

The background features a stylized, hand-drawn map of a city in shades of blue and green. In the lower right corner, a silhouette of a person is shown standing on a set of stairs that lead upwards. The overall aesthetic is artistic and conceptual.

BERKELEY'S CREATIVE ECONOMY: ECONOMIC IMPACT AND ASSESSMENT OF PANDEMIC RELIEF & RECOVERY FUNDING

PRESENTATION TO THE CITY OF BERKELEY CIVIC ARTS COMMISSION | DECEMBER 3, 2025

DEFINING THE CREATIVE ECONOMY



The creative economy refers to the industries whose primary purpose is to produce or enable cultural expression, artistic content, design, and other creative goods and services.



Visual & Performing Arts

Dance and theater companies, art dealers, museums, and activities involving independent artists, writers, and performers.



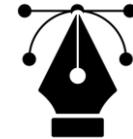
Architecture & Design

Architectural, drafting, interior design, industrial design, and landscape design services.



Entertainment & Digital Media

Motion picture and video production, post-production services, sound recording studios, radio broadcasting, and digital streaming platforms.



Communication Design

Graphic design, advertising agencies, photography studios, and commercial photography services.



Printing & Publishing

Commercial printing and publishing of periodicals, newspapers, books, directories, and mailing lists.



Creative Goods & Decorative Arts

Ceramics, household furniture, rugs, decorative objects, toys, and games.



Post-Secondary Arts Education

Instruction in dance, drama, music, and visual arts (excluding institutions that grant diplomas or degrees).



Fashion

Textile and apparel manufacturing, jewelry and silverware production, and related fashion goods and services.



BERKELEY'S CREATIVE ECONOMY: ECONOMIC LANDSCAPE

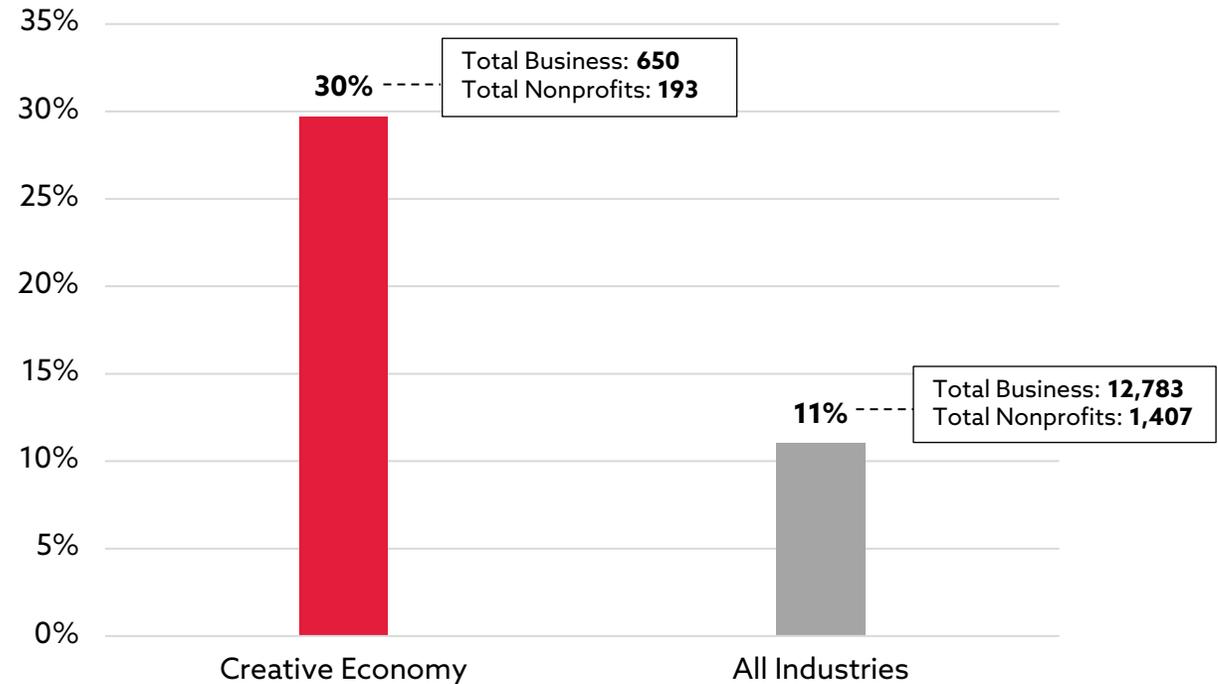
BERKELEY'S CREATIVE ECONOMY: ECONOMIC LANDSCAPE
CREATIVE ECONOMY BUSINESSES



As of 2025, there are approximately **650** creative economy businesses in Berkeley (out of 12,800 total businesses), about **30%** of which are nonprofit organizations.

There are 193 creative economy nonprofit organizations in the City of Berkeley. This share is notably high compared to the share of nonprofits across all industries (11%) in the city.

SHARE OF NONPROFIT ORGANIZATIONS IN BERKELEY'S CREATIVE ECONOMY VS. ALL INDUSTRIES | 2025



Source: City of Berkeley Active Business License Data, Internal Revenue Service, CVL Economics.

BERKELEY'S CREATIVE ECONOMY: ECONOMIC LANDSCAPE

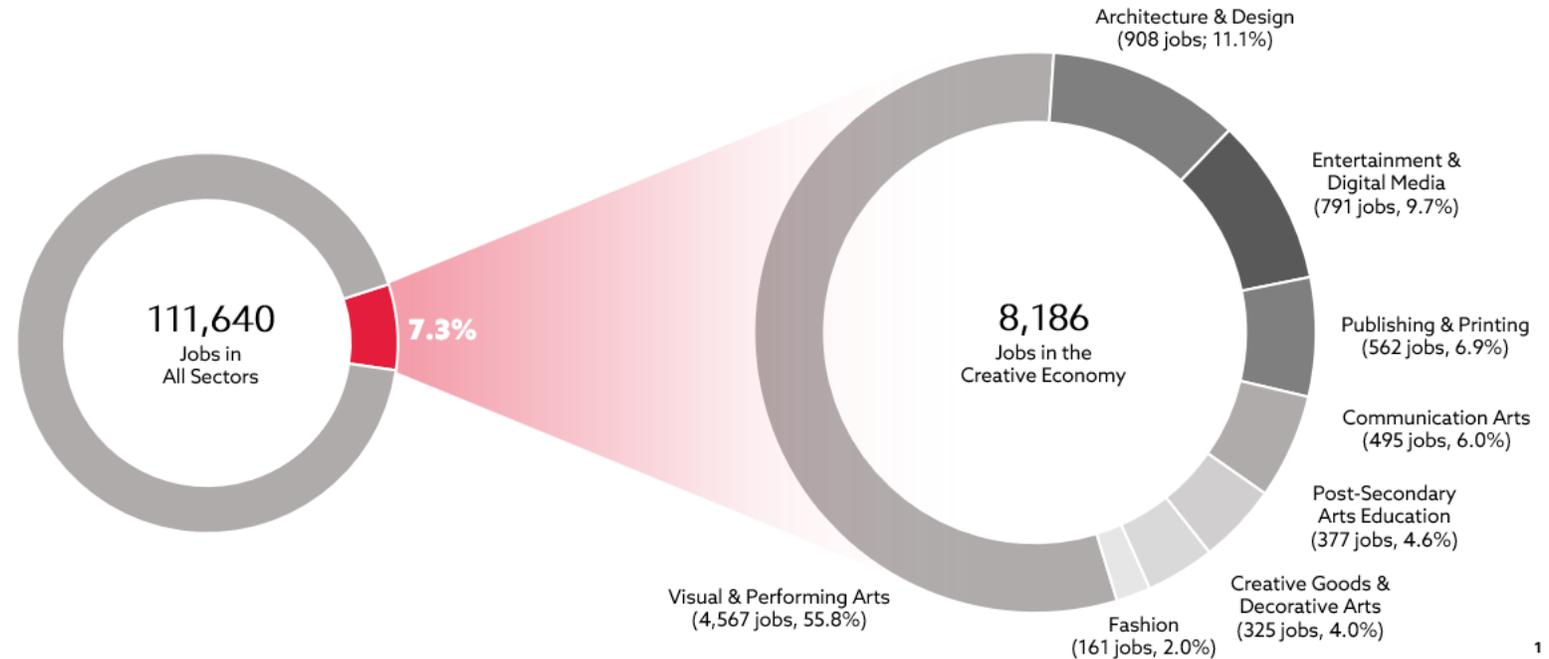
CREATIVE ECONOMY EMPLOYMENT



In 2024, Berkeley's creative economy directly employed **8,186 workers**, accounting for **7.3%** of its total workforce of 111,640 jobs.

Visual & Performing Arts dominates Berkeley's creative economy with 4,567 jobs (55.8%).

COMPOSITION OF CREATIVE ECONOMY WORKFORCE IN BERKELEY | 2024



Note: Includes salaried, self-employed, and gig jobs in the creative economy and across all sectors. Employment counts reflect the number of unique jobs and not individuals. In that sense, one individual can hold multiple jobs and therefore be counted more than once.

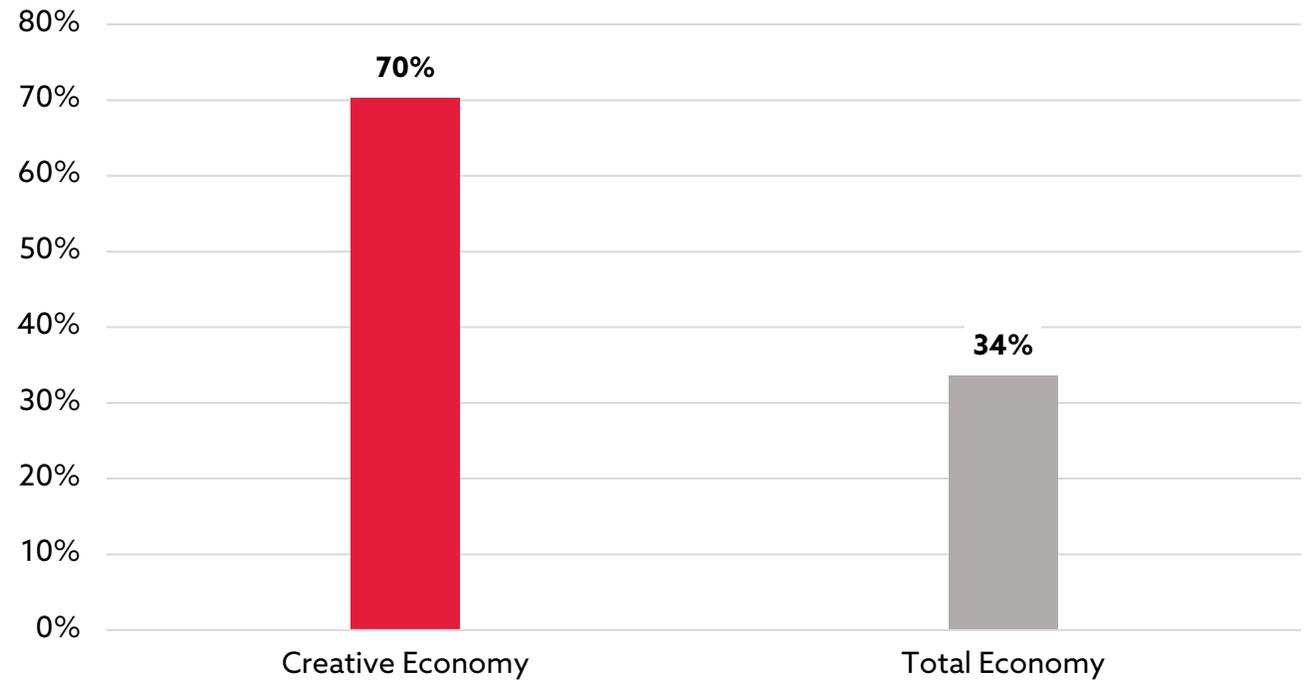
Source: U.S. Census Bureau, U.S. Bureau of Labor Statistics, Lightcast, CVL Economics.

FORMS OF EMPLOYMENT



Nearly **70%** of Berkeley's 8,186 creative economy workforce is self-employed or gig-based, underscoring the sector's reliance on non-traditional work arrangements.

SHARE OF SELF-EMPLOYED AND GIG EMPLOYMENT FOR CREATIVE ECONOMY AND ALL INDUSTRIES IN BERKELEY | 2024



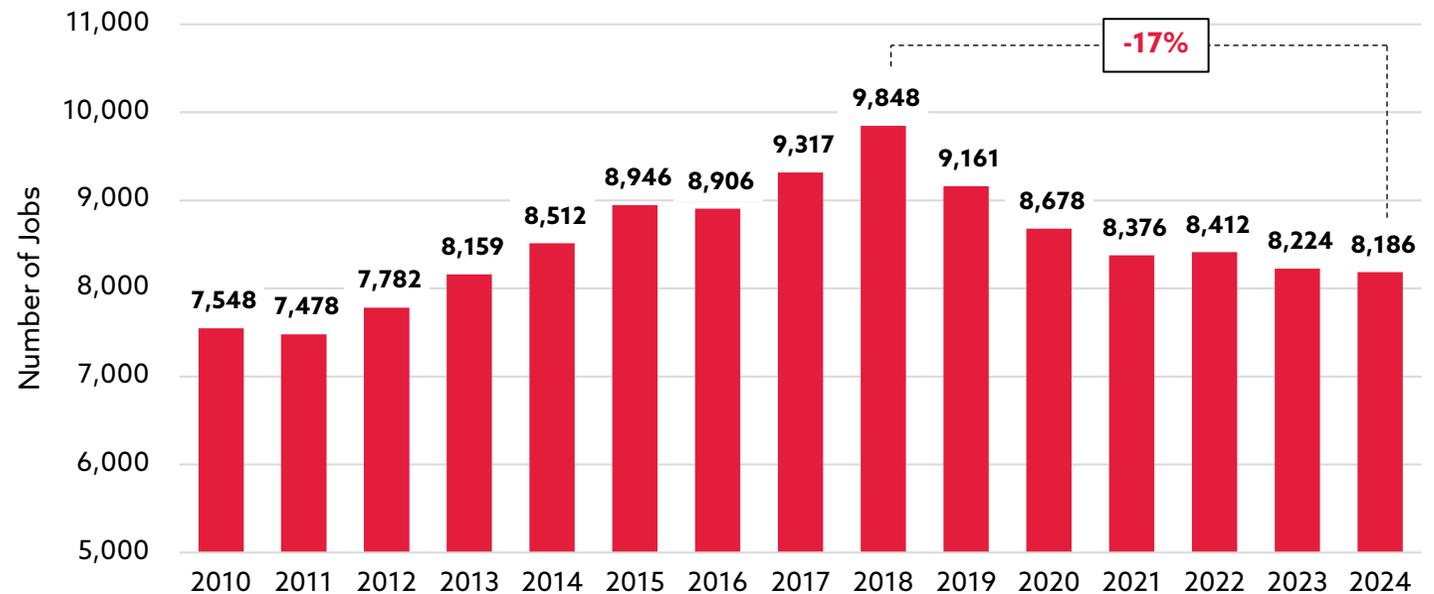
Source: U.S. Census Bureau, U.S. Bureau of Labor Statistics, Lightcast, CVL Economics.

HISTORICAL EMPLOYMENT GROWTH



Berkeley creative economy employment surged in the years before the pandemic, but current levels remain **17% below** the 2018 peak.

HISTORICAL CREATIVE ECONOMY EMPLOYMENT IN BERKELEY | 2010-2024



Note: Includes salaried, self-employed, and gig jobs in the creative economy and across all sectors. Employment counts reflect the number of unique jobs and not individuals. In that sense, one individual can hold multiple jobs and therefore be counted more than once.

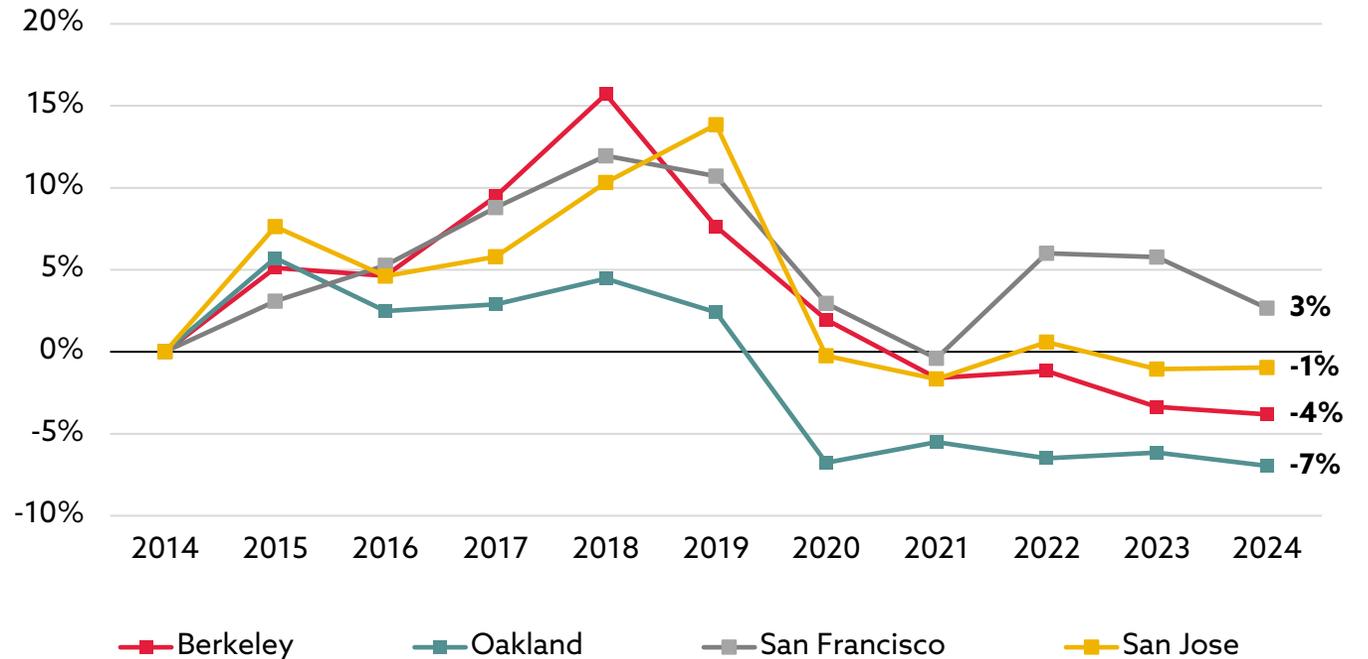
Source: U.S. Census Bureau, U.S. Bureau of Labor Statistics, Lightcast, CVL Economics.

BERKELEY'S CREATIVE ECONOMY: ECONOMIC LANDSCAPE
REGIONAL COMPARISONS



Before the pandemic, Berkeley's creative economy's upward trajectory outpaced growth in neighboring cities. However, since 2020, Berkeley's creative economy employment has declined year after year, while other neighboring cities have regained some ground.

COMPARATIVE CREATIVE ECONOMY REGIONAL EMPLOYMENT GROWTH RATE | 2014-2024



Source: U.S. Census Bureau, U.S. Bureau of Labor Statistics, Lightcast, CVL Economics.

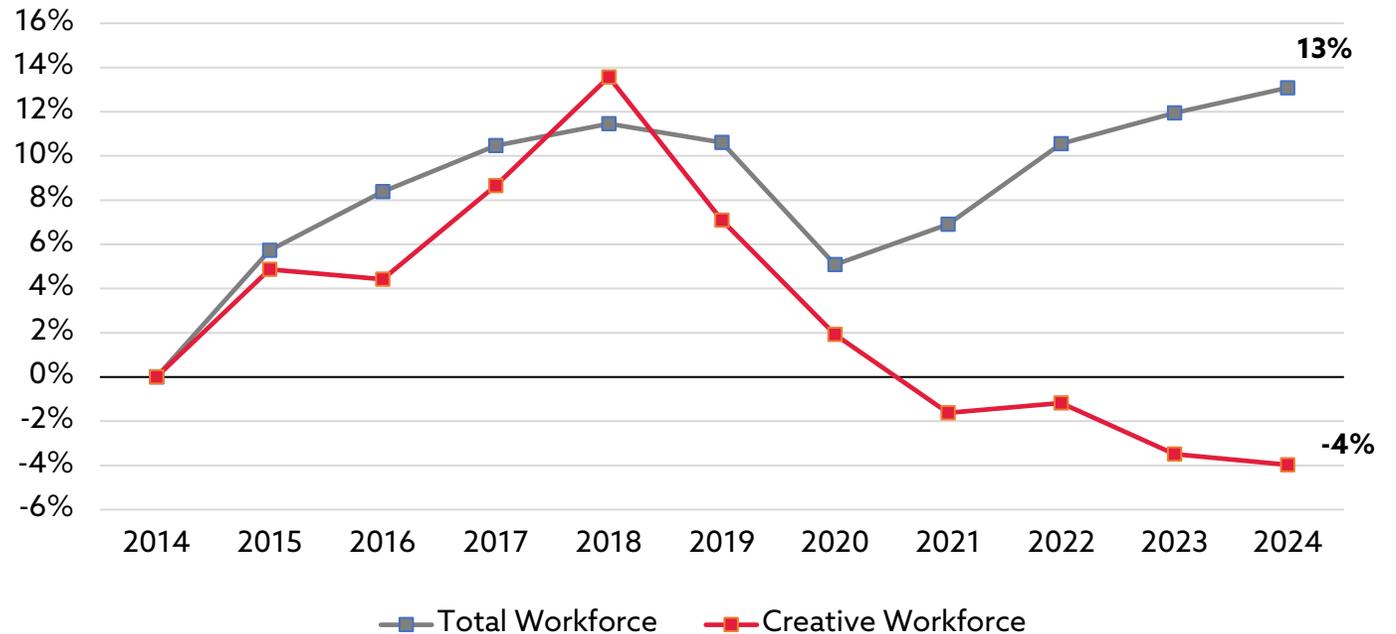
BERKELEY'S CREATIVE ECONOMY: ECONOMIC LANDSCAPE

ECONOMYWIDE COMPARISON



The city's overall economy sits about 3% above its 2019 employment level and **13%** above the 2014 level. By contrast, the city's creative economy remains 13% below its pre-pandemic baseline and **4%** below its 2014 level.

CREATIVE ECONOMY EMPLOYMENT GROWTH RATE VS. GROWTH RATE FOR ALL SECTORS IN BERKELEY | 2014-2024



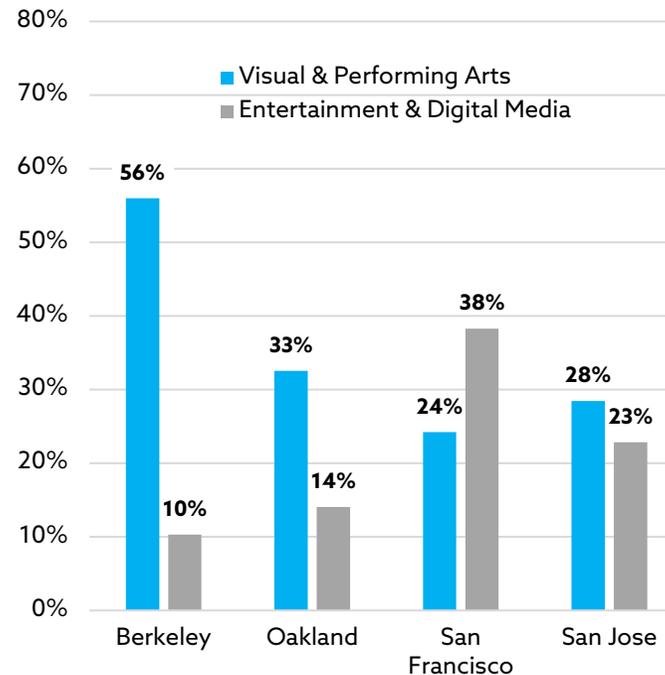
Source: U.S. Census Bureau, U.S. Bureau of Labor Statistics, Lightcast, CVL Economics.

THE VULNERABILITY OF VISUAL & PERFORMING ARTS

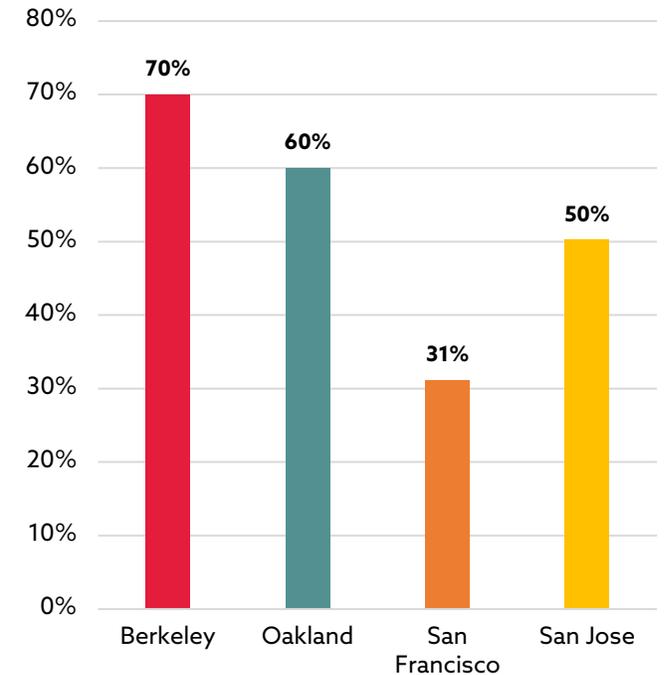


This divergence stems from Berkeley's high concentration of Visual & Performing Arts jobs, a sector reliant on in-person activity, gig work, and nonprofits—making it especially vulnerable to disruption.

REGIONAL CREATIVE ECONOMY COMPOSITION: VISUAL & PERFORMING ARTS VS. ENTERTAINMENT & DIGITAL MEDIA | 2024



REGIONAL SHARE OF CREATIVE ECONOMY SELF-EMPLOYED AND GIG-BASED WORKFORCE BY CITY | 2024



Source: U.S. Census Bureau, U.S. Bureau of Labor Statistics, Lightcast, CVL Economics.



**BERKELEY'S CREATIVE ECONOMY:
ECONOMIC IMPACT ANALYSIS**

ECONOMIC IMPACT: BASELINE BERKELEY IMPACT



Citywide, in 2024, Berkeley's creative economy generated a total impact of:

8,437 Jobs **\$537.5M** Labor Income

\$1.0B

Value Added GRP Contribution

In other words, each creative job in Berkeley generated about \$66,000 in labor income, and \$125,000 in value added (contributions to Berkeley gross regional product) citywide.

CITYWIDE ECONOMIC IMPACT OF BERKELEY'S CREATIVE ECONOMY | 2024

	EMPLOYMENT	LABOR INCOME	VALUE ADDED
Direct Effect	8,186	\$519.6M	\$979.7M
Indirect Effect	213	\$15.3M	\$22.6M
Induced Effect	38	\$2.5M	\$19.2M
Total Economic Impact	8,437	\$537.5M	\$1,021.4M
Share of Berkeley Total	7.6%	5.7%	7.9%

Note: Totals may not be exact due to rounding. Includes salaried, self-employed and gig jobs. Includes impacts associated with private and non-profit entities in Berkeley's creative economy.

Source: IMPLAN, U.S. Bureau of Labor Statistics, U.S. Bureau of Economic Analysis, CVL Economics.

ECONOMIC IMPACT: REGIONAL SPILLOVER



An additional **5,605 jobs** and **\$624 million in value added** were supported by Berkeley's creative economy in other parts of the East Bay, beyond city limits.

SPILLOVER ECONOMIC IMPACT OF BERKELEY'S CREATIVE ECONOMY INTO OTHER PARTS OF THE EAST BAY | 2024

	EMPLOYMENT	LABOR INCOME	VALUE ADDED
Direct Effect	-	-	-
Indirect Effect	3,784	\$307.9 Million	\$426.4 Million
Induced Effect	1,821	\$138.6 Million	\$254.7 Million
Total Economic Impact	5,605	\$420.8 Million	\$624.0 Million

Note: There are no direct effects in other parts of the East Bay, as this analysis measures only creative economy activity originating within the City of Berkeley. Direct effects occur only within the City of Berkeley. Totals may not be exact due to rounding. Includes impacts associated with private and non-profit entities in Berkeley's creative economy. Please see Appendix for definitions of the economic indicators.

Source: IMPLAN, U.S. Bureau of Labor Statistics, U.S. Bureau of Economic Analysis, CVL Economics.

THE CITY OF BERKELEY'S RETURN ON INVESTMENT



Every \$1 of Civic Arts Grant funding catalyzed **\$197** in total economic activity across the City of Berkeley.

Overall, the City's investments helped drive about **7.5%** of the total economic activity generated by Berkeley's creative economy.

CITY OF BERKELEY CIVIC ARTS GRANTS ALLOCATIONS | FY2016 – FY2024

FISCAL YEAR	TOTAL GRANT AMOUNT AWARDED	NUMBER OF GRANTS	AVERAGE GRANT SIZE
FY2016	\$229,100	53	\$4,323
FY2017	\$378,848	56	\$6,765
FY2018	\$497,510	61	\$8,156
FY2019	\$500,000	63	\$7,937
FY2020	\$650,199	90	\$7,224
FY2021	\$579,493	94	\$6,165
FY2022	\$714,470	104	\$6,870
FY2023	\$696,996	114	\$6,114
FY2024	\$698,782	97	\$7,204

Source: City of Berkeley, CVL Economics.

SNAPSHOT: ARTS & CULTURE ATTENDEE SPENDING



\$56 million in additional local spending is generated annually by **1.4 million visitors** to a sample of 37 Berkeley arts and culture organizations.

ANNUAL ARTS AND CULTURE ATTENDEE SPENDING BY CATEGORY FOR 37 ARTS AND CULTURE ORGANIZATIONS IN BERKELEY | 2024

SPENDING CATEGORY	LOCAL ATTENDEES	NONLOCAL ATTENDEES	TOTAL ATTENDEES
Food and Drink	\$17.6M	\$11.8M	\$29.2M
Retail Shopping	\$4.5M	\$3.1M	\$7.6M
Overnight Lodging	\$0.6M	\$3.0M	\$3.5M
Local Transportation	\$3.5M	\$3.7M	\$7.2M
Clothing and Accessories	\$2.5M	\$1.4M	\$3.8M
Groceries and Supplies	\$1.8M	\$0.8M	\$2.6M
Childcare	\$0.5M	\$0.4M	\$0.9M
Other/Miscellaneous	\$0.6M	\$0.5M	\$1.2M
Total Spend	\$31.3M	\$24.6M	\$56.0M

Source: SMU DataArts, Americans for the Arts, CVL Economics.

BERKELEY'S CREATIVE ECONOMY: ECONOMIC IMPACT

FISCAL IMPACT



CITY OF BERKELEY DIRECT TAX BENEFITS

In 2024, Berkeley's creative economy helped generate \$10.7 million in tax revenues, representing 3.9% of the City's tax base.



SUPPORT FOR REGIONAL SYSTEMS THAT RETURN VALUE LOCALLY

In addition, Berkeley's creative economy contributed \$14.3 million in County and \$74.6 million in State tax revenue.



**BERKELEY ARTS & CULTURE PANDEMIC
RELIEF & RECOVERY ASSESSMENT**

Between 2020 and 2022, the City of Berkeley awarded over **\$3 million** in emergency relief and recovery grants to arts and culture organizations and individual artists in Berkeley facing severe financial hardship during the COVID-19 pandemic.



ARTS & CULTURE ORGANIZATIONS

Two rounds of Berkeley pandemic relief and recovery grant programs were administered to **88 arts and culture organizations**, totaling almost **\$2.5 million**.

- 2020: ARTS ORGANIZATION CONTINUITY GRANT
- 2022: BERKELEY ARTS RECOVERY GRANTS (BARG) FOR ARTS ORGANIZATIONS AND FESTIVALS



ARTS & CULTURE INDIVIDUALS

Three Berkeley pandemic relief and recovery grant programs were administered to **193 arts and culture individuals** residing and practicing in Berkeley, totaling over **\$520,000**.

- 2020: EAST BAY/OAKLAND RELIEF FUND FOR INDIVIDUALS IN THE ARTS
- 2021: BERKELEY ARTS WORKS PROJECTS
- 2022: BERKELEY ARTS RECOVERY GRANTS (BARG) FOR ARTISTS AND CULTURAL PRACTITIONERS

ARTS & CULTURE ORGANIZATIONS COVID-19 IMPACT



Smaller organizations were the most vulnerable to initial pandemic disruptions.

GRANTEE REVENUE LOSS BY ORGANIZATION SIZE | 2019-2020



Source: City of Berkeley, CVL Economics.

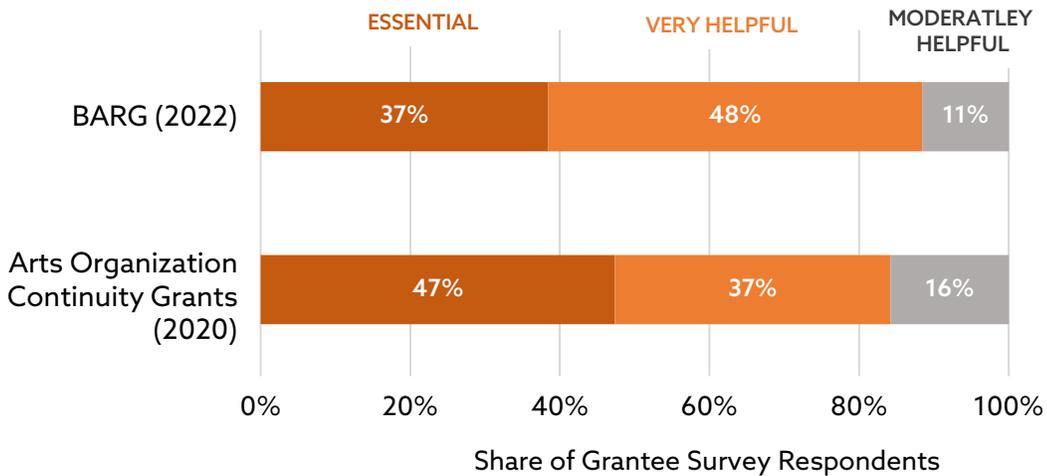
IMPACT OF BERKELEY PANDEMIC RELIEF & RECOVERY: ARTS & CULTURE ORGANIZATIONS

GRANT IMPACT

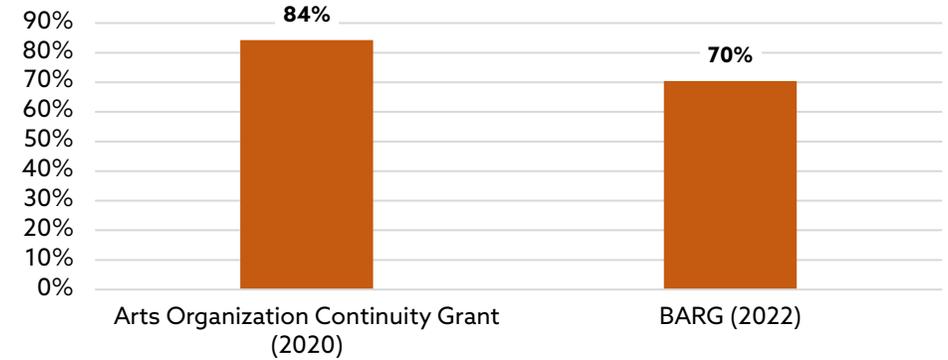


Relief and recovery funding was broadly seen as critical, helping most organizations avoid layoffs and business closure entirely.

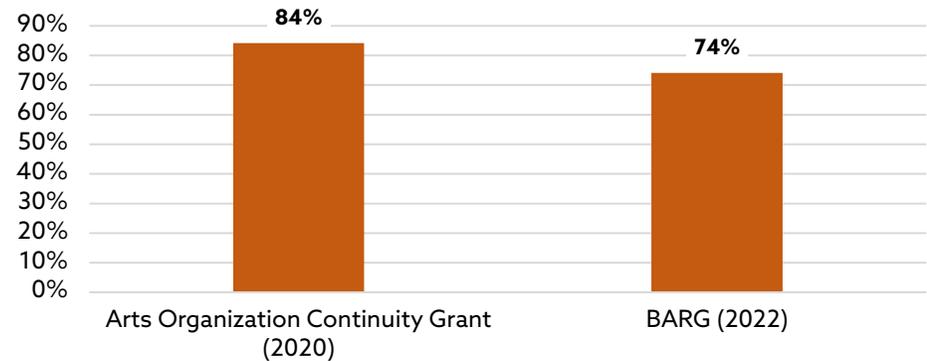
EXTENT TO WHICH PANDEMIC RELIEF AND RECOVERY FUNDING WAS ESSENTIAL



AVOIDED LAYOFFS DUE TO GRANTS



AVOIDED CLOSURE DUE TO GRANTS

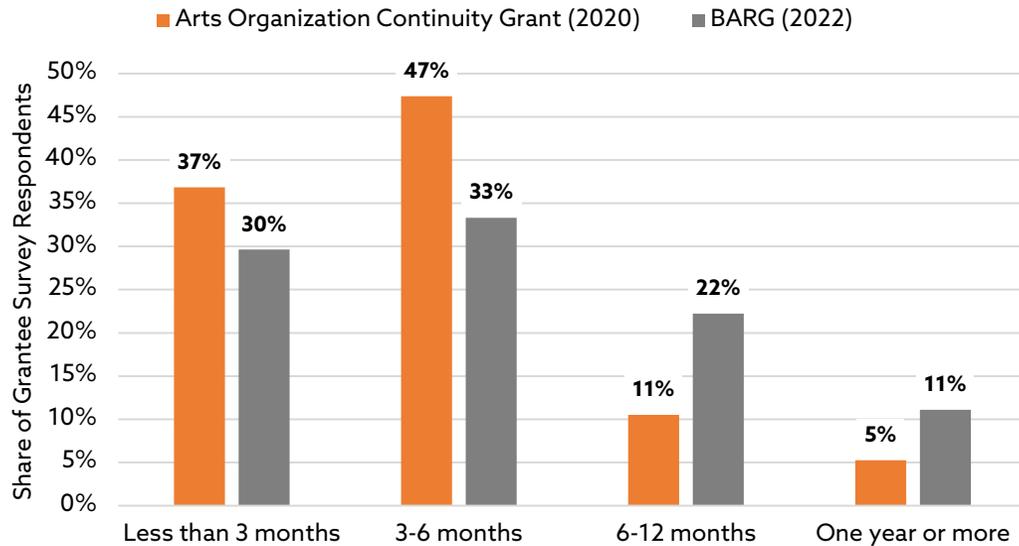


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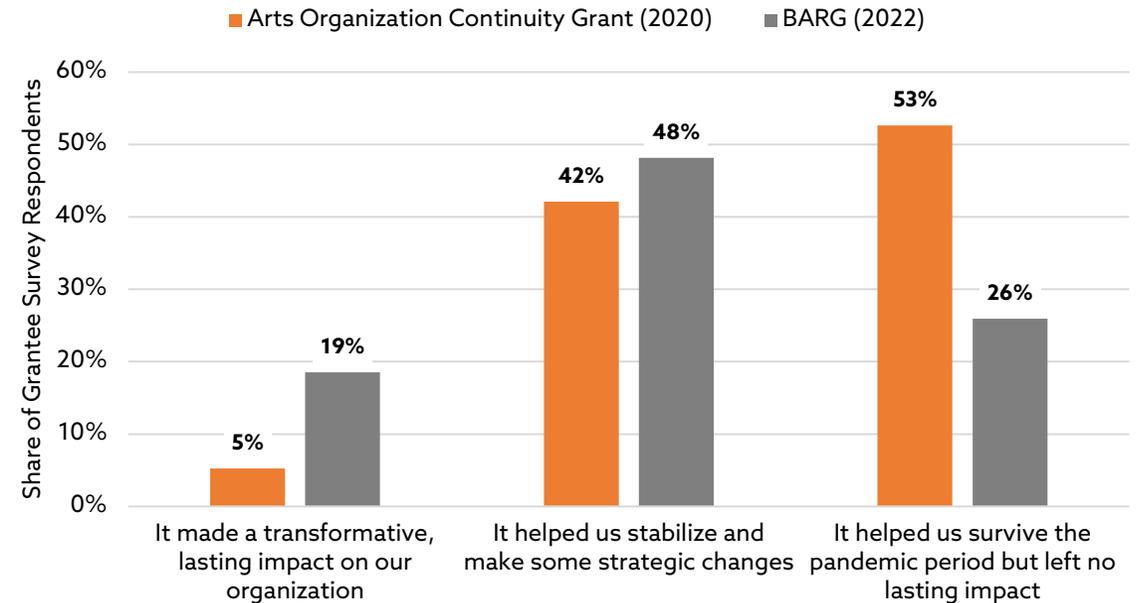


Timing mattered: Arts Organization Continuity Grants (2020) served as an immediate lifeline while Berkeley Arts Recovery Grants (2022) offered stabilization and transformation. Many (49 of the 88) grantee organizations received both rounds of funding, which extended impact beyond any single cycle.

LENGTH OF TIME GRANTS SUSTAINED OPERATIONS



SCALE OF GRANT IMPACT

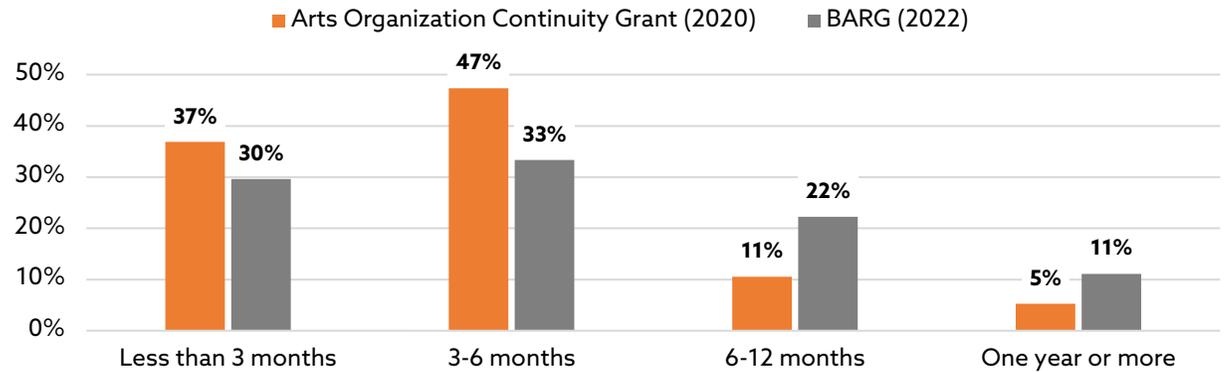


GRANT IMPACT

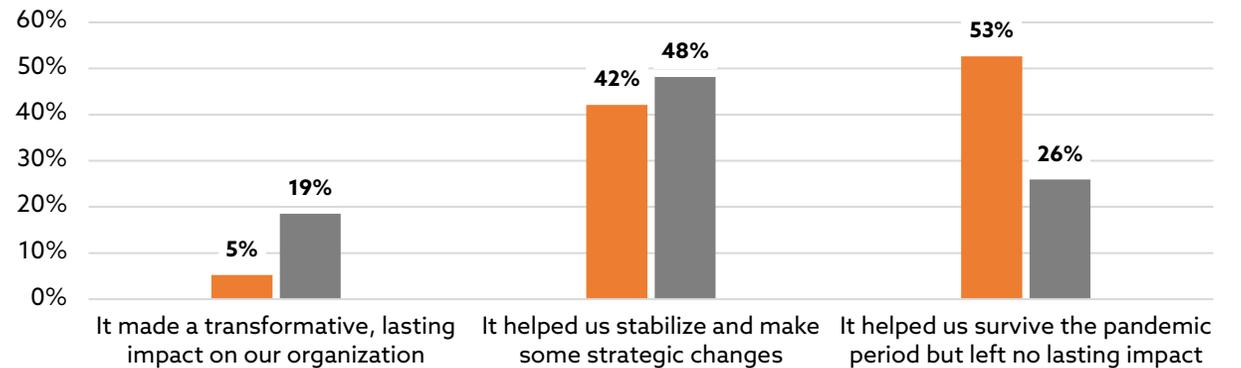


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LENGTH OF TIME GRANTS SUSTAINED OPERATIONS



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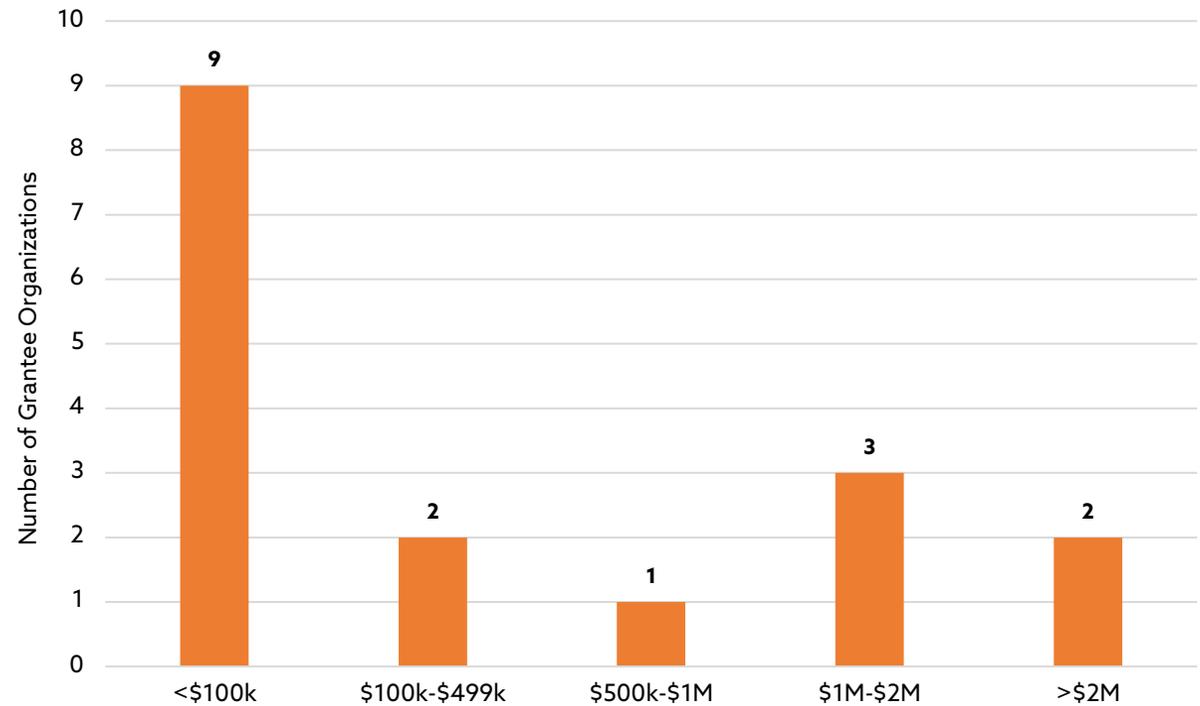
Source: CVL Economics Survey (2025). N = 30.

CLOSURES AMONG GRANT RECIPIENTS



17 of the 88 grantee organizations, or 19%, closed permanently between 2020 and 2024, the majority of which were very small organizations.

CLOSURES AMONG GRANT RECIPIENTS BY ORGANIZATION SIZE



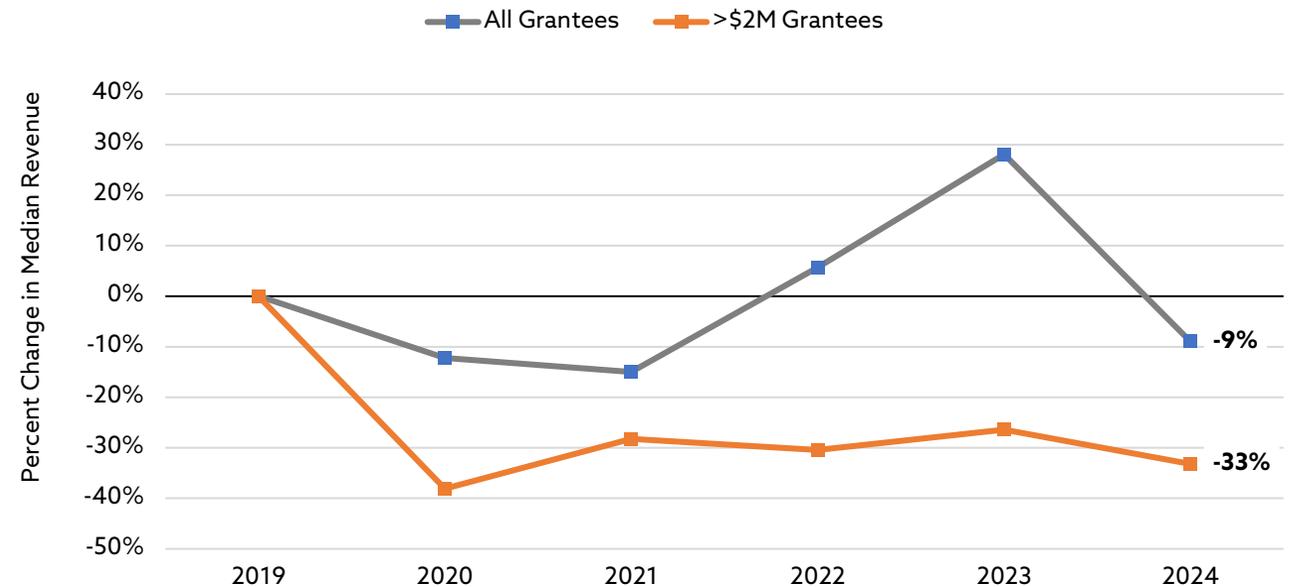
Source: City of Berkeley, CVL Economics.

ARTS & CULTURE ORGANIZATIONS LONG-TERM CHALLENGES



Revenue for the 71 surviving grantees sits 9% below pre-pandemic levels, though smaller surviving organizations fared relatively better over time.

PERCENT CHANGE IN MEDIAN SURVIVING GRANTEE REVENUE | 2019 - 2024



Note: Based on the median inflation-adjusted (2024 dollars) revenue across the 71 surviving grantee organizations.

RELIEF SUSTAINED ORGANIZATIONS, BUT CHALLENGES REMAIN



The City's \$2.5 million investment in arts and culture organizations (2020-2022) helped preserve more than **\$12.9 million** in arts and culture revenues that would otherwise have been lost. This translates to every \$1 of City pandemic emergency funding having leveraged at least **\$5.64** in arts and culture economic activity.

However, broader economic challenges are compounding strain across Berkeley arts organizations of all sizes.



Financial Pressures

Skyrocketing costs causing expenses to rise faster than revenue. Earned revenue slow to rebound, leading to a heavier reliance on contributed income.



Funding & Philanthropy

Increased competition for public and philanthropic support. Federal arts funding landscape has shifted, making recovery uneven.



Audience & Market Shifts

Performing arts venues face reduced attendance and shrinking subscriber bases.



Place-Based Challenges

Downtown struggles: empty storefronts, reduced foot traffic. Safety and transportation concerns limiting venues' role as community hubs

CVL Economics is an economic consulting firm that takes a data-driven, human-centric approach to equitable development and sustainable growth, with a focus on the creative economy. Founded in 2021, CVL Economics partners with communities, municipalities, organizations, and institutions to address today's most complex challenges and foster bold action. Coupling our robust economic models with innovative research methodologies, we provide decisionmakers with the actionable insights needed to effect change, expand opportunity, and improve economic well-being.

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