

AN INVENTORY AND ASSESSMENT OF LAS VEGAS ARTS AND CULTURAL ASSETS

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EXECUTIVE SUMMARY

Las Vegas is rich in history, cultural tradition and natural beauty. Residents draw on these resources and traditions, as individuals and as a community, to preserve and cultivate their unique and distinctive way of life. During the past few years, the community has also begun to develop a strong and motivated group of leaders working to broaden the reach of these traditions, to both improve the quality of life and strengthen the economy.

Their task is not easy. It is often suggested that any initiative to develop an economy on the basis of arts, culture and tradition must confront a central paradox – artists and those who place culture at the core of their life thrive as individuals and resist efforts to ‘brand’ and ‘market’ their work and community. This is certainly true of many in Las Vegas, a town that was established and has thrived for many years as a land grant on the frontier. This study documents the measure of the challenge faced by the emerging leadership.

The central finding of this study is the paradox of a high level of individual involvement in artistic and cultural (A&C) activities and a remarkable degree of A&C institutional decentralization in and around Las Vegas. To cite only a few of the measures of this phenomenon more carefully documented in the body of the study:

- In 51 surveys of arts and cultural leaders in the Las Vegas area, respondents identified 134 different local arts, cultural and civic organizations with which they were involved. No fewer than 64 were mentioned by only one respondent, and another 15 were referenced by two respondents. Only eight organizations were mentioned by three or more persons, and only two by more than ten. Arguably the four largest institutions in the region – the City of Las Vegas, NM Highlands University, United World College and Luna Community College – were each referenced by fewer than three participants. In many other communities that BBER has investigated in New Mexico, large public and especially educational institutions serve as a principal site and organizer for community arts and cultural activities.
- According to the data collected in this study, the principal leaders are not fully representative of the population of the region as a whole. This presents a further challenge to cultural organizers in Las Vegas. While San Miguel County is nearly 75 percent Hispanic, and includes a large number of young adults, these populations are under-represented among those engaged in organizational leadership.
- The social network analysis included in this study identifies a high degree of geographical disconnect. To be sure, the city of Las Vegas is the central point of regional contact, but the relationships between the city and communities outside it are overly dependent on too few individuals.

- Until very recently, the number of arts and culture-related businesses and non-profit organizations in Las Vegas grew steadily and rapidly. However, total revenues have remained stagnant or declined, and as a result, the average employment and revenues of each organization has declined as well. As in the organizational structure of the community, the business end of arts and culture tends to proliferate in numbers rather than strength.
- The impact of 9/11 on Las Vegas' arts and cultural industries appears to have been very significant. Revenues earned or received by organizations in the area fell sharply beginning in 2002 and have not yet shown evidence of recovery. The impact of the disaster interrupted what had been ten years of steady growth in the region's industry.

Recent efforts to organize the arts and cultural community in Las Vegas have shown a measure of success.

- The Las Vegas Arts Council, the Steering Committee of the newly establishment Arts & Cultural District and MainStreet de Las Vegas measure the highest in BBER's social network analysis in the statistical terms of 'between-ness'. Between-ness refers not directly to the number of mentions but to the effectiveness in linking otherwise disparate or disconnected individuals or organizations. In other words, these types of organizations are effective in creating hubs with the potential to organize the huge number of small, far-flung individuals and organizations that comprise the Las Vegas cultural community.
- These and other organizations have established key events that both draw together members of the community and attract others from outside the area. These events help to establish a common identity within and consistent representation of the region to other areas.

Although many of the measures included in this study emphasize the challenges that Las Vegas faces in developing its arts and cultural economy, the broader message is overwhelmingly positive. The patterns of decentralization described in this study are characteristic of a long history along a path of creative development that is distinct from neighboring regions of New Mexico, such as Santa Fe. In this light, the decentralized structure of the artistic and cultural landscape of present-day Las Vegas does not necessarily reflect radical internal disagreement but rather the many efforts of individuals and institutions to maintain the subtle nuances of an otherwise consistent vision of regional tradition. The current challenge is to organize these many initiatives in order to be more competitive in the emerging regional, national and global cultural economy, while at the same preserving the rich differences that exist within the community. To this end, A&C leaders should continue to work to develop a greater degree of central coordination while preserving the diverse set of organizations that currently exist.

INTRODUCTION

During the period October 2008-April 2009, UNM-BBER conducted a three part investigation of the Arts and Cultural (A&C) economy of Las Vegas, with a focus on an inventory and assessment of the community's cultural assets. The three parts are:

- An extensive inventory of the assets of the creative economy of the Las Vegas area. The information was collected from web searches, secondary and primary data collection, reviews of public documents and prior studies, and interviews with dozens of community leaders, public officials, business owners, artists and interested individuals. The results are available as an Excel[®]-based directory of nearly 500 entries, including descriptions, contact and personnel information, and where available, budget and funding data of A&C institutions and activities.
- A community-based survey of 51 artists, preservationists, supporters, retailers, market representatives and others engaged in creative industries in Las Vegas and neighboring communities. The survey included questions about A&C participation, the advantages and disadvantages of living and working in the Las Vegas area, demographics and, most importantly, relationships with and among A&C and other community institutions. By better understanding the individuals, institutions and relationships that comprise the creative economy, this analysis can help lead to innovation, market expansion, stronger organization, more broad-based participation, and even new models of community leadership.
- An analysis of the impact and trends of the creative economy of the Las Vegas area. This analysis draws from a variety of sources, including lodger's tax records, attendance and enrollment figures, and most importantly, the Dun & Bradstreet database of employment and revenues of businesses and public and non-profit institutions for the period 1989 – 2006. This quantification of the creative economy provides an objective account of the importance of the A&C industries for purposes of policy and planning.

The findings of this research are presented in this report in two main parts. The first is an analysis of the social assets of the creative economy of Las Vegas, including a social network analysis, an evaluation of survey results, and a review of the institutional inventory. The second part includes an analysis of the economic impact of the A&C industries in the area, including an analysis of trends during the 1989-2006 period, and information about the potential market for A&C industries.

SOCIAL ASSETS

Survey Methodology

BBER designed a survey to provide data for the qualitative analysis component of the research project. The survey is included in the Appendix as **Figure A-1**. The survey was designed to elicit information on the demographic characteristics of the A&C community, on the advantages and disadvantages of doing artistic, cultural, and creative work in the Las Vegas area, and on which individuals, organizations, and institutions work with which others.

BBER utilized a snowball sampling method in our qualitative analysis. A snowball sample is a subset of the population under study (in this case, individuals and institutions involved in artistic, creative, and cultural activities in and within 50 miles around Las Vegas) that is generated by members of the population themselves. How this happens, more specifically, is that a handful of members of the population are chosen to serve as “seeds”, each of these is asked to name others within the population as part of the interview, some of whom are then interviewed. These are again asked to name others, some of whom are subsequently interviewed, and so on until a certain percentage of the names that come up have already come up before, at which point it is determined that “saturation” has been reached. While it is very likely the sample thus generated is not representative of the population under study, it is also very likely that it accurately reflects who within the population is most visible and active within it.

An unusual aspect of the survey component of this research project was the involvement of local community members in the process. In an attempt to promote the *creation* of new connections amongst individuals involved in these activities, rather than simply documenting these connections, the five seeds were asked to conduct the subsequent interviews. These five individuals were interviewed by BBER and then trained to conduct interviews themselves. With guidance from BBER (and assistance from one other community member recruited in the eleventh hour to complete necessary interviews), these volunteers conducted 45 of the 51 interviews completed between January and May, 2009.

The findings from the survey are discussed in this section, beginning with the social network analysis.

Social Network Analysis

Social network analysis is a type of research that involves analysis of the networks of the study population. Using social network analysis software such as UCINET, which BBER used for this study, one is able to quantify the level of connectedness within the network, assess the relative “importance” (e.g., the extent to which each mediates between others within the network) of each actor within the network, and identify those actors who are isolated from the others, among many other possible analyses. The software also provides a way to

visualize the networks through “maps” whose layouts can be manipulated in several ways to reflect various attributes of the actors.

Data gathered through the survey instrument was used to conduct a social network analysis of the arts and cultural social network in and around Las Vegas. The names of individuals and institutions given by interviewees in response to survey question #6, “Please name in rank order up to five people or institutions with whom your interactions are most important in your arts and cultural activities,” were the names that ultimately served to populate the sample of the arts and cultural universe, and were the pool from which the names of interviewees were pulled. Specifically, the two individuals ranked highest in answer to this question (unless they had already been interviewed or were not Las Vegas-area residents) were the two interviewed next. (The remaining four names were included in the analysis of the entire network.) This pattern was repeated for each interviewee, so that the number of interviewees “snowballed” from the original set.

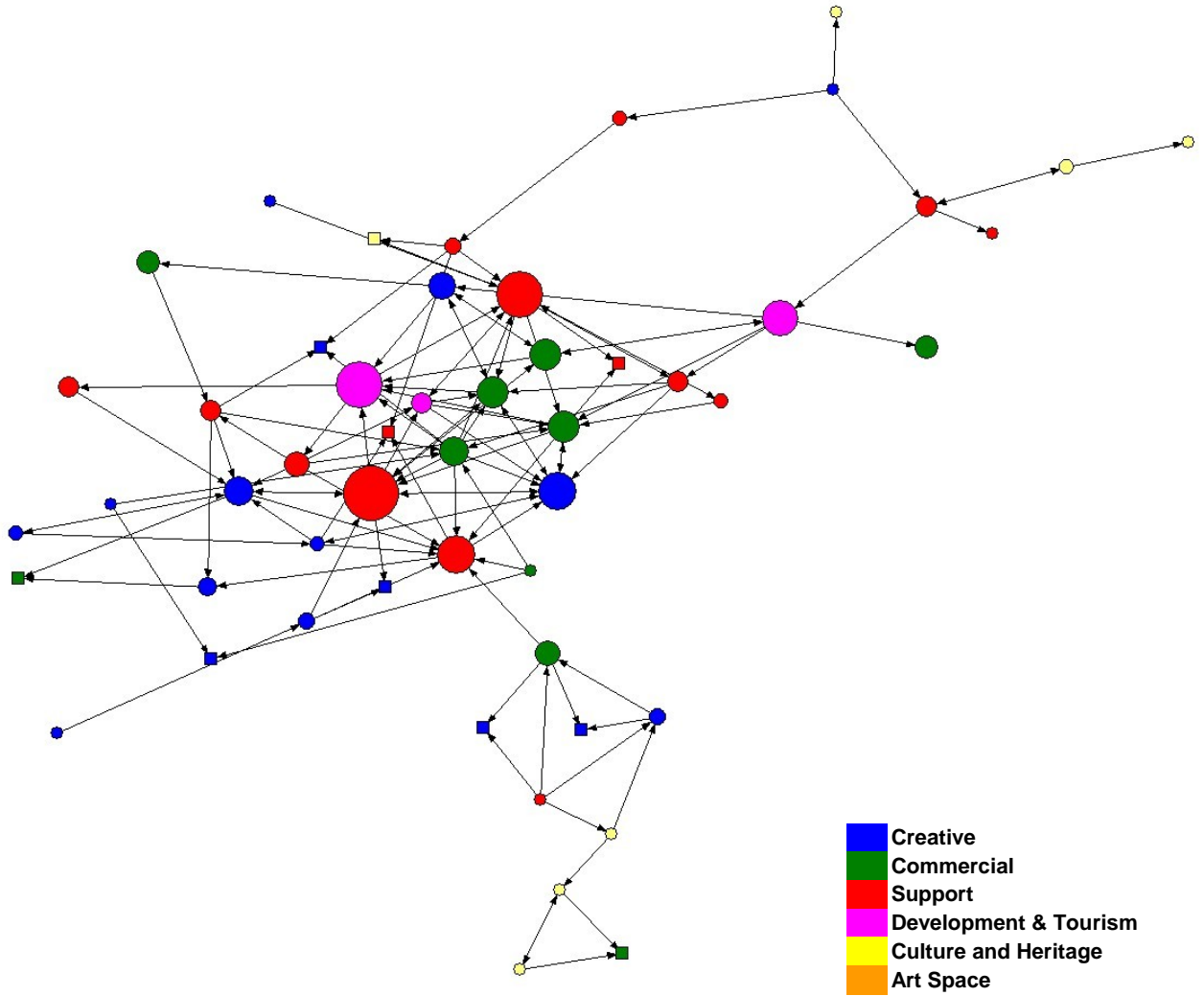
Figures 1 and 2, below, are maps of the arts and cultural social network in the Las Vegas area. The maps show:

1. the individuals or institutions mentioned in response to question # 6 of the survey instrument (“Please name in rank order up to five people or institutions with whom your interactions are most important in your arts and cultural activities.”), minus “pendants”, or individuals or institutions who were only mentioned once by the interviewees.¹ These individuals or institutions are represented by “nodes” in the shape of either circles, which symbolize those who were interviewed, or squares, which symbolize those who were not interviewed.
2. the direction of the mentioning; i.e., the arrow points to the individual or institution referenced by the node at the other end of the arrow; and
3. the level of “between-ness” of the individuals or institutions, as indicated by the size of the node. A node’s between-ness level indicates how much that node mediates between other nodes in the network.

Figure 1 is a map of relationships among individuals and institutions engaged in Las Vegas’s arts and cultural social network, organized according to the nature of one’s involvement. The color of the node indicates the sphere to which the individual or institution belongs. BBER created six different categories of activity, as described in the key following Figure 1. Blue indicates the creative sphere, green is commercial, red is support, pink is development and tourism, yellow is culture and heritage, and orange is art space.

¹ BBER collapsed the individuals into their associated businesses, organizations, or institutions for the maps and between-ness analysis.

FIGURE 1: LAS VEGAS ARTS AND CULTURAL SOCIAL NETWORK BY SPHERE



KEY TO FIGURE 1

	Creative	Activities directly engaged in the conception and production of original art & cultural products. This may include products intended for commercial markets, but excludes replication of non-original work (e.g., replication or manufacturing of established design).
	Commercial	Activities that directly or indirectly bring art and cultural products to the market for-profit, or otherwise rely on creative activities for 'content' in commercial activities. Institutions in the commercial sector may include for-profit entertainment companies (e.g., motion picture and sound production studios); media (e.g., broadcast, print, online); venues (e.g., movie theaters, clubs); design, marketing and advertising firms; art galleries; and so on.
	Support	Activities that help to make possible the creation, preservation and presentation of original art and cultural products. Support can be material (e.g., public institutions, foundations), educational (e.g., public schools and universities), political (e.g., advocacy), or some other form, with the exception of for-profit activities designated as commercial.
	Development & Tourism	Activities that draw upon and/or contribute to a sense of place rooted in arts and culture in order to create markets for arts and cultural activities (e.g. business organizations, tourism promotion, hospitality businesses, land developers).
	Culture and Heritage	Activities that preserve and promote the region's culture and history, including institutions (e.g., historical museums) and historic sites, as well as cultural events (e.g., powwows).
	Art Space	Activities that provide space for the conception, production, and display of original artistic work, with the exception of for-profit activities designated as commercial. This may include performance spaces, studios, institutions (e.g., art museums), artistic events (e.g., music festivals), or private schools.

Table 1 shows that of the overall mentions,² the creative sphere dominates, with a full 50 percent of the total. The support sphere is second at 31 percent, with the four remaining spheres mentioned far less often. Of the 175 names generated from the social network analysis survey, 51 were interviewed. A majority (51 percent) of the interviews were conducted with members of the support sphere, followed by the commercial sphere with 22 percent of the total. Of the 175 names, 102 were affiliated with institutions, with the support sector making up the majority of these (56 percent). The remaining 73 names, not surprisingly, are predominately involved in the creative sphere.

The top ten ranked individuals or institutions by level of between-ness are concentrated in the commercial sector (four out of ten), but the support, development and tourism, and creative spheres were not far behind.

In general, these data indicate that the arts and culture social network in the Las Vegas area has a large number of both artists and institutions, yet it appears to be highly decentralized.

² "Mentions" are names of individuals or institutions given in response to survey question #6 who were not interviewed.

TABLE 1: REPRESENTATION OF SPHERES IN THE LAS VEGAS ARTS AND CULTURAL SOCIAL NETWORK

SPHERE	MENTIONS	INTERVIEWED	INDIVIDUALS ¹	INSTITUTIONS ²	BETWEENNESS TOP TEN
Creative	62	3	61	4	1
Commercial	10	11	1	20	4
Support	38	26	7	57	3
Development & Tourism	2	5	0	7	2
Culture and Heritage	11	6	4	13	0
Art Space	1	0	0	1	0
TOTAL	124	51	73	102	10

SPHERE	MENTIONS	INTERVIEWED	INDIVIDUALS ¹	INSTITUTIONS ²	BETWEENNESS TOP TEN
Creative	50%	6%	84%	4%	10%
Commercial	8%	22%	1%	20%	40%
Support	31%	51%	10%	56%	30%
Development & Tourism	2%	10%	0%	7%	20%
Culture and Heritage	9%	12%	5%	13%	0%
Art Space	1%	0%	0%	1%	0%
TOTAL	100%	100%	100%	100%	100%

¹ "Individuals" means persons who are not known to be affiliated with an arts or cultural institution.

² "Institutions" means organizations, agencies, or businesses engaged in artistic or cultural activities that were either mentioned as such, or to which BBER assigned individuals who are known to be affiliated with them.

Source: Census Bureau, American Community Survey, 2005-2007 average; UNM-BBER, 2009.

Table 2 presents the 25 individuals or institutions with the highest between-ness ranking of the 175 total. Between-ness is but one of several “centrality” measures that seek to quantify an actor’s prominence within a social network. Between-ness, as mentioned above, measures the degree to which an actor falls along the paths of, or lies between, other actors within the network and can indicate individuals or institutions that are in a good position to mediate between others within the network. Degree centrality essentially reflects the popularity of the actor, to the degree that that actor is mentioned (“in-degree”). So in the case of the Las Vegas arts and cultural social network, the Las Vegas Arts Council has the highest between-ness ranking and third highest in-degree ranking, meaning that this organization mediates amongst the most others within the network and that it (or individuals affiliated with it) was the third-most often referenced actor in the network.

That the top three institutions by between-ness ranking are focused on artistic and cultural support is not surprising, given the mission of these institutions; yet this ranking indicates that their outreach efforts are successful. What is surprising is the number of artists within the top 25 between-ness rankings, especially the

one ranked fourth (and first in the in-degree ranking). This indicates how valued the local artists are within the social network.

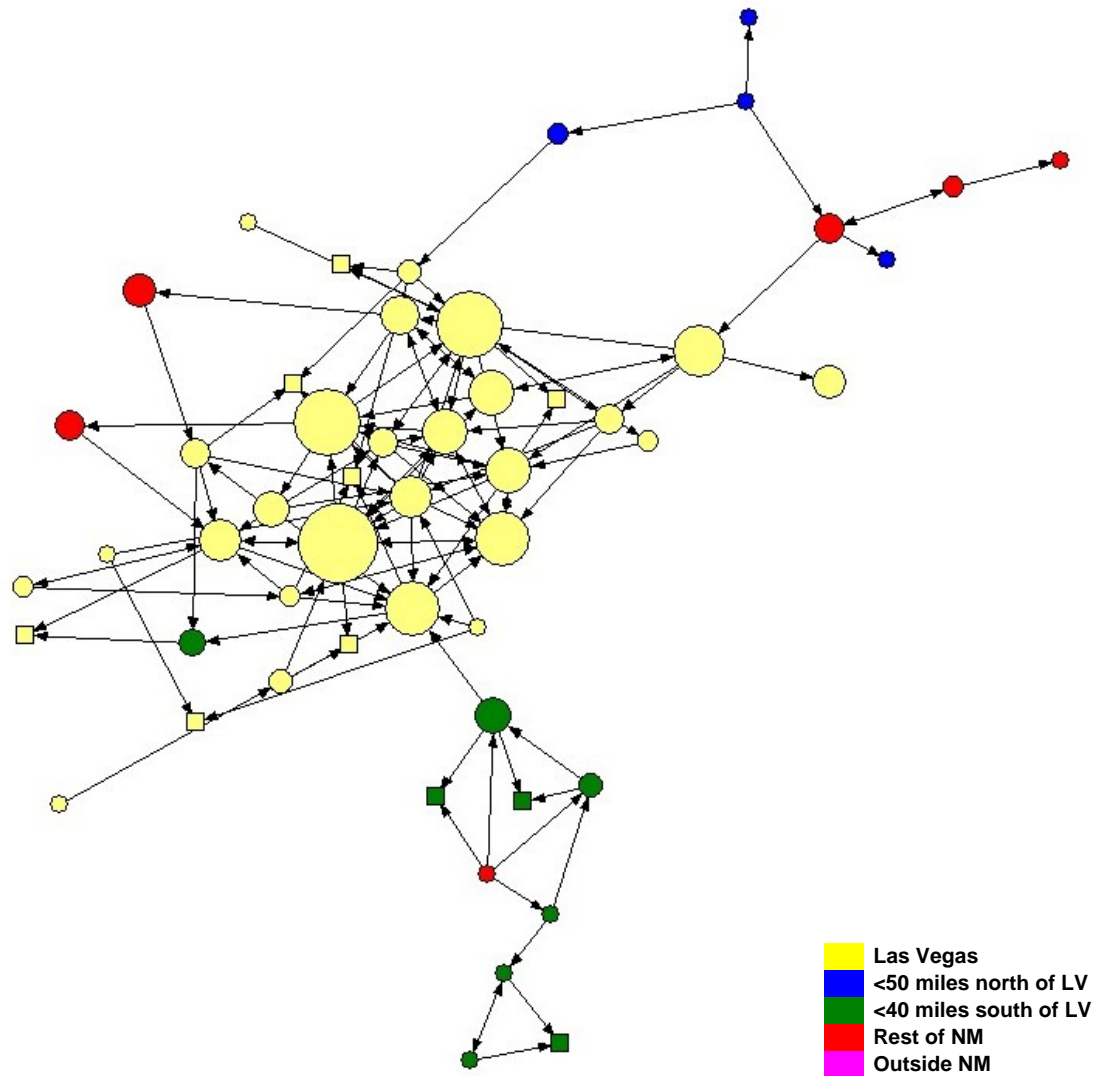
TABLE 2: RANKINGS OF INDIVIDUALS AND INSTITUTIONS BY SPHERE, GEOGRAPHY AND SELECTED MEASURES OF CENTRALITY

INDIVIDUAL / INSTITUTION	BETWEEN-NESS RANK	DEGREE RANK	SPHERE	GEOGRAPHY
Las Vegas Arts Council	1	3	Support	Las Vegas
Arts and Cultural District Steering Cmte	2	5	Devel & Tour	Las Vegas
MainStreet de Las Vegas	3	6	Support	Las Vegas
Artist	4	1	Creative	Las Vegas
New Mexico Highlands University	5	2	Support	Las Vegas
Las Vegas - San Miguel EDC	6	15	Devel & Tour	Las Vegas
Blue Barn Gallery	7	10	Commercial	Las Vegas
Tito's Gallery	8	7	Commercial	Las Vegas
Wardancer Designs and Gallery	9	4	Commercial	Las Vegas
Gallinas magazine	10	9	Commercial	Las Vegas
Artist	11	8	Creative	Las Vegas
Artist	12	11	Creative	Las Vegas
El Ancon Sculpture Park	13	16	Commercial	Ribera
United World College	14	32	Support	Las Vegas
Art Essentials Gallery	15	33	Commercial	Las Vegas
Taos Artisan Coop	16	34	Commercial	Taos
Rio Gallinas School	17	17	Support	Las Vegas
New Mexico MainStreet	18	35	Support	Santa Fe
Chamber of Commerce	19	18	Support	Las Vegas
North Central New Mexico EDC	20	19	Support	Santa Fe
Plaza Hotel	21	12	Devel & Tour	Las Vegas
Artist	22	20	Creative	Tecolote
Luna Community College	23	36	Support	Las Vegas
La Sala Pottery	24	21	Creative	Ribera
Artist	25	37	Creative	Las Vegas

Source: UNM-BBER, 2009.

Figure 2 is the same network with the colors changed to represent the geographic location of each node. In this map, yellow represents those individuals or institutions that are located within Las Vegas; blue indicates those located within 50 miles north of Las Vegas, and includes individuals or institutions in Mora, Rociada, El Pueblo, Guadalupita, and Pendaries; green symbolizes those located within 40 miles of Las Vegas to the south, including those in Ribera, Tecolote, Villanueva, San Augustin, and San Jose; red nodes are located elsewhere in New Mexico, including Albuquerque, Santa Fe, Taos, Tijeras, and Pecos; and pink represents those located outside the state, all five of which are not included in Figure 2 because they were pendants.

FIGURE 2: LAS VEGAS ARTS AND CULTURAL SOCIAL NETWORK BY GEOGRAPHY



Looking at the geographic location of the major players in the network (as shown in Figure 2 and Table 2), Las Vegas certainly is the center of the action; however, the surrounding region definitely contributes to the mix. BBER made great efforts to include the surrounding region in this study by recruiting two community volunteers who live outside of Las Vegas, in the Mora and Ribera areas. The individuals these volunteers spoke to (twelve, total), with a few exceptions, predominately identified individuals within their geographic area, rather than individuals located in Las Vegas proper. By the culmination of the surveys, the two regions did eventually connect to the core in Las Vegas, but the connections were weak. Forging stronger connections to the surrounding region could serve to bolster the entire region’s creative economy.

Participant Demographics

Table 3 summarizes the demographic data provided by the 51 individuals who were interviewed for this study and compares it to the demographics of San Miguel County as a whole. The purpose is to gauge the representativeness of the participants in the study with respect to the population of the county as a whole. Additionally, because the methodology was designed to solicit the leaders of the arts & cultural community to participate in the study, this analysis is more broadly suggestive of representativeness of these leaders of the community.

The table is divided according to gender, ethnicity, age, and time in area, respectively. The first columns show the demographic characteristics of the survey respondents; the next two columns show the corresponding information for the population of San Miguel County as a whole. Chi square measures the degree of difference of the proportions of the two.

Beginning with gender, 61 percent of respondents were female, higher than the female proportion of the county population. However, the Chi square value of 1.99 is well below the critical value of 3.84, indicating that the difference in participation is not very significant (i.e., one cannot be 95 percent sure that the difference is more than random).

Ethnicity and age of respondents, however, are significantly different from that of the population. While less than one quarter of the population of the county is non-Hispanic, fully 55 percent of those who participated in the study (and were identified as important to their work by other participants) were non-Hispanic. The Chi square value reveals the significance of the difference, as it far exceeds the critical value signifying the point of 95 percent confidence that the difference is non-random. Similarly, the age of the participants is highly unrepresentative of the age of community members.³ Specifically, the participants in the study are significantly older than the overall population. In the study, only 8 percent of the participants were between 20 and 39 years of age, whereas 44 percent were 60 years of age or older. Yet, in the total population, persons in the younger cohort substantially outnumber those of the older cohort.

At the bottom of the table are ranges of the time spent by participants in the study in the Las Vegas area. Unfortunately, comparable information for the county population is not available. However, it is generally acknowledged that the vast majority of the population has spent much of their lives in region, while fully one-third of the participants in the study are relatively new to the area.

As in any survey study, there is a possibility that the methodology used to identify survey participants is, itself, biased, such that the results indicate as much about the methodology as the actual population. In this case, we used a 'snowball' sample to identify participants – i.e., participants themselves define the

³ By design, this study did not include persons under 20 years of age. The age of the respondents is thus compared to similar cohorts of the population, from age 20 and older.

population to be surveyed. The advantage of this 'participant-driven' design is that it anticipates bias and makes it the subject of the study. In other words, the purpose of the study is to reveal how the community itself identifies its participants and leaders. Thus, while it is certainly true that the results may be an inaccurate reflection of the participation of the entire community, there is little doubt that the results are an accurate reflection of the self-identification of the leadership of the arts and cultural community.

TABLE 3: COMPARISON OF DEMOGRAPHIC CHARACTERISTICS OF SURVEY RESPONDENTS TO TOTAL POPULATION OF SAN MIGUEL COUNTY

	RESPONDENTS ¹		SAN MIGUEL COUNTY		EXPECTED	CHI SQ	D.F.
GENDER							
Female	31	61%	14,684	51%	26.0	0.98	
Male	20	39%	14,162	49%	25.0	1.01	
	51	100%	28,846	100%	51	1.99	1
						3.84	.95 critical
ETHNICITY							
Anglo	25	49%	5,483	19%	10	24.17	
Hispanic	23	45%	22,308	77%	39	6.85	
Other	3	6%	1,055	4%	2	0.69	
	51	100%	28,846	100%	51	31.71	3
						7.82	.95 critical
AGE²							
20-39	4	8%	7,032	34%	17	9.71	
40-59	24	48%	8,553	41%	20	0.64	
>59	22	44%	5,399	26%	13	6.49	
	50	100%	20,984	100%	50	16.84	3
						7.82	.95 critical
TIME IN AREA							
<10 years	17	33%					
10-19 years	7	14%					
>20 years	17	33%					
Lifetime	10	20%					
	51	100%					

¹ "Respondents" means those who were interviewed

² One respondent declined to identify age.

Source: Census Bureau, American Community Survey, 2005-2007 average; UNM-BBER, 2009.

Institutions and Organizations

The 51 members of the Las Vegas area arts and cultural community who participated in the survey were asked to identify organizations with which they were involved. The results of these references suggest a highly decentralization organizational structure to Las Vegas' arts and cultural community. The 51 participants made 134 references. Of these, 64 different organizations were mentioned only once; another 15 organizations were mentioned twice; only 6

organizations were mentioned three or four times, and only two (Las Vegas Arts Council and MainStreet de Las Vegas) were mentioned 10 or more times. This contrasts sharply with the results from Silver City, where only a few organizations dominated the listings.

As **Table 4** shows, the decentralized organizational structure in Las Vegas was reflected in all populations – Hispanic and Anglos, men and women, persons of all age groups and varying periods of time in Las Vegas are equally likely to reference participation in both far-flung, seldom mentioned organizations and in the principal organizations in the community (Las Vegas Arts Council, MainStreet de Las Vegas, and Luna Community College).

TABLE 4: DEMOGRAPHIC CHARACTERISTICS OF SURVEY RESPONDENTS IDENTIFIED WITH VARIOUS CULTURAL ORGANIZATIONS IN LAS VEGAS AREA

ORGANIZATION	TOTAL	ETHNICITY			TIME IN LAS VEGAS AREA			
		Hispanic	Anglo	Other	<10	10-19 years	20+	Lifetime
Las Vegas Arts Council	14	5	8	1	7	1	4	2
MainStreet de Las Vegas	10	4	4	2	4	1	3	2
Luna Community College	4	3	0	1	0	0	1	3
Casa de Cultura	3	2	1	0	1	0	2	0
Citizen's Committee for Historic Preservation	3	1	2	0	1	1	1	0
Gallinas Magazine	3	0	2	1	2	0	1	0
Las Vegas/San Miguel Chamber of Commerce	3	0	2	1	2	0	1	0
Old Town Commercial Club	3	2	1	0	0	1	1	1
15 organizations were referenced twice								
64 organizations were referenced once								
TOTAL	43	17	20	6	17	4	14	8

ORGANIZATION	TOTAL	ETHNICITY			TIME IN LAS VEGAS AREA			
		Hispanic	Anglo	Other	<10	10-19 years	20+	Lifetime
Las Vegas Arts Council	14	36%	57%	7%	50%	7%	29%	14%
MainStreet de Las Vegas	10	40%	40%	20%	40%	10%	30%	20%
Luna Community College	4	75%	0%	25%	0%	0%	25%	75%
Casa de Cultura	3	67%	33%	0%	33%	0%	67%	0%
Citizen's Committee for Historic Preservation	3	33%	67%	0%	33%	33%	33%	0%
Gallinas Magazine	3	0%	67%	33%	67%	0%	33%	0%
Las Vegas/San Miguel Chamber of Commerce	3	0%	67%	33%	67%	0%	33%	0%
Old Town Commercial Club	3	67%	33%	0%	0%	33%	33%	33%
15 organizations were referenced twice								
64 organizations were referenced once								
TOTAL	43	17	20	6	17	4	14	8

Source: UNM-BBER, 2009.

Perceived Advantages and Disadvantages

Table 5 shows the responses of the 51 community members who completed the survey to the question, “Please name in rank order three advantages and three disadvantages of working in the arts & cultural field in Silver City”. Along with the collaborative nature of the arts and culture community, those surveyed cited the location and ambiance of the area as providing the greatest advantage to working in Las Vegas. Most often cited was the area’s natural beauty.

Interestingly, as in other towns we have studied, there was disagreement over the extent of collaboration within the arts and culture community. It was cited as the greatest disadvantage and was in a weighted tie for greatest advantage. Disadvantages mainly concern Las Vegas' geographic isolation and the financial issues associated with working in a small community – lack of funding, small markets, and limited facilities.

TABLE 5: PERCEIVED ADVANTAGES AND DISADVANTAGES OF WORKING IN ARTS AND CULTURAL INDUSTRIES IN LAS VEGAS AREA

Advantages	1st	2nd	3rd
Location/Ambiance	17	7	7
Collaborative	8	6	9
Rich Cultural Traditions	10	7	1
Supportive	5	8	9
Room to Grow	4	4	4
Good Quality of Life	4	3	6
Small	5	3	2
Low Cost of Living	4	2	5
Variety of Art	1	4	1
Artistic Talent Level	1	2	2
Isolated	1	2	1
Artistic Freedom	1	2	1

Disadvantages	1st	2nd	3rd
Lack of Collaboration	8	8	8
Isolated	9	8	5
Economically Disadvantaged	8	8	4
Lack of Art Facilities and Venues	7	4	1
Small Town	5	6	3
Small Market	3	2	6
Lack of Arts Education	3	2	1
Fear of Change	2	3	2
Prejudiced	1	1	2
Lack of Funding	1	0	5

Source: UNM-BBER, 2009, based on community survey.

Directory of Arts and Cultural Activities

Table 6 is a summary of the directory BBER has assembled of individuals and institutions involved in artistic, creative, or cultural activities in the Las Vegas area. The summary of the entire directory is organized according to legal status and area of activity. This summary is not intended to be a comprehensive account of activities or organizations, but provides information that was used to structure much of the study.

The complete directory includes 309 entries, including addresses for 292 entries; phone numbers for 212; e-mail addresses for 106; funding sources for 36; budget

information for 24; and information on the management structure for 101 businesses and organizations.

In order to maintain consistency, we used the “universe” of arts and culture institutions and activities BBER established for our Albuquerque arts and culture study. These categories were formed along the lines of standard industrial classifications established by the North American Industry Classification System (NAICS). For example, we established the category of “artist” to include artists, musicians, actors, dancers and all others directly involved in creating visual or performing arts, literature and film.

The directory includes artists or institutions that have a basic internet presence. This does not necessarily mean a web page specifically, but it means that at some point, the artist or institution is mentioned in some capacity on the internet. This could mean an actual artist’s website, or it could mean a mention in an arts council’s newsletter. Initial research began with basic internet searches of natural gateways into a community’s arts and culture activities. For example chambers of commerce or art association websites. Over time this produced a kind of “snowball effect” whereby one internet link would lead to another and so on to build our arts and culture directory. The directory also includes artists and institutions that may not have a web presence but have been referred to us by individuals within the community as important to local arts and culture. While internet research formed the majority of the directory, we sought input from the community on arts and culture activities.

We caution that the directory is not comprehensive. We did not want to systematically bias out certain art fields or institutions, but we certainly did not expect to account for absolutely everything. Our goal was a thorough examination of a community’s arts and culture activities for the purposes of our own understanding. The directory was the foundation for our social network analysis.

TABLE 6: ARTS AND CULTURAL ORGANIZATIONS IN LAS VEGAS AND NEIGHBORING COMMUNITIES, BY ACTIVITY AND LEGAL STATUS

	INDIVIDUAL	PRIVATE FOR-PROFIT	PRIVATE NON-PROFIT	PUBLIC	TOTAL
Artists ¹	86	1	5		92
Art event ²			17		17
Retail ³		38			38
Art gallery		22		1	23
Education			6	29	35
Accomodations		8			8
Arts advocacy			9		9
Cultural preservation			13		13
Restaurant		12			12
Performance space		2	2	1	5
Media ⁴	2	7	1		10
Outdoor recreation			1	16	17
Architecture		2			2
Technology	1	3	2		6
Library/musuem			1	2	3
Government ⁵				2	2
Sports		1		2	3
Other	13	1			14
TOTAL	102	97	57	53	309

1 Artists include all media, dance, fiber arts, jewelry making, musicians, painters, photographers, potters, sculptors, writers, and makers of nichos, retablos and santeros.

2 Describes annual or continuous art showings and/or performance series.

3 Describes book stores, music stores, art supply stores, or any place that sells or displays local art, but cannot be described as a gallery.

4 Includes any local newspapers, magazines, websites, blogs, radio, and tv stations that cater specifically to deseminating local news or information.

5 Includes local and regional government agencies that support arts and culture activities.

Source: UNM-BBER, 2009

ECONOMIC MARKETS

Arts and Cultural Businesses

Table 7, on the following page, provides data on the number of establishments, employees, and sales of arts and culture-related businesses (with employees) in San Miguel County for the years 1990, 2000, and 2007.⁴ **Figure 3** shows the total number of A&C establishments and revenues (in constant 2008 dollars) for the years 1989 through 2006. **Figure 4** again shows revenues in constant dollars, but with the average number of employees in A&C business, for the period 1989-2006. The source of the information is Dun & Bradstreet.

Most significantly, these figures show a very significant decline in revenues during the period 2001-2006. Although there is no evidence to document this, it is not unreasonable to assume that this trend is associated with the tragic events of September 11, 2001, which affected travel patterns and public investment, if not the cultural environment of the country.⁵

A careful examination of the figures reveals the response of businesses to the crisis. **Figure 3** shows that, following a lag of about two years, the decline in revenues was matched by A&C business failures, with the number of establishments eventually declining from 162 to 132 over the five year period. **Figure 4** shows that the more immediate response to falling revenues was for businesses to reduce their payroll by cutting the number of employees. A somewhat more optimistic indication is that the average number of employees among establishments that remained open quickly stabilized and indeed has increased. One interpretation of these patterns is that the post-9/11 decline in revenues was devastating to some of the weak – perhaps newer – businesses, but that businesses that remained open are more viable and have weathered the storm.

Returning to **Table 7**, we see that these dynamics have, with only a few exceptions, affected most sectors of the creative economy in San Miguel County. The largest sector, by far, is higher education,⁶ which accounts for about one-third of both employment and revenues. Apart from education, there are several substantial sectors, including religious organizations, publishers, specialty retailers (galleries, books, recreational industries, musical instructions and so on), craft manufacturers, antique merchants, and broadcasters. Of these, only publishers have seen an increase in revenues over the five year period.

⁴ The categories in Table 7 generally follow those that BBER used in our study of Albuquerque arts and cultural industries. We are very inclusive in developing these categories – think of them as creative industries, rather than arts & culture in a more narrow sense.

⁵ Very similar patterns are evident in Silver City, NM. Until better information is available, it is very difficult to determine whether this pattern is part of a national trend, or instead is specific to the southwest region or perhaps small towns.

⁶ Higher education figures are estimates of only activities associated with arts and humanities. These estimates are based on a careful survey of teaching credit hours by department among area colleges and universities.

TABLE 7: BUSINESSES, EMPLOYMENT AND REVENUES OF ARTS & CULTURE RELATED BUSINESSES IN SAN MIGUEL COUNTY, 1990, 2000 AND 2006.

	1990			2000			2007		
	Businesses	Employees	Revenues	Businesses	Employees	Revenues	Businesses	Employees	Revenues
Craft Manufacturing	10	37	2,550,509	11	28	2,145,951	12	36	1,674,302
Retailers (books, musical instr)	16	44	3,391,430	19	51	3,640,138	19	37	2,025,693
Antiques	6	11	957,718	14	33	3,018,361	13	38	1,894,856
Publishers	3	24	1,595,040	2	30	1,432,599	3	31	2,417,270
Software	1	2	274,693	3	5	597,646	3	6	550,347
Motion Picture and Video Industries	3	11	1,447,123	1	7	400,098	4	10	503,620
Radio and Television Broadcasting	3	34	1,792,672	2	14	450,110	4	27	1,003,709
Libraries	2	8	272,880	2	9	270,066	3	12	237,272
Architects	4	6	349,242	7	23	1,497,865	3	3	171,958
Design	5	14	985,566	8	13	1,365,222	6	8	368,836
Photography	3	12	776,786	5	8	550,134	2	3	147,971
Art Instruction	0	-	-	1	1	54,763	0	-	-
Higher Education -- Arts & Humanities	2	97	6,524,865	2	184	17,428,911	1	183	11,136,109
Performing Arts Companies	1	1	54,543	1	1	53,138	3	7	257,521
Independent Artists, Writers & Performers	2	2	124,411	4	5	384,094	3	3	163,027
Museums, Historical Sites	1	1	55,532	0	-	-	1	2	103,839
Recreation Industries	5	17	1,429,954	4	14	2,130,895	10	23	2,089,825
Religious Organizations	25	145	6,900,611	27	90	3,667,769	31	71	2,528,690
Grantmaking and Giving Services	1	4	520,549	2	9	1,525,622	0	-	-
Social Advocacy Organizations	6	18	1,263,720	11	79	4,009,103	11	47	994,882
TOTAL	99	488	31,267,845	126	604	44,622,484	132	547	28,269,727
Share of San Miguel TOTAL	13.2%	7.8%	5.9%	12.4%	6.7%	6.2%	11.6%	5.9%	5.4%

Source: Dun & Bradstreet; summary by UNM-BBER, 2009.

FIGURE 3: ESTABLISHMENTS AND REVENUES IN CREATIVE INDUSTRIES IN SAN MIGUEL COUNTY, 1989 - 2006

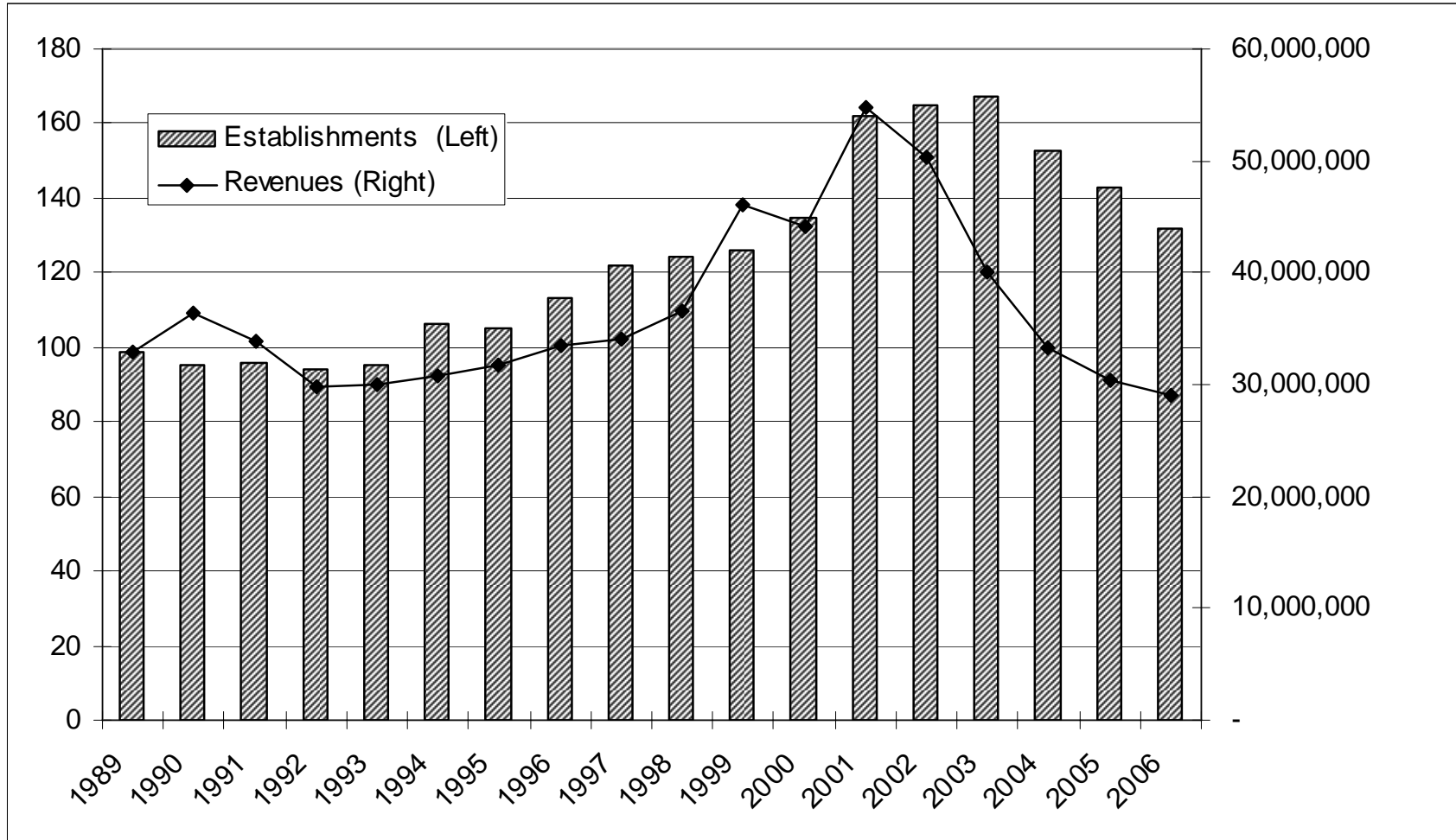
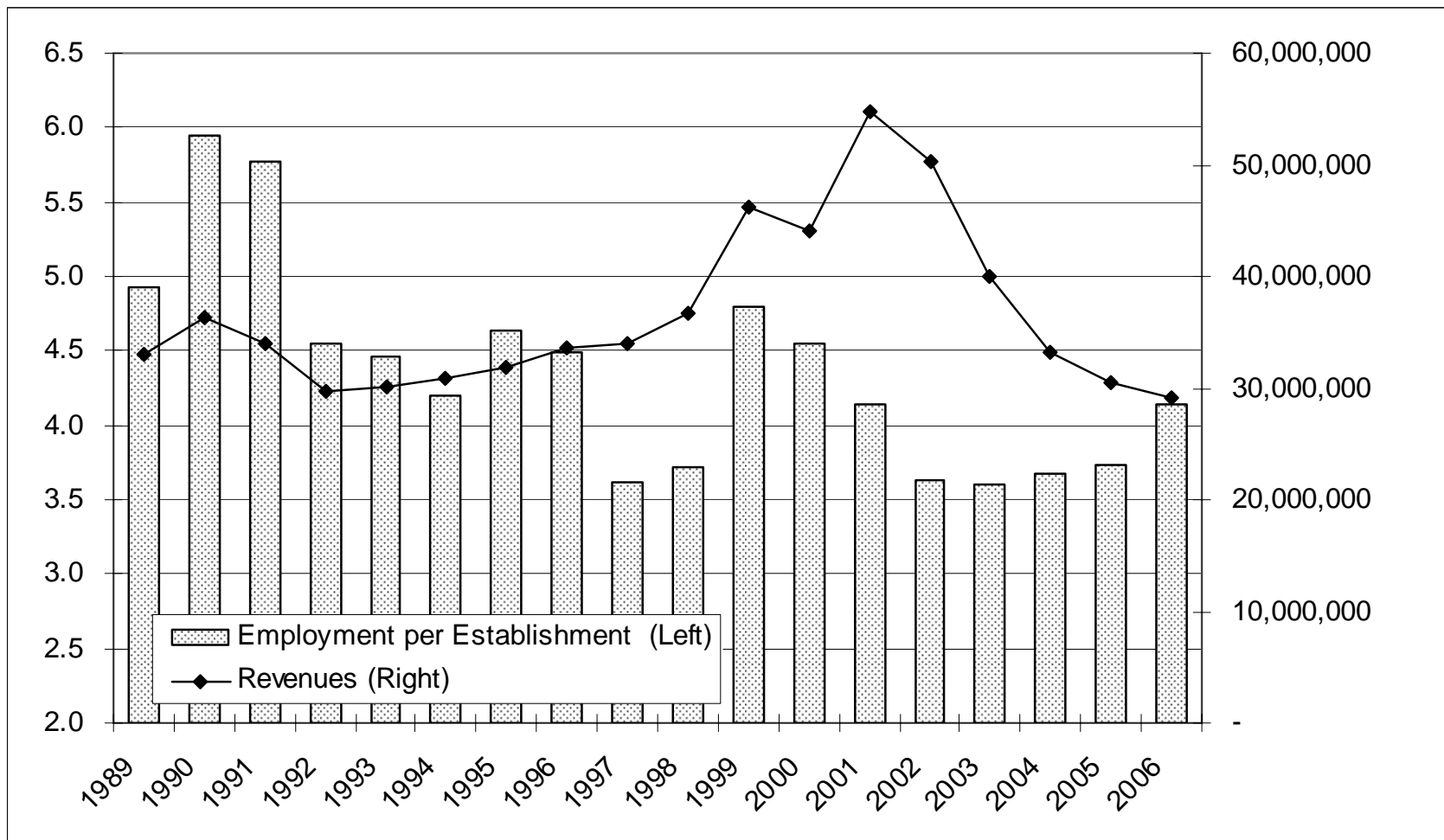


FIGURE 4: EMPLOYMENT PER ESTABLISHMENT AND REVENUES IN CREATIVE INDUSTRIES IN SAN MIGUEL COUNTY, 1989 - 2006



Economic Impact of Tourism

Table 8 and **Figure 5** display lodger's tax revenues for Las Vegas and San Miguel County for fiscal years 2000 through 2008. Overall, the figures show that following a drop after 9/11, lodger's taxes in Las Vegas were relatively flat and declining relative to the state total, until FY2007 (July 2006 through June 2007) when growth resumed in both absolute and relative terms.

Because Las Vegas is located along I-25, these figures must be carefully interpreted, as lodger's taxes are a reflection of both highway traffic (and Las Vegas' attraction to these travelers) and travelers who make Las Vegas a destination. To access these patterns, we analyze Las Vegas' performance relative to that of Raton, 100 miles to the north along I-25.

Figure 6 shows Las Vegas' lodger's tax revenues, per point of the tax rate, as a percentage of that of Raton.⁷ In general, revenues in Las Vegas are somewhat lower than in Raton, possibly because of geographical advantages to highway travelers offered by Raton (i.e., it is more of a midway point between major destinations such as Albuquerque/Santa Fe and Denver). Further, the chart shows that changes in travel patterns following 9/11 had a significantly greater impact on Las Vegas, but in the past two years the town's share of revenues has begun to recover. Although speculative, one may suggest that Las Vegas gathers a relatively greater share of revenues from destination travelers, particularly from Albuquerque and visitors to Santa Fe, and this segment of the market for accommodations are more responsive to underlying changes in the travel environment.

According to a 2006 estimate by the Travel Industry Association (TIA), based on the association's Travel Economic Impact Model, travelers spend \$52 million per year in San Miguel County, generating 0.6 jobs, \$8,500 in wages and salaries, and \$840 thousand in local tax revenues. Although county-specific estimates are highly imprecise, this model places San Miguel County 21st among 33 counties in New Mexico in terms of expenditures per capita.

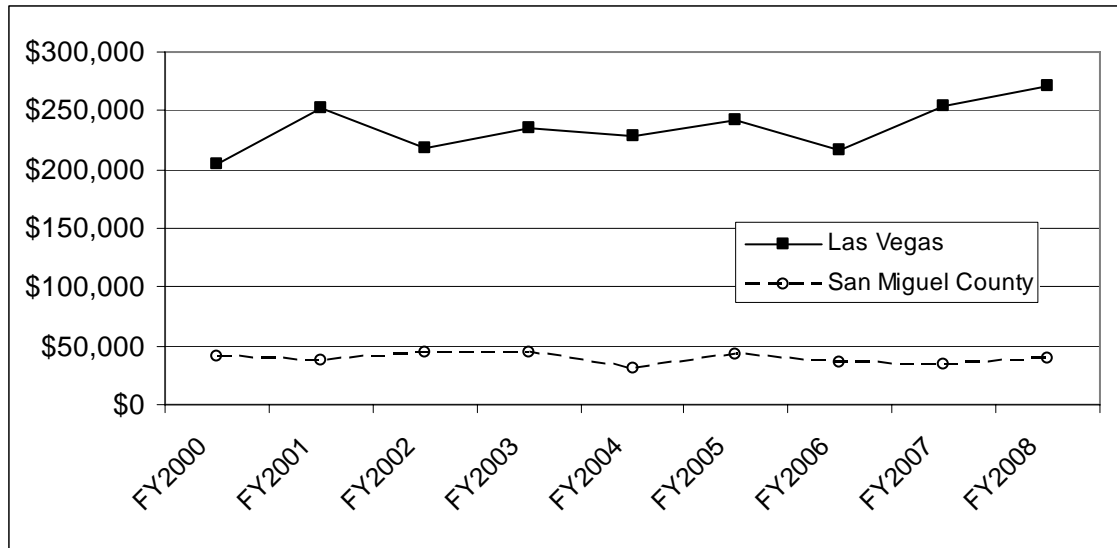
⁷ Las Vegas' lodger's tax rate is 4 percent, and Raton's rate is 5 percent. This figure removes this difference by comparing revenues for a single point of the tax rate.

TABLE 8: LODGER’S TAX REVENUES FOR LAS VEGAS AND SAN MIGUEL COUNTY, FISCAL YEARS 2000-2008. (All Values \$2008)

	Las Vegas	San Miguel County
FY2000	204,324	40,675
FY2001	252,809	37,628
FY2002	217,536	43,974
FY2003	234,630	43,531
FY2004	228,834	30,223
FY2005	242,161	42,602
FY2006	215,776	36,341
FY2007	254,007	33,476
FY2008	271,158	38,485

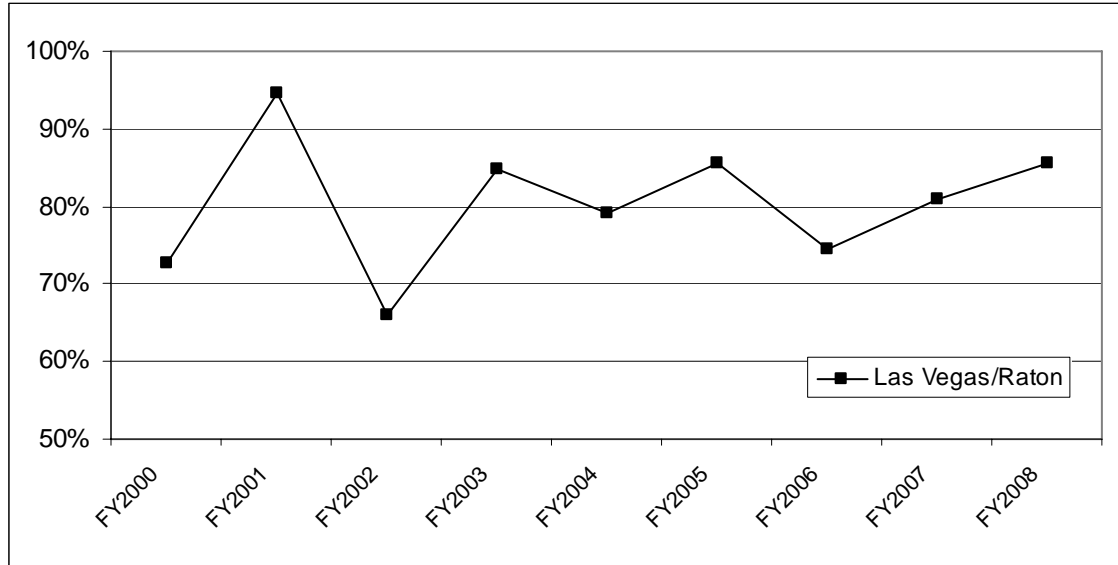
Source: New Mexico Department of Finance and Administration, Local Government Division.
 Note: Lodger’s tax rate for Las Vegas is 5 percent; rate for San Miguel County was 3 percent in FY 2000 and 2001, and 5 percent beginning in 2002.

FIGURE 5: LODGER’S TAX REVENUES FOR LAS VEGAS AND SAN MIGUEL COUNTY, FISCAL YEARS 2000-2008. (All Values \$2008)



Source: New Mexico Department of Finance and Administration, Local Government Division.
 Note: Lodger’s Tax rate for Las Vegas is 4 percent for all years; rate for San Miguel County was 3 percent for FY 2000 and 2001, and was increased to 5 percent beginning 2002.

FIGURE 6: LAS VEGAS LODGER’S TAX REVENUES PER TAX POINT AS A PERCENTAGE OF RATON LODGER’S TAX REVENUES, FISCAL YEARS 2000-2008



Source: New Mexico Department of Finance and Administration, Local Government Division. Calculations by UNM-BBER, 2009.

Note: Lodger’s Tax rate for Las Vegas is 4 percent for all years; rate for San Miguel County was 3 percent for FY 2000 and 2001, and was increased to 5 percent beginning 2002.

Table 9 displays visitor center statistics from the Las Vegas/San Miguel Chamber of Commerce from July 2008 through April 2009.

TABLE 9: LAS VEGAS VISITOR’S CENTER STATISTICS

	July-December 08	January-April 09
Visitor Center Walk-ins	3,201	1,357
Chamber Walk-ins	234	73
CHAMBER STATISTICS		
Las Vegas/ San Miguel Chamber of Commerce Requests:		
	1,248	
Reader Response Cards filled out	514	299
Tourist Requests by Phone	90	62
Tourist Requests by Mail	16	16
Tourist Requests by E-mail	13	9
Relocation Requests by Phone/Mail/E-mail	9	4
Conference Packets Mailed	216	0

Source: Las Vegas/San Miguel Chamber of Commerce, 2009.

Markets for Arts and Cultural Events

The data in **Table 10** on the following page was collected by BBER through interviews with various organizations, and consists of some actual counts as well as estimates by personnel. The Rough Rider Motorcycle Rally is one of the most significant draws to the area with approximately 12 to 15,000 attendees in 2008.⁸ Fort Union National Monument is also a significant draw with 9,171 visitors last year.⁹ The events sponsored by the Las Vegas Arts Council were the largest source of arts and culture attendance in the area with at least 1,300 attendees.¹⁰ This is not counting the People's Faire whose attendance numbers are also significant.

⁸ Source: Rough Riders Motorcycle Rally lead organizer, March, 2009

⁹ Source: Fort Union National Monument Director, March, 2009

¹⁰ Source: MainStreet Arts and Culture District Application-Las Vegas, 2007; Summary by UNM-BBER, 2009

TABLE 10: MARKETS FOR CULTURAL INSTITUTIONS AND EVENTS IN THE LAS VEGAS AREA

ORGANIZATION/EVENT	ATTENDANCE / PARTICIPATION (Est.)	FREQUENCY OF EVENT	PREDOMINANT GEOGRAPHICAL SOURCE OF ATTENDEES
Las Vegas Arts Council			
Las Vegas Celebrates the Arts Studio Tour <i>participants</i>	30 artists	annual	NM; Las Vegas Area
<i>attendees</i>	approx. 500 attendees		
Altered Alters Regional Art Exhibition <i>participants</i>	40-45 artists	annual	NM; Las Vegas Area
<i>attendees</i>	125 opening attendees; 100 show attendees		
Regional High School Art Competition <i>participants</i>	approx. 100 works exhibited; 10 volunteers	annual	Northern NM; Las Vegas Area
<i>attendees</i>	100-200 reception attendees; approx. 600 show attendees		
Adult Drawing Class	24 participants	continuous	Las Vegas Area
Chicken River Writers	4 participants	continuous	Las Vegas Area
Colores de Corazon Fiber Arts Show		continuous	NM; Las Vegas Area
Tinwork Class		continuous	Las Vegas Area
Tuesday Sketch Group	2 participants	continuous	Las Vegas Area
Wednesday Watercolor Group		continuous	Las Vegas Area
Writing as Therapy		continuous	Las Vegas Area
Children's Summer Art Class	13 participants	annual	Las Vegas Area
Faces of Women	52 artists	annual	NM; Las Vegas Area
Jack Glatzer Show	50-60 attendees	annual	NM; Las Vegas Area
Las Peliculas Film Festival		annual	Northern NM; Las Vegas Area
Outreach Summer Concert Series	approx. 100 attendees	annual	Las Vegas Area
People's Faire	65 vendors, 7 performing groups	annual	Northern NM; Las Vegas Area
Missoula Children's Theater	70 participants	annual	Northern NM; Las Vegas Area
Rough Rider Motorcycle Rally	12-15,000 attendees	annual	NM; Las Vegas Area; TX, CO, NV, AZ
MainStreet de Las Vegas			
Second Saturday Artwalk	100-150 attendees	continuous	Las Vegas area
Fort Union National Monument	91,71 visitors ²	continuous	None predominant
Las Vegas Museum	3,192 visitors ²	continuous	1670 ²
Historic Accommodations in A&C District			
El Fidel Hotel ¹	10% occupancy rate for "overnight" rooms ¹	continuous	NM
	Jan09- 48%; Feb09- 43%; Mar09- 45%; Apr09- 41%		
Inn on the Santa Fe Trail	occupancy	continuous	Mostly NM; summer months from TX
Plaza Hotel	65% to 72% occupancy rate	continuous	summer months
Las Vegas/San Miguel Chamber of Commerce	city-wide	continuous	None predominant

¹ El Fidel is mostly an extended stay hotel. 10 of their 17 rooms are rented out as apartments.² 2008

APPENDIX

FIGURE A-1: LAS VEGAS ARTS AND CULTURAL COMMUNITY SURVEY

University of New Mexico

Verbal Informed Consent for Surveys

A Study of Arts and Cultural Districts in New Mexico MainStreet Communities

The University of New Mexico’s Bureau of Business and Economic Research (BBER) is conducting a research study with the support of the New Mexico MainStreet program and in collaboration with members of your community. The purpose of the study is to inventory the artistic, cultural, and creative assets in New Mexico. You are being asked to participate in this study because you have been identified as a person involved in art, culture, creative, or cultural tourism activities in your community.

Your participation will involve answering several questions. The survey should take no more than 30 minutes to complete. Your involvement in the study is voluntary, and you may choose not to participate. You can also refuse to answer any of the questions at any time. The survey includes questions such as “What are three advantages of working in the arts & cultural field in your community?” and asks you to provide names of individuals involved in the arts and cultural community in your town whom BBER may ask, in turn, to complete a survey for this study.

There are no risks associated with your participation in this study. All information you provide will be kept confidential. With your permission, BBER may use direct quotes from your survey in the final report or in presentations, but without including any identifying information.

The findings from this project will provide information on the human and institutional artistic, creative, and cultural assets in your community.

Do you have any questions for me about this research project, the survey, or your participation in the survey before I ask you for your consent to participate? [Allow time for questions and answers.]

Should any questions about this research project arise, you can call Dr. Jeffrey Mitchell at (505) 277-5993. If you have questions regarding your legal rights as a research subject, you may call the UNM Human Research Protections Office at (505) 277-0067.

Do you consent to participate in this survey? _____ Yes _____ No [Check the appropriate response.]

Researcher’s Name

IRB#: 08-550
Version: 11/11/08

OFFICIAL USE ONLY			
APPROVED	01/19/09	EXPIRES	01/18/10
The University of New Mexico Main Campus IRB			



Bureau of Business
& Economic Research

LAS VEGAS ARTS AND CULTURAL COMMUNITY SURVEY

Informed Consent

Before beginning the survey, the community volunteer (“Researcher”) must read the Verbal Informed Consent for Surveys script (attached at the front) to the interviewee and check the appropriate response at the bottom of the script page. (If the interviewee does not give consent, do not proceed with the survey.) Then sign your name in the “Researcher’s Name” area on the bottom of the script pages and leave one copy with the interviewee.

Inform the interviewee that the survey should take about 15-20 minutes.

Background:

1. Your name: _____
2. How long have you lived in/around Las Vegas? _____
If not for entire life, where did you live before? _____
3. Describe your involvement in arts, cultural, and creative activities. Please be specific about the type of creative work that you are engaged in (e.g., landscape painting, historical fiction).
4. Choosing from the following list, in which **one** role do you exert the greatest influence on the arts and cultural community in Las Vegas (*circle*). *Check other roles as appropriate.*

 artist preservationist teacher/mentor supporter (\$) student

 enthusiast volunteer organizer promoter business
5. Please identify arts & cultural or community organizations with which you are currently involved.

INVENTORY AND ASSESSMENT OF LAS VEGAS ARTS AND CULTURAL ASSETS

6. Please name in rank order up to five people or institutions with whom your interactions are most important in your arts and cultural activities. These may include peers, mentors, students, artists, fans, collaborators, organizers, financial supporters, galleries, and so on.

1. NAME _____ INSTITUTION _____
RELATIONSHIP _____ FREQUENCY OF CONTACT 1 2 3 4 5
TOWN OF RESIDENCE _____
CONTACT INFORMATION _____

2. NAME _____ INSTITUTION _____
RELATIONSHIP _____ FREQUENCY OF CONTACT 1 2 3 4 5
TOWN OF RESIDENCE _____
CONTACT INFORMATION _____

3. NAME _____ INSTITUTION _____
RELATIONSHIP _____ FREQUENCY OF CONTACT 1 2 3 4 5
TOWN OF RESIDENCE _____
CONTACT INFORMATION _____

4. NAME _____ INSTITUTION _____
RELATIONSHIP _____ FREQUENCY OF CONTACT 1 2 3 4 5
TOWN OF RESIDENCE _____
CONTACT INFORMATION _____

5. NAME _____ INSTITUTION _____
RELATIONSHIP _____ FREQUENCY OF CONTACT 1 2 3 4 5
TOWN OF RESIDENCE _____
CONTACT INFORMATION _____

INVENTORY AND ASSESSMENT OF LAS VEGAS ARTS AND CULTURAL ASSETS

Contact

1...no contact in years 2...about once a year 3...about once a month 4...about once a week
5...daily

7. Please name **in rank order** three ADVANTAGES and three DISADVANTAGES of working in the arts & cultural field in Las Vegas.

ADVANTAGES

1 _____

2 _____

3 _____

DISADVANTAGES

1 _____

2 _____

3 _____

Demographics:

8. Gender: Female Male

9. Age: Under 20 y/o 20-39 y/o 40-59 y/o Over 60 y/o

10. With which race and ethnicity do you identify yourself? (Check all that apply)

Hispanic Anglo Native American

African American Other _____

NOTES:

*Please leave the participant with the "Survey of the Arts & Cultural Community in Las Vegas" participant handout sheet and the **un-signed** copy of the informed consent form.*

*Please return the survey and the **signed** copy of the informed consent in the postage-paid business reply envelope.*

Please tell the participant about the online bulletin board at <http://gilacommunity.net> (scroll down to "Las Vegas Arts and Cultural District" section) or give them our address to mail comments:

UNM-BBER, Attn Molly Bleecker
MSC 06-3510; Albuquerque NM 87131