise McIntosh Slaughter.” *Creative Industries Report*

descriptive picture of the area. A number of maps were created using two separate data sources.

The first set of maps uses the database of reported addresses of visual artists that have exhibited their work in Buffalo area galleries. This database was provided by *Beyond/In Western New York*. Using this information, maps were produced that show the precise location of artist's addresses, the location of art institutions, and demographic distributions within the city and surrounding region. Artists were categorized by five media types based on the type of art they produce: media artists, painters, photographers, sculptors, and multiple media artists.

The second set of maps was created using occupational data from the 2000 decennial census. Using the SF-4 section of the census, which looks at the occupations of residents by census tract, one can approximate the distribution of all artists workers among census tracts within the city. By creating dot density maps that have one dot representing one arts worker living in that census tract, the goal is to picture the locations and clusters that exist in the arts community on a wider basis.

This larger occupational category of Arts, Design, Entertainment, Sports, and Media Occupations, which will be referred to in this study as "All Arts Workers," is comprised of three sub-categories:

- Art and Design Workers⁹⁵
- Entertainers and Performers, Sports and Related Workers (Performers)⁹⁶
- Media and Communication Workers.⁹⁷

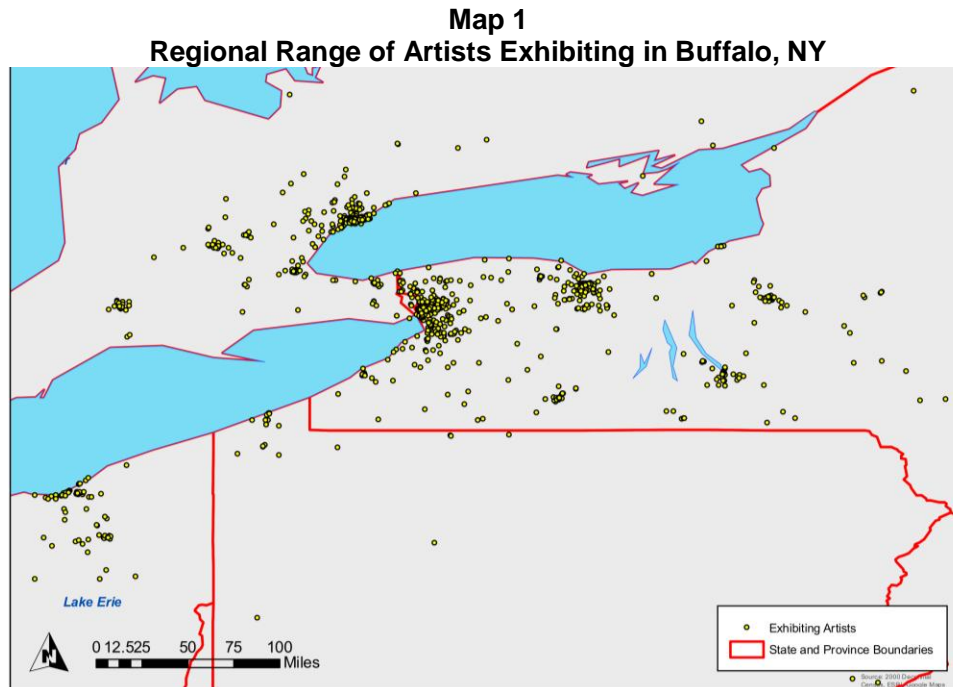
⁹⁵ The census defines this category as including: art directors, craft artists, fine artists (including painters, sculptors, and illustrators), multi-media artists and animators, artists and related workers, commercial and industrial designers, fashion designers, floral designers, graphic designers, interior designers, interior designers, merchandise displayers and window trimmers, set and exhibit designers.

⁹⁶ The census defines this category as including: actors, producers, directors, athletes, coaches, umpires, dancers, choreographers, musicians, and singers.

⁹⁷ The census defines this category as including radio, television, and p.a. announcers; news analysts, reporters, and correspondents; public relations specialists, writers, editors, broadcast and sound engineering technicians and radio operators; photographers; television, video, and motion picture camera operators and editors.

MAPPING VISUAL ARTISTS

The initial finding from this geographic mapping analysis is obvious in the regional map of visual artists by media type: Greater Buffalo galleries have a binational region-wide pull. Map 1 shows that artists who exhibit in Buffalo galleries have been attracted not only from the Buffalo Niagara region, but also in significant numbers from southern Ontario, the Rochester area and the Southern Tier, and neighboring Great Lakes metros, especially Cleveland.

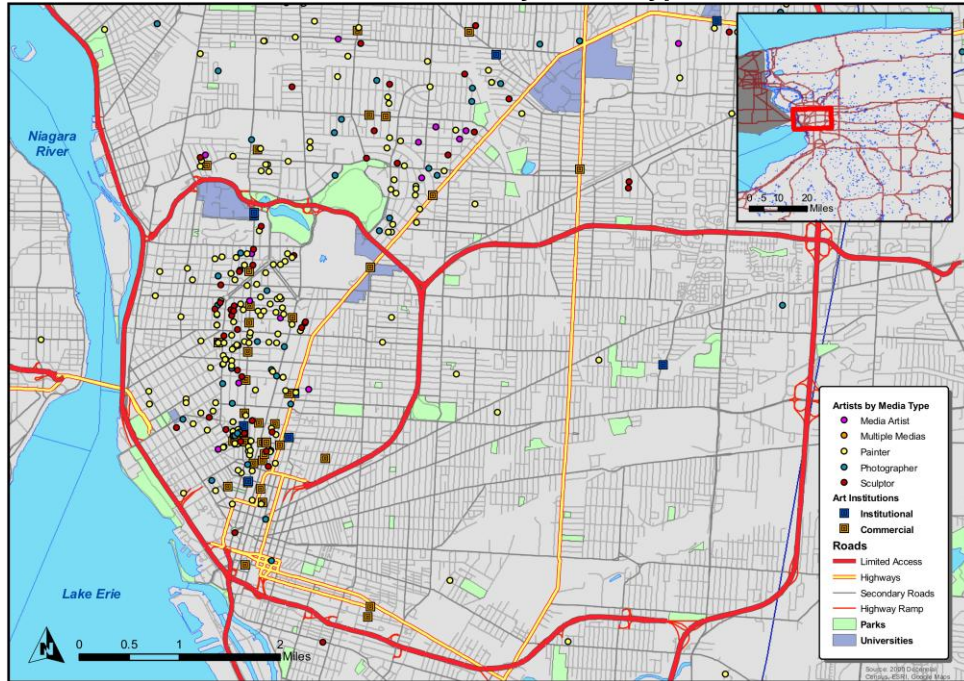


Looking more closely at Greater Buffalo, three distinct urban clusters can be seen in Map 2. The first cluster is located in the Allentown district where there are a number of art institutions. Allentown, the area around the central spine of Allen Street, includes a number of smaller side streets. This cluster extends from Main Street, down Allen and along Porter Avenue. In this area the institutions are nearly all private galleries and shops. The second cluster is a little north of Allentown along the Elmwood Avenue Corridor. Commonly known as the Elmwood Village, this area extends south from the Scajaquada Expressway to around North Street. At the northern end of this district are the major public institutions of the Albright-Knox Art Gallery, the Burchfield-Penney Art Center and Buffalo State's Upton Hall Gallery. Probably not coincidentally, Buffalo State College boasts the largest and most comprehensive visual arts program in the State University of New York system. The third cluster is in North Buffalo, which is north of the Scajaquada Expressway. This cluster is more dispersed with less concentration of both artists and galleries.

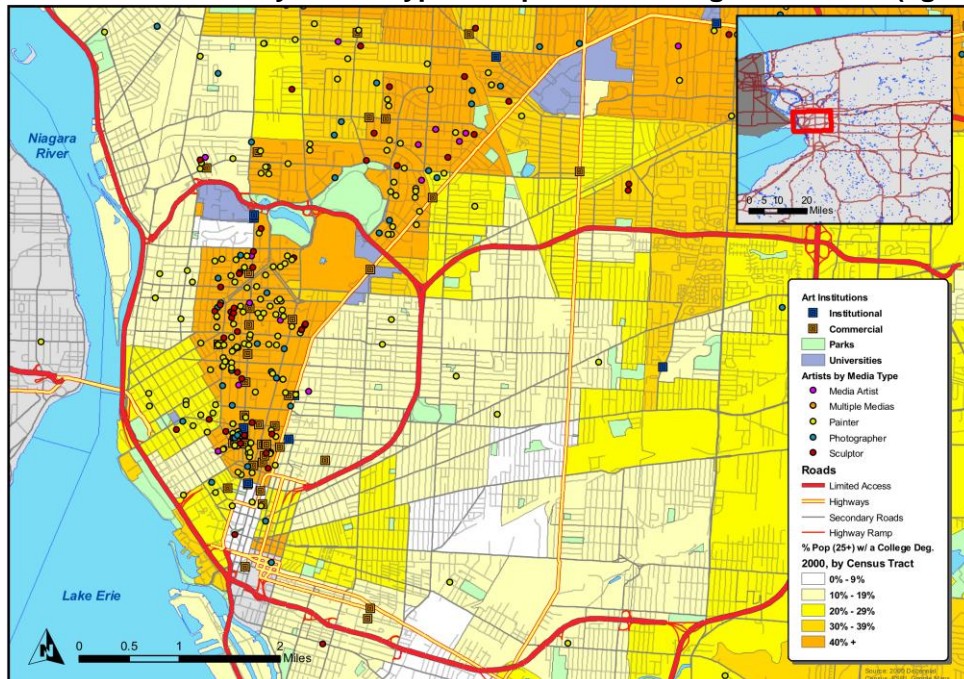
In general these maps show the dense concentration of visual artists that are involved with art organizations being located west of Main Street. This type of clustering supports Markusen's assertions about what types of amenities appeal to artists, because these areas have many small coffee shops, boutiques and bars and are known for their nightlife and unique

character. In North Buffalo the neighborhoods are somewhat more residential in nature, however there seems to be a clustering around Delaware Park, which is another type of public amenity that Markusen finds to be attractive to artists.

Map 2
Distribution of Visual Artists by Media Type, Buffalo, NY

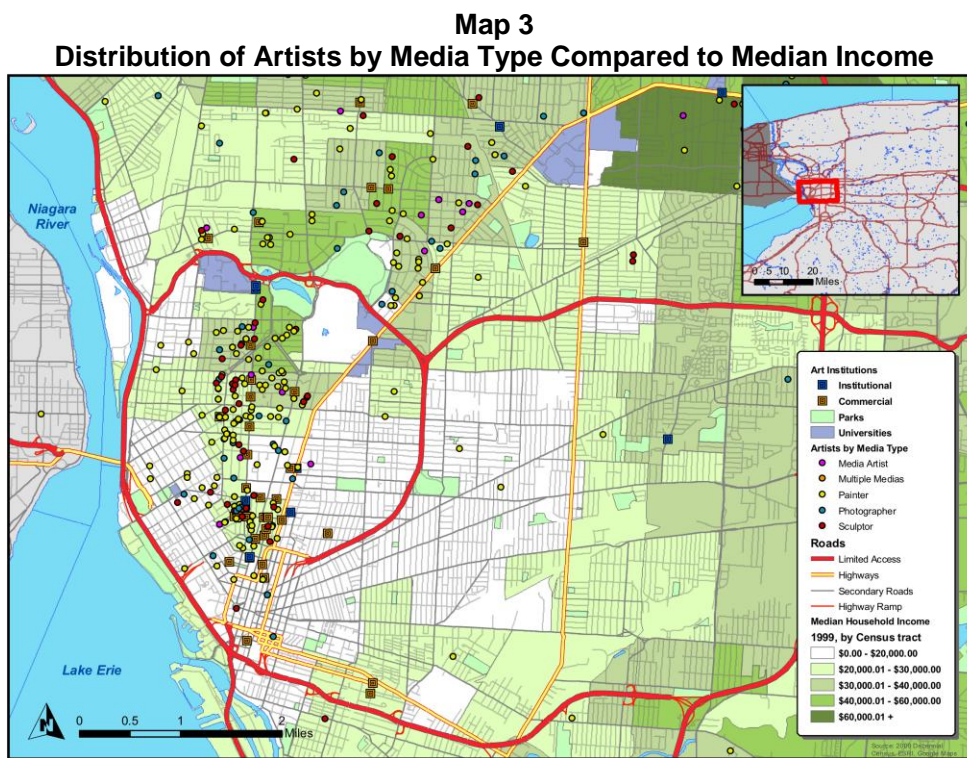


Map 3
Distribution of Artists by Media Type Compared to College Graduates (age 25+)



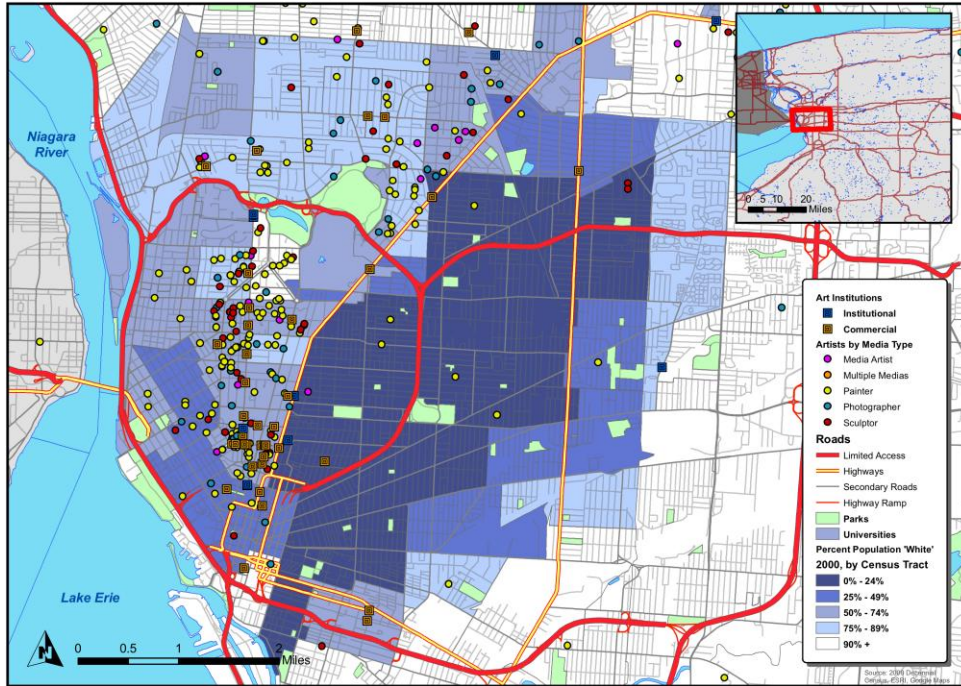
Map 3 shows the location of visual artists in relation to the population demographics of college graduates. This map reveals a clear tendency for artists to locate in census tracts with college graduation rates above 40 percent. Many fewer artists are located in areas that have less than a 20 percent college graduation rate.

Map 4, which looks at median household income, gives a somewhat different picture. Artists seem not to be located in census tracts with median household income above \$60,000. Instead, they tend to locate in census tracts directly adjacent to higher income tracts, where the median income is between \$20,000 and \$40,000. This finding supports the belief that artists are locating based on the affordability of the housing stock and quality of life issues. By locating in areas with lower household incomes they can pay less for housing; however, by maintaining proximity to wealthier census tracts they are still close to desired amenities.



The most noticeable observation from Map 5, which maps racial demographics of the population, is that there are few visual artists in census tracts with less than 24 percent of their population classified as “white.” The neighborhoods with the highest density of visual artists tend to be diverse neighborhoods, with most being between 25 percent and 75 percent “white,” although this varies somewhat from cluster to cluster.

Map 4
Distribution of Artists by Media Type Compared to Population Diversity

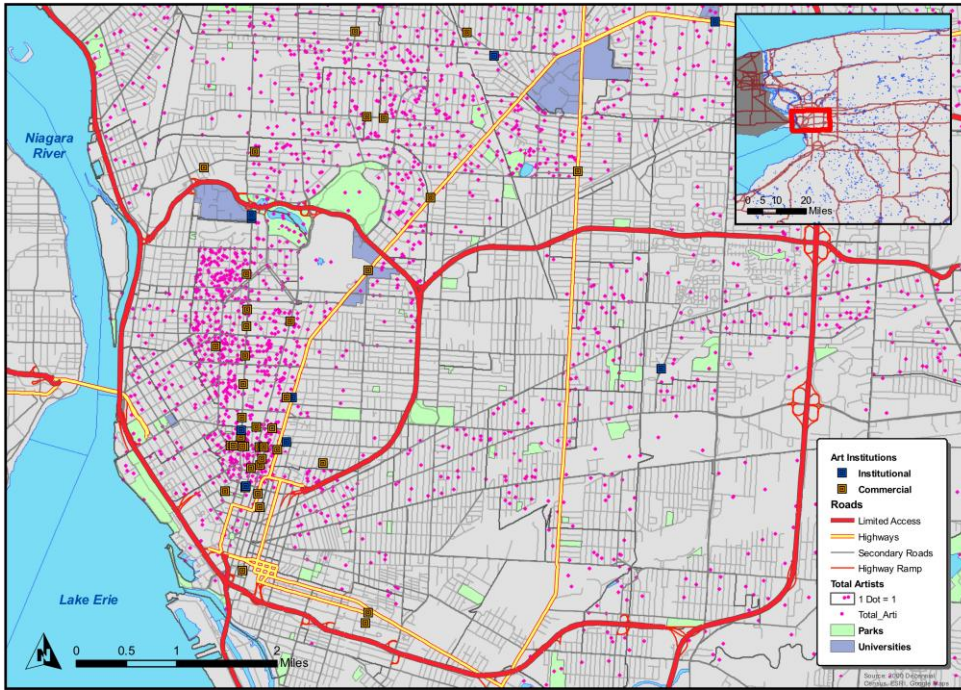


ARTS WORKERS BY CENSUS TRACT

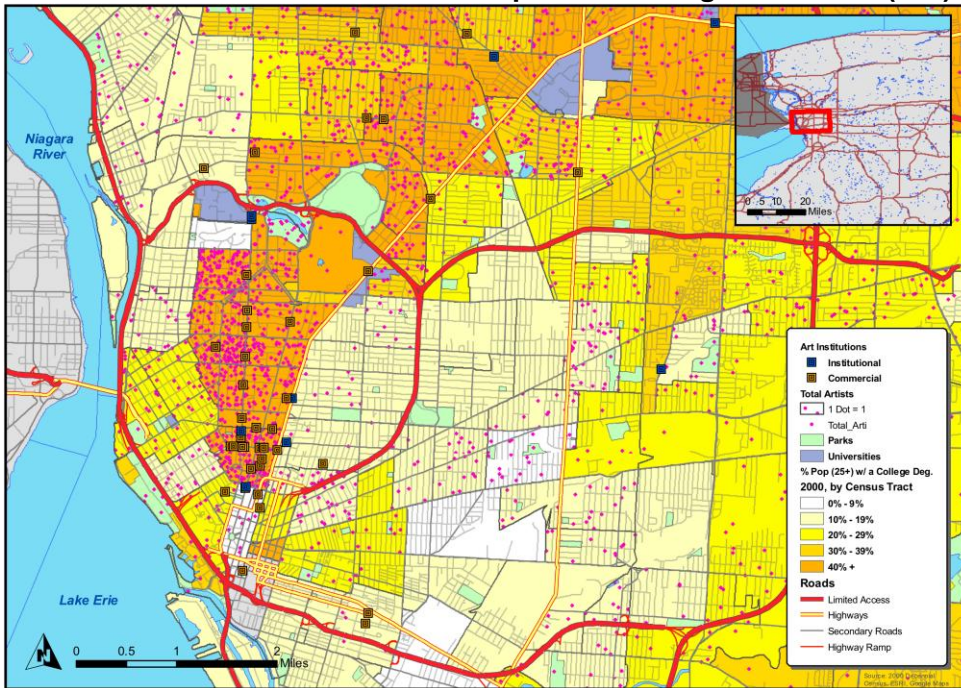
Map 6, plots the distribution of all arts workers in Greater Buffalo, utilizing census data on occupational classifications for artists and designers, entertainers and performers, and media and communication workers. While the previous concentrations of visual artists along Elmwood Avenue, Allen Street, and in North Buffalo are still visible, there are many more clusters to the east of downtown, along the Niagara River on the West Side, and around the University at Buffalo's South Campus. On the East Side, clusters are located between Genesee Street and Williams Street. On the West Side artists are located all the way from downtown up to West Ferry Street.

In Map 7 arts workers are shown in relation to college graduation rates by census tract. As with the visual artists, all arts workers are more densely located in census tracts with more than 40 percent college graduates, although artists on the East and West Side are located in census tracts that have lower college graduation rates. In most of these census tracts, the percentage of college graduates in the population is less than 19 percent, although some tracts show up to 29 percent of their population has a college degree.

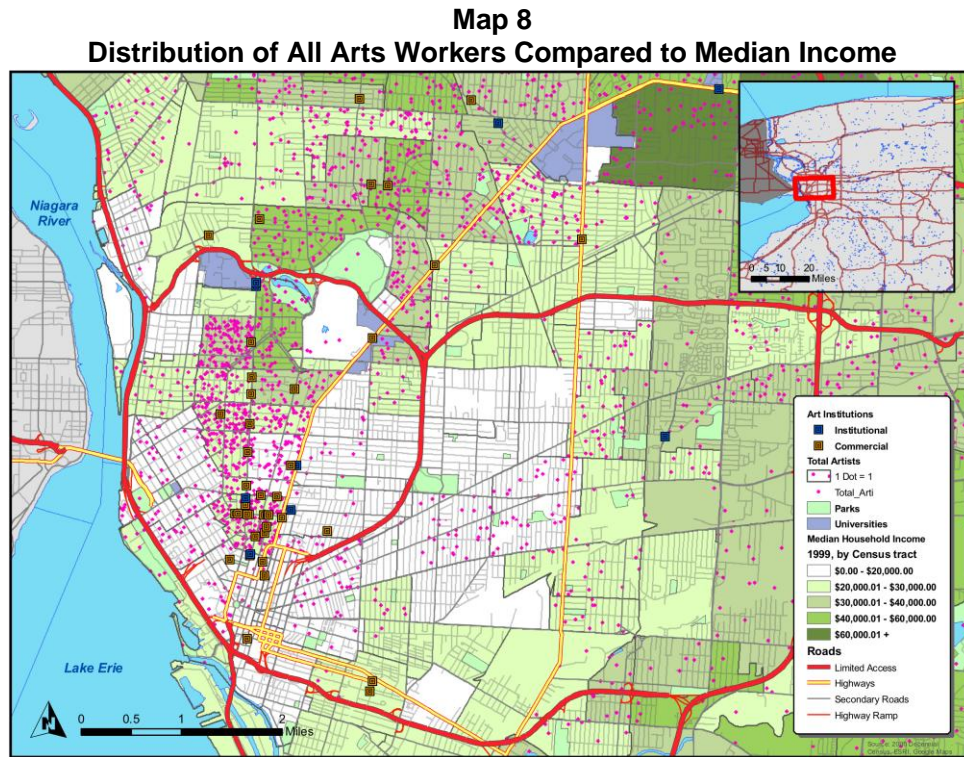
Map 6
Distribution of All Arts Workers, Buffalo, NY



Map 7
Distribution of All Arts Workers Compared to College Graduates (25+)



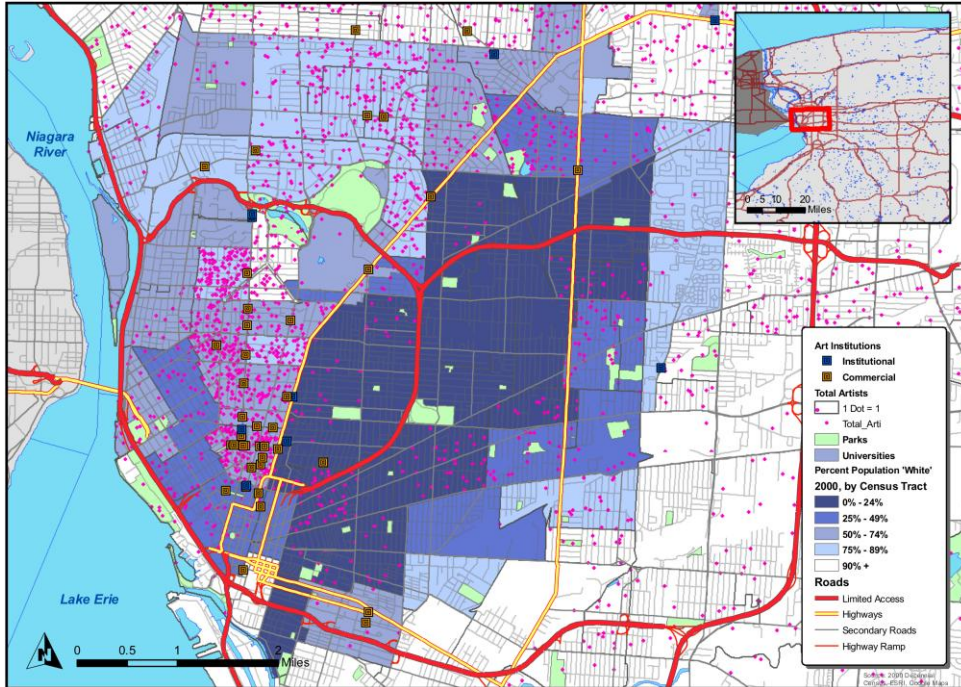
In terms of median household income, Map 8 shows all arts workers more widely distributed across all income level census tracts than was found with visual artists. Again, the density of arts workers is greater in moderate income areas, although significant numbers reside in census tracts at the bottom of the median income scale, while there are also some that live in the highest median income census tracts.



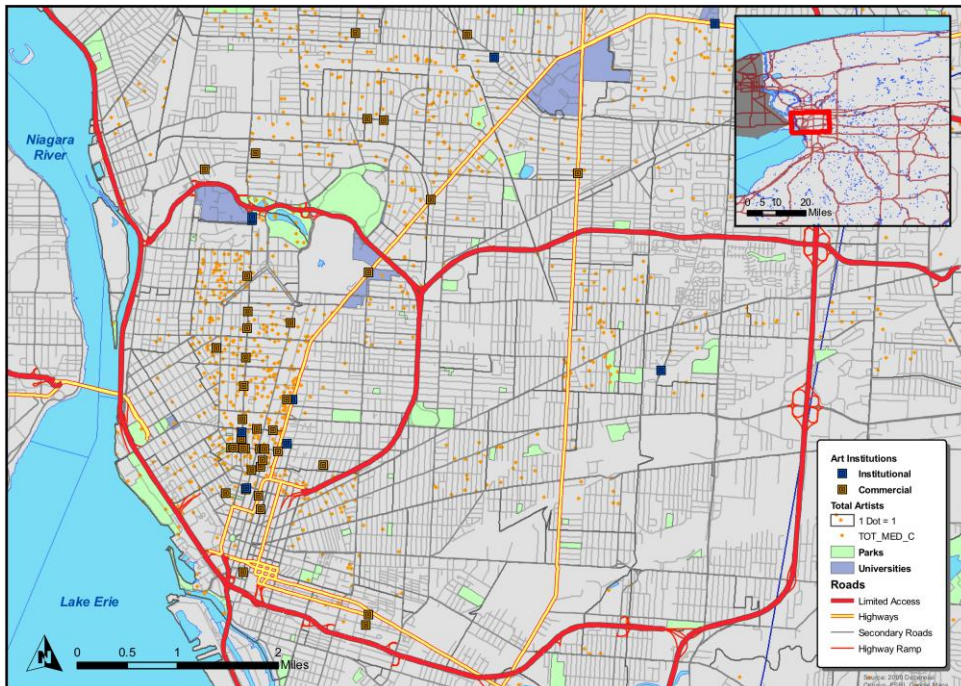
Map 9, showing the racial composition of the census tracts, reveals an interesting pattern. A large number of the majority non-white census tracts on the East Side have virtually no “declared” artists living in them, that is, no people who listed one of the arts classifications as their occupation. (Of course, there are likely artists who earn their primary living at some other occupation.) At the same time, the arts workers who are located on the West Side and in the Elmwood/Allentown area live in census tracts that are more evenly white and non-white. One observation that can be taken from this map is that the arts community seems to locate where there is a mixture of residents, which also supports Markusen’s findings. Rather than locating in neighborhoods that are predominantly white, or predominantly non-white, artists are found where a diverse mix of people lives.

Analyzing the three sub-categories of arts workers presents some interesting findings. Media and communications workers appear to be the largest and most widely dispersed sub-group (Map 10). Artists and designers are also distributed, but smaller in number than the media and communications workers (Map 11). Performers (Map 12) are highly clustered in North Buffalo, Elmwood/Allentown, and around the UB South Campus. This group is the smallest of the three sub-groups.

Map 9
Distribution of All Arts Workers Compared to Population Diversity



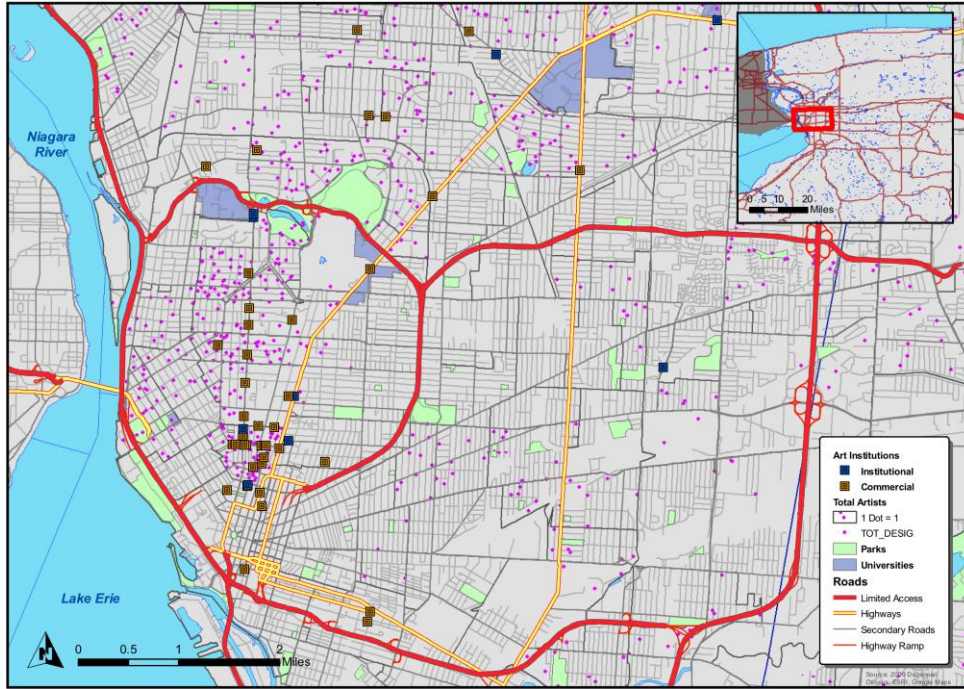
Map 10
Distribution of Media & Communication Workers



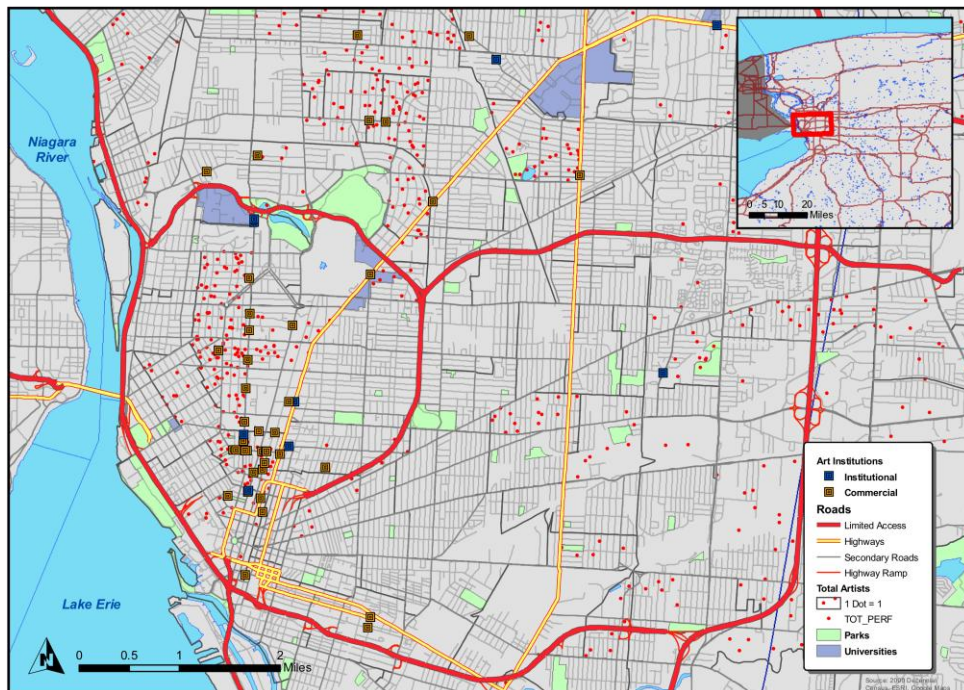
The performers sub-group and the artists and designers sub-group are more concentrated in areas with high college graduation rates (Map 13 and 14). Conversely, media and communications workers are more dispersed among census tracts with varying levels of

college graduation rates (Map 15). These workers seem to account for the majority of the arts workers located on the East Side of Buffalo.

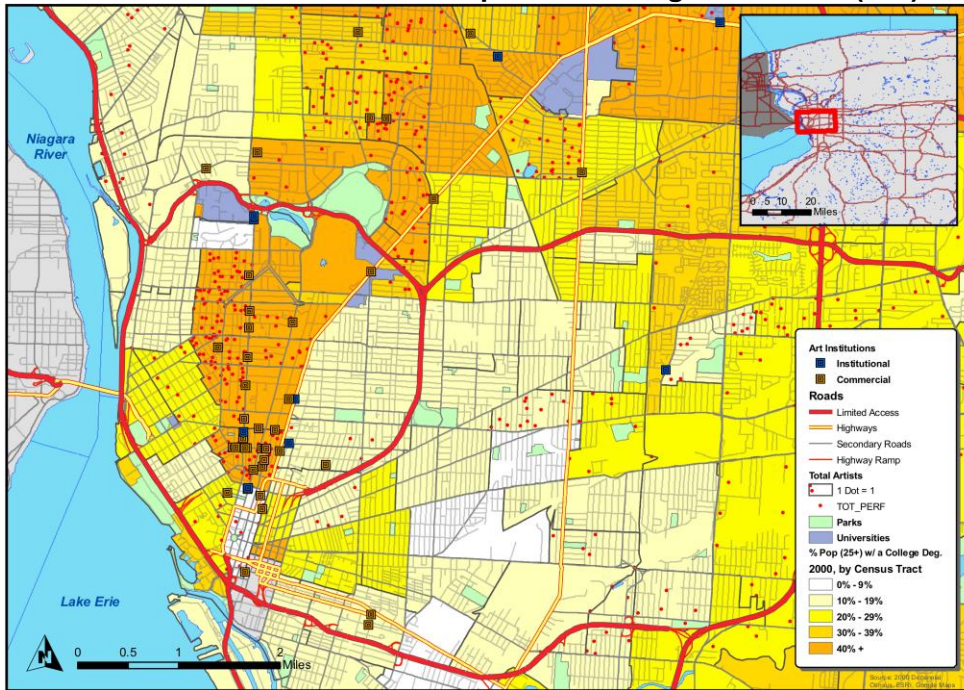
Map 11
Distribution of Artists & Designers



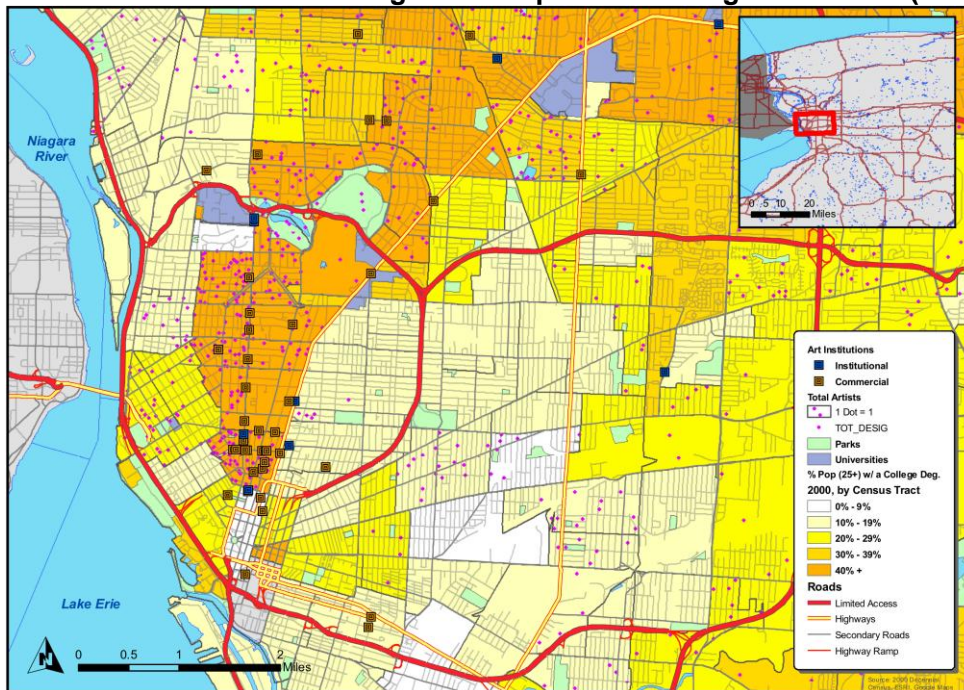
Map 12
Distribution of Performers



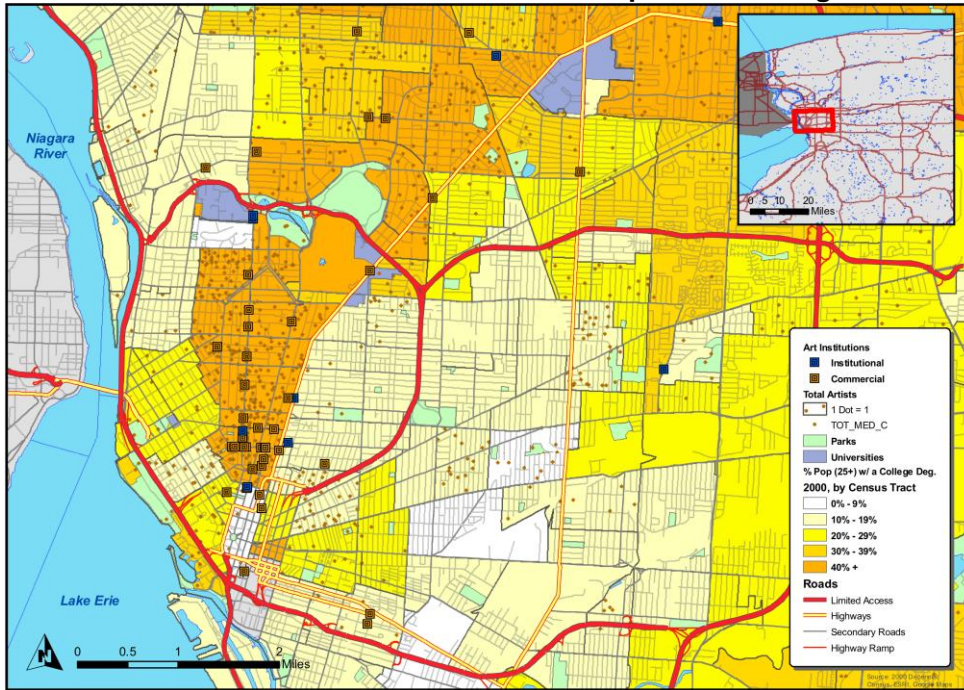
Map 13
Distribution of Performers Compared to College Graduates (25+)



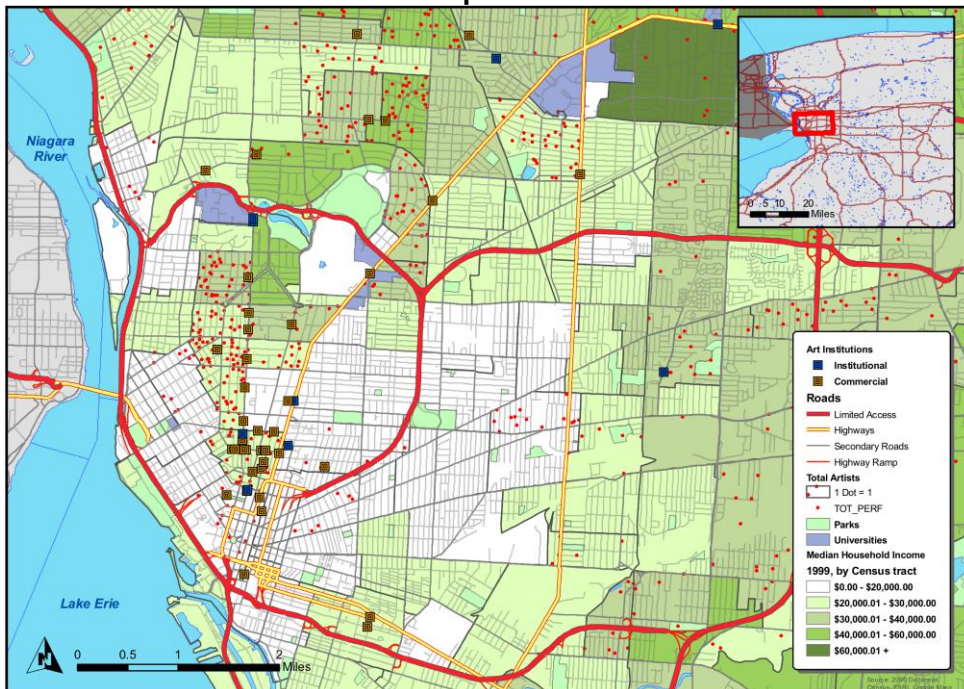
Map 14
Distribution of Artists & Designers Compared to College Graduates (25+)



Map 15
Distribution of Media & Communication Workers Compared to College Graduates (25+)



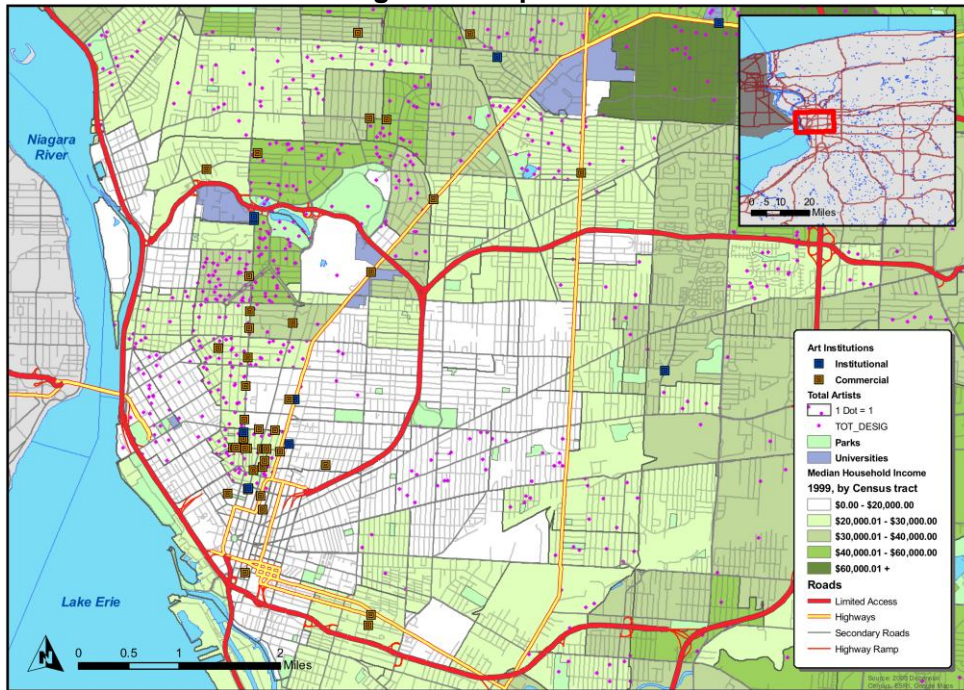
Map 16
Distribution of Performers Compared to Median Household Income



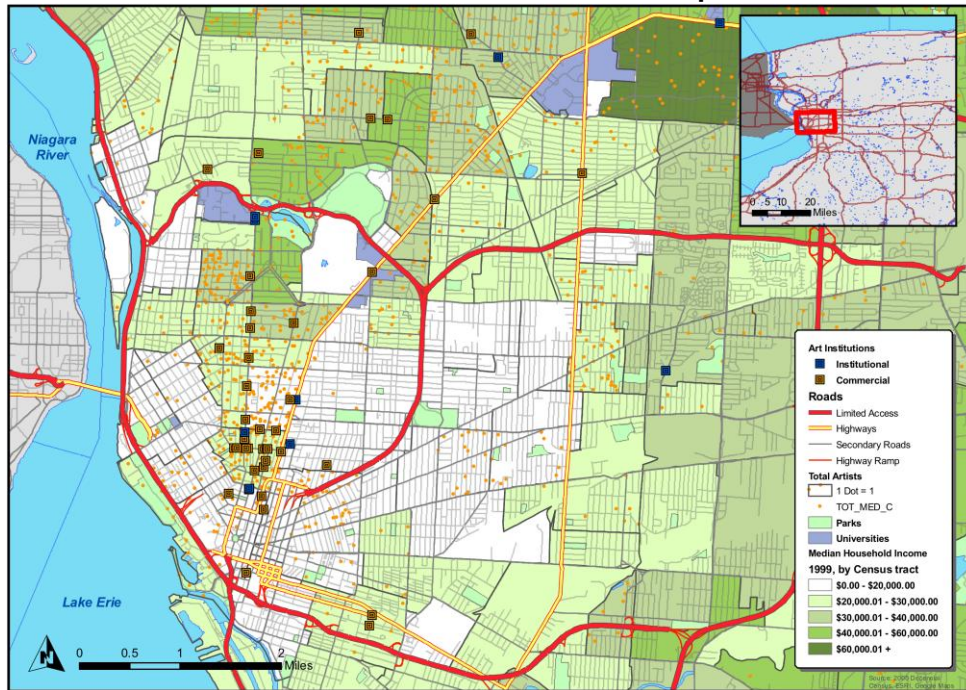
Plotted over median household income, the three sub-groups are all rather evenly dispersed between high and low median incomes. The performers sub-group (Map 16) is the smallest and the most clustered. There are very few performers in the lowest median income tracts (\$0-\$20,000); however, the greatest numbers are located in tracts with the second lowest median income (\$20,000-\$30,000). The artists and designers (Map 17), as well as the media and communications workers (Map 18) are widely distributed among various census tracts. Perhaps the most striking observation is the sparse distribution of any workers in the highest median income tracts. These observations might indicate that the location of arts workers in Buffalo is not as strongly dependent on the median income of an area as it is more associated with the education level or the racial diversity of the neighborhood.

In terms of racial make-up, the same patterns observed among all the workers appear to hold true for each of the three sub-groups. Arts workers as a whole seem to locate in areas that are relatively diverse in their racial makeup (Maps 19, 20 and 21).

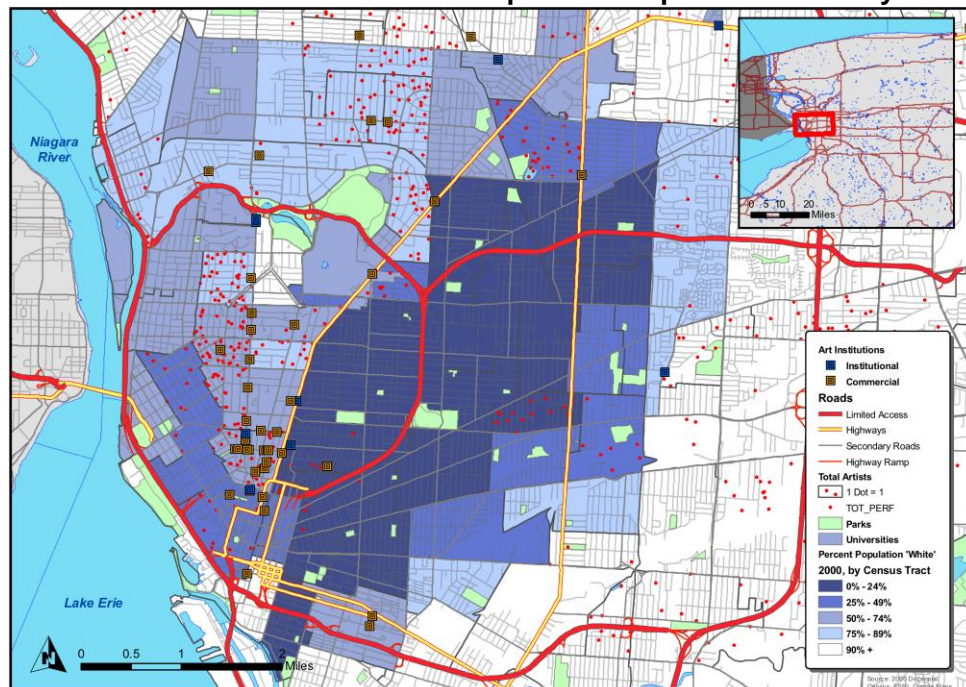
Map 17
Distribution of Artists & Designers Compared to Median Household Income



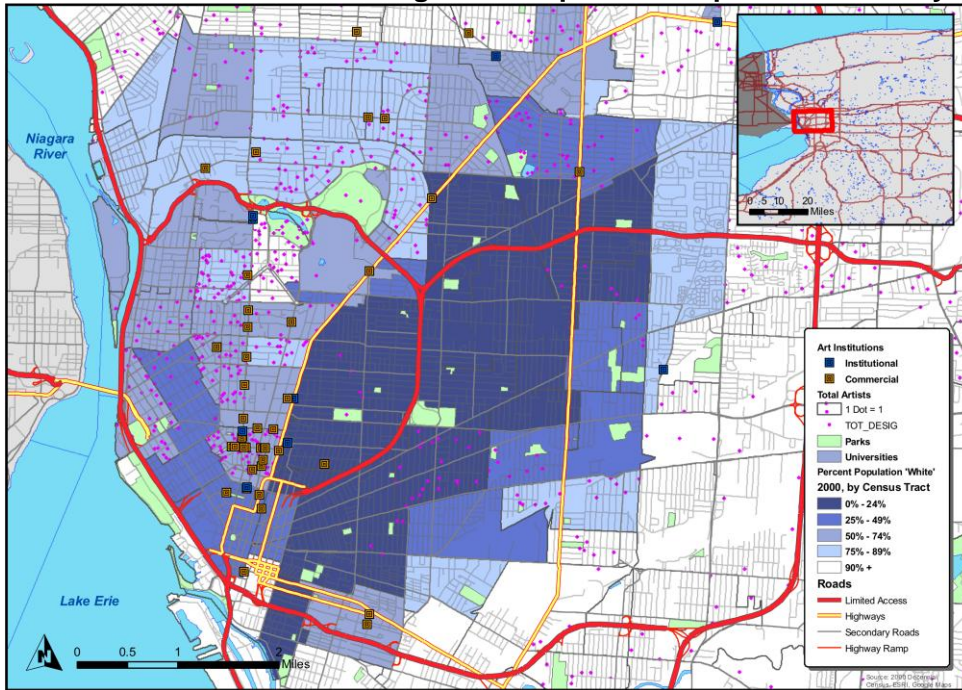
Map 18
Distribution of Media & Communications Workers Compared to Median Income



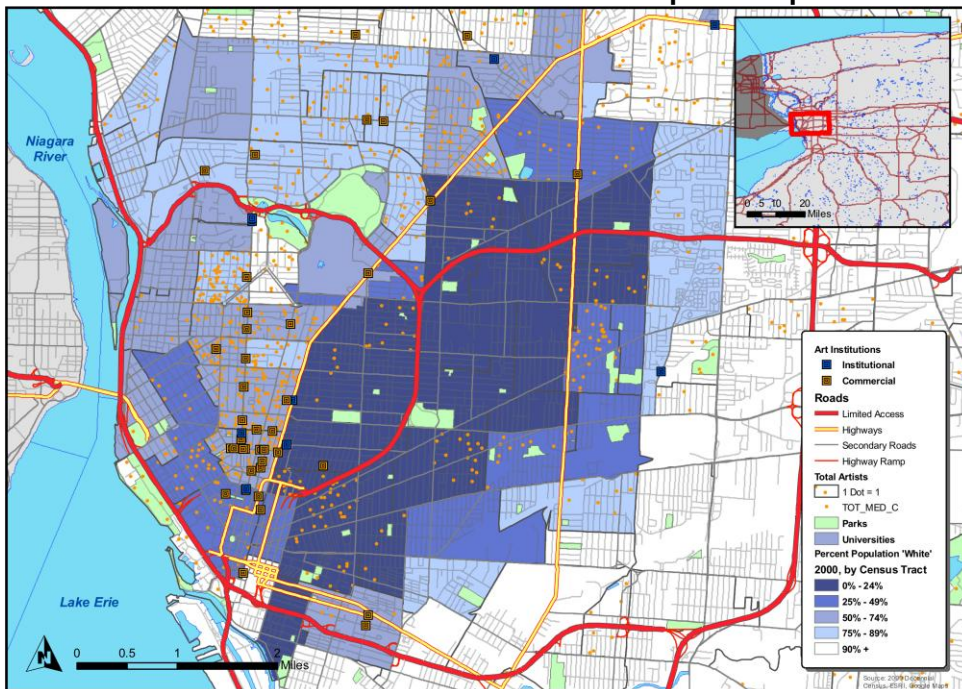
Map 19
Distribution of Performers Compared to Population Diversity



Map 20
Distribution of Artists & Designers Compared to Population Diversity



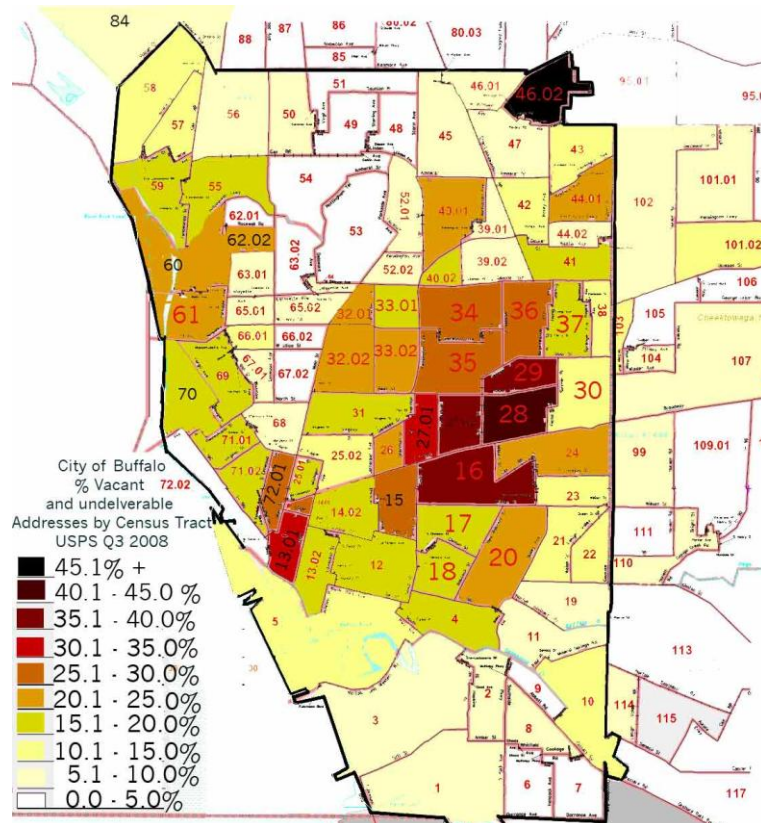
Map 21
Distribution of Media & Communication Workers Compared Population Diversity



PROPERTY VACANCY MAP

As a final level of analysis, the maps from both data sets were analyzed in comparison to a map of the percent of vacant and undeliverable properties within the City of Buffalo (Map 22). This picture shows an expected correlation between those census tracts in the city that have 30 percent or greater vacancy rates and those census tracts with few artists located in them. The East Side of Buffalo has the highest vacancy rates and is notably sparse in artists, perhaps reflective of general population loss intrinsically linked to high vacancy areas. The West Side of the city, from downtown up past the junction of the 190 and 290 expressways, has relatively high vacancy rates. While this area has lower rates than the East Side, it is similarly devoid of artists. The current and past industrial character of some of these areas may also contribute to both the higher vacancy rates and the lack of artists in this part of the city.

Map 22
Total Vacant and Undeliverable Properties in Buffalo, NY



CONCLUSIONS

Through this spatial analysis it is possible to pull out several key findings. The first is that artists in the Buffalo area are found clustered in mid-income neighborhoods. Buffalo's great affordability, decent housing, and unique amenities most likely work to draw cost-conscious artists to the city. The second finding is that artists locate in areas with high levels of racial

diversity. The neighborhoods surrounding Elmwood Avenue and Allen Street, where many of the artists have located, boast very diverse populations, with several census tracts identified as 50 percent white and 50 percent non-white. Perhaps these artists are drawn to the variety of people, cultures, and business establishments that locate and thrive in areas with such diverse populations. A third finding confirms that artists locate around anchoring institutions. These galleries, performance venues and cultural institutions offer a portfolio of spaces for learning, networking, sharing tools and workspaces, exhibiting and marketing their work to the wider population.

Many of Markusen's ideas about how artists choose to locate appear to be supported in this geographic analysis. Less often located in racially or economically homogeneous neighborhoods, local artists are more often found in areas with higher education levels. This close-up of Buffalo arts workers tends also to confirm the thesis that artists are more likely to live in areas characterized by the variety and richness of racial, ethnic and class diversity

As the economic development significance of the arts becomes more widely appreciated, urban areas across the country are devising strategies to attract and retain artists. The "creative class" is important not only for their impact on quality of life but also for their impact on economic vitality. Markusen offers a number of strategies for governments to employ in their efforts to strengthen and nurture art communities in their regions. She suggests that government can:

- Help artists market their work through the Internet, art fairs and in the promotion of the city or region
- Support artist centers, places where artists come together to share their craft and to learn ways of making a living from their art
- Use public education for the arts and support arts events to help raise the visibility of arts in a community and generate sales for individual artists
- Facilitate connections between the corporate community and resident artists
- Improve the decision criteria for allocating public dollars to the arts so that smaller, more diverse cultural organizations, artists' live-work spaces, and artists' centers are more equitably funded.

Many of these recommendations have been partially implemented in Buffalo. With its abundance of interesting and usable old buildings, urban neighborhoods with unique shops and dining and entertainment establishments, a cultural and architectural infrastructure of national significance, Buffalo is recognized as one of the leading arts communities in the country. A growing number of innovative festivals, creative enterprises and experimental collaborations add to the strengths of established institutions to form the foundation for the Western New York arts community – a world class feature of the region and a major contributor to the economy.

STUDY METHODOLOGY

In response to the receipt of a grant from the Empire State Development Corporation, the faculty of Cornell ILR arts and entertainment industry project team:

- Reviewed the literature on this industry
- Analyzed data from primary and secondary sources on industry trends, workforce, and education and training institutions.
- Conducted interviews with leaders in all segments of the field
- Held forums and focus groups in Buffalo, New York City, and Albany
- Met with New York State executive and legislative officials
- Consulted with Cornell faculty with relevant experience and expertise
- Participated in Sloan Industry Studies programs, and the newly formed Industry Studies Association, presenting findings about the arts and entertainment industry
- Explored expansion of arts industry networks through Labor and Employment Relations Association (LERA)
- Investigated funding sources for future applied industry research and education
- Convened a meeting and conducted interviews of industry leaders and representatives to react to findings and suggest research and policy implications for inclusion in the final report.

Literature Review

The review of the extensive literature (books, articles, reports, and organizational studies dealing with the arts and entertainment industry) focused on identifying major competitive issues and challenges to the vitality of this sector along with workforce and training needs. Particular attention was given to studies about the industry in New York State. Highlights from this review are incorporated into the report. (See Bibliography for listing of sources.)

Industry Data Analysis

Earlier studies conducted by members of the project team (*New York's Big Picture: Assessing New York's Competitive Position in Film, Television and Commercial Production*; *Under the Stars: Essays on Labor Relations in the Arts and Entertainment Industry*; *Cultural Capital: Challenges to New York's Competitive Advantages in the Arts and Entertainment Industry*; along with various industry and union commissioned studies of electronic media and performing arts) served as starting points for outlining the scale, structure, characteristics, economic importance, and interconnectedness of various segments of the industry. These initial sources were supplemented with data from the Bureau of Labor Statistics' Quarterly Census of Employment and Wages and the non-employer series of the Census Bureau; as well as with sector-specific information from industry groups, reports from academic analysts, and other research examined in the literature review.

Workforce Data Analysis

Analyzing patterns of employment and income for the workforce, as well as its demographic composition and educational attainment, required tabulations from the 2005-2007 Public Use

Microdata Sample (PUMS) of the American Community Survey (ACS), U.S. Census Bureau. The sample includes more than 237,000 housing units in New York State. Estimates based on these data are subject to sampling and non-sampling errors.

Research on Arts Education and Training Facilities in New York State

An inventory (database) of higher education and training institutions offering certificate and degree programs in New York State was built using data from the National Center for Education Statistics (NCES) of the US Department of Education, which through its Integrated Postsecondary Education Data System collects and makes available data on post-secondary institutions that participate in federal student financial aid programs (Title IV Programs). In order to capture and incorporate into the inventory those institutions that do not participate in federal financial aid programs, it was necessary to conduct an internet search and a limited telephone survey. The index with names, subjects offered, and type of degree or certificate offered is provided in Appendix C, supplemented by geographic maps by region in Appendix B. The entire content of this database is available for further research.

Consultation with Academics with an Interest in Arts and Entertainment

Early in the research process the project team consulted with Cornell faculty who had demonstrated interest and conducted research relating to arts and entertainment. Twenty-one faculty members were interviewed individually and invited to a consultative meeting which elicited noteworthy questions for research and opportunities for collaboration. Professor Ann Markusen of the University of Minnesota, author of major arts industry workforce studies who was a visiting faculty member at Cornell in 2008, participated in that meeting. Based on faculty recommendations, a colloquium was arranged featuring the research findings of Professor Douglas Heckathorn and Professor Joan Jeffri of Columbia University dealing with jazz musicians in New York City. This was broadcast as a webinar to Cornell colleagues and industry representatives in New York City and Buffalo. In addition, Lois Gray, who was asked by the Labor and Employment Relations Association (LERA) to form an arts and entertainment industry council for the association, attended the annual LERA meeting and consulted with a number of academics with experience and/or interest in researching this sector.

Interviews with Leaders in the Arts and Entertainment Sector

Interviews were conducted in person and by telephone with leaders from every segment of the arts industry across the State of New York. Their opinions of the industry's most important trends and challenges and the kinds of applied research or other support that would be of greatest benefit to the industry were elicited in structured but open-ended interviews. In addition, industry leaders and officials of educational and training institutions were consulted about training needs of the workforce and the availability and adequacy of training offered in New York State. A focus group of twenty artists, producers, educators and public officials was convened in Buffalo to explore industry needs and opportunities in the bi-national region of Western New York.

In preparation for this report, leaders consulted and interviewed included 26 executives and producers, 9 officials of industry associations, 22 from employee organizations, 13 from arts service organizations, 24 government officials, and 33 officials and faculty members of

educational and training organizations. (See Appendix B for list of leaders interviewed and consulted.)

Arts and Entertainment Industry Forums in Buffalo, New York City and Albany

In addition to interviews and focus groups, Cornell ILR faculty presented research findings and collected ideas through public meetings in key cities throughout New York State – Buffalo, New York City and Albany. In these forums Cornell ILR speakers reported on findings from their recent studies about the arts and entertainment industry followed by panels of industry, labor and government representatives who pointed to challenges facing this sector.

Participants drawn from local producers, unions and arts organizations were invited to raise questions and suggestions for research and action. The Albany forum constituted an outreach to members of the New York State legislature and their staff members as well as state officials in the executive branch.

Advisory Meeting and Final Interviews

Finally on June 19, 2009, the report's authors convened a meeting of 32 industry, union, government, and academic leaders in New York City and interviewed key arts leaders in Western New York for critique of research findings and recommendations of research and policy initiatives which are included in the final report.

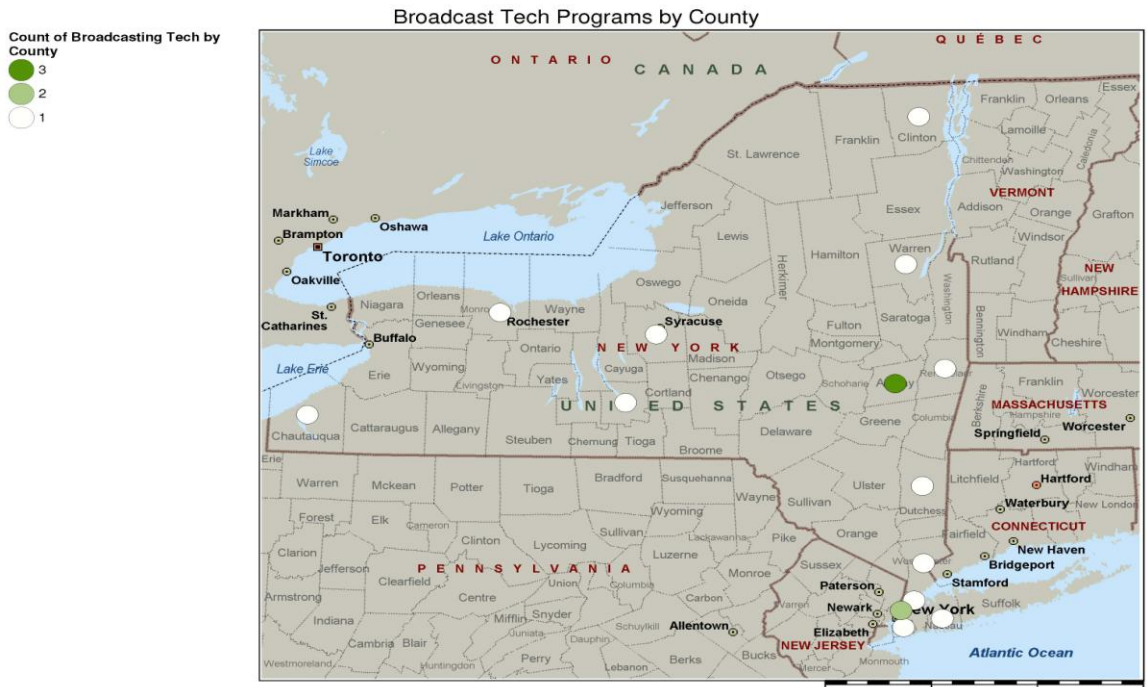
APPENDIX A: NYS ARTS WORKFORCE BY COUNTY

NYS Arts Workforce by County		
Region	County	Arts Workforce
Capital District	Albany	2,023
	Columbia/Greene	1,310
	Rensselaer	1,343
	Saratoga	1,809
	Schenectady	780
	Warren/Washington	743
Central	Cayuga/Onondaga	729
	Madison/Onondaga	586
	Onondaga	3,770
	Oswego	436
Finger Lakes	Genesee/Orleans	713
	Livingston/Wyoming	481
	Monroe	6,537
	Monroe/Wayne	507
	Ontario	659
Finger Lakes & Southern Tier	Seneca/Tompkins*	1,749
Hudson Valley	Dutchess	2,905
	Orange	4,381
	Putnam/Westchester	1,293
	Rockland	2,554
	Ulster	3,025
	Westchester	11,877
Hudson Valley & Mohawk Valley	Delaware/Otsego/Schoharie*	830
Long Island	Nassau	12,853
	Suffolk	11,708
Mohawk Valley	Fulton/Montgomery	505
	Herkimer/Oneida	584
	Oneida	592
North Country	Jefferson/Lewis	987
	St. Lawrence	420
North Country & Mohawk Valley	Clinton/Essex/Franklin/Hamilton*	879
NYC	Bronx	8036
	Kings	46,710
	New York	89,862
	Queens	24,602
	Richmond	3,353
Southern Tier	Broome	1,354
	Broome/Tioga	771
	Chemung/Shuyler	546
Southern Tier & Central	Chenango/Cortland*	447
Western Region	Allegany/Cattaraugus	566
	Chautauqua	749
	Erie	6,136
	Niagara	625
Western Region & Finger Lakes	Steuben/Yates*	436
Totals		263,761
*Note: The American Community Survey does not provide separate data for these counties.		
Source: Census Bureau, American Community Survey 2005-2007.		

APPENDIX B: MAPS OF TRAINING INSTITUTIONS BY DISCIPLINE

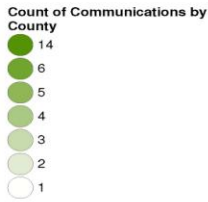


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Communications Programs by County



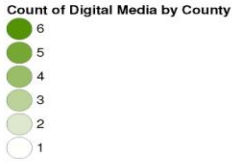
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Dance Programs by County



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Digital Media Programs by County



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Film & TV Editing Programs by County



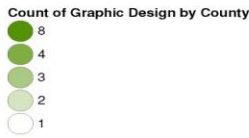
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Film & TV Production Programs by County

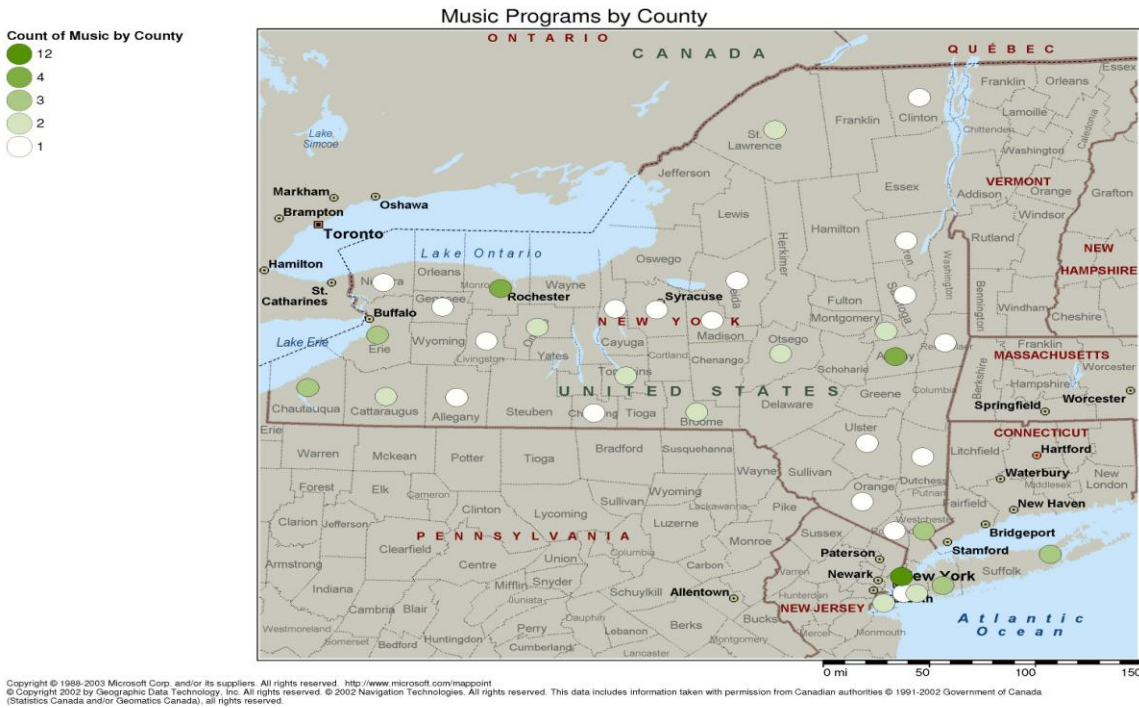


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Graphic Design Programs by County



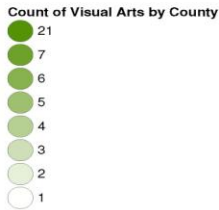
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Theatre Drama Acting Programs by County



Visual Arts Programs by County



APPENDIX C:

INVENTORY OF EDUCATION AND TRAINING INSTITUTIONS OFFERING ARTS AND ENTERTAINMENT PROGRAMS IN NYS

School/ Institute	SUNY/ CUNY	City	Region	Program Offerings	Degree/ Certificate
University at Albany	SUNY	Albany	Capital District	Visual Arts, Theatre/Drama/Acting, Film & TV Prod, Music	BA, MA, MFA
The College of Saint Rose		Albany	Capital District	Visual Arts, Graphic Design, Digital Media, Sound Recording, Music, Communications, Arts Ed/Therapy, Admin/Bus/Mgt/Marketing	BA, BFA, BS, MA, MS
Excelsior College		Albany	Capital District	Music, Communications	BA
Russell Sage College		Albany	Capital District	Visual Arts, Theatre/Drama/Acting, Graphic Design, Broadcasting Tech, Communications, Arts Ed/Therapy	BA, BS, MAT
The New School of Radio & Television		Albany	Capital District	Broadcasting Tech, Communications	
ITT Technical Institute, School of Drafting & Design		Albany	Capital District	Graphic Design, Digital Media, Communications	Associates, Bachelors
Columbia-Greene Community College	SUNY	Hudson	Capital District	Visual Arts, Digital Media	AA, Certificate
Siena College		Loudonville	Capital District	Visual Arts, Theatre/Drama/Acting, Broadcasting Tech, Music	BA, Certificate
Adirondack Community College	SUNY	Queensbury	Capital District	Visual Arts, Film & TV Prod, Broadcasting Tech, Sound Recording, Music, Communications	Certificate, AS, AAS
Empire State College (Available Statewide)	SUNY	Saratoga Springs	Capital District	Visual Arts, Theatre/Drama/Acting, Dance, Graphic Design, Film & TV Prod	AA, AS, BA, BS, BPS
Skidmore College		Saratoga Springs	Capital District	Visual Arts, Theatre/Drama/Acting, Dance, Music	Undergraduate and Graduate
Schenectady County Community College	SUNY	Schenectady	Capital District	Visual Arts, Theatre/Drama/Acting, Music, Admin/Bus/Mgt/Marketing	AAS, AS, Certificate
Union College		Schenectady	Capital District	Visual Arts, Theatre/Drama/Acting, Dance, Music	Undergraduate
Hudson Valley Community College	SUNY	Troy	Capital District	Visual Arts, Theatre/Drama/Acting, Digital Media, Broadcasting Tech, Admin/Bus/Mgt/Marketing	AAS, AS, Certificate
Rensselaer Polytechnic Institute (RPI)		Troy	Capital District	Digital Media, Music, Communications	BS, MFA, PhD
Russell Sage College		Troy	Capital District	Visual Arts, Theatre/Drama/Acting, Graphic Design, Communications, Arts Ed/Therapy	BA, BS, MAT
Cayuga Community College	SUNY	Auburn, Fulton	Central New York	Visual Arts, Graphic Design, Film & TV Prod, Broadcasting Tech, Sound Recording, Music, Communications	Associate
Cazenovia College, Center for Art & Design		Cazenovia	Central New York	Visual Arts, Graphic Design, Communications	Associate, Bachelor

School/ Institute	SUNY/ CUNY	City	Region	Program Offerings	Degree/ Certificate
Cortland University	SUNY	Cortland	Central New York	Visual Arts, Graphic, Digital Media, Communications	BA, BFA
Elmira College		Elmira	Central New York	Visual Arts, Theatre/Drama/Acting, Music, Arts Ed/Therapy	BA
Bryant & Stratton College		Liverpool (Syracuse North Campus)	Central New York	Graphic Design, Digital Media, Communications	Associate
Morrisville State College	SUNY	Morrisville	Central New York	Communications	AAS, AS, BS, B.Tech,
Oswego	SUNY	Oswego	Central New York	Visual Arts, Theatre/Drama/Acting, Graphic Design, Film & TV Prod, Music, Communications, Arts Ed/Therapy	BA, BFA, MA, MAT
Syracuse University		Syracuse	Central New York	Visual Arts, Theatre/Drama/Acting, Graphic Design, Film & TV Prod, Broadcasting Tech, Music, communications, Arts Ed/Therapy	BA, MA
Onondaga Community College	SUNY	Syracuse	Central New York	Visual Arts, Theatre/Drama/Acting, Graphic Design, Film/TV Editing, Music, Communications	AAS, AS, Certificate
Upstate NY Ballet		Syracuse	Central New York	Dance	
Le Moyne College		Syracuse	Central New York	Theatre/Drama/Acting	BA
Genesee Community College	SUNY	Batavia	Finger Lakes	Visual Arts, Theatre/Drama/Acting, Design, Digital Media, Set/Stage Design & Construction, Music	AA, AAS, AS, Certificate
The College at Brockport	SUNY	Brockport	Finger Lakes	Visual Arts, Theatre/Drama/Acting, Dance, Film & TV Prod, Arts Ed/Therapy	Certificate, BFA, MA, MFA
Finger Lakes Community College	SUNY	Canandaigua	Finger Lakes	Visual Arts, Theatre/Drama/Acting, Graphic Design, Sound Recording, Music, Communications	AAS, AS
Geneseo	SUNY	Geneseo	Finger Lakes	Visual Arts, Theatre/Drama/Acting, Music, Communications, Arts Ed/Therapy	BA
Hobart & William Smith Colleges		Geneva	Finger Lakes	Visual Arts, Dance, Music, Communications, Arts Ed/Therapy	BA
Keuka College		Keuka Park	Finger Lakes	Visual Arts	BA
University of Rochester		Rochester	Finger Lakes	Visual Arts, Film & TV Prod, Music, Arts Ed/Therapy	BA, BM, BS, DMA, MA, MM, PhD
Rochester Institute of Technology, College of Imaging Arts & Sciences		Rochester	Finger Lakes	Visual Arts, Graphic Design, Digital Media, Film & TV Prod, Film TV Editing, Broadcasting Tech, Communications, Art Ed/Therapy	Associate, Bachelor, Master
Monroe Community College	SUNY	Rochester	Finger Lakes	Visual Arts, Theatre/Drama/Acting, Graphic Design, Film & TV Prod, Broadcasting Tech, Music, Communications, Admin/Bus/Mgt., Marketing	AA, AAS, AS, Certificate
The Timothy M. Draper Center for Dance Education: Draper Center		Rochester	Finger Lakes	Dance	
Roberts Wesleyan College		Rochester	Finger Lakes	Visual Arts, Graphic Design, Music, Communications, Arts Ed/Therapy	BA, BS, MM

School/ Institute	SUNY/ CUNY	City	Region	Program Offerings	Degree/ Certificate
Saint John Fisher College		Rochester	Finger Lakes	Communications	Bachelor's
Bryant & Stratton College		Rochester	Finger Lakes	Graphic Design, Digital Media, Communications	Associate
Nazareth College, Graduate Art Therapy Program		Rochester	Finger Lakes	Visual Arts, Theatre/Drama/Acting, Music, Arts Ed/Therapy	Master
Bard College		Annandale-on-Hudson (Town of Redhook)	Hudson Valley	Visual Arts, Theatre/Drama/Acting, Dance, Digital Media, Film & TV Prod, Music	Undergraduate, Graduate, Post-Graduate
Sarah Lawrence College		Bronxville	Hudson Valley	Visual Arts, Theatre/Drama/Acting, Dance, Graphic Design, Film & TV Prod, Music	Undergraduate, MFA
Mercy College		Dobbs Ferry	Hudson Valley	Visual Arts, Graphic Design, Digital Media, Film & TV Prod, Broadcasting Tech, Sound Recording, Communications, Admin/Bus/Mgt/Marketing	AAS, Certificate, BA
Sullivan County Community College	SUNY	Loch Sheldrake	Hudson Valley	Digital Media, Communications	AAS, AS
Orange County Community College	SUNY	Middletown	Hudson Valley	Visual Arts, Theatre/Drama/Acting, Graphic Design, Music, Communications	AAS
New Paltz	SUNY	New Paltz	Hudson Valley	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Music, Communications, Art Ed/Therapy	Undergraduate, MA, M.Ed, MFA
The College of New Rochelle		New Rochelle	Hudson Valley	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Communications, Arts Ed/Therapy	BA, BFA, BS, MA, MS
Iona		New Rochelle	Hudson Valley	Communications	BA
Mount Saint Mary College		Newburgh	Hudson Valley	Communications	Undergraduate
Nyack College		Nyack	Hudson Valley	Music, Communications, Arts Ed/Therapy	
Dominican College		Orangeburg	Hudson Valley	Communications	Undergraduate
Pace University		Pleasantville	Hudson Valley	Visual Arts	BS
Dutchess Community College	SUNY	Poughkeepsie	Hudson Valley	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Music, Communications	AS, AAS, Certificate
Vassar College		Poughkeepsie	Hudson Valley	Visual Arts, Theatre/Drama/Acting, Film & TV Prod, Music	BA
Marist College		Poughkeepsie	Hudson Valley	Visual Arts, Graphic Design, Digital Media, Film & TV Prod, Broadcasting Tech, Communications	BA, BS, Certificate, MA, MS
Purchase College	SUNY	Purchase	Hudson Valley	Visual Arts, Theatre/Drama/Acting, Dance, Film & TV Prod, Music, Arts Ed/Therapy	BA; BS; BFA; Mus. B; MA; MFA; MM; Music Performance Certificate, Music Artist Diploma
Manhattanville College		Purchase	Hudson Valley	Visual Arts, Theatre/Drama/Acting, Dance, Music, Communications, Arts Ed/Therapy	Advanced Certification, BA, BFA, B Music, MAT

School/ Institute	SUNY/ CUNY	City	Region	Program Offerings	Degree/ Certificate
Hoff-Barthelson Music School		Scarsdale	Hudson Valley	Music	Graduation Certificate
Saint Thomas Aquinas College		Sparkill	Hudson Valley	Visual Arts, Graphic Design, Communications	
Ulster County Community College	SUNY	Stone Ridge	Hudson Valley	Visual Arts, Theatre/Drama/Acting, Graphic Design, Communications, Admin/Bus/Mgt/Marketing	AA, AAS, AS, Diploma
Rockland Community College	SUNY	Suffern	Hudson Valley	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Communications	AA, AAS, AS
Westchester Community College	SUNY	Valhalla	Hudson Valley	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Communications	AA, AAS, Certificate
Long Island University		Westchester	Hudson Valley	Visual Arts, Dance, Digital Media, Film & TV Prod, Music, Communications, Arts Ed/Therapy, Admin/Bus/Mgt/Marketing	BA, BFA, BM, BS, MA, MFA
The Music Conservatory of Westchester		White Plains	Hudson Valley	Music	College Credits toward a BS at Mercy College
Pace University		White Plains	Hudson Valley	Communications	BA
Briarcliff College		Bethpage	Long Island	Visual Arts, Graphic Design	Associates and Bachelor's
Five Towns College		Dix Hills, Long Island	Long Island	Film & TV Prod, Music, Communications, Arts Ed/Therapy	AA, AAS, AS, BFA, BS, Music B
Farmingdale State College	SUNY	Farmingdale	Long Island	Visual Arts, Theatre/Drama/Acting, Communications	B.Tech
Nassau Community College	SUNY	Garden City	Long Island	Visual Arts, Theatre/Drama/Acting, Dance, Graphic Design, Digital Media, Film/TV Editing, Sound Recording, Music, Communications	AA, AAS, AS, Certificate
Adelphi University, Department of Art		Garden City	Long Island	Visual Arts, Theatre/Drama/Acting, Dance, Music, Communications, Arts Ed/Therapy	Master
Hofstra University		Hempstead	Long Island	Visual Arts, Theatre/Drama/Acting, Dance, Graphic Design, Film & TV Prod, Broadcasting Tech, Sound Recording, Music, Communications, Arts Ed/Therapy, Admin/Bus/Mgt/Marketing	BA, BS, BS in Ed, MA, MFA, MSED
Dowling College		Oakdale	Long Island	Visual Arts, Graphic Design, Digital Media, Music, Communications, Arts Ed/Therapy	BA, BS
The College at Old Westbury	SUNY	Old Westbury	Long Island	Visual Arts	BA, BS
New York Institute of Technology		Old Westbury	Long Island	Visual Arts, Graphic Design, Communications	
St. Joseph's College		Patchogue	Long Island	Visual Arts, Communications	Undergraduate
Briarcliff College		Patchogue	Long Island	Graphic Design	Associates and Bachelor's
Molloy College		Rockville Centre	Long Island	Visual Arts, Theatre/Drama/Acting, Music, Communications, Arts Ed/Therapy	BA, BFA, BS, MS

School/Institute	SUNY/CUNY	City	Region	Program Offerings	Degree/Certificate
Suffolk County Community College	SUNY	Selden; Brentwood; Riverhead (Long Island)	Long Island	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Film & TV Prod, Film/TV Editing, Broadcasting Tech, Set/Stage Design & Construction, Music, Communications	AA, AAS, AS, Certificate
Long Island University		Southampton	Long Island	Visual Arts, Dance, Digital Media, Film & TV Prod, Broadcasting Tech, Music, Communications, Arts Ed/Therapy, Admin/Bus/Mgt/Marketing	BA, BFA, BM, BS, MA, MFA
Stony Brook University	SUNY	Stony Brook	Long Island	Visual Arts, Theatre/Drama/Acting, Music, Communications	BA, MA, MFA, MM, PhD, DMA
Cobleskill Technology College	SUNY	Cobleskill	Mohawk Valley	Graphic Design, Digital Media	BS, B.Tech,
Colgate University		Hamilton	Mohawk Valley	Visual Arts, Theatre/Drama/Acting, Music	BA
Herkimer County Community College	SUNY	Herkimer	Mohawk Valley	Visual Arts, Theatre/Drama/Acting, Film & TV Prod, Broadcasting Tech, Music, Communications, Admin/Bus/Mgt/Marketing	
Fulton-Montgomery Community College	SUNY	Johnstown	Mohawk Valley	Visual Arts, Theatre/Drama/Acting, Graphic Design, Communications, Admin/Bus/Mgt/Marketing	AS, AAS, Certificate
SUNY IT	SUNY	Marcy, Utica	Mohawk Valley	Communications	BS, MS
Mohawk Valley Community College	SUNY	Rome	Mohawk Valley	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Film & TV Prod, Communications, Admin/Bus/Mgt/Market	AS, AAS, Certificate
Pratt at Munson-Williams-Proctor Arts Institute		Utica	Mohawk Valley	Visual Arts, Graphic Design, Communications	Bachelor
Mohawk Valley Community College	SUNY	Utica	Mohawk Valley	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Film & TV Prod, Film/TV Editing, Communications, Admin/Bus/Mgt/Marketing	AS, AAS, Certificate
Utica College		Utica	Mohawk Valley	Communications	BS
Canton Technology College	SUNY	Canton	North Country	Graphic Design, Communications	Bachelor in Tech.
St. Lawrence University		Canton	North Country	Visual Arts, Theatre/Drama/Acting, Dance, Music, Communications	Undergraduate
Hamilton College		Clinton	North Country	Visual Arts, Theatre/Drama/Acting, Dance, Music, Communications	BA
Clinton Community College	SUNY	Plattsburgh	North Country	Visual Arts, Communications	A.A.
Plattsburgh	SUNY	Plattsburgh	North Country	Visual Arts, Theatre/Drama/Acting, Graphic Design, Film & TV Prod, Broadcasting Tech, Sound Recording, Music, Communications, Arts Ed/Therapy	BA, BFA, BS
Potsdam	SUNY	Potsdam	North Country	Visual Arts, Theatre/Drama/Acting, Dance, Music, Arts Ed/Therapy, Admin/Bus/Mgt/Marketing	BA, AS
Clarkson University		Potsdam	North Country	Digital Media, Communications	Undergraduate Degrees
North Country Community College	SUNY	Saranac Lake	North Country	Digital Media	AAS, Certificate

School/ Institute	SUNY/ CUNY	City	Region	Program Offerings	Degree/ Certificate
Queensborough Community College	CUNY	Bayside	NYC	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Sound Recording, Admin/Bus/Mgt/Marketing	AAS, AS, Certificate
Bronx Community College	CUNY	Bronx	NYC	Graphic Design, Digital Media, Broadcasting Tech, Communications	AAS
Brooklyn College	CUNY	Brooklyn	NYC	Visual Arts, Theatre/Drama/Acting, Digital Media, Film & TV Prod, Film/TV Editing, Music, Communications, Arts Ed/ Therapy	Advanced Certificate, BA, BFA, BS, MA, MFA, Mus. B, MM, MS
Kingsborough Community College	CUNY	Brooklyn	NYC	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Broadcasting Tech, Admin/Bus/Mgt/Marketing	AS, AAS
New York City College of Technology	CUNY	Brooklyn	NYC	Graphic Design, Digital Media, Set/Stage Design & Construction, Sound Recording, Communications, Admin/Bus/Mgt/Marketing	AAS, B. Tech., Certificate
Medgar Evers College	CUNY	Brooklyn	NYC	Visual Arts, Theatre/Drama/Acting, Sound Recording, Communications	AA
St. Joseph's College		Brooklyn	NYC	Visual Arts, Communications	Undergraduate
Brooklyn Workforce Innovations		Brooklyn	NYC	Film & TV Prod	Certification
Polytechnic Institute of NYU		Brooklyn	NYC	Digital Media	BS, MS, Advanced Certificate
Long Island University		Brooklyn	NYC	Visual Arts, Dance, Digital Media, Film & TV Prod, Music, Communications, Arts Ed/Therapy, Admin/Bus/Mgt/Marketing	BA, BFA, BM, BS, MA, MFA
Saint Francis College		Brooklyn Heights	NYC	Theatre/Drama/Acting, Film & TV Prod, Broadcasting Tech, Communications	Undergraduate
Queens College	CUNY	Flushing	NYC	Visual Arts, Theatre/Drama/Acting, Graphic Design, Film & TV Prod, Music, Communications, Arts Ed/Therapy	Advanced Certificate and Diploma, BA, BFA, BS MA, MFA, MLS, MS in Ed
Vaughn College of Aeronautics and Technology		Flushing	NYC	Digital Media	AAS
York College	CUNY	Jamaica	NYC	Visual Arts, Theatre/Drama/Acting, Digital Media, Music, Communications	BA, BS, Ed Certificate
Academy for Careers in TV & Film		Long Island City	NYC	Film & TV Prod	College prep for 9th and 10th grade students, designed to provide more adequate transitions into traditional four year colleges.
LaGuardia Community College	CUNY	Long Island City (Queens)	NYC	Visual Arts, Sound Recording, Communications	AS, AAS, Certificate
Fordham University		Manhattan	NYC	Visual Arts, Theatre/Drama/Acting, Dance, Film & TV Prod, Set/Stage Design & Construction, Music, Communications	Bachelor of Fine Arts
The New York Conservatory for Dramatic Arts (School of Film & Television)		New York	NYC	Theatre/Drama/Acting	
New York Institute of Technology		New York	NYC	Visual Arts, Graphic Design, Communications	
Sotheby's Institute of Art		New York	NYC	Visual Arts, Admin/Bus/Mgt/Marketing	

School/ Institute	SUNY/ CUNY	City	Region	Program Offerings	Degree/ Certificate
Christie's Education		New York	NYC	Visual Arts, Admin/Bus/Mgt/Marketing	Cert., MA
Teachers College at Columbia University		New York	NYC	Visual Arts, Dance, Communications, Arts Ed/Therapy	Masters, Doctorate
The American Academy of Dramatic Arts		NY	NYC	Theatre/Drama/Acting	AA, Advanced Certificate in Acting
Tribeca Film Institute: Summer Arts Institute		NY	NYC	Visual Arts, Theatre/Drama/Acting, Dance, Film & TV Prod, Music	Summer Intensive program for high school students
Yeshiva University		NYC	NYC	Visual Arts, Music, Communications	Undergraduate Studies/Majors
Bernard M. Baruch College	CUNY	NYC	NYC	Music	AS
Borough of Manhattan Community College	CUNY	NYC	NYC	Visual Arts, Theatre/Drama/Acting, Digital Media, Film & TV Prod, Film/TV Editing, Broadcasting Tech,	AAS, AS
City College	CUNY	NYC	NYC	Visual Arts, Theatre/Drama/Acting, Digital Media, Film & TV Prod, Music, Communications, Arts Ed/ Therapy	BA, BFA, Certificate, Ed Certificate, MA, MFA,
City University of New York: The Graduate Center	CUNY	NYC	NYC	Visual Arts, Theatre/Drama/Acting, Film & TV Prod, Music	Advanced Certificate Post Bacc., D.M.A., MA, Ph.D.
Hunter College	CUNY	NYC	NYC	Visual Arts, Theatre/Drama/Acting, Film & TV Prod, Music, Communications, Arts Ed/Therapy	Advanced Certificate Post Bacc., BA, BFA, Ed Certificate, MA, MFA, Mus. B,
Institute of Audio Research	CUNY	NYC	NYC	Sound Recording, Music	NG (Assoc.)
Fashion Institute of Technology	SUNY	NYC	NYC	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Communications, Admin/Bus/Mgt/Marketing	Certificate, Associate, Bachelor, Master
Adler Stella Conservatory of Acting Inc		NYC	NYC	Theatre/Drama/Acting	MFA-equivalent program
Alvin Ailey Dance Foundation, Inc		NYC	NYC	Dance, Music	BFA, Certificate
BalletTech		NYC	NYC	Dance	
Joffrey Ballet School		NYC	NYC	Dance	Certificate
Lee Strasberg Theatre & Film Institute Inc		NYC	NYC	Theatre/Drama/Acting, Film & TV Prod, Film/TV Editing, Sound Recording, Music	2 yr Certificate Program
The New Actors Workshop of New York Inc		NYC	NYC	Theatre/Drama/Acting	6 Week Program, 2 yr Program, MA
New York Theatre Ballet		NYC	NYC	Dance	
Manhattan School of Music		NYC	NYC	Music	Undergraduate, Graduate, Doctoral

School/ Institute	SUNY/ CUNY	City	Region	Program Offerings	Degree/ Certificate
New York Studio School of Drawing, Painting & Sculpture		NYC	NYC	Visual Arts, Theatre/Drama/Acting	Certificate, MFA
The Art Institute of New York City		NYC	NYC	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Film & TV Prod	Associate of Occupational Studies
Art Studio NY		NYC	NYC	Visual Arts, Theatre/Drama/Acting, Communications, Arts Ed/Therapy	Certificate
Chubb Institute		NYC	NYC	Graphic Design	Diploma
National Academy School of Fine Arts		NYC	NYC	Visual Arts, Theatre/Drama/Acting, Communications	
New York Academy of Art		NYC	NYC	Visual Arts, Theatre/Drama/Acting	Graduate & Continuing Ed
School of Visual Arts		NYC	NYC	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Film & TV Prod, Arts Ed/Therapy	Bachelor, Master, and Continuing Ed
Studio Jewelers Ltd.		NYC	NYC	Visual Arts, Theatre/Drama/Acting	Certificate
Wood Tobé-Coburn School		NYC	NYC	Visual Arts, Theatre/Drama/Acting, Graphic Design	Diploma, Associate
Live Design Master Classes		NYC	NYC		
Metropolitan College of New York		NYC	NYC	Admin/Bus/Mgt/Marketing	MBA
Katherine Gibbs School		NYC	NYC	Graphic Design, Digital Media, Film & TV Prod, Communications	Associate and Certificate
Barnard College		NYC	NYC	Visual Arts, Theatre/Drama/Acting, Dance, Film & TV Prod, Music	Undergraduate Degrees
Columbia University's School of the Arts		NYC	NYC	Visual Arts, Theatre/Drama/Acting, Dance, Film & TV Prod, Set/Stage Design & Construction, Music, Communications, Admin/Bus/Mgt/Marketing	MFA
The Cooper Union for the Advancement of Science and Art		NYC	NYC	Visual Arts	Undergraduate BFA, Graduate & Continuing Ed
Touro College (Digital Media Arts)		NYC	NYC	Sound Recording, Music, Admin/Bus/Mgt/Marketing	Certificate, 30 credits toward AA
The Julliard School		NYC	NYC	Theatre/Drama/Acting, Dance, Sound Recording, Music	Diploma in Dance, Dama & Music. BA Music and Fine Arts, Master of Music, Doctor of Musical Arts
Marymount Manhattan College of the Liberal Arts		NYC	NYC	Visual Arts, Theatre/Drama/Acting, Dance	Bachelor of Fine Arts and Bachelor of Arts Degrees
New York Film Academy		NYC	NYC	Digital Media, Film & TV Prod, Film/TV Editing, Communications	Certificate, Bachelor of Arts, Master of Fine Arts, Continuing Ed
New York University (Institute of Fine Arts, Tisch)		NYC	NYC	Visual Arts, Theatre/Drama/Acting, Dance, Graphic Design, Film & TV Prod, Broadcasting Tech, Set/Stage Design & Construction, Music, Communications, Arts Ed/Therapy	BA, BFA, MA, MFA, MPS, PhD

School/ Institute	SUNY/ CUNY	City	Region	Program Offerings	Degree/ Certificate
Pace University		NYC	NYC	Visual Arts, Theatre/Drama/Acting, Digital Media, Set/Stage Design & Construction, Communications, Admin/Bus/Mgt/Marketing	BFA, BA, BS, MFA
New School (Parsons)		NYC	NYC	Visual Arts, Theatre/Drama/Acting, Graphic Design, Music, Communications	Certificate Programs, Associates, BA, Graduate, Continuing Ed
Pratt Institute		NYC, Brooklyn	NYC	Visual Arts, Graphic Design, Digital Media, Film & TV Prod, Arts Ed/Therapy, Admin/Bus/Mgt/Marketing	Associates, BA, MA, Continuing Ed, Professional Studies
St. John's University		Queens	NYC	Visual Arts, Graphic Design, Digital Media, Film & TV Prod, Film/TV Editing, Communications	AS, BFA, BS
The College of Mount Saint Vincent		Riverdale	NYC	Communications	BA
Manhattan College		Riverdale	NYC	Communications	Undergraduate
College of Staten Island	CUNY	Staten Island	NYC	Visual Arts, Theatre/Drama/Acting, Film & TV Prod, Music, Communications	BA, BS, MA
Wagner College		Staten Island	NYC	Visual Arts, Theatre/Drama/Acting, Music, Admin/Bus/Mgt/Marketing	BA, BS
Lehman College	CUNY	West Bronx	NYC	Visual Arts, Theatre/Drama/Acting, Dance, Graphic Design, Music, Communications, Art Ed/Therapy	Advanced Certification Post Bacc., BA, BFA, BS, Ed Certificate, MA, MAT, MFA
Binghamton University	SUNY	Binghamton	Southern Tier	Visual Arts, Theatre/Drama/Acting, Film & TV Prod, Music	BA, BFA, B.Music, MA, MM, PhD
Broome Community College	SUNY	Binghamton	Southern Tier	Music	AS
Corning Community College	SUNY	Corning	Southern Tier	Visual Arts, Graphic Design	AS
Delhi Technology College	SUNY	Delhi	Southern Tier	Digital Media	AAS, AOS, Certificate.
Tompkins Cortland Community College	SUNY	Dryden	Southern Tier	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Broadcasting Tech, Communications	AAS, AS
Cornell University		Ithaca	Southern Tier	Visual Arts, Theatre/Drama/Acting, Dance, Digital Media, Film & TV Prod, Music, Communications	BFA, DMA, MA, MFA, PhD
Ithaca College		Ithaca	Southern Tier	Visual Arts, Theatre/Drama/Acting, Graphic Design, Film & TV Prod, Set/Stage Design & Construction, Sound Recording, Music, Communications, Art ed/Therapy, Admin/Bus/Mgt/Marketing	BA, BFA, BM, BS, MM
Katherine Gibbs School		Melville	Southern Tier	Graphic Design, Digital Media, Film & TV Prod, Communications	Associate and Certificate
Oneonta	SUNY	Oneonta	Southern Tier	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Music, Communications, Admin/Bus/Mgt/Marketing	BA, BS
Hartwick College		Oneonta	Southern Tier	Visual Arts, Theatre/Drama/Acting, Music, Arts Ed/Therapy	BA, BS
Alfred School of Art and Design at Alfred University		Alfred	Western New York	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Film & TV Prod, Communications, Art Ed/Therapy	Certificate, Associate, BFA, MFA

School/ Institute	SUNY/ CUNY	City	Region	Program Offerings	Degree/ Certificate
Alfred State (SUNY College of Technology)	SUNY	Alfred	Western New York		AAS, AOS, BS
Daemen College		Amherst	Western New York	Visual Arts, Graphic Design, Arts Ed/Therapy	
Bryant & Stratton College		Amherst	Western New York	Graphic Design, Digital Media, Communications	Associate
Wells College		Aurora	Western New York	Visual Arts, Theatre/Drama/Acting, Dance, Music	Undergraduate
University at Buffalo	SUNY	Buffalo	Western New York	Visual Arts, Theatre/Drama/Acting, Dance, Graphic Design, Digital Media, Film & TV Prod, Set/Stage Design & Construction, Music, Communications, Art Ed/Therapy, Admin/Bus/Mgt/Marketing	BA, BFA, BS, MA, MFA
Buffalo State	SUNY	Buffalo	Western New York	Visual Arts, Theatre/Drama/Acting, Dance, Graphic Design, Film & TV Prod, Music, Art Ed/Therapy	BA, BFA, B.Music, BS, Graduate Cert Program, MA, MS Ed, CAS, Teacher Cert.
Canisius College		Buffalo	Western New York	Visual Arts, Theatre/Drama/Acting, Digital Media, Music, Communication	BA, BS
Villa Maria College		Buffalo	Western New York	Visual Arts, Graphic Design, Digital Media, Film/TV Editing, Music, Admin/Bus/Mgt/Marketing	AAS, BA, BS
Medaille College		Buffalo	Western New York	Visual Arts, Communications	BS
Jamestown Community College	SUNY	Dunkirk	Western New York	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Sound Recording, Music, Communications	AA, AAS, AS, Certificate
Fredonia	SUNY	Fredonia	Western New York	Visual Arts, Theatre/Drama/Acting, Dance, Graphic Design, Digital Media, Film & TV Prod, Broadcasting Tech, Set/Stage Design & Construction, Music, Communications, Art Ed/Therapy, Admin/Bus/Mgt/Marketing	BA, BFA, BA in Interdisciplinary Studies, BS, MM
Hilbert College		Hamburg	Western New York	Visual Arts, Theatre/Drama/Acting, Digital Media, Communications	AA, BA
Houghton College		Houghton	Western New York	Visual Arts, Music, Communications, Arts Ed/Therapy	BA, B Music, MA in Music, Master of Music
Jamestown Community College	SUNY	Jamestown	Western New York	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Sound Recording, Music, Communications	AA, AAS, AS, Certificate
Niagara University		Niagara	Western New York	Theatre/Drama/Acting	BA, BFA
Jamestown Community College	SUNY	Olean	Western New York	Visual Arts, Theatre/Drama/Acting, Digital Media, Sound Recording, Music, Communications	AA, AAS, AS, Certificate
Erie Community College	SUNY	Orchard Park	Western New York	Digital Media, Communications	AS
Niagara County Community College	SUNY	Sanborn	Western New York	Visual Arts, Theatre/Drama/Acting, Graphic Design, Digital Media, Music, Communications	AA, AAS, AS, Certificate
Saint Bonaventure University		St. Bonaventure	Western New York	Visual Arts, Theatre/Drama/Acting, Music, Communications	BA, MA

APPENDIX D: LEADERS INTERVIEWED AND CONSULTED

Sector	Affiliation	Interviewees & Titles
Arts and Entertainment Executives and Producers	ABC Television	Jeffrey Ruthizer, Senior Vice President
	Above the Title Entertainment	Jed Bernstein, Producer
	Brooklyn Philharmonic Orchestra	Catherine Cahill, CEO
	Crosswater Digital Media	John Adamo, President
		Armin St George, Senior Vice President
	Crystal Dynamics	Sean Vesce, General Manager
	Electric City Publishing	John P Weiksner, Producer
	Focus Feature Productions	James Schamus, CEO
	Highway End Films	Seth Wochensky
	IBC Digital	Ben Pocari, President and CEO
	Independent Film Maker	Anthony Bregman
	Lucille Lortel	Georges Forbes, Creative Director
	Mammoth Production Packages	Gregg Goodhew
	Manhattan Theatre Club	Barry Grove, Executive Producer
	Odessa Pictures, Inc.	Steve Powell, Owner
	Road Less Travelled Productions	Scott Behrend, Artistic Director
	Rubin Museum	Don Rubin, CEO
	Schneider Digital	Zack Schneider
	Silvercup Studios	Stuart Suna, President
		Gary Kesner, Executive Vice President
	Steiner Studios	Damone Richardson, Director, Human Resources and Community Relations
	Theatre of Youth	Robert Brunschmid
		Meg Quinn
Theatre for Change, Inc.	Darleen Pickering Hummert, Owner/Director	
Tonawanda Pictures	Terrence Thier	
Ujima Theatre Company	Rahwa Ghirmatzian, Executive Director	
Industry Associations	Alliance of Resident Theatres (Art/NY)	Virginia Louloudes, Executive Director
	Broadway League	Charlotte St. Martin, Executive Director
	League of Off Broadway Theatres	George Forbes, President
	Dance/NYC	Michelle Burkhart, Interim Director
	Independent Feature Project	Michelle Byrd, Director
	League of American Orchestras	Jesse Rosen, Ex. VP, Managing Director
		Atul Kanagat, VP, Research & Development
	Opera America	Kelly Ruorke, Research Director
Recording Industry of America	Cary Sherman, President	

Sector	Affiliation	Interviewees & Titles
Unions	Actors Equity Association (AEA)	John Connolly, Executive Director
		Tom Miller, Director of Outreach and Career Development
	American Federation of Musicians (AFM) Local 802	Mary Landolfi, President
		Jay Schaffner, Recording Department
	American Federation of Television Artists (AFTRA)	Roberta Reardon, National President
	American Guild of Musical Artists (AGMA)	Alan Gordon, National Executive Director
	Broadcast Technicians, IBEW Local 1212	Keith Morris, Business Manager
	Cinematographers Local 600	John Amman, Business Representative
		Chaim Kantor, Eastern Regional Director
	Directors Guild (DGA)	Russell Hollander, Eastern Regional Director
	Editors Guild, Local 700, IATSE	Paul Moore, Eastern Regional Director
	Entertainment Unions	Frank Moss, Attorney
	Freelancers Union	Sara Horowitz, Executive Director
	International Alliance of Theatrical and Stage Employees (IATSE)	Matt Loeb, International President
		Dan Mahoney, International Representative
	National Association of Broadcast Employees and Technicians (NABET)	James Joyce, National Director of Training
	NYS AFL-CIO	Denis Hughes, President and Chair, Art and Entertainment Union Committee
	Screen Actors Guild (SAG)	Nancy Fox, National Director, Policy and Strategic Planning
		John McGuire, National Contract Director
Stage Hands Local 1 (IATSE)	John Diaz, Training Coordinator	
Studio Mechanics Local 52 (IATSE)	Richard Cohn, Coordinator of Training	
Wardrobe Local 764 (IATSE)	Patricia White, President	
Arts Service Organizations	Advancing Arts and Culture in Buffalo Niagara	Florine Luhr, Executive Director
	Alliance for the Arts	Randall Bourscheidt, President
	Arts and Business Council of Americans for the Arts	Gary Steuer, VP of Private Sector Affairs and Executive Director
	Arts Council of Buffalo	Celeste M. Lawson, Executive Director
	Bi-National Tourism Alliance	Arlene White, Executive Director
	Bronx Council on the Arts	William Aguado, Executive Director
	Municipal Art Society	Brendan Sexton, Former Executive Director
	New York Foundation for the Arts	Michael Royce, Executive Director
	NYC Performing Arts Spaces	Eugenie Cowan, Director
	The Actors Fund	Barbara Davis, Program Director
		Kathy Shrier, Director, Actors Work Program
	Women in Film and Television	Nora Brown
Women's Interart Center	Margo Lewitin, Director	

Sector	Affiliation	Interviewees & Titles
Government	City of Buffalo Department of Economic Development	David Granville
	New York City Department of Cultural Affairs	Kate Levin, Commissioner
		Jamie Bennett, Chief of Staff
		Susan Rothchild, General Counsel
		Timothy Thayer, Assistant Commissioner, Cultural Institutions
	New York City Economic Development Corporation	Teresa Vasquez, Vice President, Not-For-Profit Desk
	New York State Council on the Arts	Mary Schmidt Campbell, Former Chair
		Richard Schwartz, Former Chair
		Heather Hitchens, Executive Director
		Lisa Johnson, Director, Music Program
		Robert Zukerman, Director, Theatre Program
	New York State Department of Labor	Bruce Herman, Deputy Commissioner for Workforce Development
	New York State Governor's Office for Motion Picture & Television Development	Pat Swinney Kaufman, Executive Director
	New York State Legislature	The Honorable Serphin Maltese Senator, 15 th District
		The Honorable Susan V. John Assemblymember, District 131
		The Honorable Steve Englebright Assemblymember, District 4
		The Honorable Sam Hoyt Assemblymember, District 144
		The Honorable Joan K. Christensen Assemblymember, District 119
	New York State Executive Offices	Brian Pack Budget Examiner, Education Unit, NYS DOB
		Marshall Vitale Senior Budget Examiner, Ed. Unit, NYS DOB
		Michael J. Evans Special Assistant to the Deputy Secretary for Economic Development
	New York State Empire State Development Corporation	Karen S. DeJarnette Director, Workforce Development Initiatives
		Daniel Gundersen Commissioner and Upstate Chair
		Christine Orsi, Director Buffalo Office
		Marguerite Greco, Project Manager
	United States Senate	Ryan Arnold, Representative for Senator Charles Schumer, Buffalo Office
		Chris VanKirk, Representative for Senator Charles Schumer, Buffalo Office

Sector	Affiliation	Interviewees & Titles
Academia	Buffalo State College	Drew Kahn, Professor and Chair, Theater Department
		Ted Pietrzak, Director Burchfield Penney Art Center
	Columbia University	Gregory Moser, Director Columbia Arts Initiative
		Joan Jeffri, Professor, Teachers College, Research Center for Arts and Culture
		James Schamus, Dean, Film Division, School of the Art
	Erie Community College	John Sullivan
	New York University	Mary Schmidt Campbell, Dean, Tisch School of the Arts
		Ruth Ann Stewart, Professor, Public Policy in the Arts
		Randy Martin, Professor and Chair, Department of Art and Public Policy
		Rosemary Scanlon, Associate Professor and Consultant on Urban Planning
	Juilliard School	Ara Guzelimian, Provost and Dean
	University of Buffalo	Ruth Bereson, Director, Arts Management Program
		Kathryn Foster, Director, Regional Institute
	Cornell University	Rose Batt, Alice H. Cook Professor of Women and Work, ILR School
		Dominic C. Boyer, Associate Professor, Anthropology
		Sahara Byrne, Assistant Professor, Communication Department
		Susan Christopherson, Professor, City and Regional Planning
		Margaret Corbit, Manager of Research Outreach, Cornell theory Center
		David M. Feldshuh, Professor and Artistic Director, Theatre, Film, and Dance
		Allen Fogelsanger, Director of Udergraduate Studies, Theatre, Film, and Dance
Robert H. Frank, Professor of Management & Economics, Johnson School of Business		
J. Ellen Gainor, Professor, Theatre, Film, and Dance		
Tarleton Gillespie, Assistant Professor, Communication Department		
Kent Goetz, Professor and Chair, Theatre, Film, and Dance		
Donald Greenberg, Professor, Program of Computer Graphics		
Sabine Haenni, Assistant Professor, Theatre, Film, and Dance		
Douglas Heckathorn, Professor, Sociology		

Sector	Affiliation	Interviewees & Titles
	Cornell University (Cont.)	Bruce Levitt, Professor, Theatre, Film, and Dance Yasimin Miller, Director, Survey Research Institute Joyce Morgenroth, Professor, Theatre, Film, and Dance Shimon Abraham Ravid, Visiting Professor, Finance Frank Robinson, Director, Johnson Museum of Art Ron Seeber, Associate Provost for Land-Grand Affairs, Professor ILR School Walker White, Professor, Director, Games Design Initiative, Department of Computer Science
Note: Campbell, Schamus and Forbes are listed in two categories		

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