

The Economic Importance of Arts and Cultural Attractions in the Louisville Area



**Arts & Cultural
Attractions
Council**

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Arts & Cultural Attractions Council

About this study

This file contains the findings from our 2007 study of arts and cultural attractions in Louisville. This updates our 2001 study, which is available online at: http://monitor.louisville.edu/arts/Arts_Report.pdf

The study has two major components – a rollup of activity by individual groups in the Louisville area, and a comparison of activity in Louisville to that in a set of peer metropolitan areas.

See the next slide for a table of contents. The topics shown are hyperlinked to the page containing the relevant findings. You can page down between slides, or jump back to the table of contents by clicking on the home button in the bottom right hand corner.

This study was commissioned by the Arts and Cultural Attractions Council, an industry network of Greater Louisville Inc. Special thanks to Stephen Klein and the executive committee, as well as Lauren Hardwick at GLI. Of course, the study would not have been feasible without the participation of all the local arts and cultural groups, who generously provided internal data, help with interpretation, and assisted in obtaining national comparison data. We greatly appreciate your help. And, as always, we want to acknowledge the generous and ongoing research support from National City, which provides us the resources to deepen and enhance important economic development projects like this.



CONTENTS

EXECUTIVE SUMMARY

I. SIZE OF ARTS AND CULTURAL ATTRactions INDUSTRY IN LOUISVILLE

Scope and definitions

Attendance

Employment

Volunteers

Wages, salaries, benefits

Revenues by type

Expenditures by type

Taxes paid

Growth since 2000

II. HOW LOUISVILLE COMPARES TO OTHER MARKETS

Performing Arts – Symphony Orchestra

Performing Arts – Theatre

Performing Arts – Opera

Performing Arts – Ballet

Museums, Zoos, Historic Sites - Summary

Museums – Art

Museums – Science and natural history

Museums – Children’s

Museums – Sports

Zoos and Aquariums

Arboretums and Nature Centers

Historic Sites and Houses

Financial data on tax-exempt organizations

Private art galleries

APPENDICES

A. List of participating organizations

B. Letter and data template used for study

C. Comparison Markets – peer MSAs, component
counties, population





EXECUTIVE SUMMARY

The arts and other cultural attractions are integral to the quality of daily life for residents and visitors to the greater Louisville area. We enjoy music, theatre, dance, exhibits, paintings, zoos, and other cultural amenities at all stages of life. Indeed, we enjoy these treasures so much and so often that we sometimes take them for granted. The impact of cultural attractions is not only social and spiritual, but also economic in nature. The human and financial resources deployed to offer the daily menu of cultural offerings in Louisville constitute an industry, one we investigate in this report.

There is also a more subtle economic development dimension to arts and cultural activities in our market. Community assets, like museums, opera, theatres, ballet, zoos, historic homes, and orchestras, attract talented people to move here. Potential residents, comparing Louisville to other large urban markets in the midwest and south, size up both the array of our cultural offerings and their perceived quality. Major corporations, in particular, have long understood the importance of the performing arts in attracting top management talent to Louisville. Except for education, probably no other (manmade) piece of the quality of life quilt is as important as art and cultural assets. In fact, we find that much of attendance and associated revenues for ACA groups comes from delivering programs to school children.

Conceived by executives of major cultural organizations in the area, the study has three primary objectives. First, we seek to carefully document the size and scope of the arts and cultural attraction industry in Louisville. Second, we seek to document how Louisville compares to other similarly sized markets in the various cultural dimensions. Third, we want to learn how the ‘industry’ has changed since our last study, in 2001.

To this end, we have surveyed 50 top arts and cultural organizations in the Louisville area. They have generously provided attendance, budget, and other economic data, but also many hours of help with interpretation of the information. We have also acquired and organized data from membership associations that track cultural activity in markets across the country. Among the most important and interesting research findings described in this report are:

EXECUTIVE SUMMARY (cont)

- ✓ Louisville area Arts and Cultural Attractions (ACA) organizations are collectively supporting an attendance of at least 4.9 million per year, over four contacts per metro area resident. Museums alone account for 1.5 million in attendance, more than the combined annual attendance at the Riverbats and UL basketball and football games.
- ✓ Further we estimate that about 23 percent of attendees and visitors to ACA organizations reside outside the Louisville metropolitan area. In that regard, the ACA groups are an important component of Louisville's tourism industry. The largest source of export sales - those to visitors - appears to be from the museums (especially the Louisville Slugger Museum, the Kentucky Derby Museum, the Louisville Science Center, and the Speed Art Museum), performing arts (especially the PNC Broadway Series productions, the Kentucky Center for the Arts, Derby Dinner Playhouse, Actors Theatre, and the Louisville Ballet), and the Zoo.
- ✓ The ACA organizations have collective annual revenues of around \$109 million. Over forty percent of the revenues are generated from ticket sales and concessions. Government grants and private donations account for about one-fourth each. Revenues from other sources, including contracts to deliver programs to school groups, have grown in importance and now account for about eight percent of revenues. We estimate that ACA activities generate at least \$5.6 million in tax receipts annually for state and local governments.
- ✓ These organizations collectively employ about 1,820 persons, and have a combined annual labor cost (including contract labor) of \$52 million. Part-time employment rose, while full-time employment fell slightly since our 2001 study. Annual earnings per job of ACA employees average about \$23,200, well below the average for all jobs in the Louisville MSA. This partly reflects the heavy reliance on part-time workers by ACA groups.
- ✓ Attendance overall was up about 14 percent since our 2001 study, with a majority of the *net* growth due to new organizations. Paid attendance overall was up modestly, about 2 percent, due to paid admissions at the new attractions. Overall revenues and expenditures were up 31 percent, with 19 percentage points due to growth at organizations included in our 2001 study, and the rest due to new organizations. Employment overall was flat, with payroll expenses percent.



EXECUTIVE SUMMARY (cont)

- ✓ While there has been overall growth in the ACA economic activity during the current decade, the growth among organizations and sectors varies widely. For example, an important museum saw a decline in attendance, which was more than offset by activity at a new museum – the Frazier International History Museum. Moreover, overall museum revenues grew dramatically, from \$19 million in 2000 to \$34 million in 2006.
- ✓ Attendance, both paid and unpaid, was down by about ten percent overall for the performing arts organizations. The Kentucky Center posted strong growth in attendance, but not enough to offset declines for the Louisville Orchestra, the Louisville Ballet, Actors Theatre, and the Kentucky Opera. Despite a drop in attendance, the groups managed to boost revenues, expenses, and payrolls, thanks largely to a 35 percent increase in private contributions.
- ✓ Louisville's nature attractions saw an increase in overall attendance of 27 percent, with growth in paid attendance of 9 percent this decade. This sector is dominated by Louisville Zoo, the Falls of Ohio State Park Interpretive Center, and Bernheim Arboretum and Research Forest. Employment was unchanged from 2000, though payroll expenses rose nearly 49 percent, due largely to strong growth at the Zoo (which saw a 16 percent growth in earned revenue).
- ✓ The number of visitors to Louisville's historic and heritage sites was essentially unchanged from 2000, as was the overall number of employees in this sector. However, strong growth in grant activity boosted revenues and expenditures by 35 percent overall, led primarily by growth at the Filson Club, Riverside, The Farnsley-Moreman Landing, and Locust Grove.
- ✓ Relative to fourteen other metropolitan areas in its size class, Louisville ranks very high in sports museum and theatre activity. In most other categories, including art museums, science museums, orchestras, opera, ballet and zoos, Louisville's ranking falls about where one would expect based upon population size.

Scope and Definitions

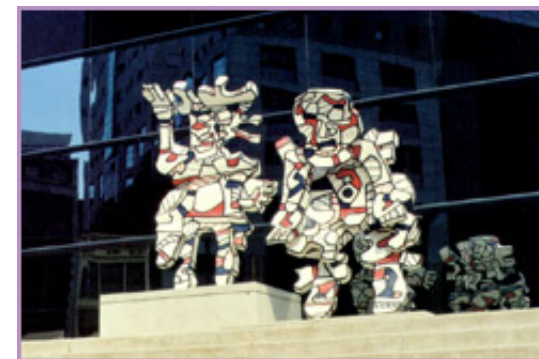
Broadly defined, arts and cultural attractions include any organized activity whose purpose is to enlighten, educate, and entertain local residents and/or visitors. Taken literally, this definition includes such diverse activities as movie theatres, night clubs, bible study groups, and bowling allies. To keep this research project manageable, the Arts and Cultural Attractions (ACA) Research Committee directed us to focus on the following general categories:

Museums: visual art, science, children's, sports,

Performing Arts: orchestra, theatre, ballet, opera

Heritage Sites: historic homes, heritage research facilities

Nature Attractions: zoos, arboretums, gardens, Ohio River



We have excluded, for example, schools and religious organizations, libraries, city and state parks, sports, rock concerts, and seasonal events. This has the disadvantage of missing some major attractions, like Thunder Over Louisville, Kentucky Kingdom, the Derby, University of Louisville sports, the Louisville Riverbats, and the St. James Art Fair. However, the limited scope does allow us to focus more sharply on the activities of most interest to the sponsors. A listing of the participating organizations is provided as Appendix A. A copy of the survey instrument is included as Appendix B.

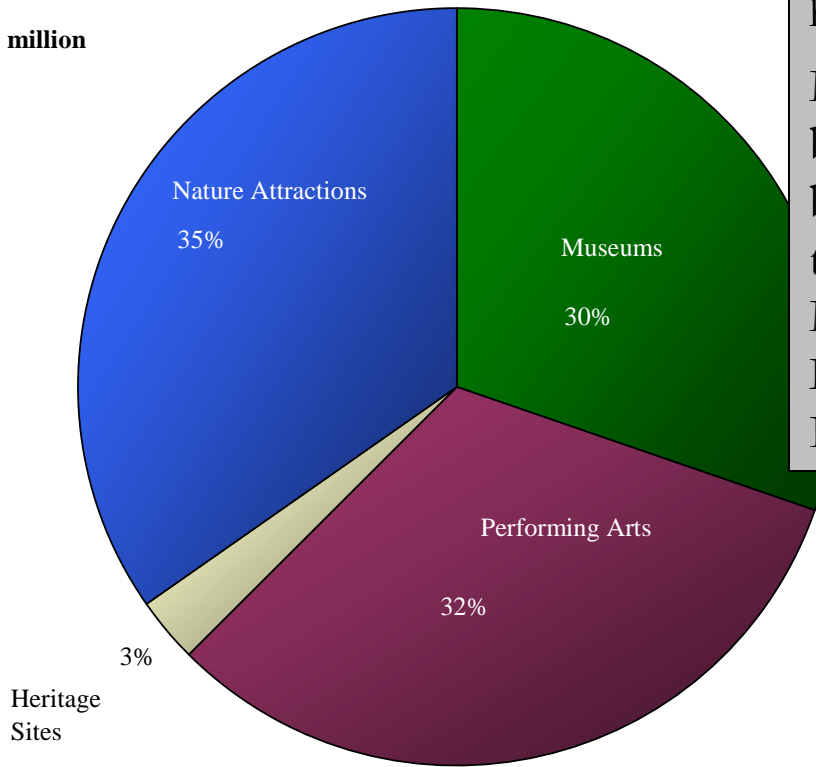
For similar reasons, we also had to restrict the types of information collected. Our efforts focused on obtaining good data on attendance, performances, revenues, expenditures, employees, payrolls, and physical assets. We did not attempt to examine marketing or management issues.

The reference time periods for the estimates vary, depending upon the reporting cycles of the organizations. We asked all organizations for their latest accurate information. In some cases, the data refer to the 2006-07 fiscal year; others refer to 2005-06, and a few reported calendar year 2006 data. In all cases, we have used annual totals. In a few cases, where organizations did not respond, we made estimates of activity based on good data from other similar attractions.



Attendance at the ACA Organizations

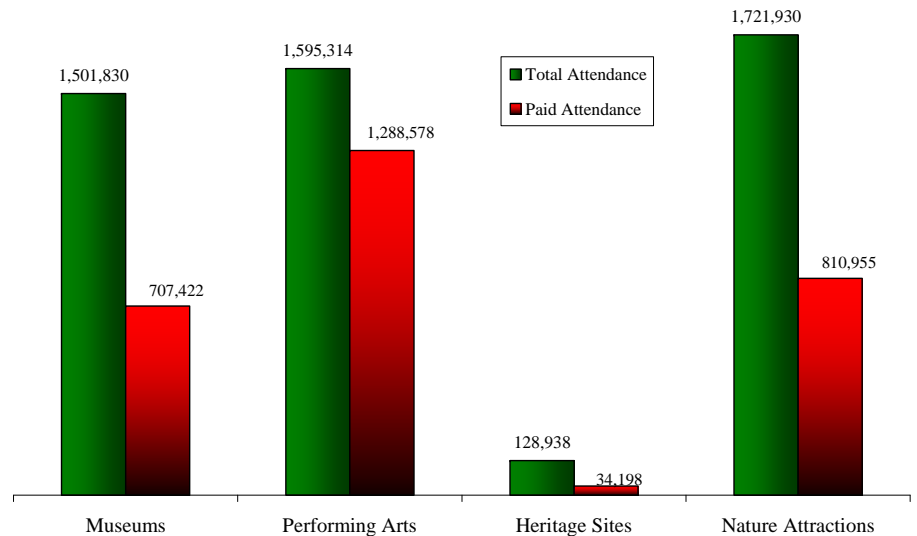
Total = 4.9 million



Total attendance is about 4.9 million annually, of which about 2.8 million were paid admissions.

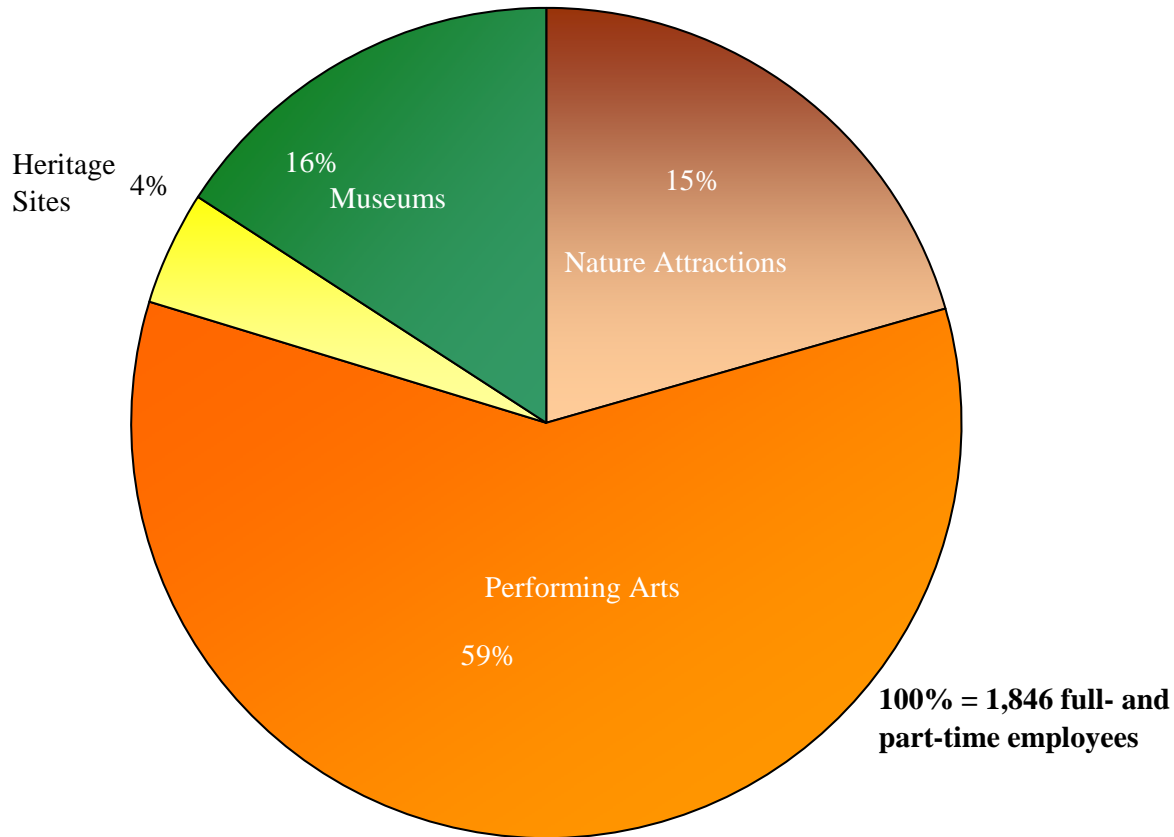
Most attendees lived in the Louisville MSA, but about 1 million were not residents. The biggest attractors of nonresident visitors are the Louisville Zoo, the Kentucky Derby Museum, the Louisville Slugger Museum, the Louisville Science Center, and the Frazier International History Museum.

Paid v/s Total Attendance



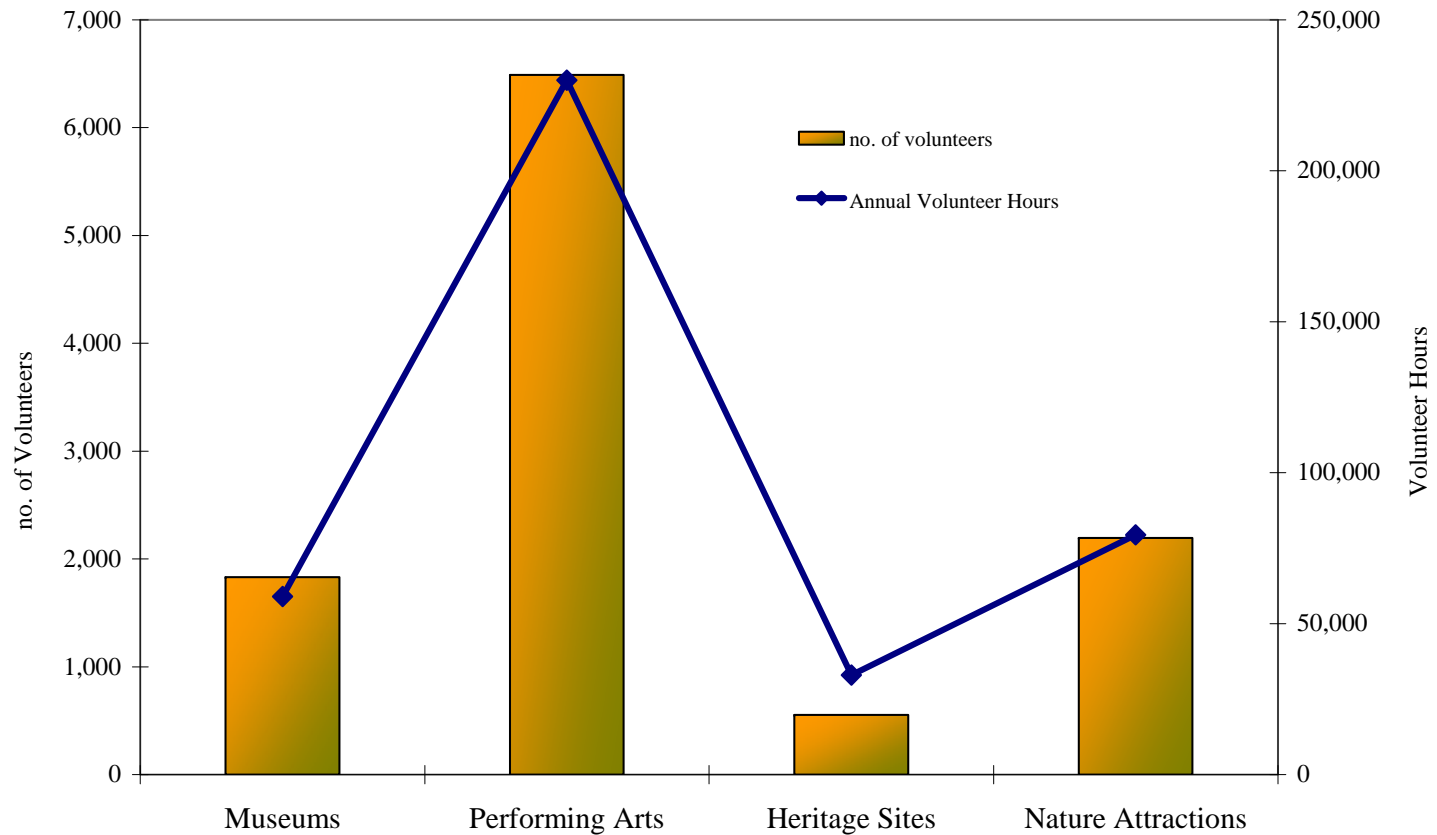
Collectively the ACA organizations employed 1,846 people, almost equally split between full-time and part-time workers. The performing arts groups are by far the largest employers, with 1,092 artists, production, and administrative people.

Employment by ACA Organizations



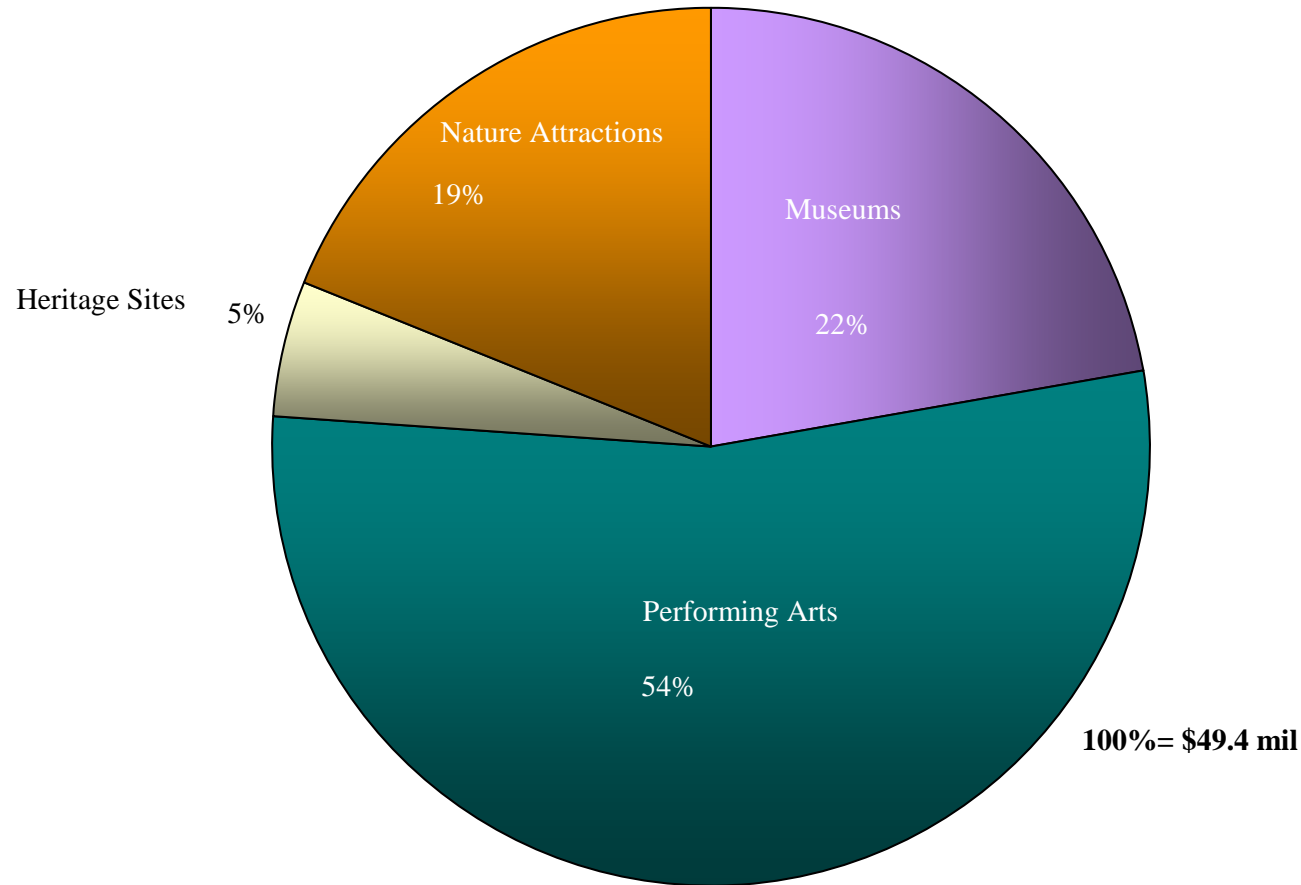
Collectively the ACA organizations relied on over 11,000 volunteers, who contributed over 400,000 hours of service. Performing arts groups were the major beneficiaries.

Number of Volunteers and Annual Volunteer Hours for ACA Groups



Collectively the ACA groups had an annual payroll of \$41.0 in wages and salaries, plus \$8.4 million in fringe benefits. They had an additional \$3.8 million in contract labor costs.

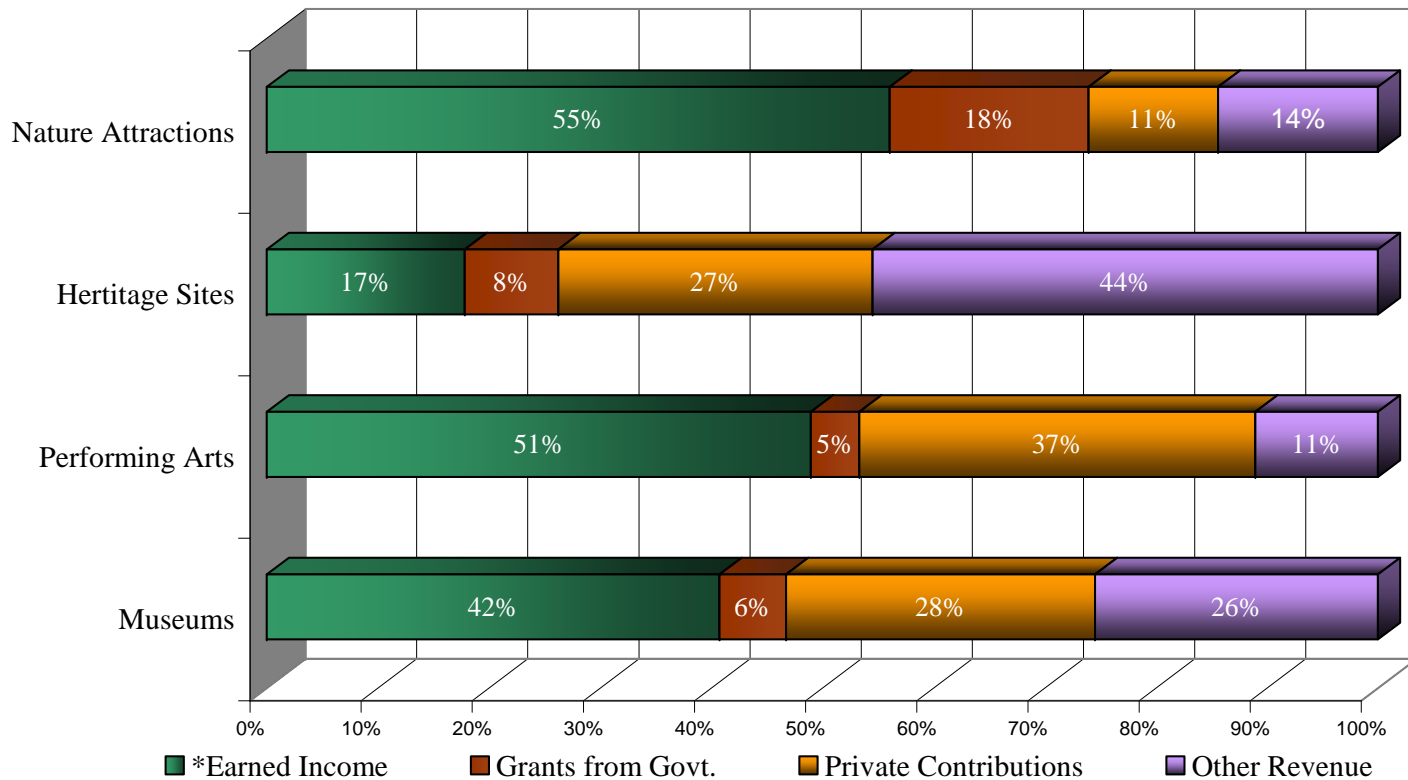
Total Payroll and Benefits of the ACA Organizations



Collectively, the ACA groups reported gross income of \$109 million. Over half (\$56 million) of that was received by performing arts groups, followed by museums (\$34 million), nature attractions (\$14 million), and historic sites (\$5 million).

Nature attractions and performing arts groups received over half their income from ticket sales and concessions, with museums earning on average 42 of their income. Performing arts are the most dependent on private contributions.

Sources of Income of ACA Organizations



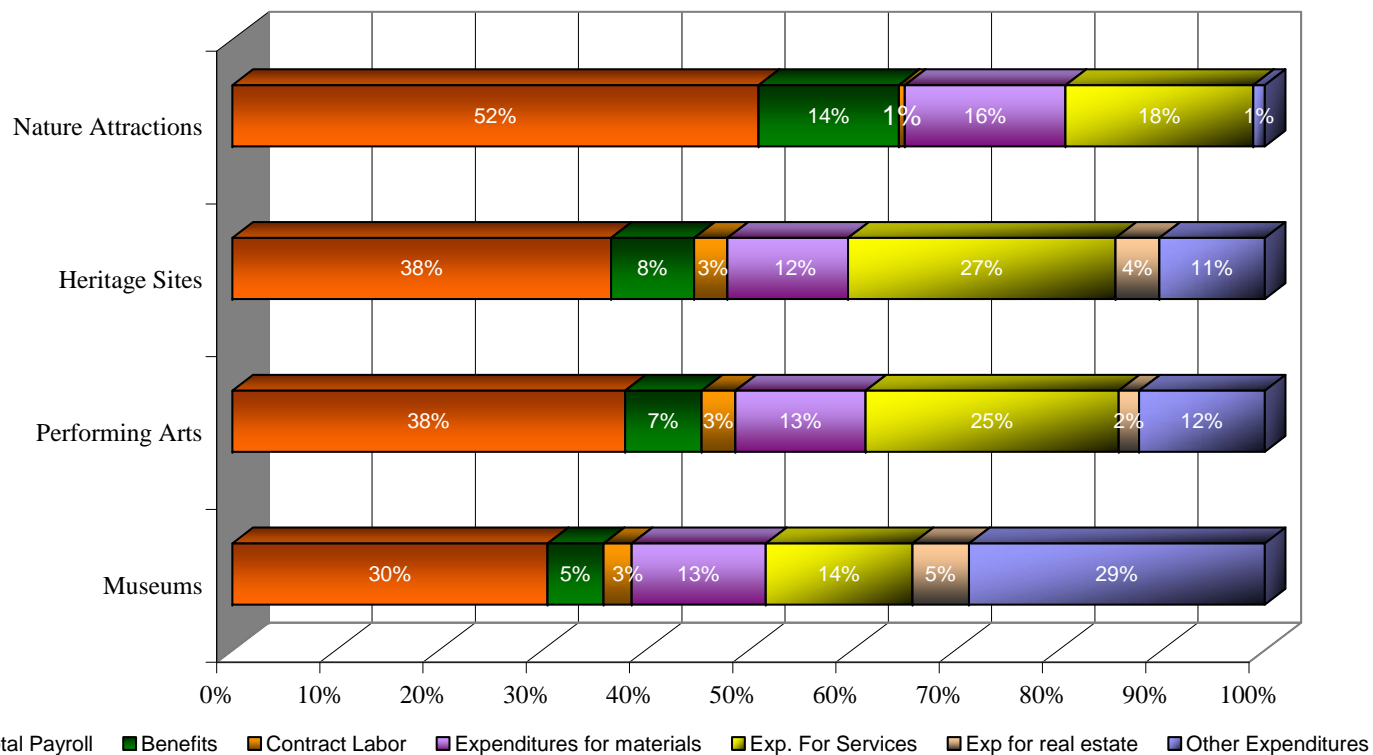
* Earned Income = Revenues from Admission + revenues from concessions + other revenues from sales



Collectively, the ACA groups reported spending \$108 million. Over half (\$58 million) of that was spent by performing arts groups, followed by museums (\$31 million), nature attractions (\$14 million), and historic sites (\$5 million).

Labor costs accounted two-thirds of expenditures for nature attractions, and between 38 and 49 percent in other categories. Performing arts had the most expenditures on materials and services, about \$22 million.

Expenditures by the ACA Organizations



We have used the payroll and sales data to estimate the taxes paid by ACA groups to local and state governments. The groups pay about \$800,000 annually in occupational taxes to Louisville-Jefferson County, Jefferson County Schools, and TARC. They are also associated with about \$4.8 million annually in income and sales taxes to Kentucky and Indiana state governments.

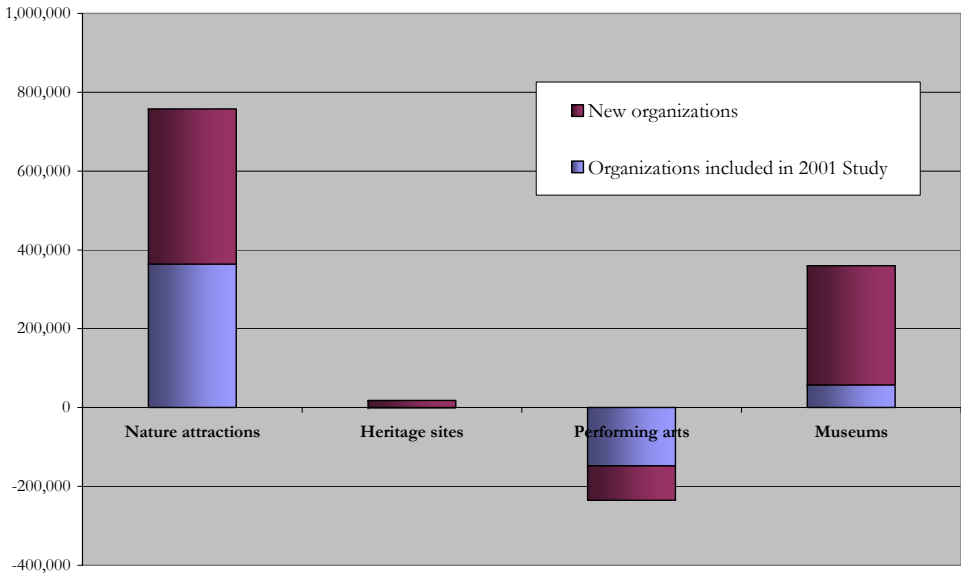
Estimated Annual Tax Base and Tax Revenues

Linked to Louisville Arts and Cultural Attractions

Wages and salaries, contract labor, paid by ACA organizations	
in downtown Louisville	\$26,472,585
rest of Jefferson County	\$13,098,866
southern Indiana	\$3,030,749
other Kentucky counties	\$1,387,945
Total	\$43,990,145
Concessions, gift shop sales, etc	\$21,746,177
Local occupational taxes	
Louisville-Jefferson County Government	\$494,643
Jefferson County School System	\$237,429
Transit Authority of River City	\$79,143
State income and sales taxes	
Kentucky state government	\$4,375,283
Indiana state government	\$448,699
Total Occupational, Income, and Sales Taxes	\$5,635,197



Growth in Attendance, 2000 to 2006
paid and unpaid



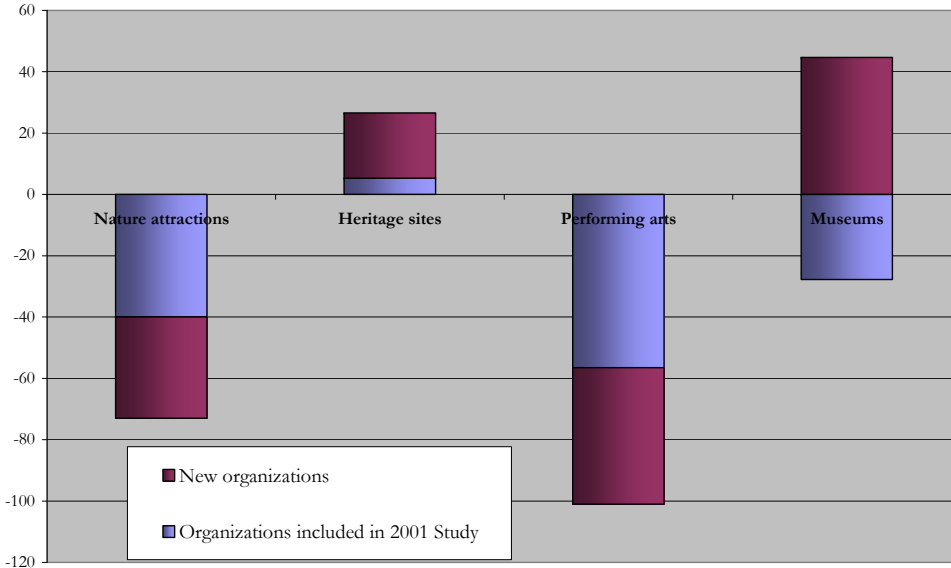
We have added several new organizations since our 2001 study, including the Frazier International History Museum. Their activity boosted overall attendance above that in our last study. Nature attractions saw the greatest growth in attendance, both paid and total. Performing arts groups saw a decline of about 10 percent in attendance, both paid and total.

For comparison, the population of the Louisville MSA grew by 4.9 percent between 2000 and 2006.

Growth in Paid Attendance, 2000 to 2006



Growth in Employees, 2000 to 2006
full-time equivalents

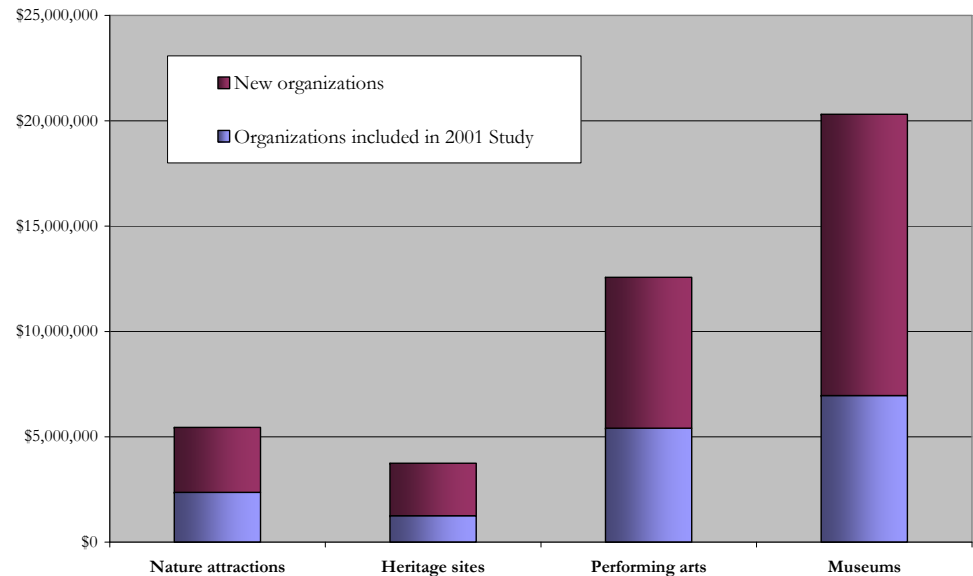


Overall employment was about the same as in our 2001 study, with contributions from new groups just offsetting a decline by existing organizations. For comparison, the Louisville MSA had a net loss of 0.5% in total jobs between 2000 and 2006.

Total expenses grew by 31.7% overall, with the greatest growth in museums and performing arts organizations.

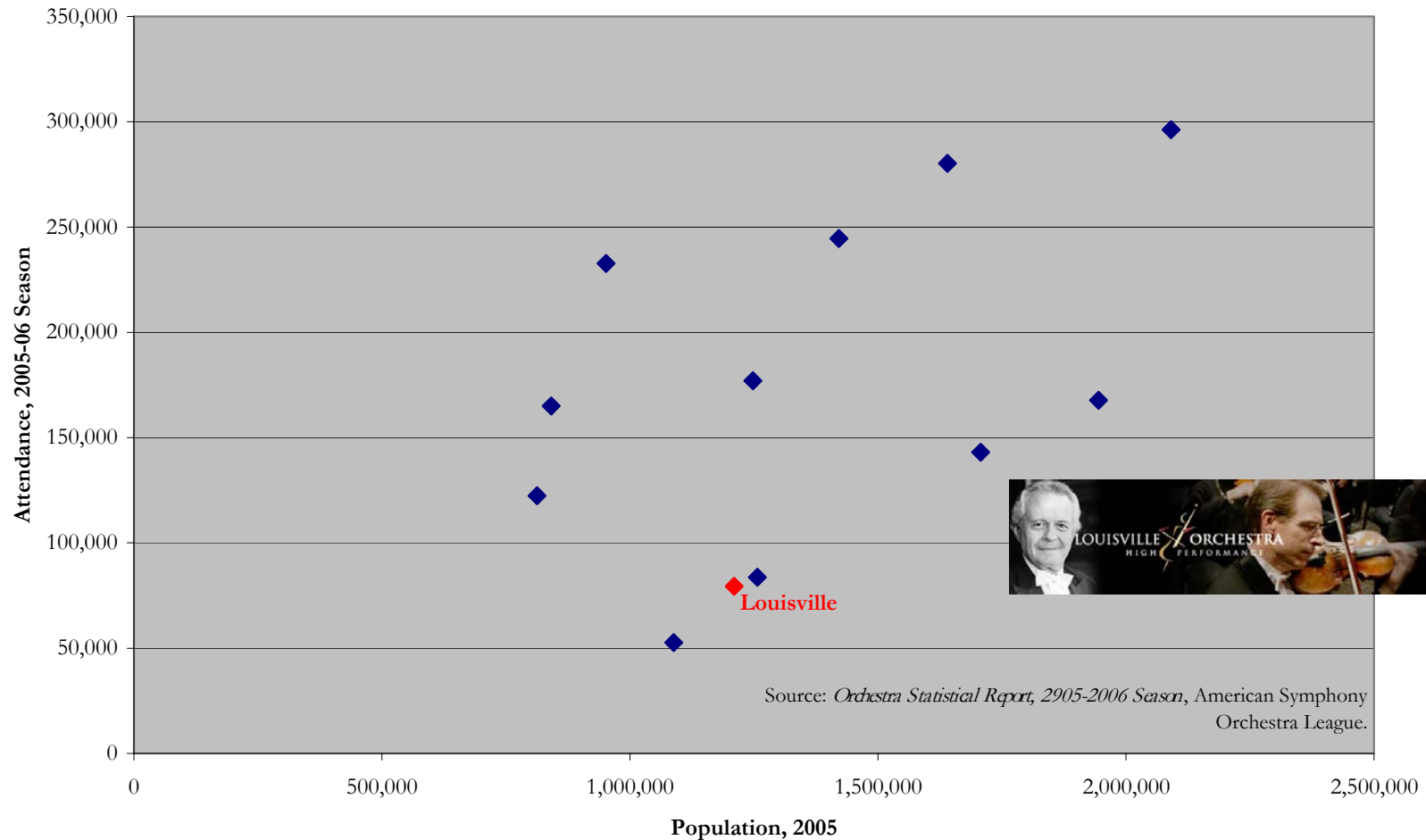
For comparison, there was a 20.4% growth in per capita income of Louisville MSA residents between 2000 and 2006; and a 14.9% in the national price level (inflation) for personal consumption expenditures.

Growth in Total Expenditures, 2000 to 2006



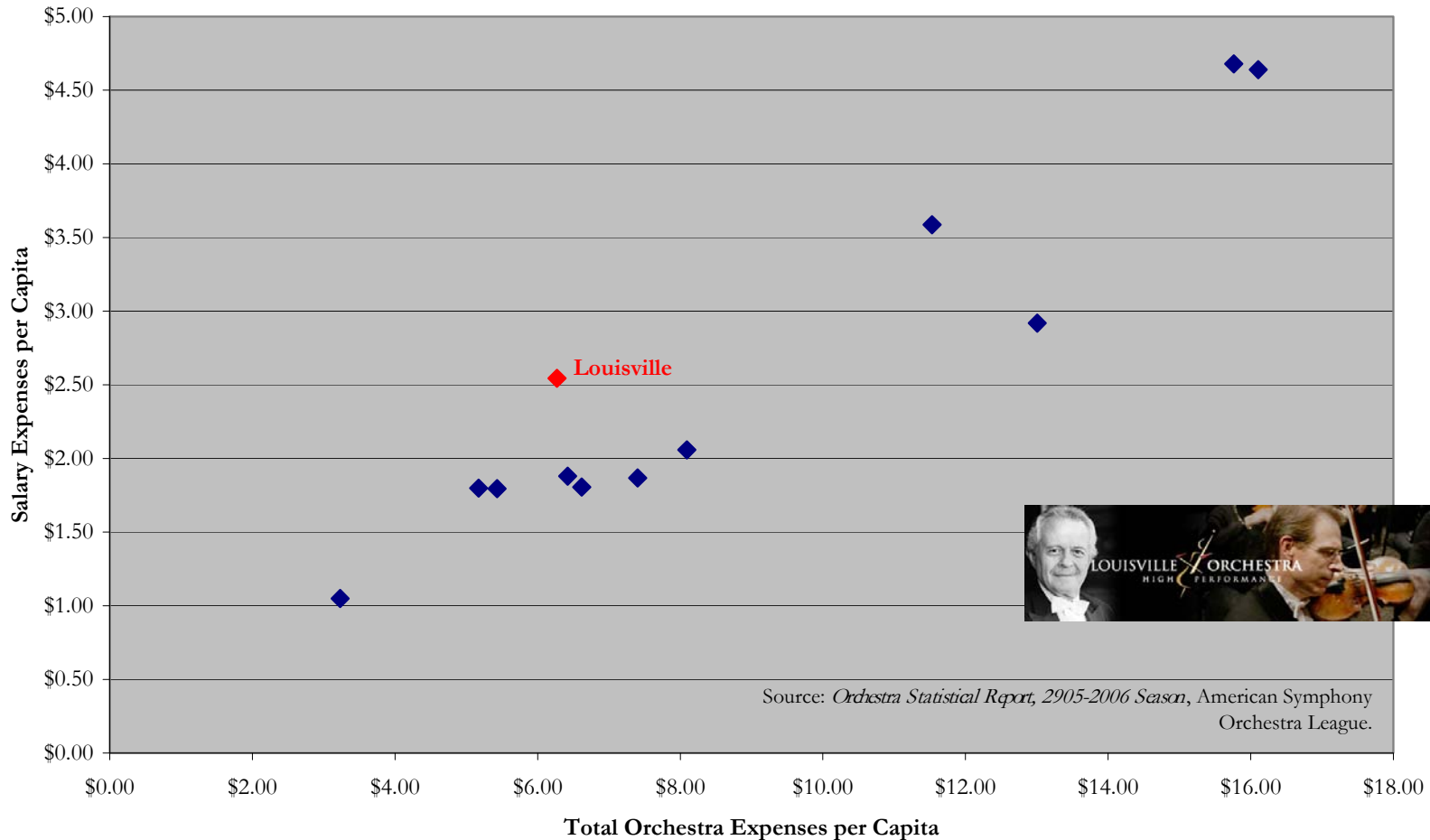
Data on orchestra activity is available for most of Louisville's competitor markets. The American Symphony League produces statistical reports for twelve of the markets. The Louisville Orchestra ranks 11th in attendance, with 66 attendees per 1,000 residents. It ranks 9th in number of musicians, 8th in annual operating expenses, and 7th in salaries.

**Metropolitan Population and Symphony Orchestra Attendance
Louisville and Eleven Peer MSAs**



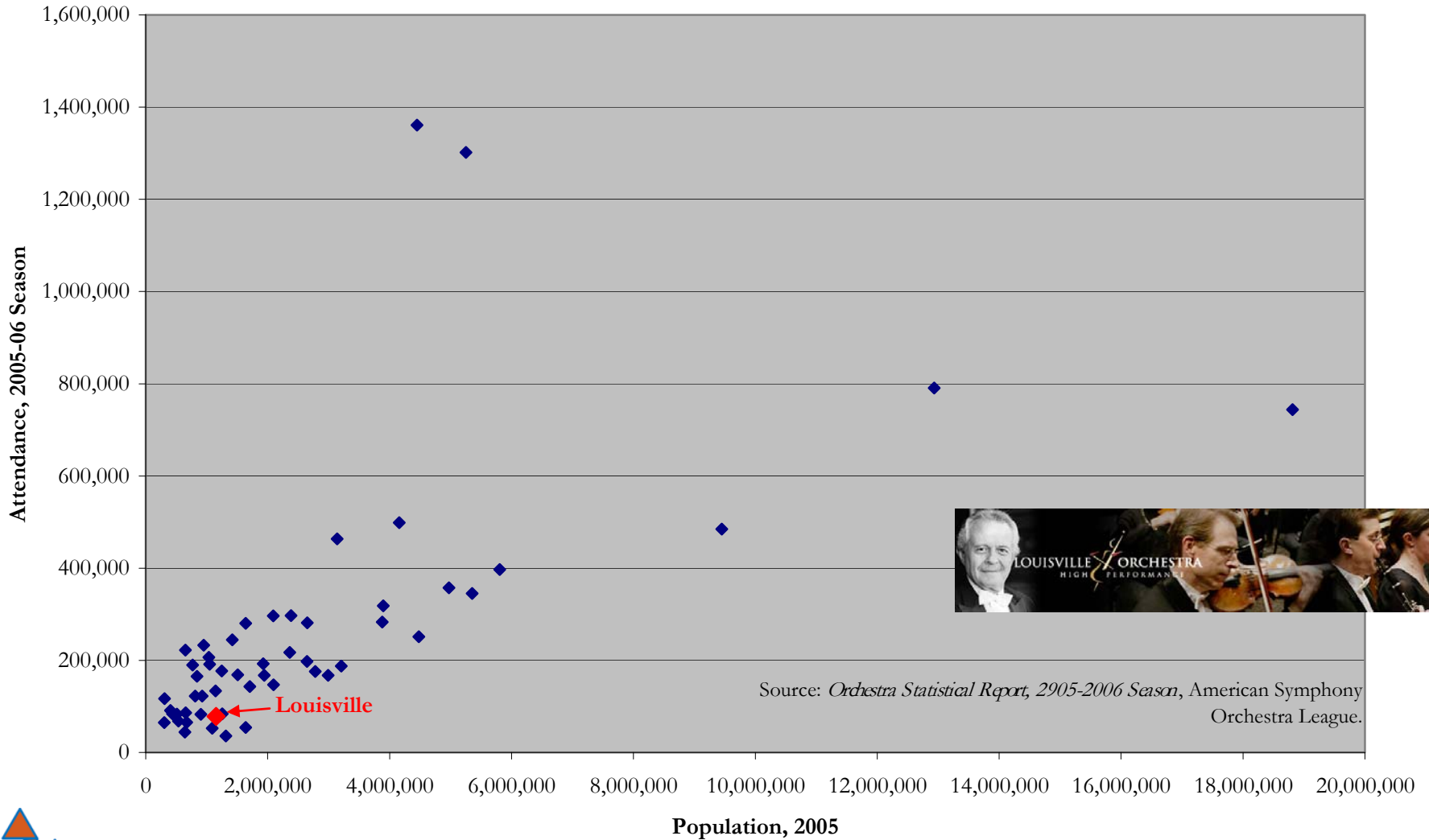
On a per capita basis, the Louisville Orchestra ranks 11th in attendance, 9th in total orchestra expenses, and 5th in orchestra salaries.

Total and Salary Expenses per Capita Symphony Orchestras in Louisville and Eleven Peer MSAs



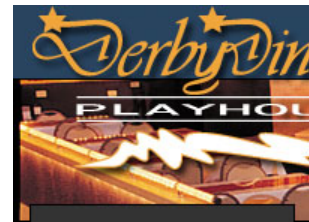
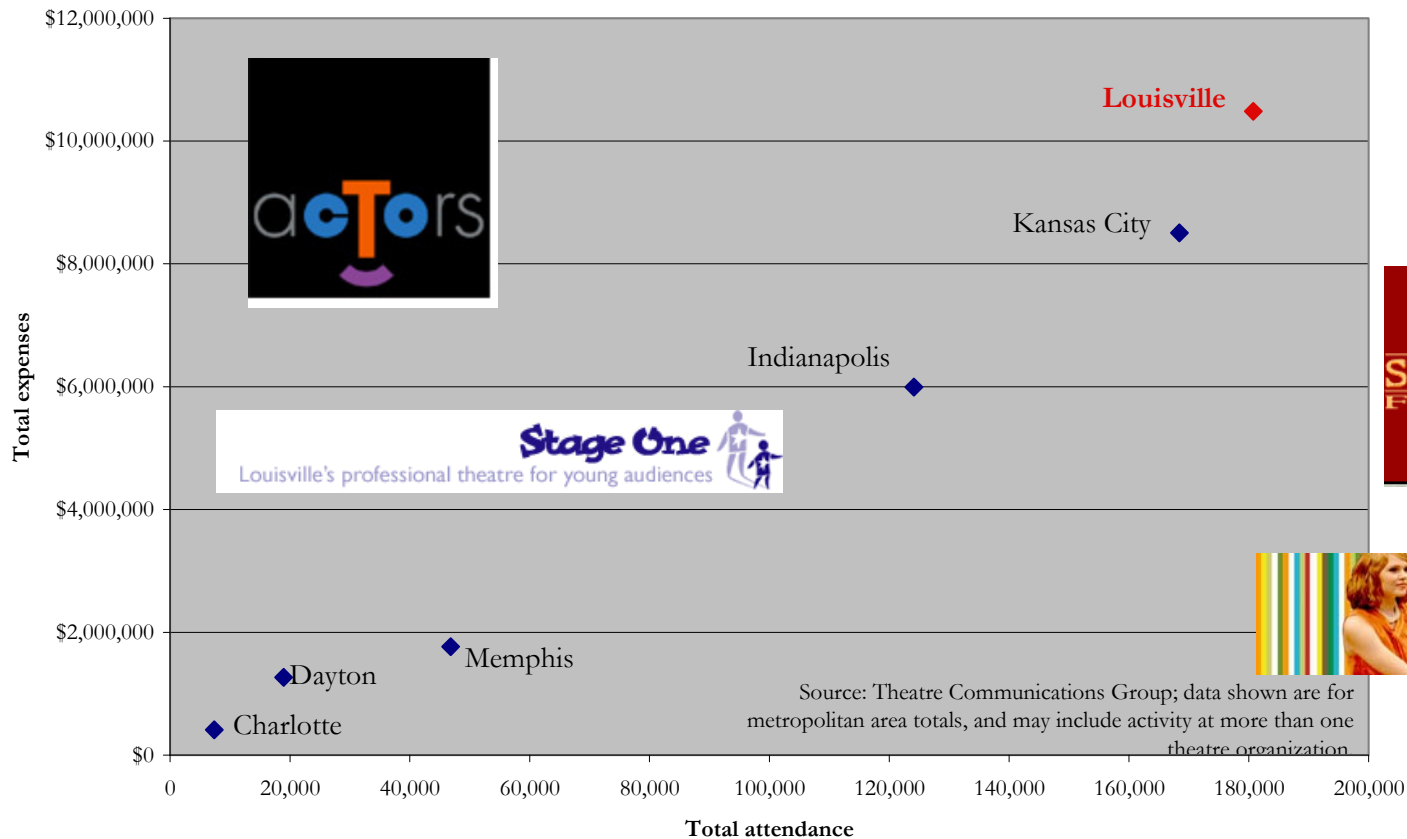
Nationally, Louisville ranks 46th in attendance among the 54 metropolitan areas where orchestra reports are available.

Metropolitan Population and Symphony Orchestra Attendance 54 MSAs



Comparable theatre data is only available for a few prominent companies. Nevertheless, the latest data support prior findings that Louisville truly stands out in theatre activity. Actors Theatre pushes Louisville to the top in terms of performances, attendance, and operating expenses for a market in its size class.

Theatre Attendance and Budgets, 2005



Walden Theatre
Changing the lives of young people for 30 years.



Opera

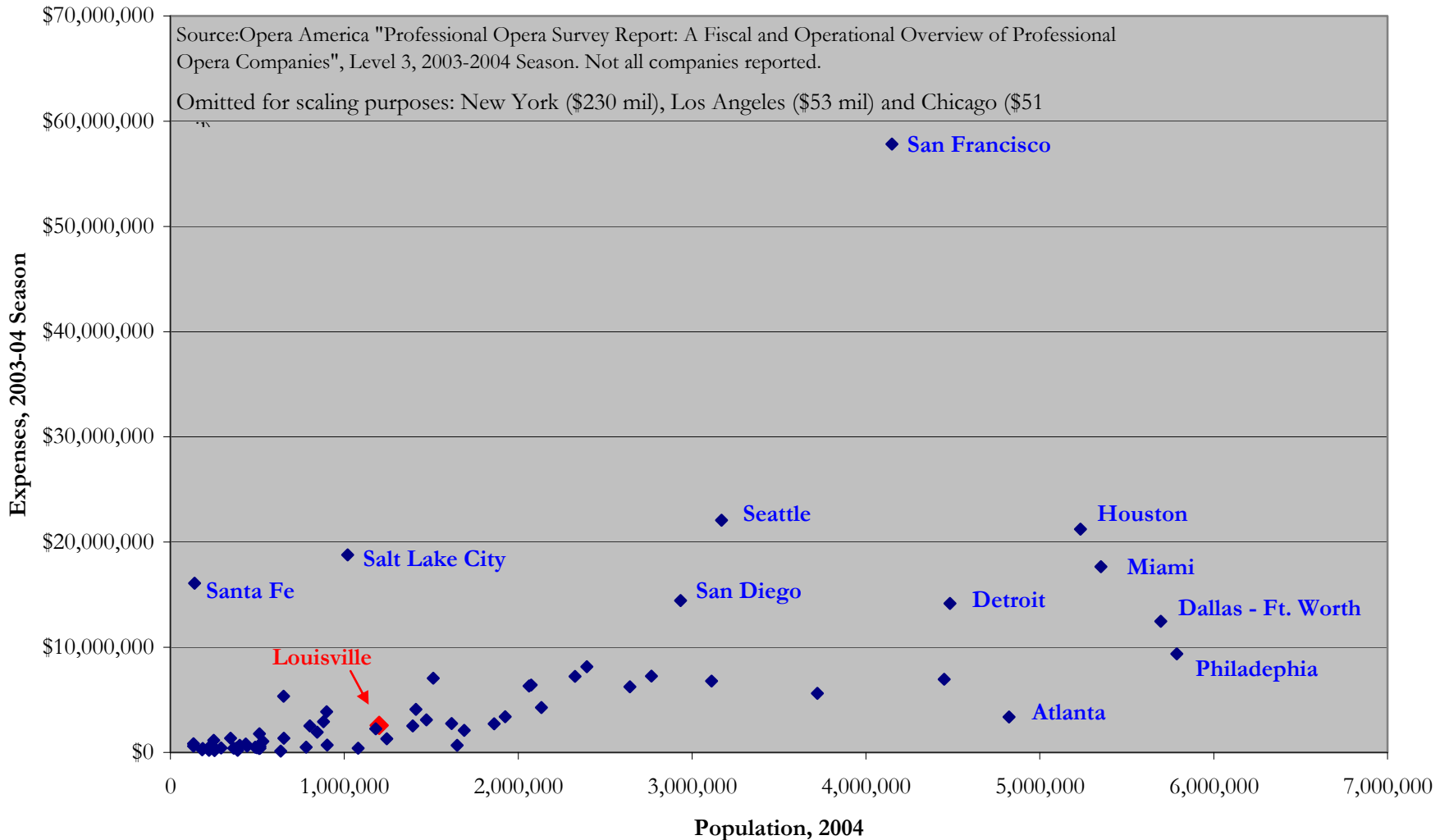


- Opera is the most hierarchical of all performing arts, with New York accounting for over 30% of all company expenditures and attendance in US;
- ...add in San Francisco, Chicago, and Los Angeles to account for half of all activity.
- The Kentucky Opera in Louisville ranks 33rd in expenditures per capita, 56th in attendance per capita; Louisville MSA ranks 33rd in population size among 69 MSAs for which opera data available.

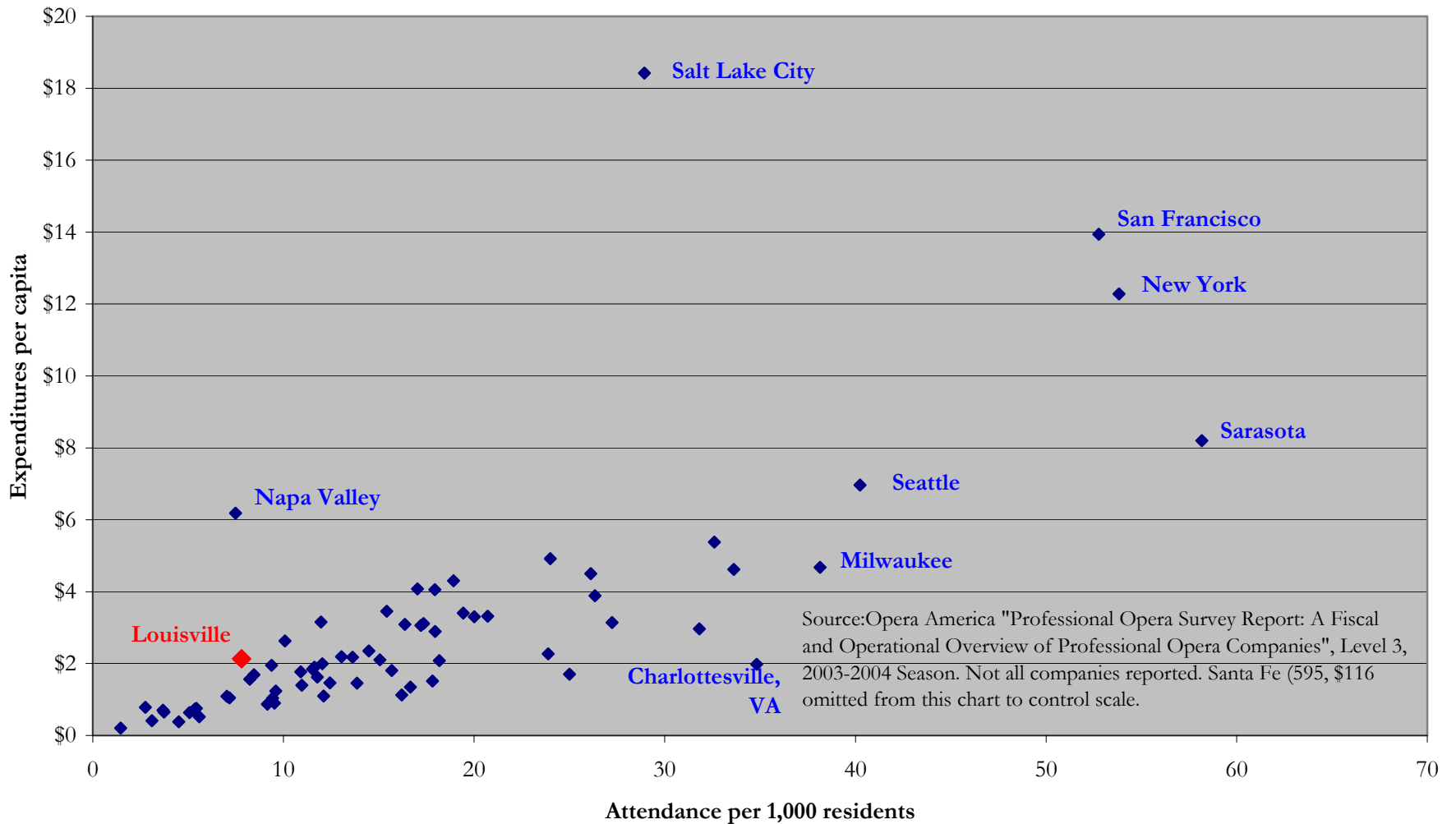


Expenditures by Opera Companies

66 Metropolitan Statistical Areas



Per Capita Opera Expenditures and Attendance per 1,000 Residents 68 Metropolitan Statistical Areas



**Opera Companies, 2003-2004 Season
Louisville and Peer MSAs**

Metropolitan Statistical Area	Population, 2004	Total Expenditures	Mainstage Attendance	Expenditures per capita	Attendance per 1,000 residents
Birmingham-Hoover, AL	1,080,135	\$410,792	4,872	\$0.38	4.5
Charlotte-Gastonia-Concord, NC-SC	1,472,619	\$3,096,013	22,173	\$2.10	15.1
Cincinnati-Middletown, OH-KY-IN	2,074,789	\$6,409,354	33,963	\$3.09	16.4
Columbus, OH	1,689,263	\$2,088,184	16,206	\$1.24	9.6
Dayton, OH	843,546	\$1,917,428	20,148	\$2.27	23.9
Indianapolis-Carmel, IN	1,617,406	\$2,737,028	13,664	\$1.69	8.4
Kansas City, MO-KS	1,925,536	\$3,401,589	20,991	\$1.77	10.9
Louisville-Jefferson County, KY-IN	1,200,526	\$2,561,789	9,368	\$2.13	7.8
Memphis, TN-MS-AR	1,244,757	\$1,302,386	8,927	\$1.05	7.2
Nashville-Davidson-Murfreesboro-Franklin, TN	1,393,618	\$2,518,253	21,842	\$1.81	15.7
Omaha-Council Bluffs, NE-IA	802,003	\$2,518,253	21,842	\$3.14	27.2

Source: Opera America "Professional Opera Survey Report: A Fiscal and Operational Overview of Professional Opera Companies", Level 3, 2003-2004 Season.

Greensboro is served by the Greensboro Opera Company, but they are not listed in the report.

No opera company was found for Jacksonville, FL.

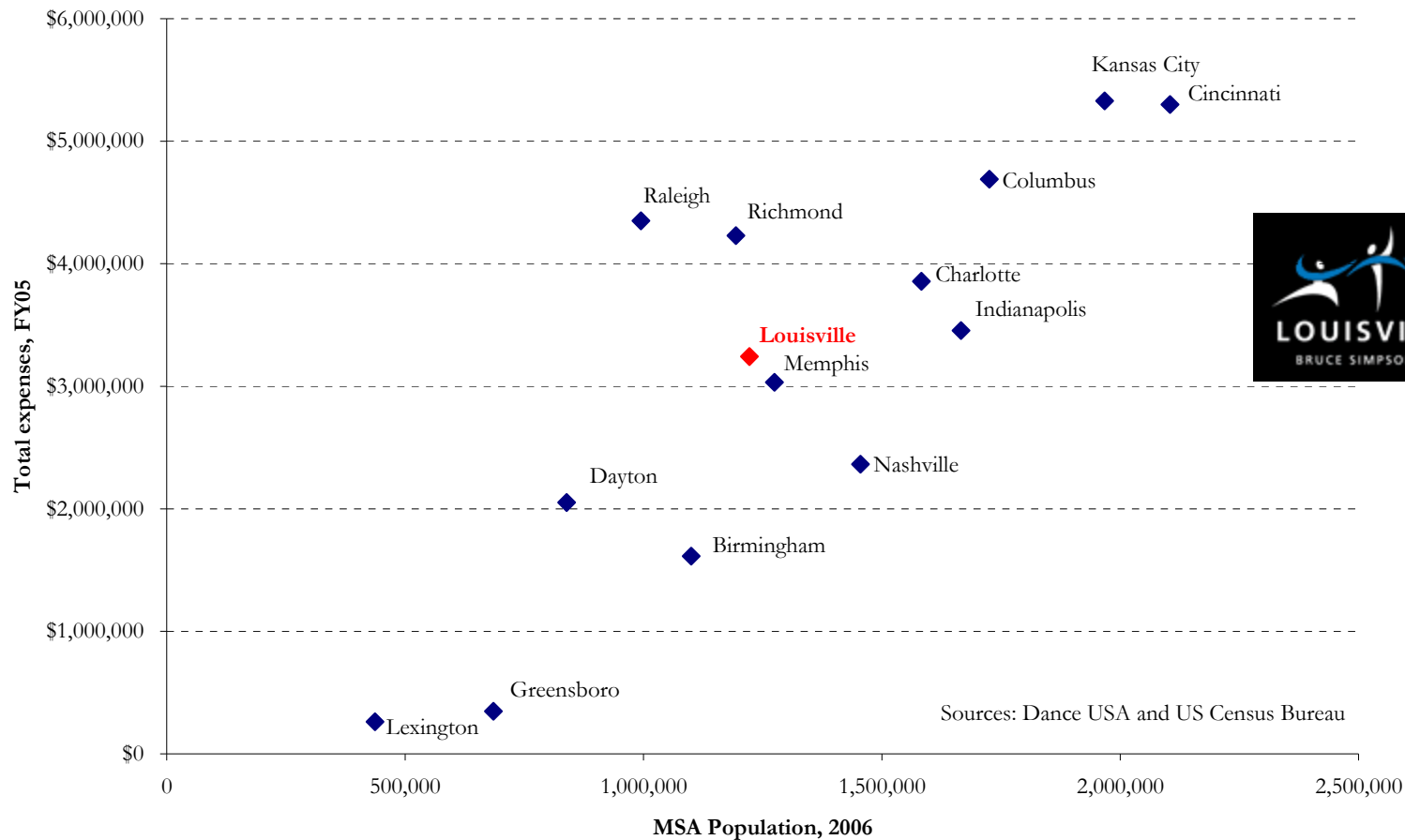
The Virginia Opera serves Richmond, Norfolk and other Virginia markets.

Raleigh has The Opera Company of North Carolina, but they are not listed in the report.



Comparable ballet data is available from Dance America for most of Louisville's comparison cities. Clearly, ballet budgets are a function of market size, with Louisville activity where one would expect for a city our size. Raleigh and Richmond appear to be above average, while Birmingham and Nashville appear below average.

Ballet Company Expenditures vs. MSA Population





Museums, Historical Sites, Zoos

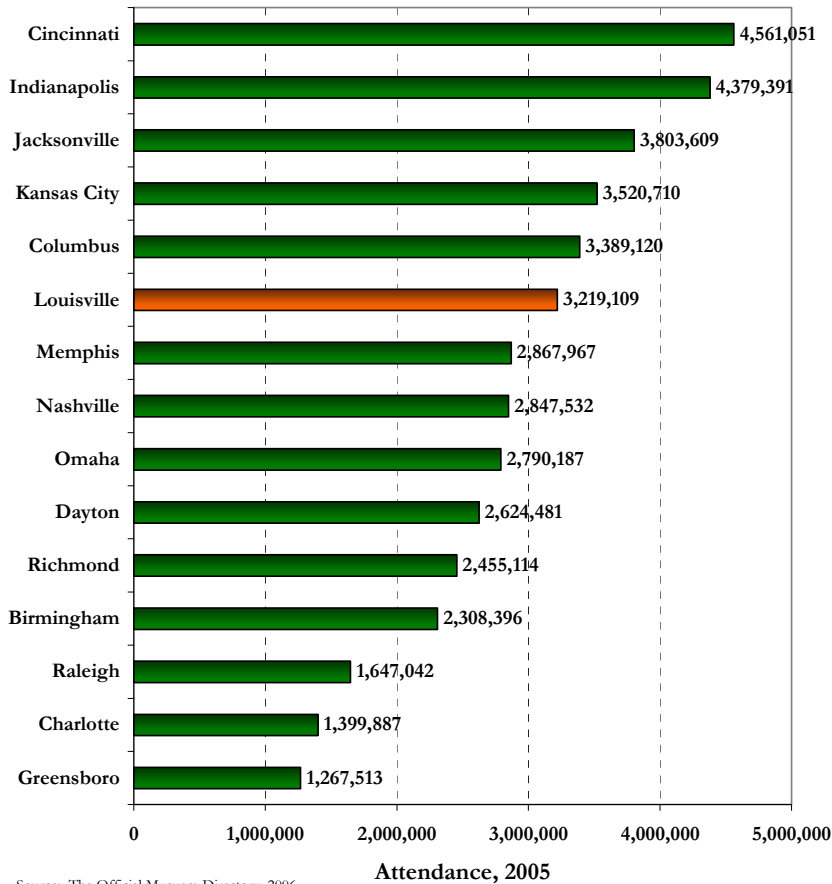
We have used the *Official Museum Directory, 2006**, to identify museums, galleries, zoos, historical sites and other attractions located in the fifteen peer markets. We organized the attendance museum data into seven categories: art museums, science and natural history museums and planetariums, children's museums, sports museums, zoos and aquariums, arboretums and nature centers, historic sites and houses. Attendance figures for each category are shown in the following slides.

We also add attendance across all the categories, to get a measure of overall activity. See next slide. Louisville ranks highly in this regard, primarily due to its large showing in the science museum and sport museum categories. The Louisville Science Center, the Kentucky Derby Museum, and the Louisville Slugger Museum are major attractions, with sufficient attendance to boost Louisville to the top of the rankings among the peer markets for comparable museum types.

Louisville also scores well in nature sites, with attendance above what would be expected for a market with a population of 1.2 million. With no venues, Louisville ranks below average in attendance at aquariums, botanical gardens, and children's museums.

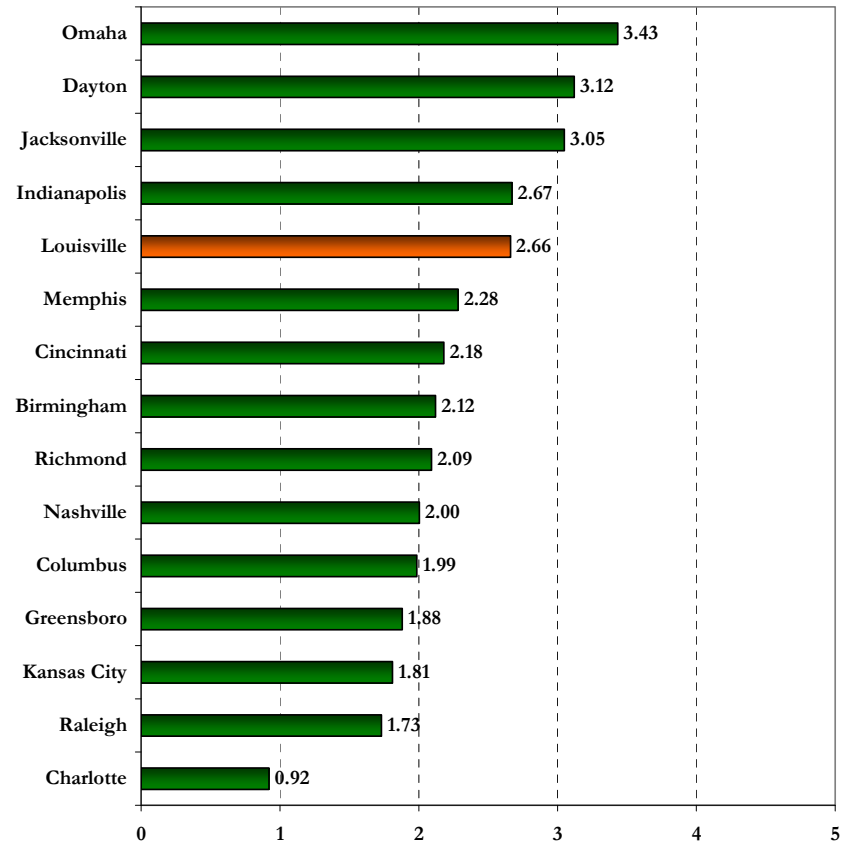
* While the most comprehensive listing available, the *Directory* does not have entries for all attractions. For Louisville, important omissions include the Frazier Museum and the Falls of Ohio state park.

Attendance at all Area Art, Children's, History, Natural History, Science, & Sports Museums, Arboretums, Botanical Gardens, Nature Centers, Zoos, Aquariums, Planetariums, and Historic Sites 2005



Source: The Official Museum Directory, 2006.

Per Capita Attendance at all Area Art, Children's, History, Natural History, Science, & Sports Museums, Arboretums, Botanical Gardens, Nature Centers, Zoos, Aquariums, Planetariums, and Historic Sites 2005



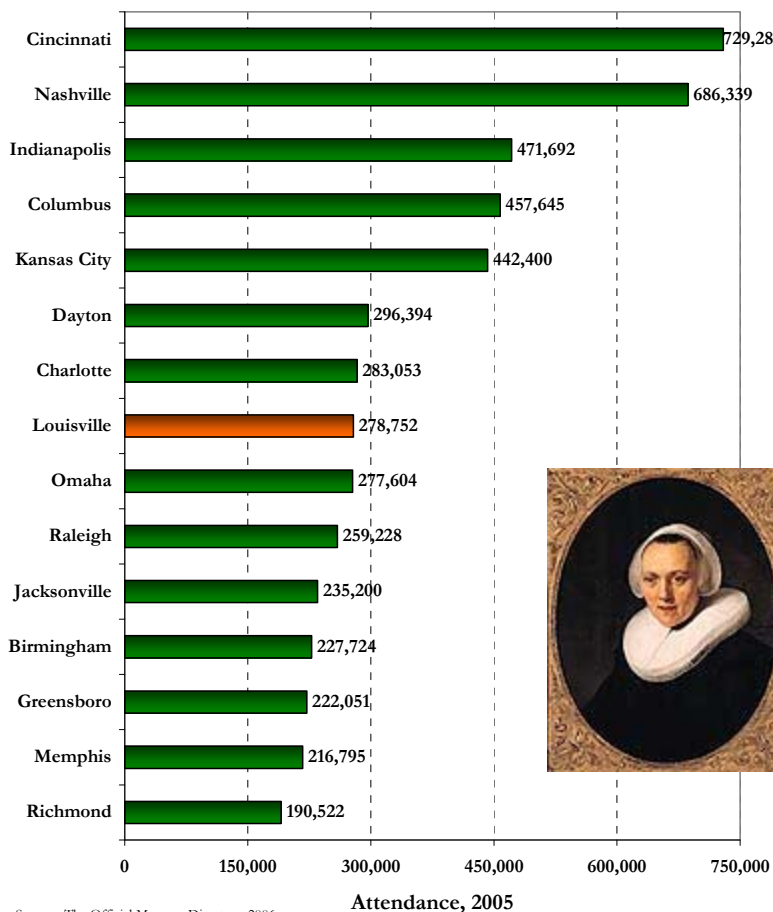
Source: The Official Museum Directory, 2006.

Per Capita Attendance, 2005

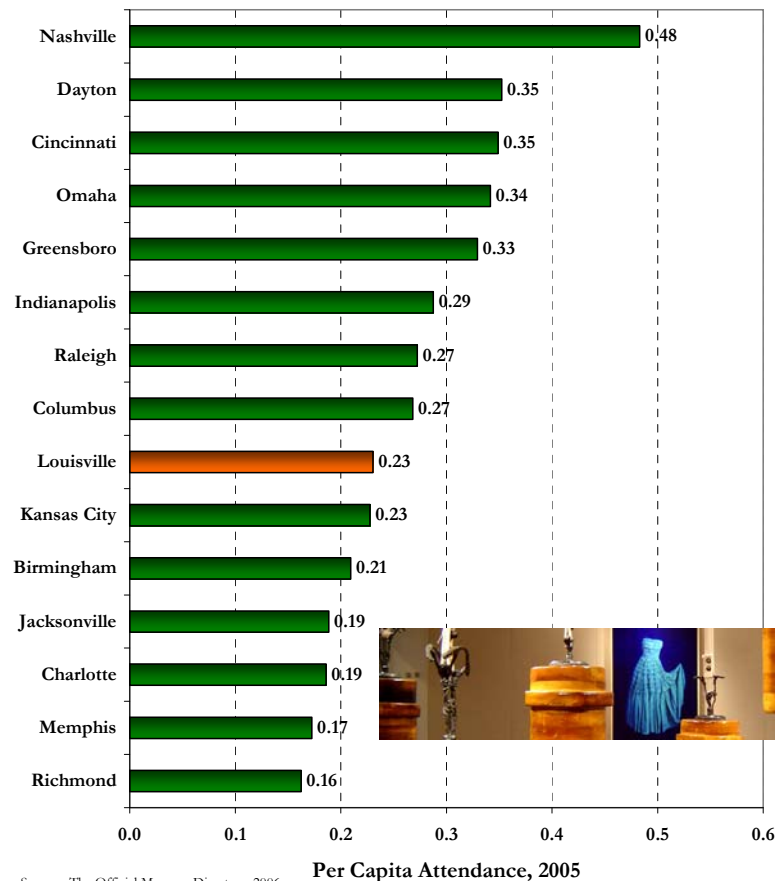


Louisville ranks eighth in total art museum attendance among the fifteen metropolitan areas, and ninth on a per capita basis. The Speed Art Museum accounts for most of the attendance in Louisville. The figures also include attendance at the Kentucky Museum of Art and Craft, the Hite Gallery, the Carnegie Center for Art and History. Nashville now tops the per capita ranking, boosted by 301,000 attendees at the new Frist Center alone.

Attendance at all Area Art Museums and Galleries, 2005



Per Capita Attendance at all Area Art Museums and Galleries, 2005



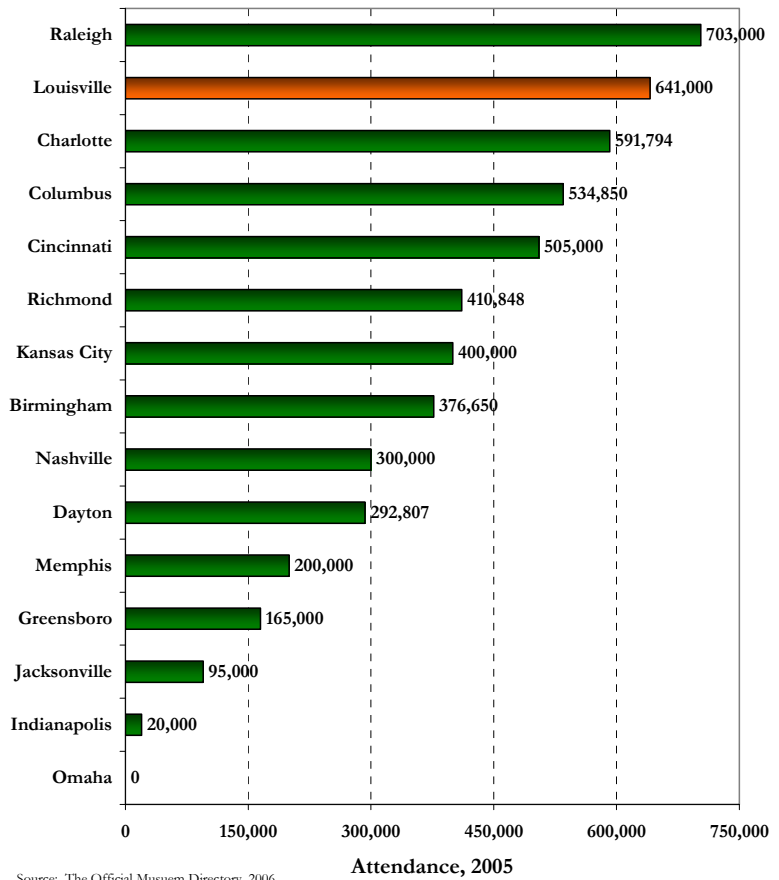
Source: The Official Museum Directory, 2006.

Source: The Official Museum Directory, 2006.

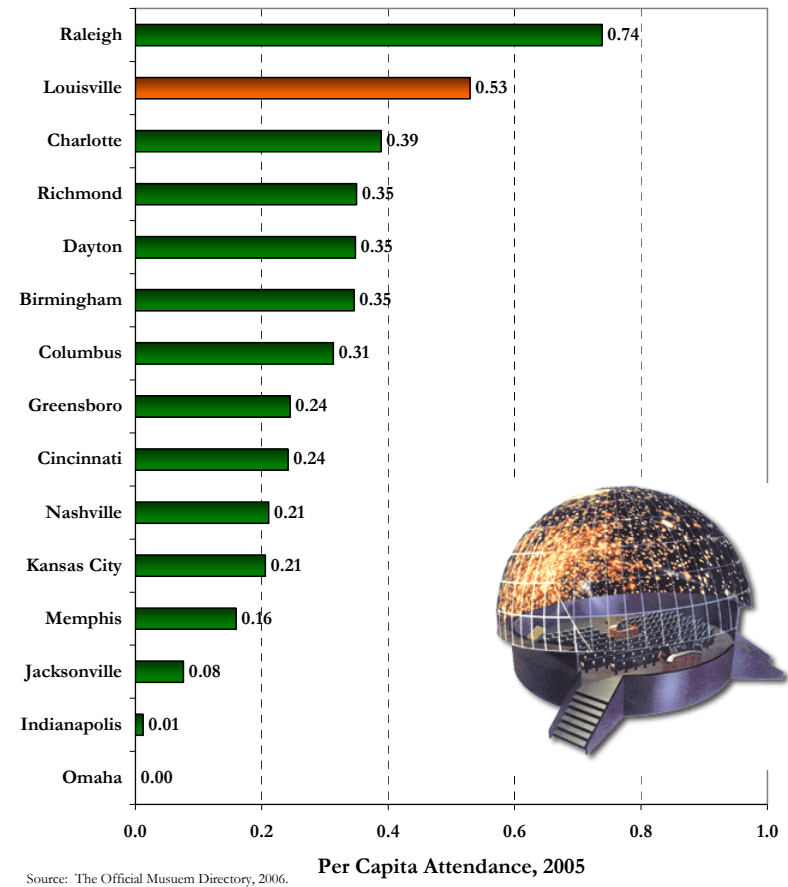
Louisville ranks second in attendance in the category of Science Museums, Natural History Museums, and Planetariums.. Figures include attendance at the Louisville Science Center and at the Gheens Planetarium (UL). Raleigh's North Carolina Museum of Natural Science had over 700,000 visitors..Charlotte's Discovery Place had attendance of 525,000.



Attendance at all Area Science and Natural History Museums and Planetariums, 2005



Per Capita Attendance at all Area Science and Natural History Museums and Planetariums, 2005

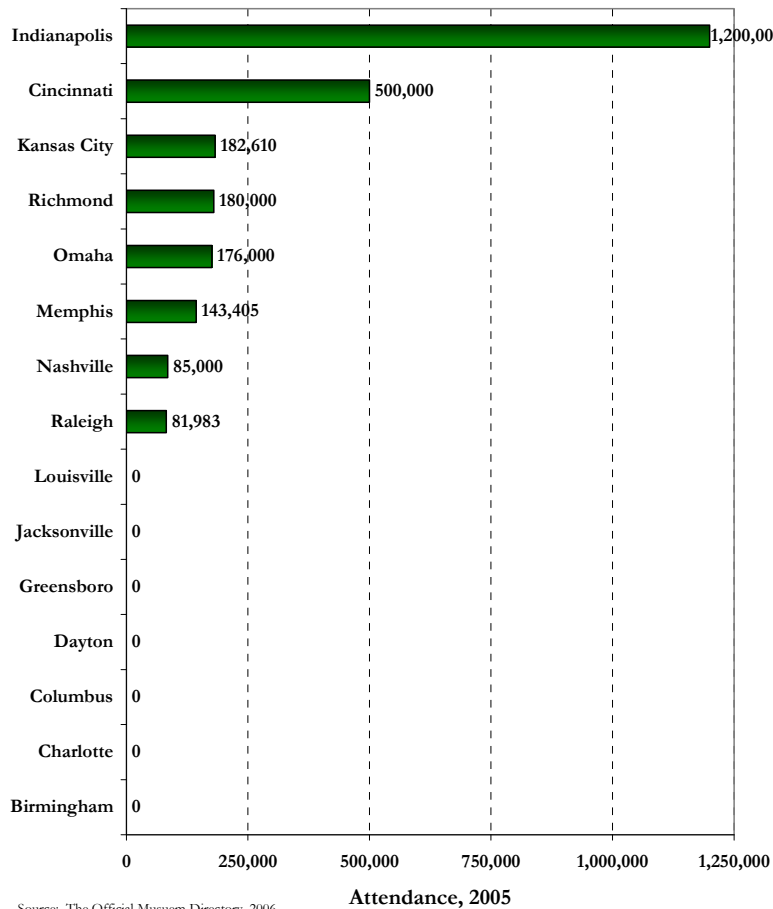


Source: The Official Museum Directory, 2006.

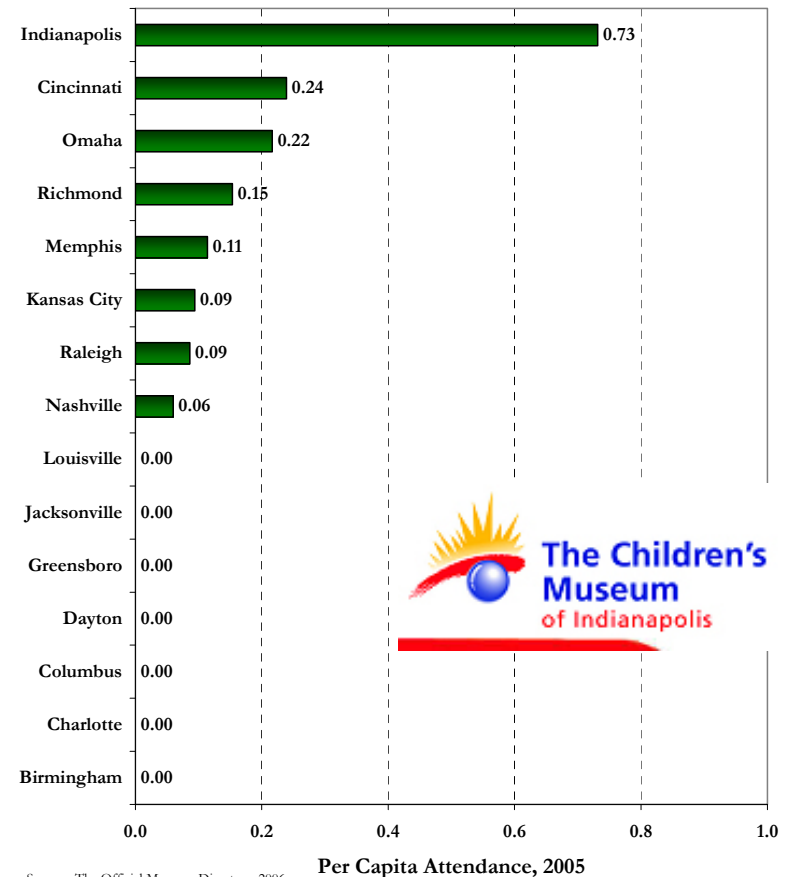
Source: The Official Museum Directory, 2006.

Indianapolis and Cincinnati have major Children's museums, and dominate this ranking. Louisville has a Science Center with many of the same attributes (next slide), but is not classified as a museum primarily as for children..

Attendance at all Area Children's Museums, 2005



Per Capita Attendance at all Area Children's Museums, 2005



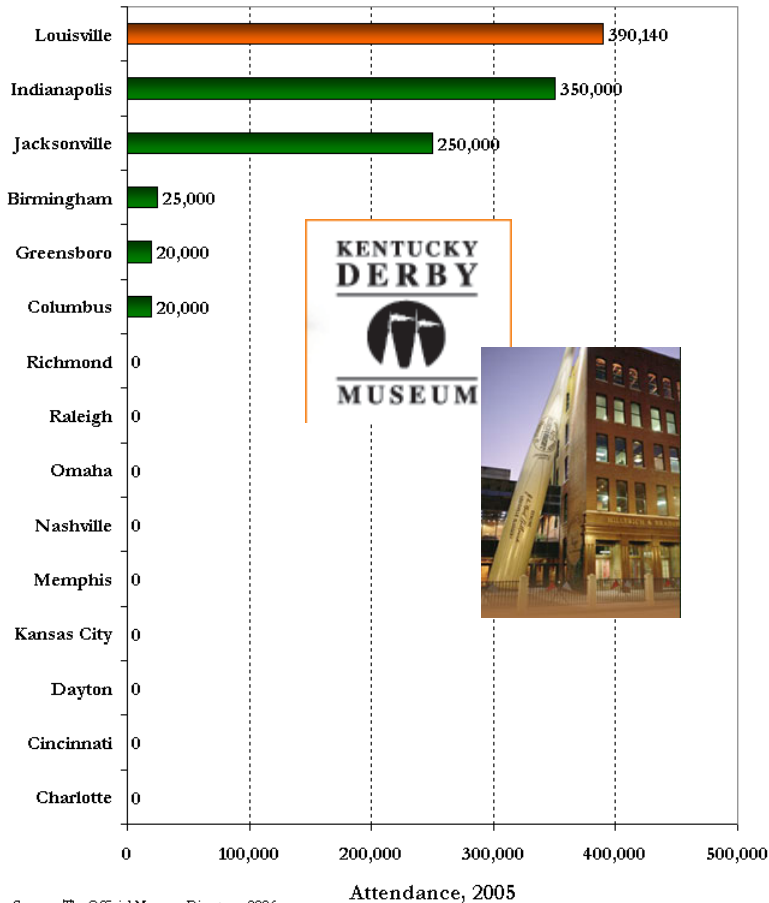
Source: The Official Museum Directory, 2006.

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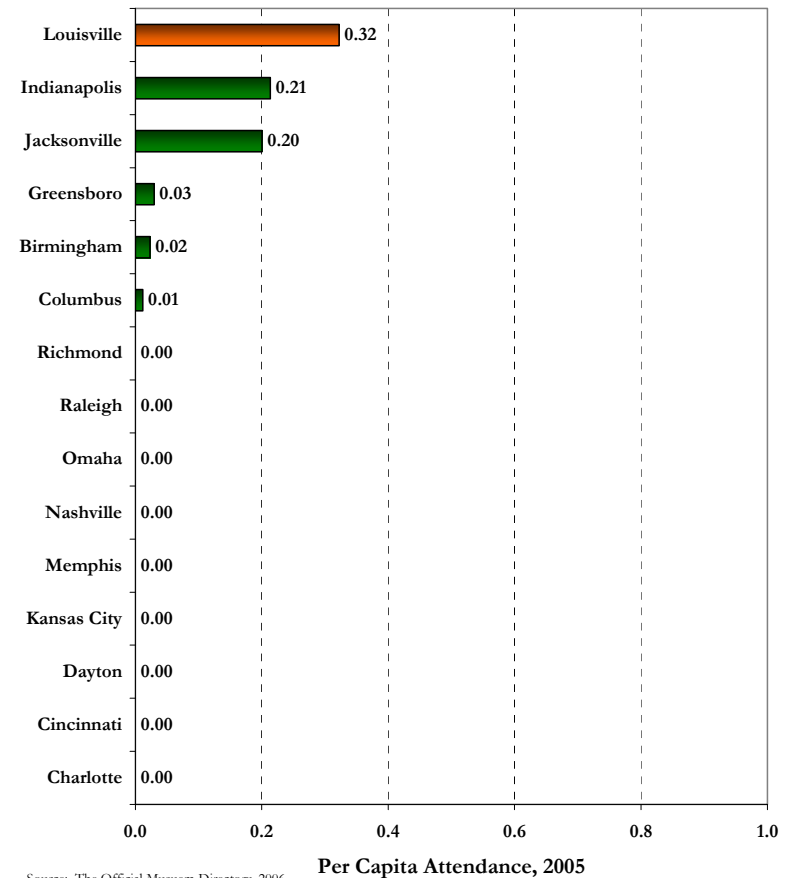


Louisville tops the list in terms of attendance at Sports museums, with two major attractions: the Kentucky Derby Museum and the Slugger Museum. The only sports museums among the peers with comparable attendance are the Indianapolis Motor Speedway Hall of Fame Museum (350,000), and the World Golf Hall of Fame (250,000) in Jacksonville.

Attendance at all Area Sports Related Museums, 2005



Per Capita Attendance at all Area Sports Related Museums, 2005



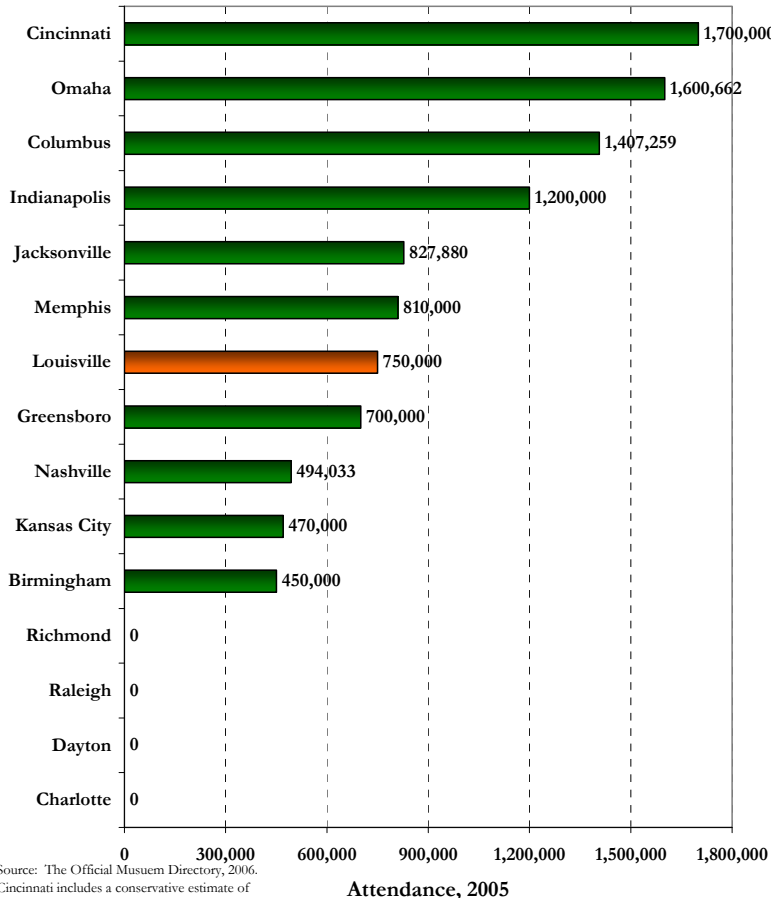
Source: The Official Museum Directory, 2006.

Source: The Official Museum Directory, 2006.



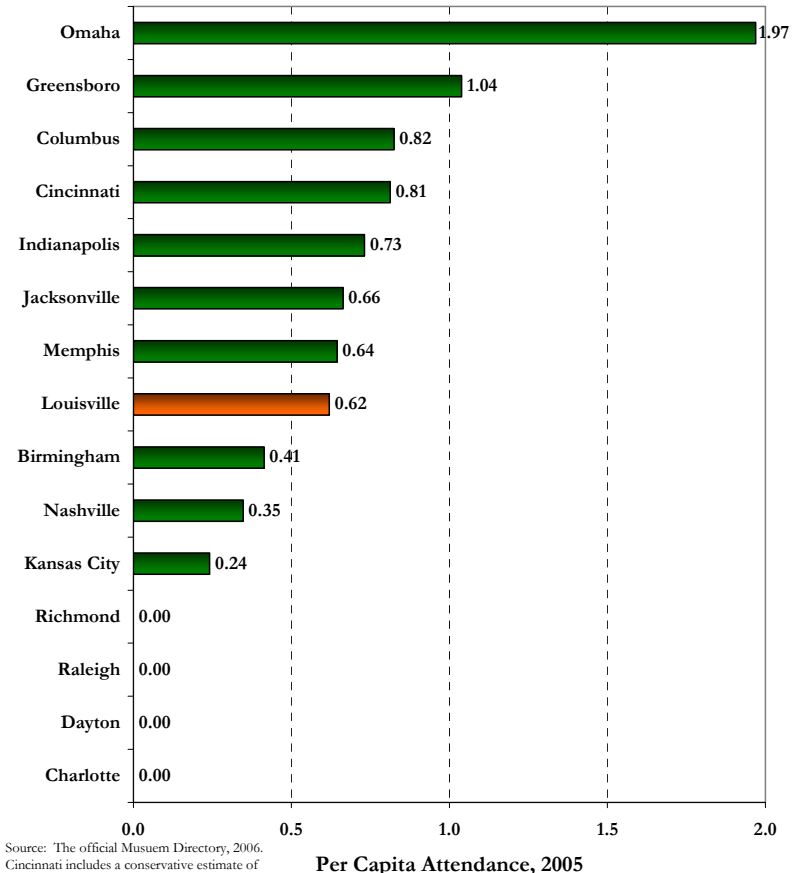
Eleven of the comparison markets have zoos. Charlotte, with a population of 1.5 million, is easily the largest metro area without a zoo. Cincinnati and Omaha top the rankings in terms of attendance, with Omaha standing out due to its small population size (812,000). Louisville ranks in the middle of the metros. Because of the scheduling of special events, 2005 was an off year for the Louisville Zoo, which had attendance of over 810,000 in 2006-07.

Attendance at all Area Zoos and Aquariums, 2005



Source: The Official Museum Directory, 2006.
Cincinnati includes a conservative estimate of Newport Aquarium attendance.

Per Capita Attendance at all Area Zoos and Aquariums, 2005

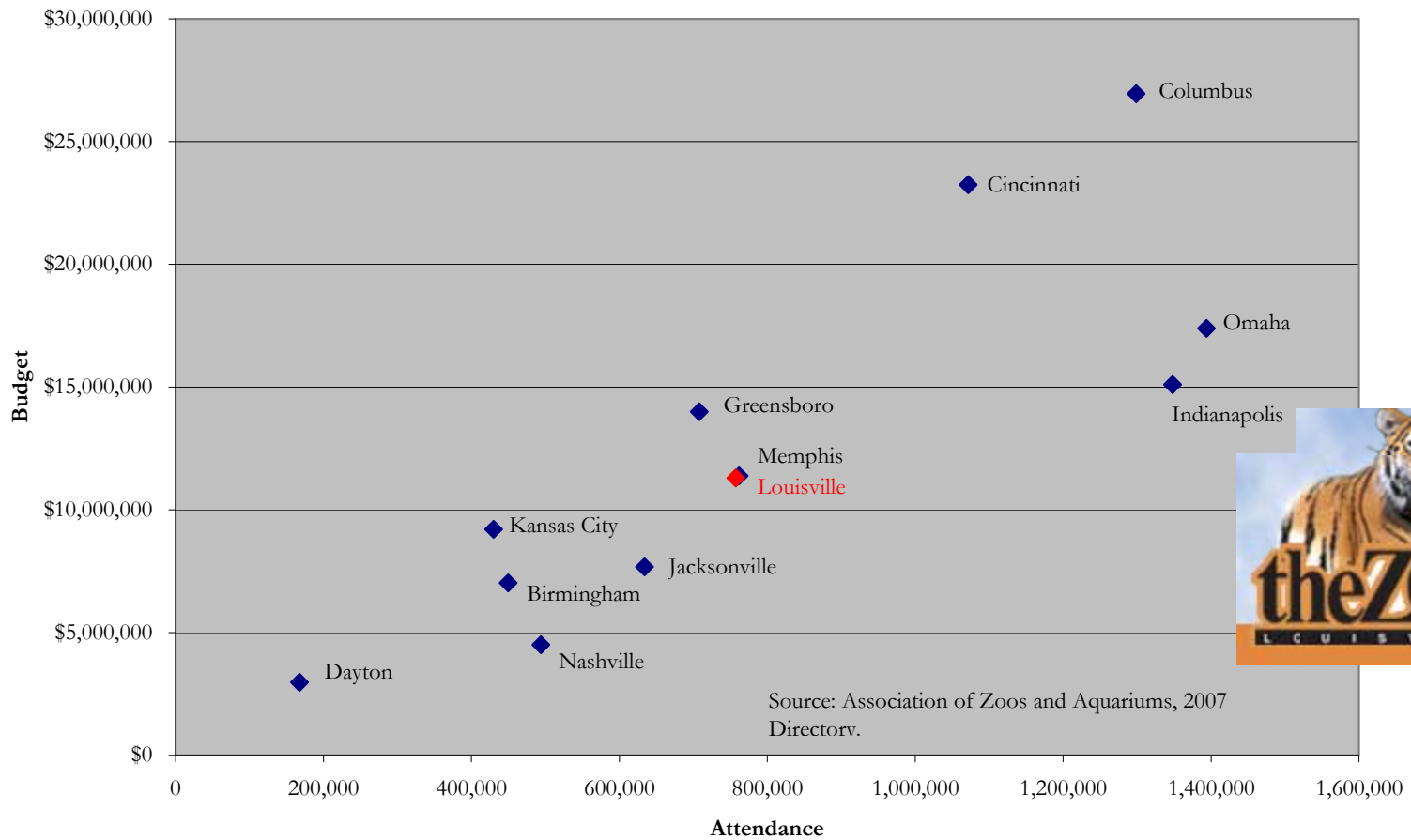


Source: The official Museum Directory, 2006.
Cincinnati includes a conservative estimate of Newport Aquarium attendance.



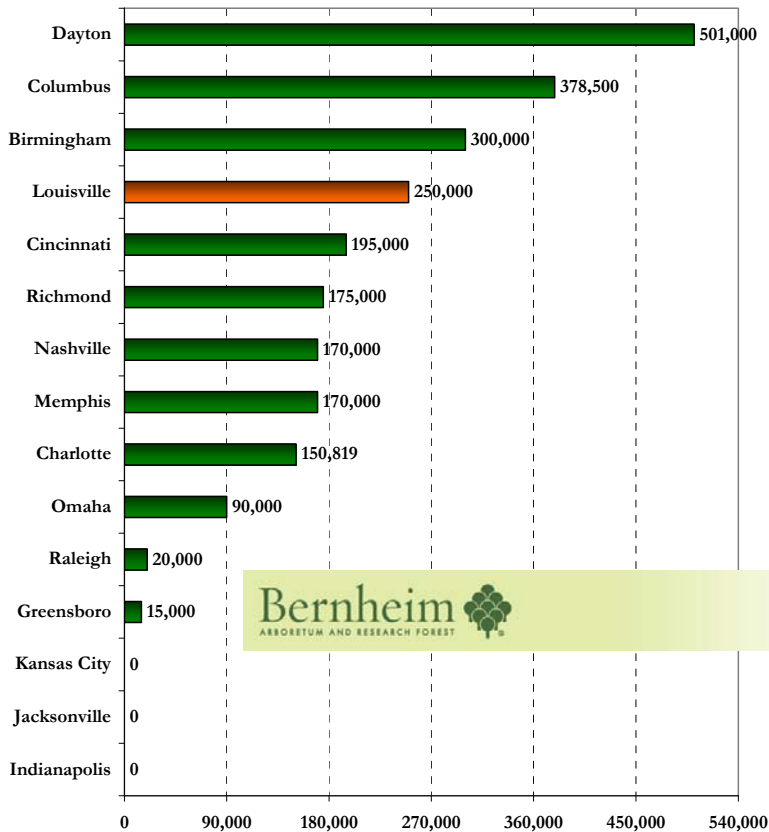
One finds a similar pattern when looking only at zoos, and using data from the Association of Zoos and Aquariums for 2005. Louisville and Memphis are nearly identical in zoo activity and population size. Omaha and Greensboro stand out in terms of zoo activity in a smaller market, while Kansas City, Nashville have below average zoo activity. Charlotte and Richmond have private zoos, with no data published.

Zoo Attendance and Annual Budgets, 2005

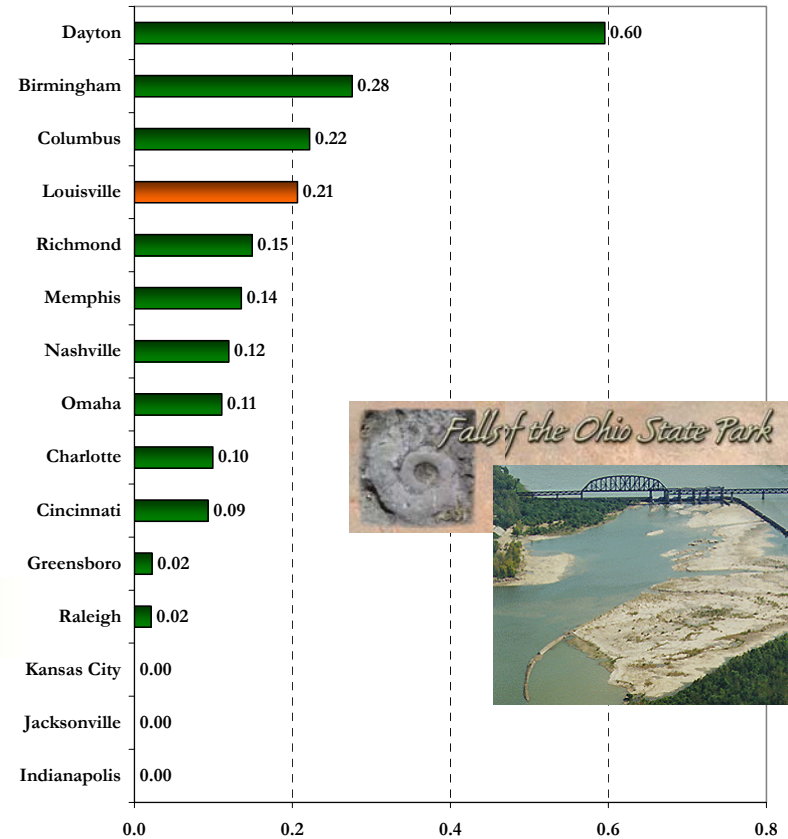


Twelve of the comparison markets have arboretums, botanical gardens or nature center. Indianapolis, with a population of 1.6 million, is easily the largest metro area without such an attraction. Dayton tops the rankings in terms of attendance, due primarily to its Cox Arboretum and Gardens Metropark. Louisville ranks above average, thanks to 250,000 reported visitors to Bernheim Arboretum and Research Forest.

Attendance at all Area Arboretums, Botanical Gardens and Nature Centers, 2005



Per Capita Attendance at all Area Arboretums, Botanical Gardens and Nature Centers, 2005



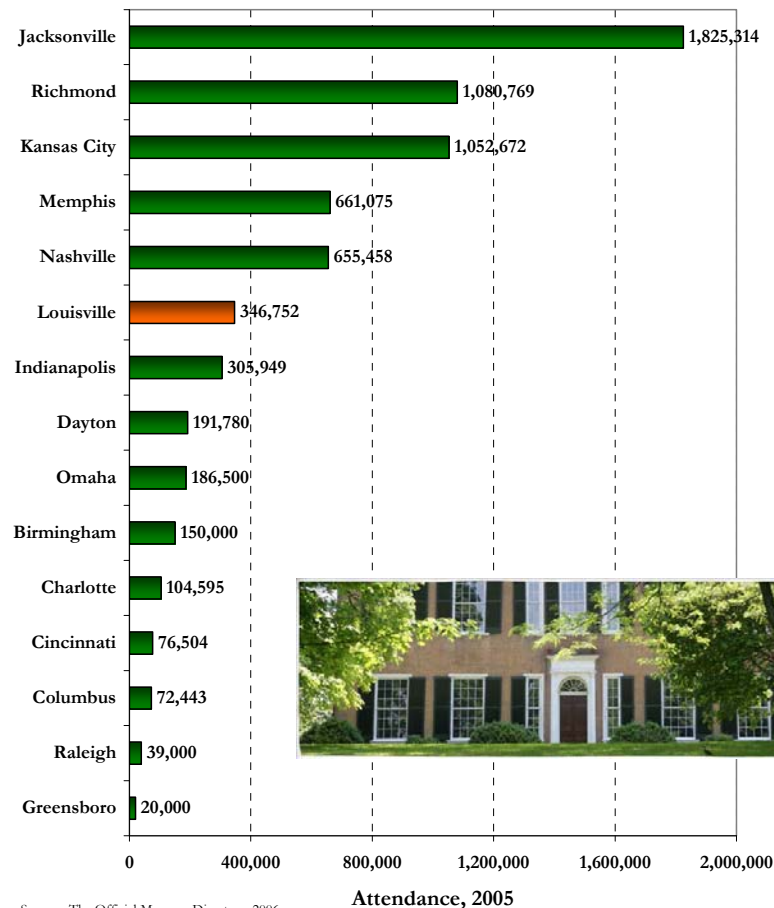
Source: The Official Museum Directory, 2006.

Source: The Official Museum Directory, 2006.

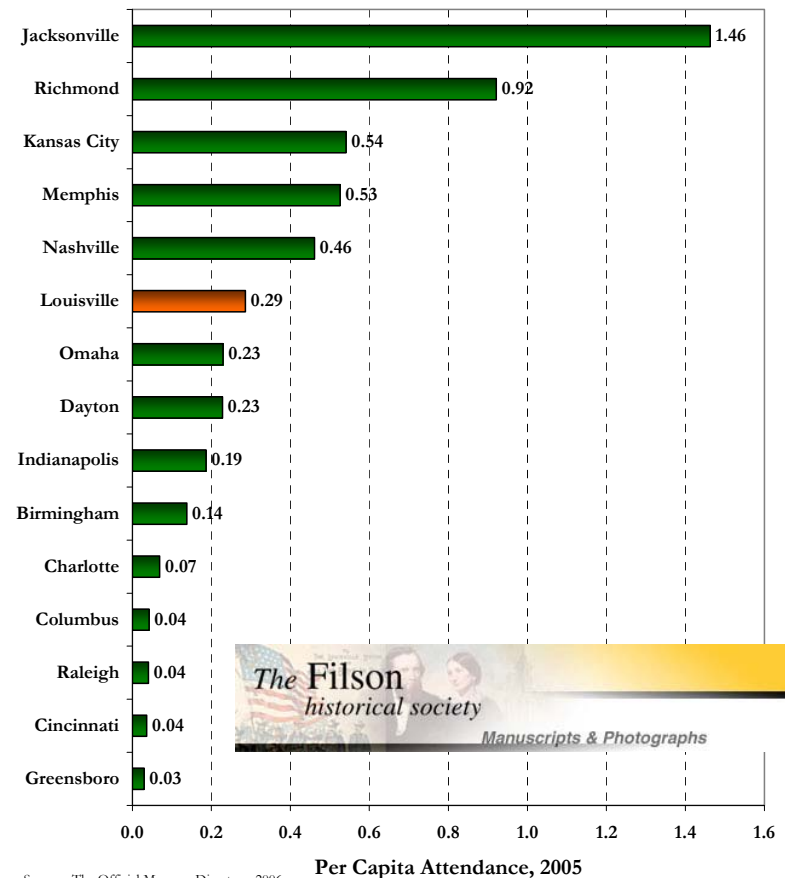


All of the comparison markets have historic sites and houses. Jacksonville tops the rankings in terms of attendance, with eight listed attractions. The largest are the Fort Matanzas National Monument (700,000 visitors) and the Castillo de San Marcos National Monument (650,000). Eleven sites are listed for the Louisville area, with my Old Kentucky Home state park posting the greatest attendance (100,000).

Attendance at all Area Historic Sites & Houses, 2005



Per Capita Attendance at all Area Historic Sites & Houses, 2005

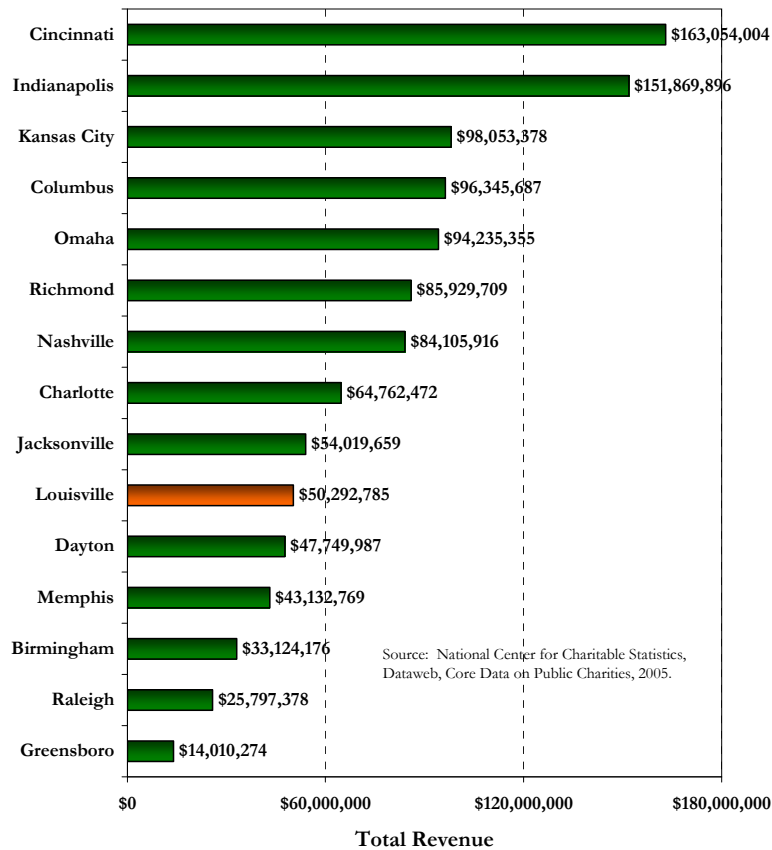


Source: The Official Museum Directory, 2006.

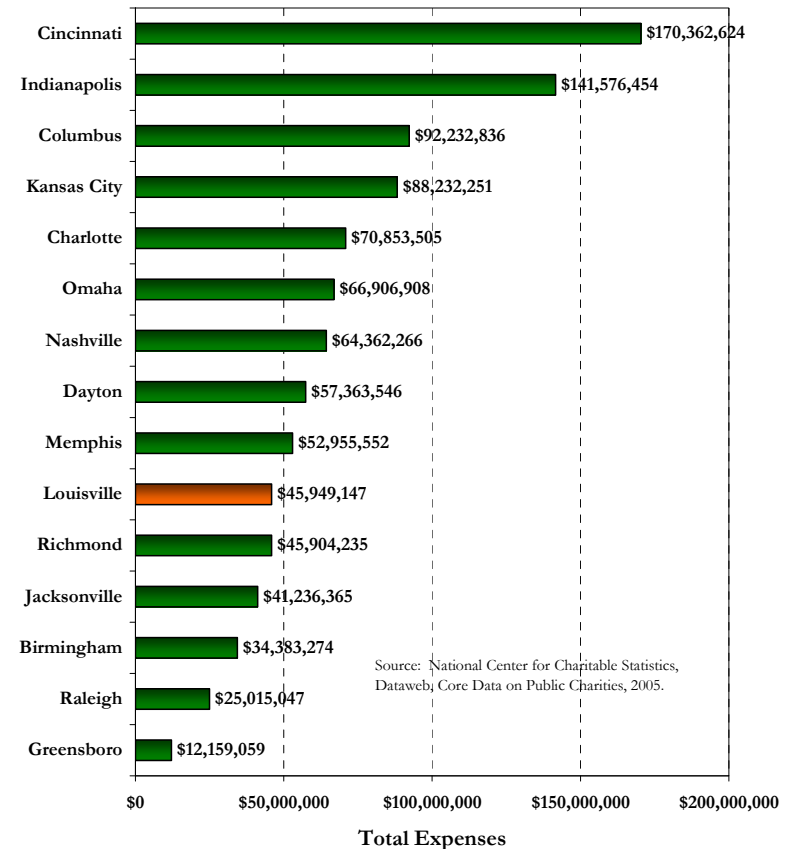
Source: The Official Museum Directory, 2006.

One fairly comprehensive measure of the arts and cultural economic footprint is from data reported to the IRS by tax-exempt groups. We organized data on 810 tax-exempt museums, performing arts groups, botanical gardens and arboreta, zoos and aquariums in the fifteen comparison metros. The 37 Louisville groups reporting had \$50 million in revenues, and \$46 million in expenditures in 2005 (11th highest per capita). Continued....

Total Revenues of Tax Exempt Museums, Performing Arts Groups, Botanical Gardens & Arboreta, and Zoos & Aquariums, 2005

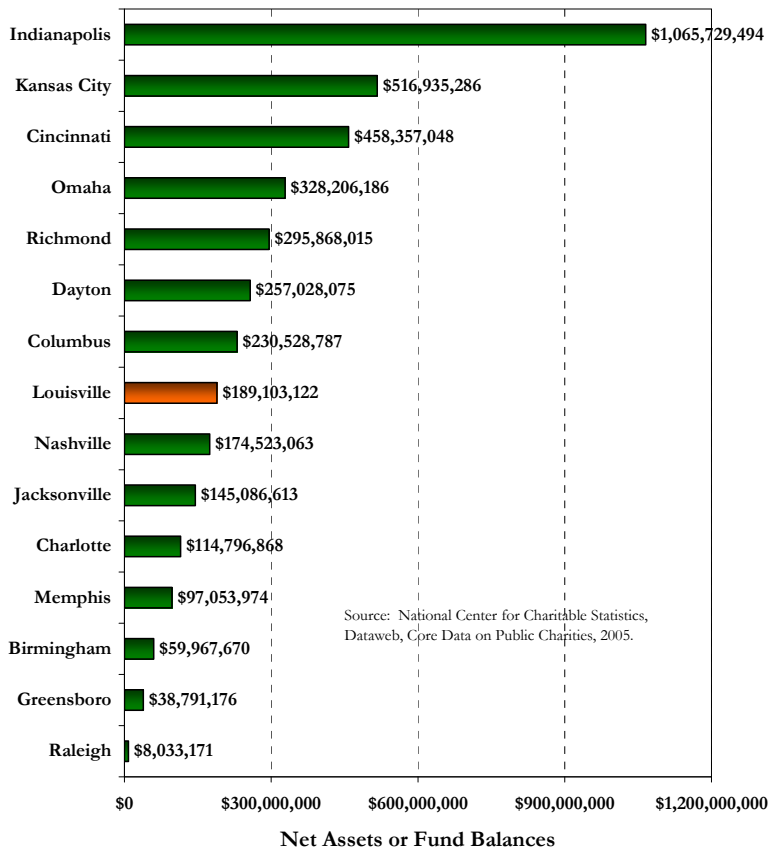


Total Expenses of Tax Exempt Museums, Performing Arts Groups, Botanical Gardens & Arboreta, and Zoos & Aquariums, 2005

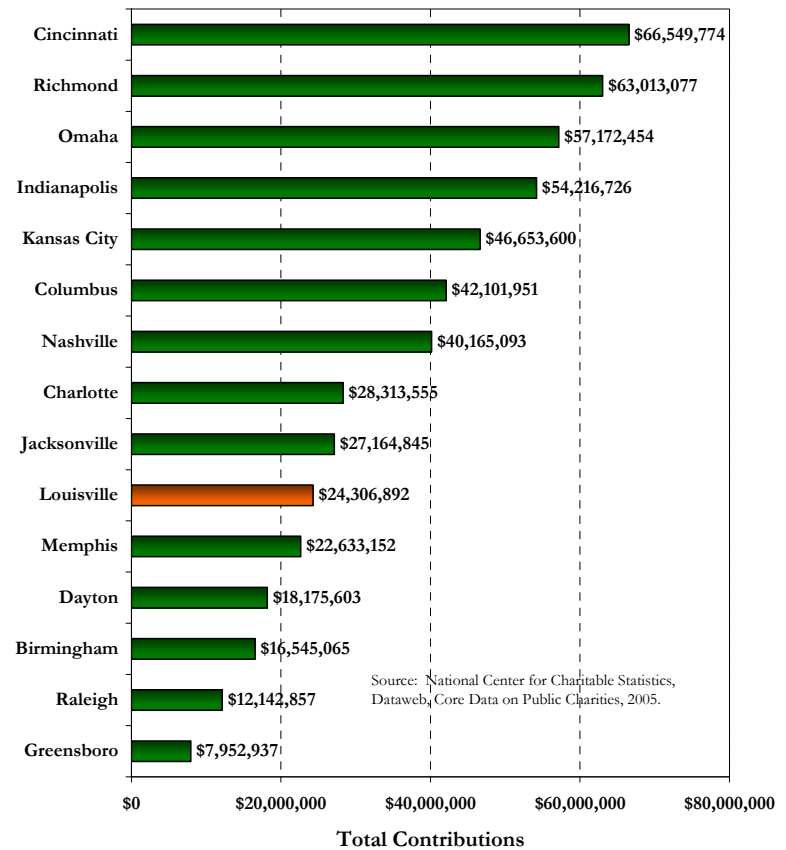


The Louisville groups reported assets of \$189 million, 8th highest among the fifteen metropolitan areas, and 7th highest on a per capita basis. Total contributions to the groups were \$24 million, 10th highest overall and per capita.

Net Assets or Fund Balances of Tax Exempt Museums, Performing Arts Groups, Botanical Gardens & Arboreta, and Zoos & Aquariums, 2005



Total Contributions, Public & Private, to Tax Exempt Museums, Performing Arts Groups, Botanical Gardens & Arboreta, and Zoos & Aquariums, 2005



According to LOOK, a consortium of area art galleries, there are currently 44 galleries in Louisville. Some of these are counted in other categories, such as the museums and the activity at the Kentucky Center, Actors Theatre, and University of Louisville. Several establishments are more than art galleries, including the studios, Glassworks, Kaviar, Hidden Hill. The First Friday Gallery Hop and the Frankfort Avenue Trolley Hop, hosted by many of these galleries, have become cultural attractions as well.

B. Deemer

Canoe

Carnegie Center for Art and History

Carr + Waite Studios

ccHill

Celia's @ Mellwood

Gayle Cerlan / Jacque Parsley Gallery and Studio

Chapman Friedman Gallery (2)

Chez Moi Gallery

Cobalt Artworks

Mary Craik Gallery

Crescent Hill Gallery

Dunbar & Bryant Art Studio

Edenside Gallery

Fischer Gallery

Flame Run

Galerie Hertz

Gallery at Actors Theatre

Gallery Janjobe

Gallery at The Kentucky Center

Gallery Nulu

Garner - Furnish Studio

Glassworks Gallery

Hess Gallery

Hidden Hill Nursery / Sculpture Garden

Hite Art Institute (2)

Kaviar Forge & Gallery

Kentucky Museum of Art and Craft

Lionheart Gallery

Louisville Visual Art Association

Mad About Art

Mellwood Arts & Entertainment Center

Merridian Fine Art

Objects of Desire

Paul Paletti Gallery

Presents Gallery

PYRO Gallery

David Schuster Creations

Speed Art Museum

Swanson Reed Contemporary

21C Museum

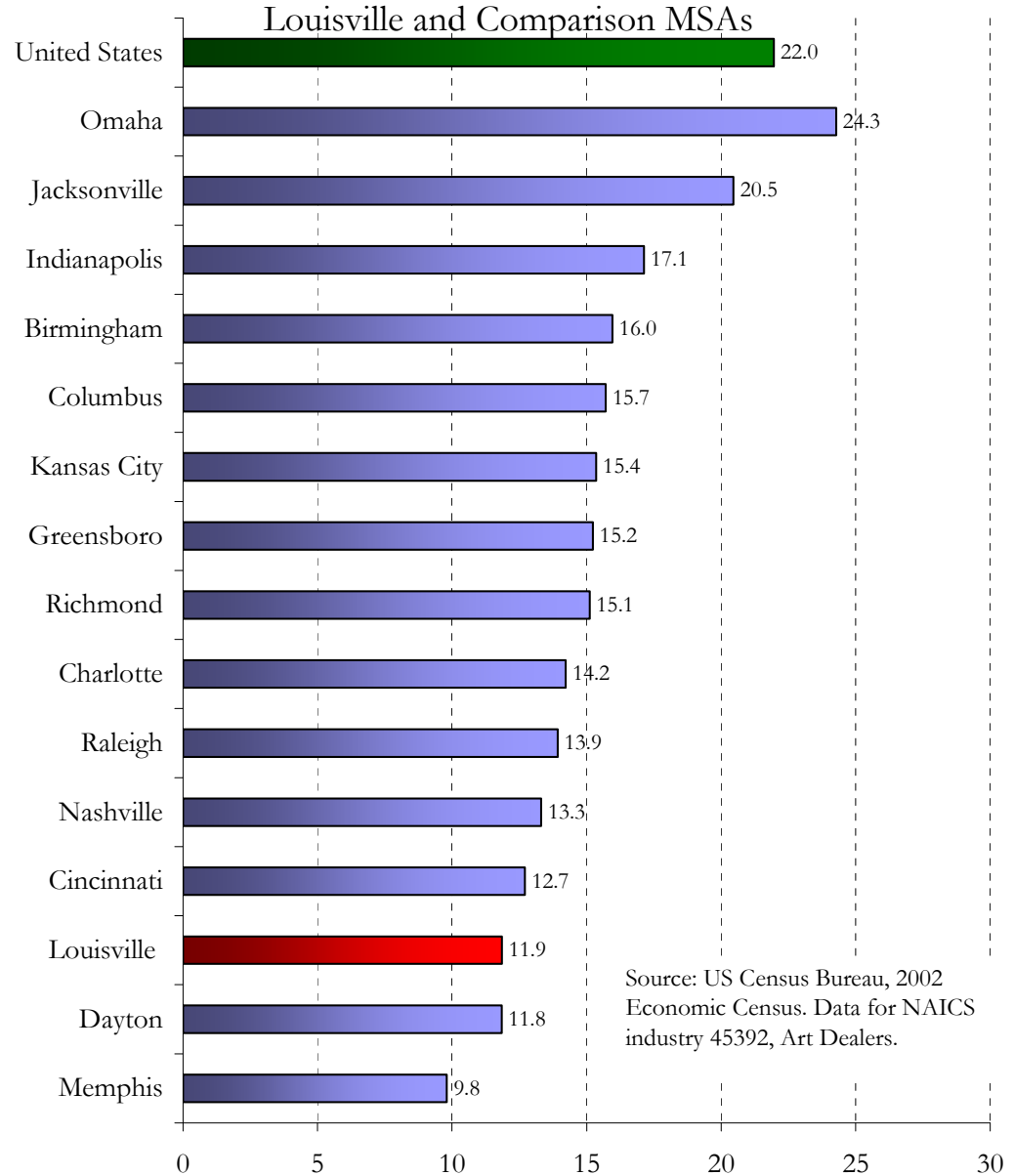
Zephyr Gallery

Most art galleries are privately owned and small, and hence there is little publicly available data on their economic activity.

The last economic census shows 14 art gallery establishments in the Louisville metropolitan area, with combined sales of \$3.8 million. They employed 51 people, with annual payroll of \$707,000.

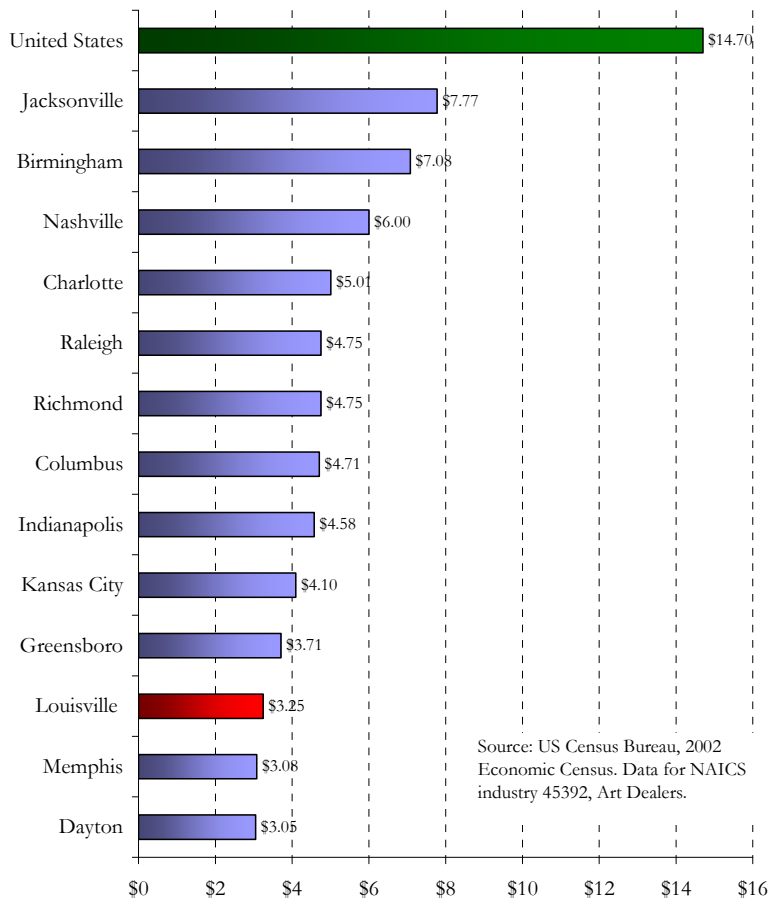
Louisville ranks 13th among the comparison metros in terms of number of galleries per capita. All the metros but Omaha are below the national average, and Louisville has only about one-half the concentration as the US overall. Continued.....

Number of Retail Art Dealers per Million Residents

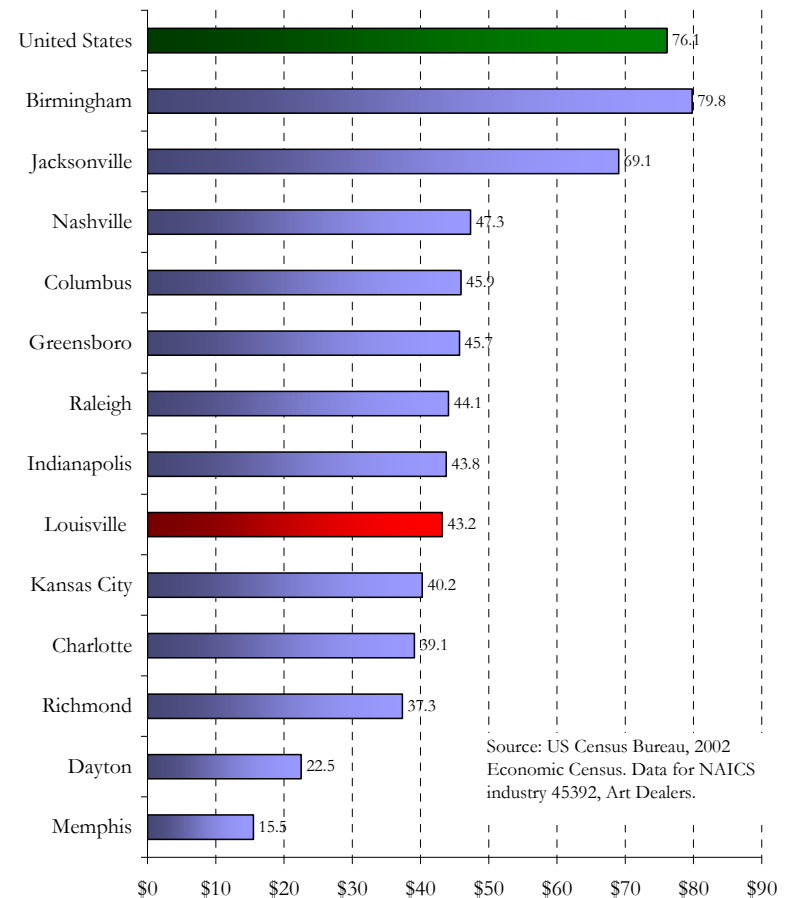


...due to federal confidentiality laws, sales, jobs, and payroll data were only published for thirteen of the MSAs. Louisville ranked 11th in terms of sales per capita, and 8th in terms of jobs per capita. By most measures, Memphis and Dayton are at the bottom of the rankings, while Omaha, Jacksonville, and Birmingham are at the top.

Revenues of Retail Art Dealers, per Capita
Louisville and Comparison MSAs



Employees at Retail Art Dealers, per Capita
Louisville and Comparison MSAs



Appendix A.

Arts and Cultural Organizations Included in Study

Museums

Callahan Museum: American Printing House for the Blind
Carnegie Center for Art & History
Frazier International History Museum
Hite Galleries, University of Louisville
Howard Steamboat Museum
Jeffersontown Historical Museum
Kentucky Museum of Art and Craft
Kentucky Derby Museum
Kentucky Railway Museum
Louisville Science Center
Louisville Slugger Museum
Louisville Visual Art Association
Portland Museum
Speed Art Museum

Heritage and Cultural Sites

Cathedral Heritage Foundation
Crane House
Farmington Historic Home
Filson Club
Locust Grove
National Society of the Sons of the American Revolution
My Old Kentucky Home State Park
Riverside, The Farnsley-Moreman Landing
Thomas Edison House
Whitehall

Performing Arts

Actors Theatre
Blue Apple Players
Choral Arts Society
Clifton Center
Comedy Caravan
Derby Dinner Playhouse
Fund for the Arts
Kentucky Center for the Performing Arts
Kentucky Shakespeare Festival
Louisville Ballet
Kentucky Opera (KCA)
Kentucky Watercolor Society
Louisville Orchestra
Mellwood Arts & Entertainment Center
Music Theatre Louisville (amphitheatre)
Ogle Cultural and Community Center (IUS)
Palace Theatre
PNC Bank Broadway Series
Stage One: The Louisville Children's Theatre, Inc.
The Louisville Chorus
Walden Theatre

Nature Attractions

Bernheim Arboretum and Research
Botanica
Falls of the Ohio State Park Interpretive Center
Louisville Zoo
Yew Dell Gardens



Appendix B. Letter and Data Template Used for Study

May 8, 2007

Dear,

As you may know, we are working with the Arts and Cultural Attractions Council of Greater Louisville, Inc. to update our 2000 study “The Economic Importance of Arts and Cultural Attractions in the Louisville Area”. That study provided a first-ever rollup of activity and financial data on the major ACA organizations in the region, as well as a comparison with other similarly sized metropolitan areas. The report remains available on the ACA website (www.greaterlouisville.com/acanet/resources.asp). The Council has used the study to elevate the collective profile of our arts and cultural attractions in the perceptions of elected officials, economic development professionals, and the general public. It is time for an update, to see how the ‘industry’ has grown this decade and what has changed in Louisville relative to other markets.



We need your help again. In particular, we need some basic data on your organization. You may or may not have developed a database of economic activities – employment, payrolls, volunteers, visits, paid admissions, revenues, expenditures, assets. We are not asking you to do a lot of research, but to share some of your already compiled internal data. As before we promise not to release your data to anyone, but simply to combine it with that of your colleagues and report summary measures by type of activity.

Would you please provide entries in the attached table, as available and appropriate for your latest reporting year, using estimates for the current fiscal year if it is about to conclude? You can respond by email, mail or fax. If more convenient we will visit you at your office to go through it in person. This flexible format worked well last time. ***We would like a response by Friday, May 18.***

We very much value and appreciate your time in this research. In fact, we cannot compile the statistical snapshot without your help. Feel free to make suggestions as to the best measures for your ACA activities – we recognize that the various organizations may have very different economic concepts and measurement protocols.

Sincerely,

Paul Coomes, Ph.D.
Professor of Economics, and
National City Research Fellow
University of Louisville

Stephen Klein
President of The Kentucky Center, and
Chair, Arts and Cultural Attractions Council



Appendix B. Letter and Data Template Used for Study (cont)

NAME: _____

ORGANIZATION: _____



Reference Year *	Annual Budget Summary
* please specify calendar or fiscal year range	
Services	Revenues
Visits/attendance annually, paid and unpaid	from admissions/ticket sales
Paid visits/attendance	from concessions
Estimated % of visitors that are not residents*	from other sales
* not residents of 13-county Louisville MSA	from government grants
Workforce and payrolls	from private grants and contributions
Average monthly full-time employment	from investment income
Average monthly part-time employment	other
Estimate of FTE of the part-time workforce	Total annual revenues
	Expenditures
Total annual payroll, excluding fringe benefits	for personnel
Fringe benefits	for materials, supplies, equipment
Annual contract labor costs	for services (utilities, advertising, legal, etc)
	for real estate (rent, mortgage)
Number of volunteers (individuals) annually	other
Annual volunteer hours	Total annual expenditures
Assets	Footprint
Insured value of real estate, equipment	Square feet of office space utilized
Value of financial assets	Parking spots controlled

Please email to paul.coomes@louisville.edu, or fax to 852.7672, or mail to Paul Coomes, College of Business, University of Louisville, Louisville KY 40292. Call with questions, 852.4841. Thanks.



Component Counties of 16 Competitor Metros

Area Code* MSA.....Counties	Population 2002	Area Code* MSA.....Counties	Population 2002	Area Code* MSA.....Counties	Population 2002
71000 Birmingham, AL	935,168	73480 Indianapolis, IN	1,655,097	74920 Memphis, TN-AR-MS	1,160,065
01009 Blount, AL	52,968	18011 Boone, IN	48,277	47047 Fayette, TN	31,202
01073 Jefferson, AL	661,153	18057 Hamilton, IN	205,610	47157 Shelby, TN	905,678
01115 St. Clair, AL	67,215	18059 Hancock, IN	58,343	47167 Tipton, TN	53,436
01117 Shelby, AL	153,832	18063 Hendricks, IN	114,301	05035 Crittenden, AR	51,291
		18081 Johnson, IN	121,604	28033 De Soto, MS	118,458
71520 Charlotte-Gastonia-Rock Hill, NC-SC	1,584,898	18095 Madison, IN	132,068		
37025 Cabarrus, NC	140,182	18097 Marion, IN	863,429	75360 Nashville, TN	1,270,520
37071 Gaston, NC	193,443	18109 Morgan, IN	67,791	47021 Cheatham, TN	36,986
37109 Lincoln, NC	66,598	18145 Shelby, IN	43,674	47037 Davidson, TN	570,785
37119 Mecklenburg, NC	737,950			47043 Dickson, TN	44,231
37159 Rowan, NC	133,359	73600 Jacksonville, FL	1,154,809	47147 Robertson, TN	57,446
37179 Union, NC	139,611	12019 Clay, FL	152,093	47149 Rutherford, TN	194,934
45091 York, SC	173,755	12031 Duval, FL	806,120	47165 Sumner, TN	136,170
		12089 Nassau, FL	60,558	47187 Williamson, TN	136,889
		12109 St. Johns, FL	136,038	47189 Wilson, TN	93,079
71640 Cincinnati, OH-KY-IN PMSA	1,669,136				
39015 Brown, OH	43,464				
39025 Clermont, OH	183,352	73760 Kansas City, MO-KS	1,828,247	75920 Omaha, NE-IA	734,270
39061 Hamilton, OH	833,721	29037 Cass, MO	87,310	31025 Cass, NE	24,839
39165 Warren, OH	175,133	29047 Clay, MO	191,381	31055 Douglas, NE	472,744
21015 Boone, KY	93,290	29049 Clinton, MO	19,632	31153 Sary, NE	129,319
21037 Campbell, KY	88,604	29095 Jackson, MO	660,773	31177 Washington, NE	19,211
21077 Gallatin, KY	7,836	29107 Lafayette, MO	33,125	19155 Pottawattamie, IA	88,157
21081 Grant, KY	23,620	29165 Platte, MO	77,655		
21117 Kenton, KY	152,164	29177 Ray, MO	23,811	76640 Raleigh-Durham-Chapel Hill, NC	1,267,676
21191 Pendleton, KY	14,815	20091 Johnson, KS	476,536	37037 Chatham, NC	53,893
18029 Dearborn, IN	47,333	20103 Leavenworth, KS	70,789	37063 Durham, NC	234,199
18115 Ohio, IN	5,804	20121 Miami, KS	28,904	37069 Franklin, NC	50,449
		20209 Wyandotte, KS	158,331	37101 Johnston, NC	133,159
				37135 Orange, NC	120,458
71840 Columbus, OH	1,583,907			37183 Wake, NC	675,518
39041 Delaware, OH	125,399	74280 Lexington, KY	489,717		
39045 Fairfield, OH	129,161	21017 Bourbon, KY	19,576		
39049 Franklin, OH	1,086,814	21049 Clark, KY	33,726	76760 Richmond-Petersburg, VA	1,023,419
39089 Licking, OH	148,731	21067 Fayette, KY	263,618	51036 Charles City, VA	7,239
39097 Madison, OH	40,365	21113 Jessamine, KY	40,740	51041 Chesterfield, VA	271,142
39129 Picaway, OH	53,437	21151 Madison, KY	73,334	51053 Dinwiddie, VA	24,747
		21209 Scott, KY	35,320	51075 Goochland, VA	17,523
		21239 Woodford, KY	23,403	51085 Hanover, VA	92,050
72000 Dayton-Springfield, OH	947,446			51087 Henrico, VA	268,270
39023 Clark, OH	143,416	74520 Louisville, KY-IN	1,039,599	51127 New Kent, VA	14,157
39057 Greene, OH	149,964	21029 Bullitt, KY	63,800	51145 Powhatan, VA	23,997
39109 Miami, OH	99,596	21111 Jefferson, KY	698,080	51149 Prince George, VA	34,135
39113 Montgomery, OH	554,470	21185 Oldham, KY	49,310	51570 Colonial Heights city, VA	17,063
		18019 Clark, IN	98,198	51670 Hopewell city, VA	22,525
73120 Greensboro-Winson Salem-High Point, NC	1,286,265	18043 Floyd, IN	71,633	51730 Petersburg city, VA	33,115
37001 Alamance, NC	135,893	18061 Harrison, IN	35,244	51760 Richmond city, VA	197,456
37057 Davidson, NC	151,238	18143 Scott, IN	23,334		
37059 Davie, NC	36,734				
37067 Forsyth, NC	314,933				
37081 Guilford, NC	430,937				
37151 Randolph, NC	134,217				
37169 Stokes, NC	44,984				
37197 Yadkin, NC	37,329				

* Federal Information Processing Standards (FIPS) codes, for metropolitan areas defined as of June 30, 1996; and for counties as of January 1, 1990.

Population data from US Census Bureau.

