PURPOSE OF THE STUDY

1. Measure and document the economic contribution of arts & cultural industries (A&Clis).

2. Understand how A&Clis work locally and identify opportunities and challenges to their growth.

3. Recommend policies to enhance the economic impact of A&Clis.
1. MEASURING ARTS & CULTURAL INDUSTRIES IN ALBUQUERQUE-BERNALILLO COUNTY
ECONOMIC CONTRIBUTION OF A&Cl's:

In 2004:

- $1.2 billion in revenues
- 19,500 jobs (about 6% of all jobs in Bernalillo Co.)
- $413 million in wages & salaries
- 50% revenues from outside dollars
- Outside dollars create more jobs than either UNM, Intel, or Santa Fe A&Cl's
A&CIs DIRECT EMPLOYMENT

- Education
- Hospitality
- Fairs
- Design
- Artists
- Movies
- Media
- Advocacy
- Sports
- Wholesale
- Retail
- Museums
- Artisans
- Movies

Jobs = 19,508

UNM Bureau of Business & Economic Research
A&Cs EMPLOYMENT IMPACT – OUTSIDE $

Jobs = 14,162
## A&C Is EMPLOYMENT – KEY PARAMETERS

<table>
<thead>
<tr>
<th>Industry</th>
<th>Outside $ as % of Total</th>
<th>A&amp;C as % of Total</th>
<th>Multiplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospitality</td>
<td>99%</td>
<td>15%</td>
<td>1.39</td>
</tr>
<tr>
<td>Artisans</td>
<td>76%</td>
<td>87%</td>
<td>1.73</td>
</tr>
<tr>
<td>Wholesale</td>
<td>76%</td>
<td>94%</td>
<td>1.84</td>
</tr>
<tr>
<td>Fairs</td>
<td>59%</td>
<td>89%</td>
<td>1.21</td>
</tr>
<tr>
<td>Media</td>
<td>55%</td>
<td>37%</td>
<td>2.93</td>
</tr>
<tr>
<td>Artists</td>
<td>43%</td>
<td>98%</td>
<td>1.94</td>
</tr>
<tr>
<td>Museums</td>
<td>35%</td>
<td>98%</td>
<td>1.86</td>
</tr>
<tr>
<td>Design</td>
<td>33%</td>
<td>57%</td>
<td>1.58</td>
</tr>
<tr>
<td>Retail</td>
<td>29%</td>
<td>70%</td>
<td>1.39</td>
</tr>
<tr>
<td>Sports</td>
<td>21%</td>
<td>100%</td>
<td>1.17</td>
</tr>
<tr>
<td>Advocacy</td>
<td>18%</td>
<td>41%</td>
<td>1.32</td>
</tr>
<tr>
<td>Education</td>
<td>15%</td>
<td>33%</td>
<td>1.48</td>
</tr>
<tr>
<td>Movies</td>
<td>10%</td>
<td>100%</td>
<td>1.92</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>46%</strong></td>
<td><strong>32%</strong></td>
<td><strong>1.81</strong></td>
</tr>
</tbody>
</table>
2. EXPLORING CREATIVE INDUSTRIES IN ALBUQUERQUE-BERNALILLO COUNTY
CREATIVE ECONOMY

CREATIVE

COMMERCIAL

TECHNOLOGY

DEVELOPMENT & TOURISM

SUPPORT

Quality of Life

Business Environment
A&Cs INTERVIEWS

- 95 in-depth interviews in all sectors
- Demographics and creative background
- Advantages and disadvantages of working in Albuquerque:
  - Place and perception
  - Creativity and collaboration
  - Support and infrastructure
  - Markets and competition
- Referrals and networks
PERCEIVED ADVANTAGES & DISADVANTAGES

ADVANTAGES
- Talent, diversity, openness to innovation
- Quality of life, affordability, location
- Arts & technology resources

DISADVANTAGES
- Poor coordination of funding & services
- Small markets & limited exposure
- Lack of secure funding
## COMPARISON OF VISUAL ARTS MARKETS

<table>
<thead>
<tr>
<th>METRO AREA</th>
<th>POPULATION (Millions)</th>
<th>ART REVENUES ($ millions)</th>
<th>ART REVENUES vs. LOCAL DEMAND</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>288.1</td>
<td>$4,236.5</td>
<td>100%</td>
</tr>
<tr>
<td>New York</td>
<td>18.6</td>
<td>$1,502.0</td>
<td>420%</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>12.7</td>
<td>$223.1</td>
<td>113%</td>
</tr>
<tr>
<td>Chicago</td>
<td>9.3</td>
<td>$134.1</td>
<td>85%</td>
</tr>
<tr>
<td>Philadelphia</td>
<td>5.7</td>
<td>$115.4</td>
<td>117%</td>
</tr>
<tr>
<td>Dallas-Fort Worth</td>
<td>5.5</td>
<td>$49.2</td>
<td>55%</td>
</tr>
<tr>
<td>Miami</td>
<td>5.2</td>
<td>$116.0</td>
<td>143%</td>
</tr>
<tr>
<td>Washington</td>
<td>5.0</td>
<td>$46.9</td>
<td>46%</td>
</tr>
<tr>
<td>Houston</td>
<td>5.0</td>
<td>$28.4</td>
<td>35%</td>
</tr>
<tr>
<td>Atlanta</td>
<td>4.6</td>
<td>$41.6</td>
<td>58%</td>
</tr>
<tr>
<td>Detroit</td>
<td>4.5</td>
<td>$110.2</td>
<td>149%</td>
</tr>
<tr>
<td>Boston</td>
<td>4.5</td>
<td>$76.3</td>
<td>85%</td>
</tr>
<tr>
<td>San Francisco-Oakland</td>
<td>4.2</td>
<td>$176.2</td>
<td>191%</td>
</tr>
<tr>
<td>Las Vegas</td>
<td>1.5</td>
<td>$42.0</td>
<td>195%</td>
</tr>
<tr>
<td>New Orleans</td>
<td>1.3</td>
<td>$36.7</td>
<td>205%</td>
</tr>
<tr>
<td>Tucson</td>
<td>0.9</td>
<td>$13.2</td>
<td>126%</td>
</tr>
<tr>
<td>Albuquerque</td>
<td>0.7</td>
<td>$10.0</td>
<td>100%</td>
</tr>
<tr>
<td>Santa Fe</td>
<td>0.1</td>
<td>$114.3</td>
<td>1411%</td>
</tr>
</tbody>
</table>
SOCIAL NETWORKS

- Social networks are critical to innovation & development in A&Cl's.
- Social network analysis corroborates qualitative findings:
  - Small, loosely connected clusters
  - Highly individualized relationships, especially with support institutions
  - ‘Connector’ institutions have been effective (e.g. NHCC, IPCC, UNM ARTS Lab)
SUPPORT SECTOR
CREATIVE & COMMERCIAL SECTORS

Creative

Commercial

Combined
3. TOWARD POLICIES TO SUPPORT ARTS & CULTURAL INDUSTRIES
A&Cs ACTION PLAN

1. Coordinate —
   - Minimize redundancies
   - Create stronger creative networks

2. Plan Strategically —
   - Link content & technology
   - Anticipate changes in cultural markets
   - Address identity-branding (look ‘within’)
   - Align relations with Santa Fe & Northern New Mexico

3. Secure Funding —
   - Predictability for organizational planning
   - Operational funding to allow for creativity
   - Encourage small & medium-sized organizations
PARTNERS IN DEVELOPING AN A&CIs ACTION PLAN

- Albuquerque can learn from other communities, but must create its own models because of unique institutional conditions
  - Small corporate & philanthropic communities
  - Public investment in cornerstone cultural institutions

- Collaboration among diverse institutions is key, e.g.,
  - Public - Private
  - Content - Technology
  - Creative - Commercial
  - Local - Regional - National
CONTRIBUTORS TO THE RESEARCH:

- Joshua M. Akers
- Molly Bleecker
- Carmen J. Land
- Dr. Lee A. Reynis
- Billy James Ulibarrí

And the parade of persons and institutions who provided information and shared their experiences.
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