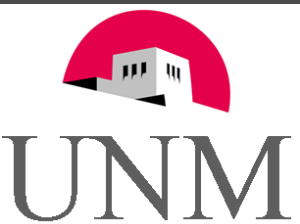


ARTS & CULTURAL INDUSTRIES IN ALBUQUERQUE - BERNALILLO COUNTY

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Bureau of Business &
Economic Research

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PURPOSE OF THE STUDY

1. Measure and document the economic contribution of arts & cultural industries (A&CIs).
2. Understand how A&CIs work locally and identify opportunities and challenges to their growth.
3. Recommend policies to enhance the economic impact of A&CIs.

1. MEASURING ARTS & CULTURAL INDUSTRIES IN ALBUQUERQUE-BERNALILLO COUNTY

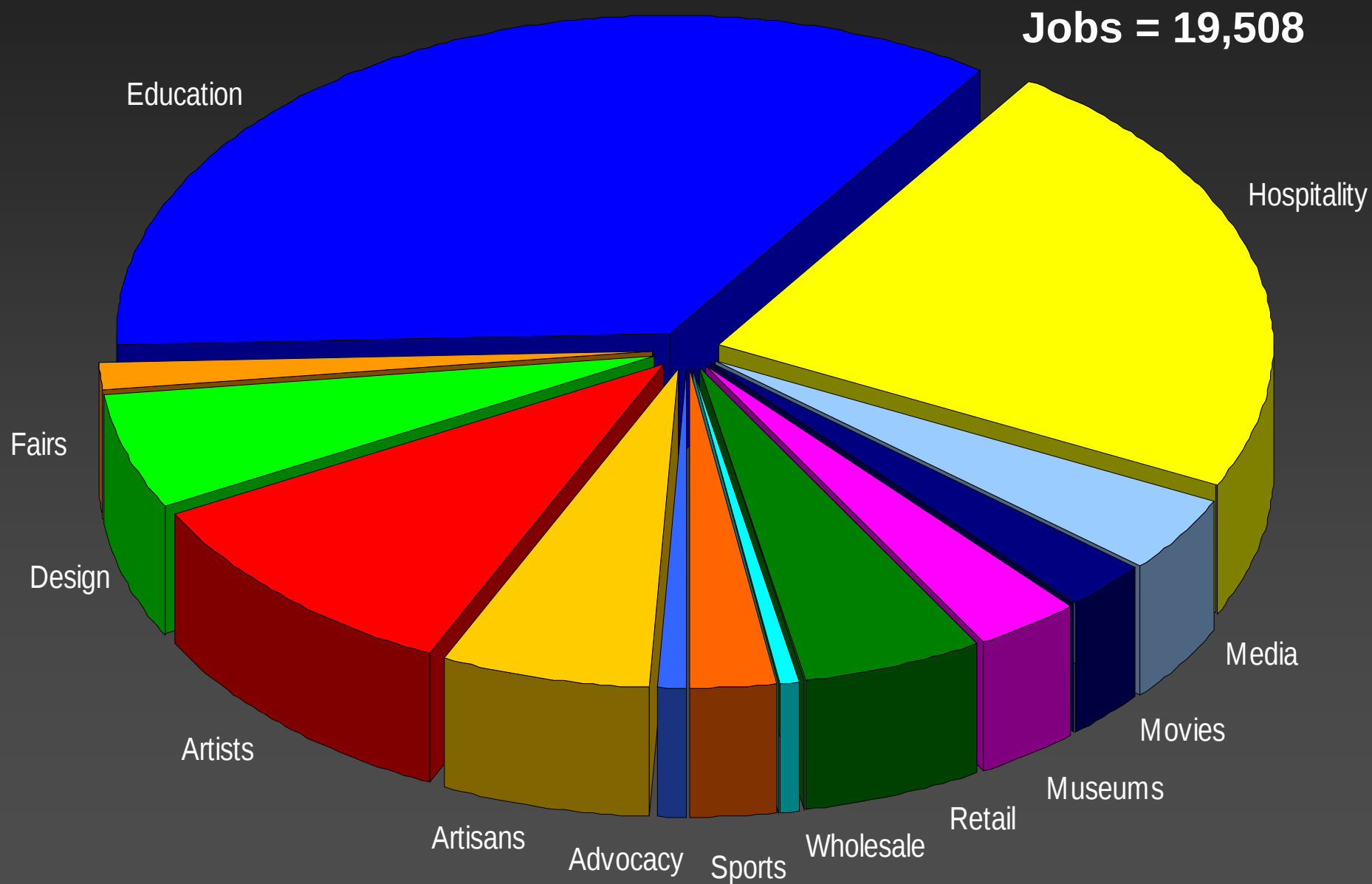


ECONOMIC CONTRIBUTION OF A&CIs:

In 2004:

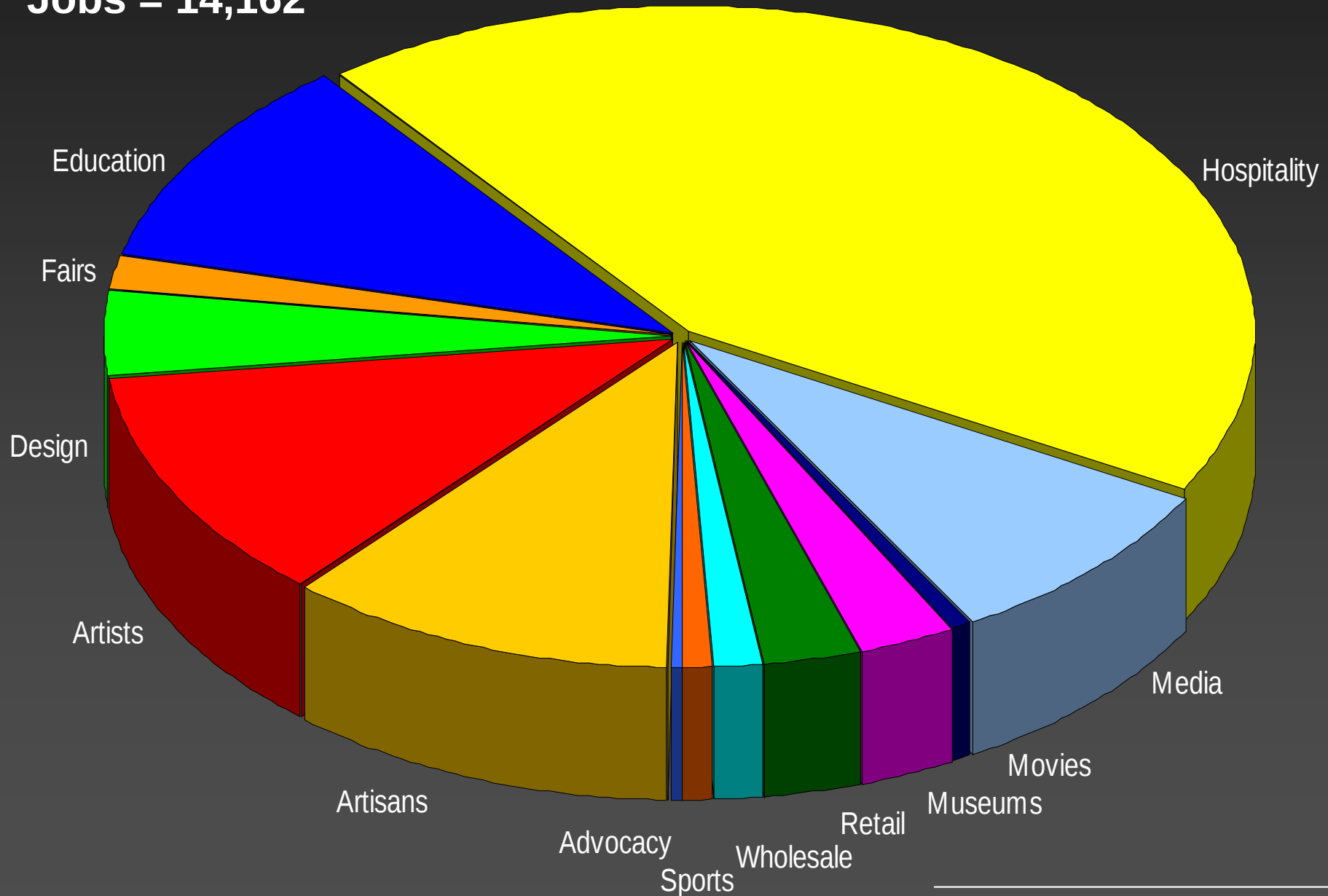
- \$1.2 billion in revenues
- 19,500 jobs (about 6% of all jobs in Bernalillo Co.)
- \$413 million in wages & salaries
- 50% revenues from outside dollars
- Outside dollars create more jobs than either UNM, Intel, or Santa Fe A&CIs

A&CIs DIRECT EMPLOYMENT



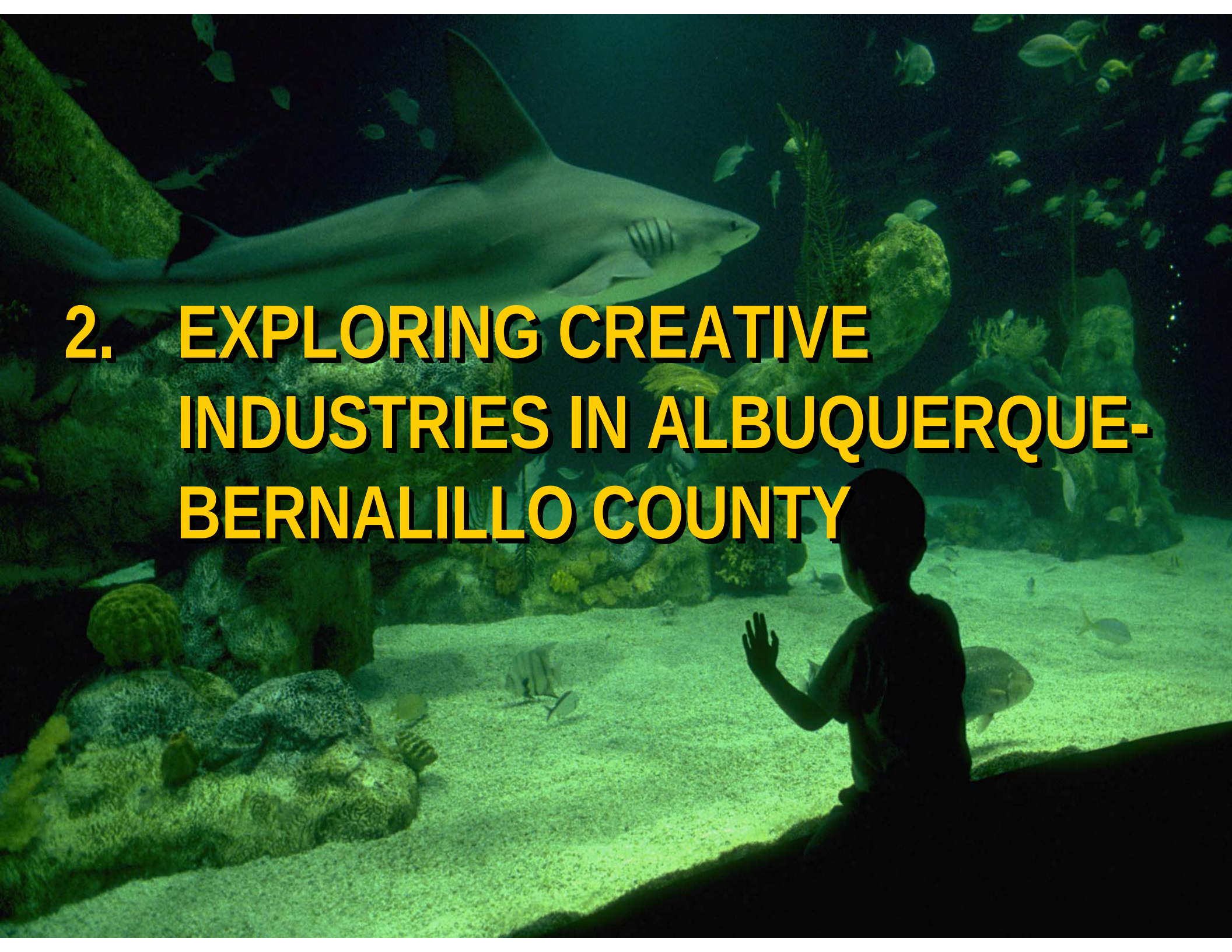
A&CIs EMPLOYMENT IMPACT – OUTSIDE \$

Jobs = 14,162



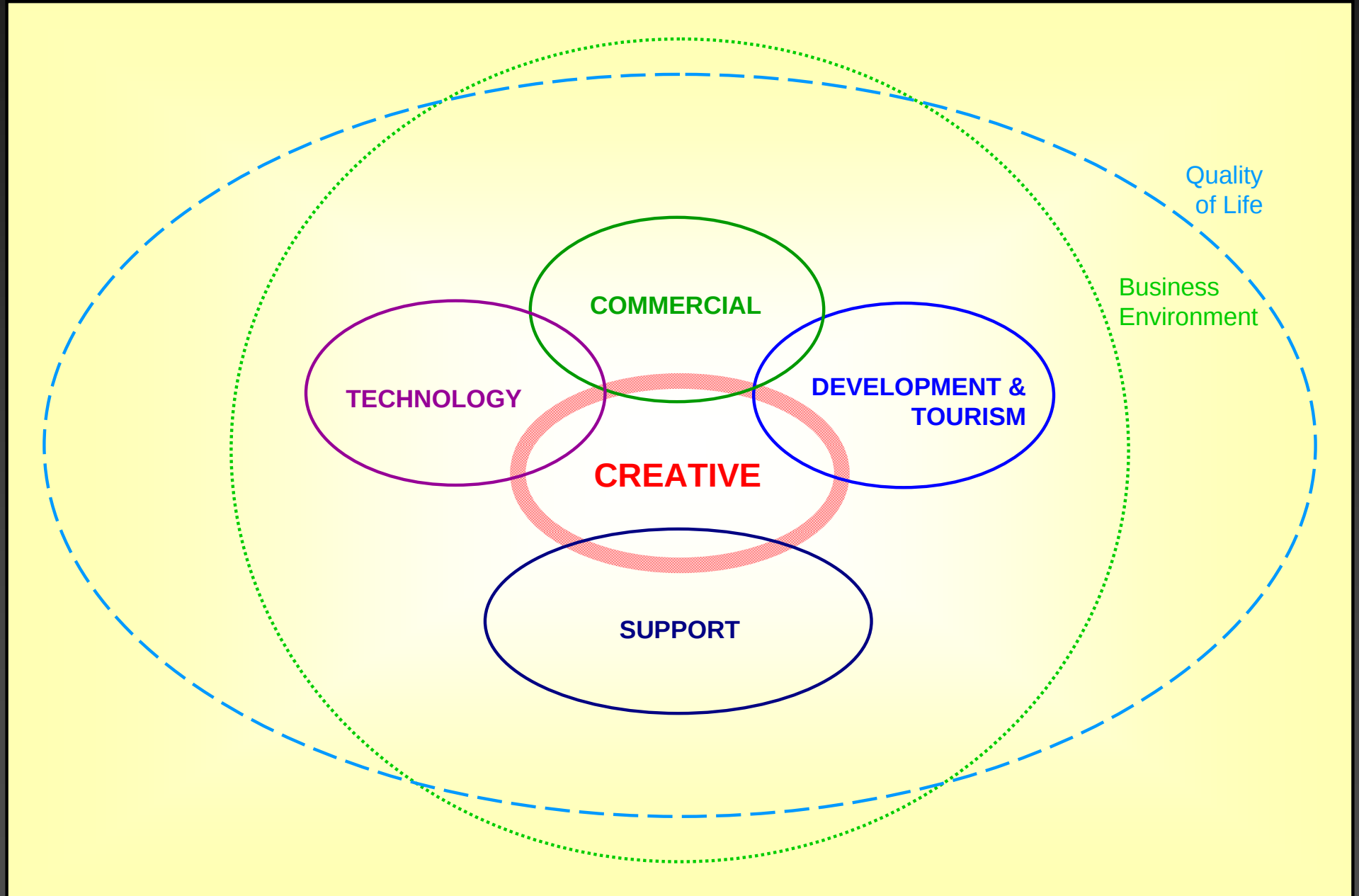
A&CIs EMPLOYMENT – KEY PARAMETERS

	Outside \$ as % of Total	A&C as % of Total	Multiplier
Hospitality	99%	15%	1.39
Artisans	76%	87%	1.73
Wholesale	76%	94%	1.84
Fairs	59%	89%	1.21
Media	55%	37%	2.93
Artists	43%	98%	1.94
Museums	35%	98%	1.86
Design	33%	57%	1.58
Retail	29%	70%	1.39
Sports	21%	100%	1.17
Advocacy	18%	41%	1.32
Education	15%	33%	1.48
Movies	10%	100%	1.92
TOTAL	46%	32%	1.81

A large shark is swimming in an aquarium tank. In the foreground, a child is sitting on the edge of the tank, looking at the shark. The tank is filled with various fish and coral. The text "2. EXPLORING CREATIVE INDUSTRIES IN ALBUQUERQUE-BERNALILLO COUNTY" is overlaid on the image in yellow, bold, sans-serif font.

2. EXPLORING CREATIVE INDUSTRIES IN ALBUQUERQUE-BERNALILLO COUNTY

CREATIVE ECONOMY



A&CIs 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

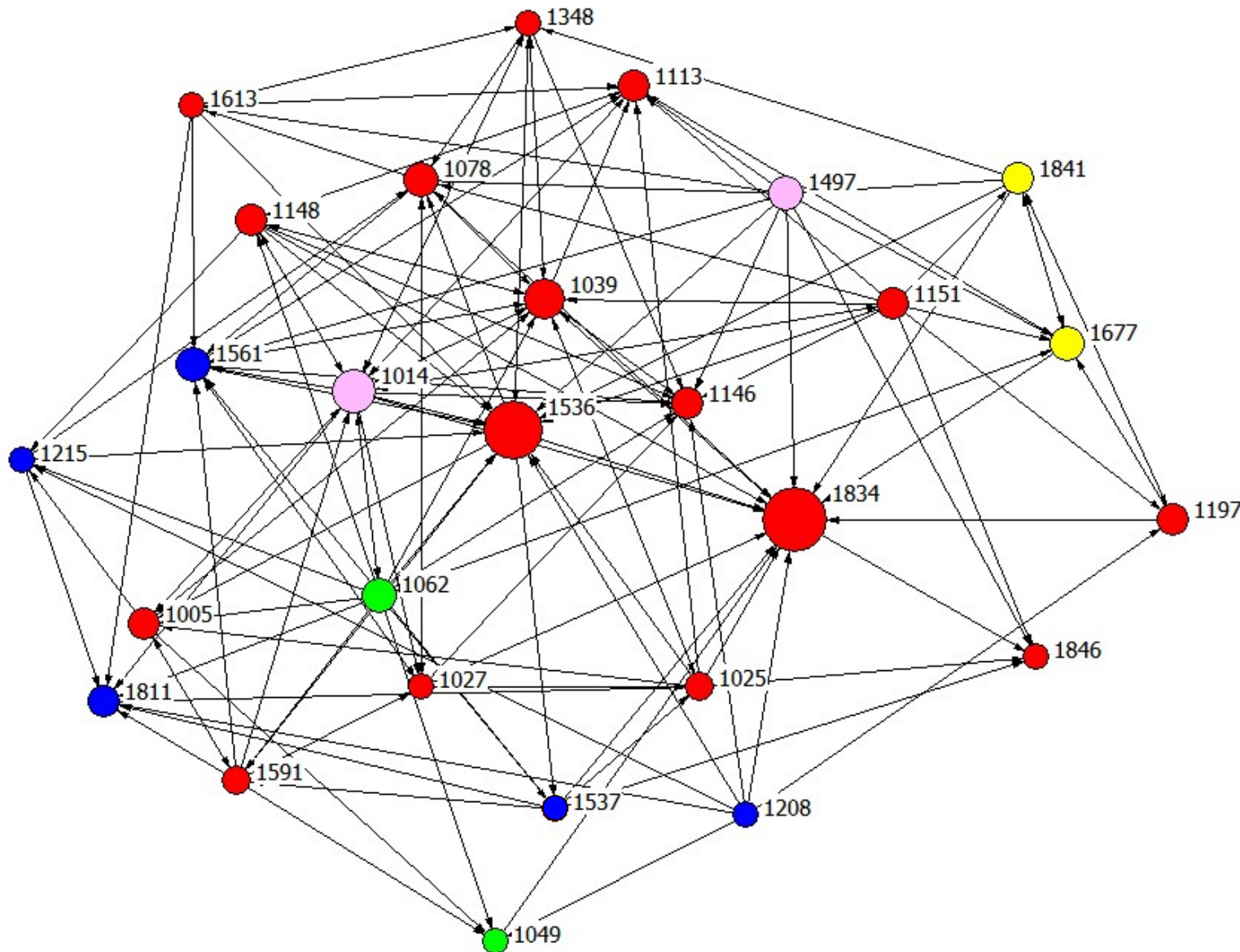
COMPARISON OF VISUAL ARTS MARKETS

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

SOCIAL NETWORKS

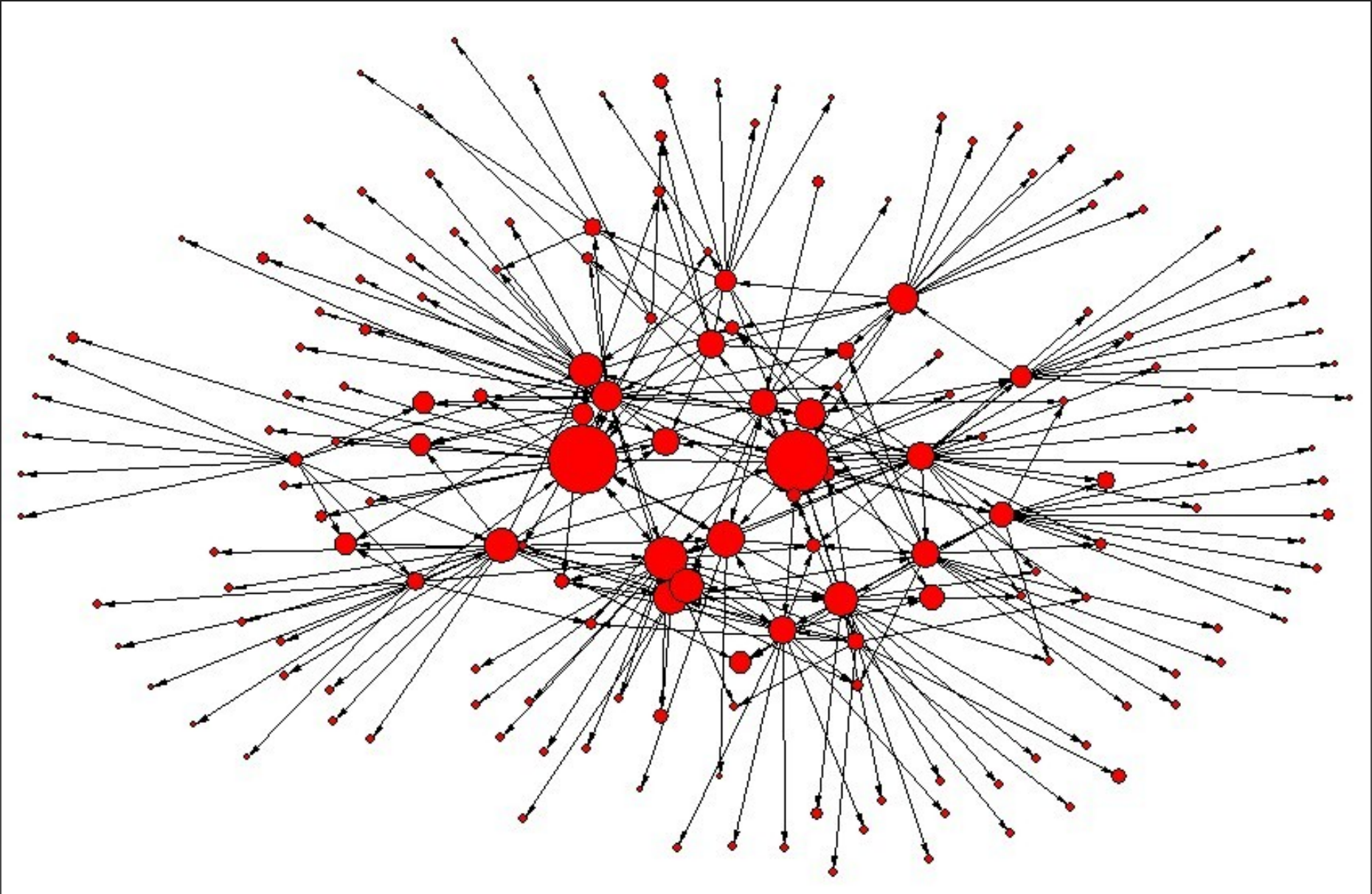
- Social networks are critical to innovation & development in A&CIs.
- Social network analysis corroborates qualitative findings:
 - Small, loosely connected clusters
 - Highly individualized relationships, especially with support institutions
 - 'Connector' institutions have been effective (e.g. NHCC,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

A&CIs SOCIAL NETWORK

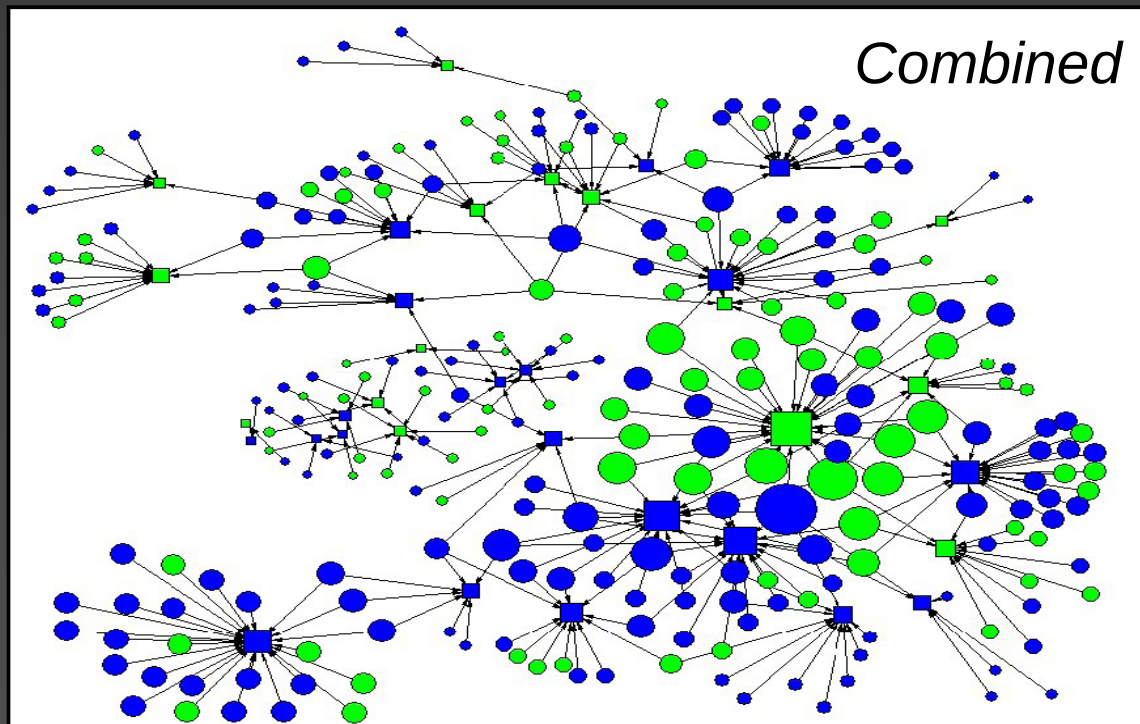
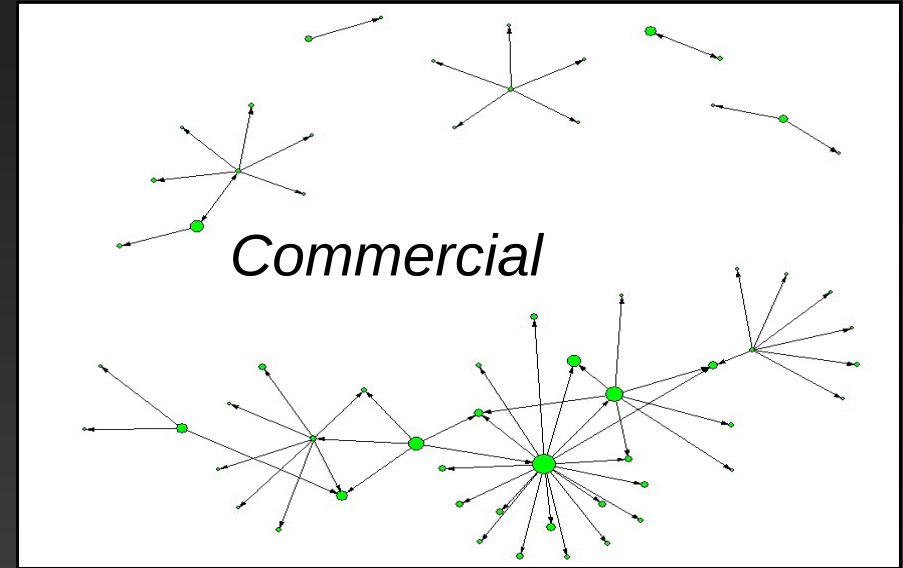
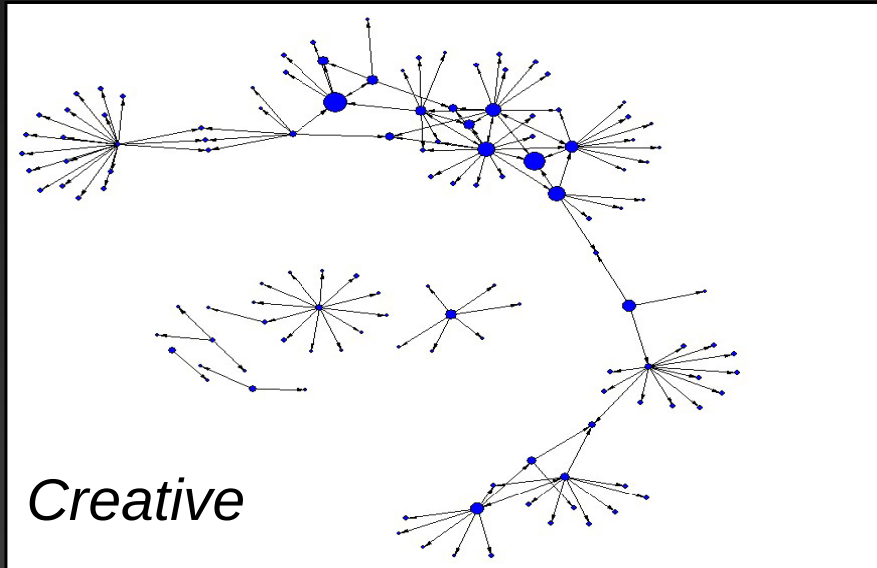


ID	Institution
1834	Univ. New Mexico
1536	National Hispanic CC
1014	ACVB
1039	ABQ Museum
1561	NM Symphony
1677	Sandia Labs
1497	Mesa del Sol
1062	AMP Concerts
1078	APS
1151	CABQ Film Office
1146	CABQ
1113	BioPark
1811	Tricklock Theater
1197	CNM
1841	UNM ARTS Lab
1148	ABQ Cultural Services
1005	516 Arts
1591	Outpost Productions
1025	Curator/Educator
1537	Institute of Flamenco
1208	Actor/Producer
1348	Indian Pueblo CC
1846	UNM Fine Arts
1613	PNM
1215	Poet
1049	Alibi Weekly
1027	ABQ Arts Alliance

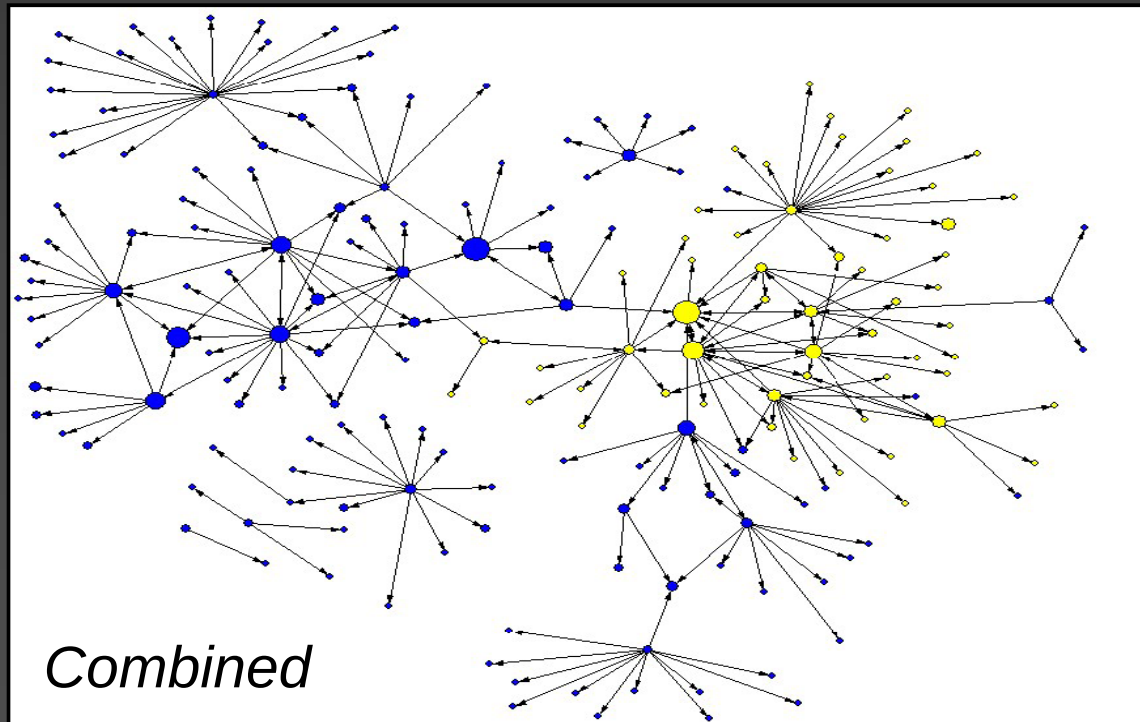
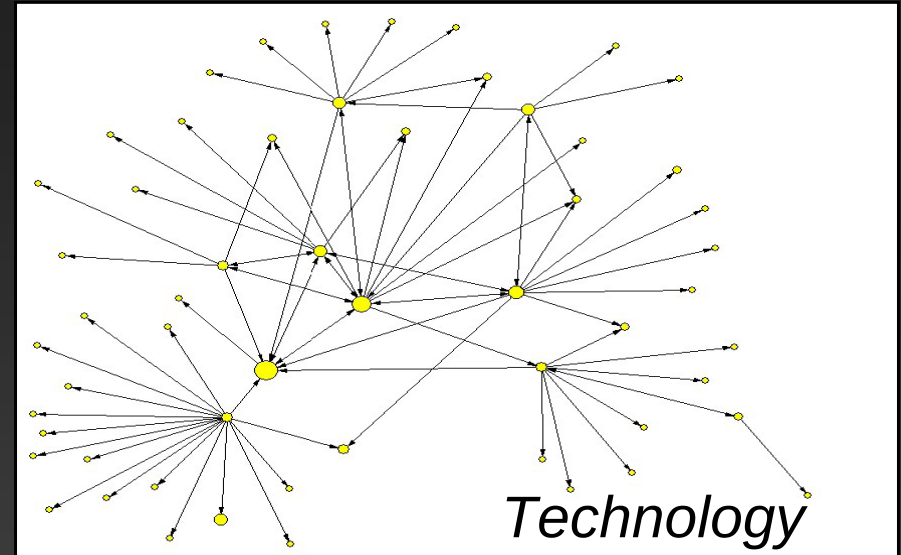
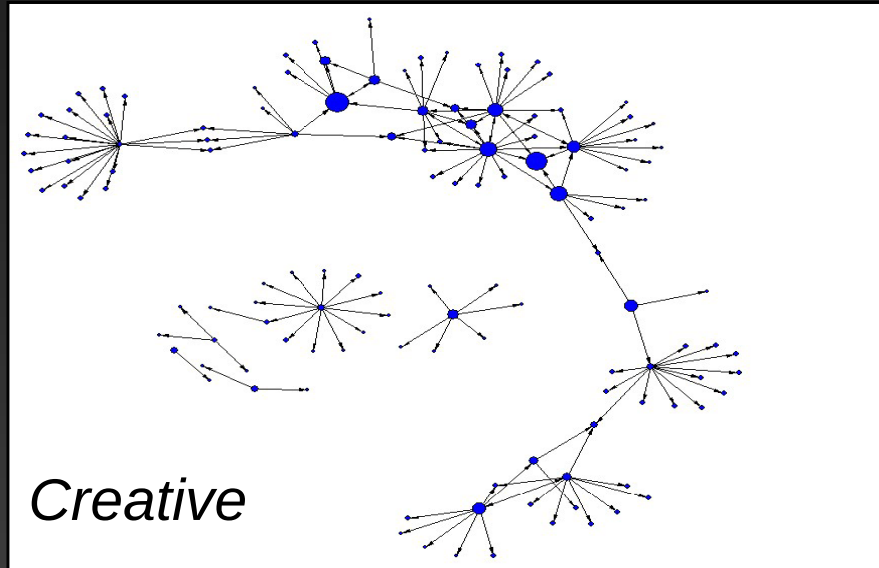
SUPPORT SECTOR



CREATIVE & COMMERCIAL SECTORS



CREATIVE & TECHNOLOGY SECTORS



3. TOWARD POLICIES TO SUPPORT ARTS & CULTURAL INDUSTRIES



A&CIs 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:

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- Molly Bleecker
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- Dr. Lee A. Reynis
- Billy James Ulibarri
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