

CREATIVE VITALITY INDEX™

2011

The Creative Vitality Index™ is commissioned from WESTAF by the Durham Arts Council, with data compilation assistance from Durham Convention & Visitors Bureau. The CVI presentation is supported by the Durham Arts Council's Business Committee for the Arts program, a partnership of the DAC, DCVB, Greater Durham Chamber of Commerce, Duke University, and the City of Durham's Office of Economic and Workforce Development. The local program is an affiliate of the national Business Committee for the Arts Program.

Each year programs are presented in Durham to highlight the important role of the arts and the creative economy, and to encourage arts and business partnerships.

For more information and/or a copy of the full Creative Vitality Index report for Durham, please visit www.durhamarts.org.

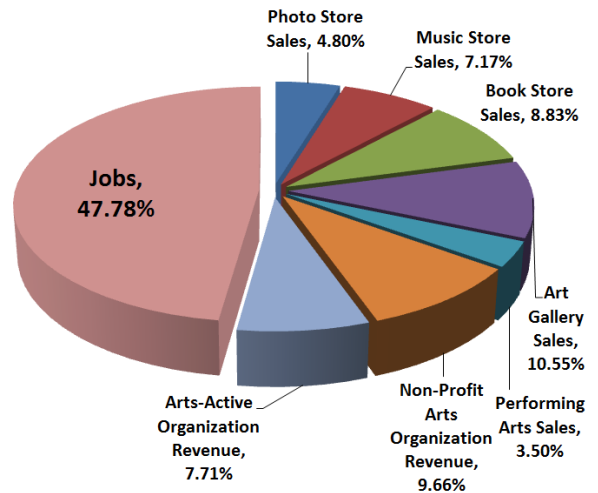
CREATIVE VITALITY INDEX™ - 2011

What is the Creative Vitality Index™?

The Creative Vitality Index™ (CVI) is an annual measure of the health of the creative economy in a city, county, state or other geographic area. The creative economy as defined in the CVI includes for-profit and not-for-profit arts-related enterprises. Using readily available, inexpensive data on employment and community participation, the CVI reflects the vigor of this sector of the economy and culture.

The Index has two major components. One component measures concentrations of arts-related EMPLOYMENT, the other measures seven indicators of community PARTICIPATION in the arts:

1. Income of not-for profit arts organizations
2. Income of not-for-profit humanities orgs.
3. Per capita bookstore sales
4. Per capita music store sales
5. Per capita photography store sales
6. Per capita performing arts revenues
7. Per capita art gallery/individual artist sales



How Did Durham Do?

The baseline score for the CVI is 1.00 – this is the national score using the same data streams used locally. A community's score reflects a value to this baseline; a score of 1.0 or greater means the area has a relatively strong arts/creative sector.

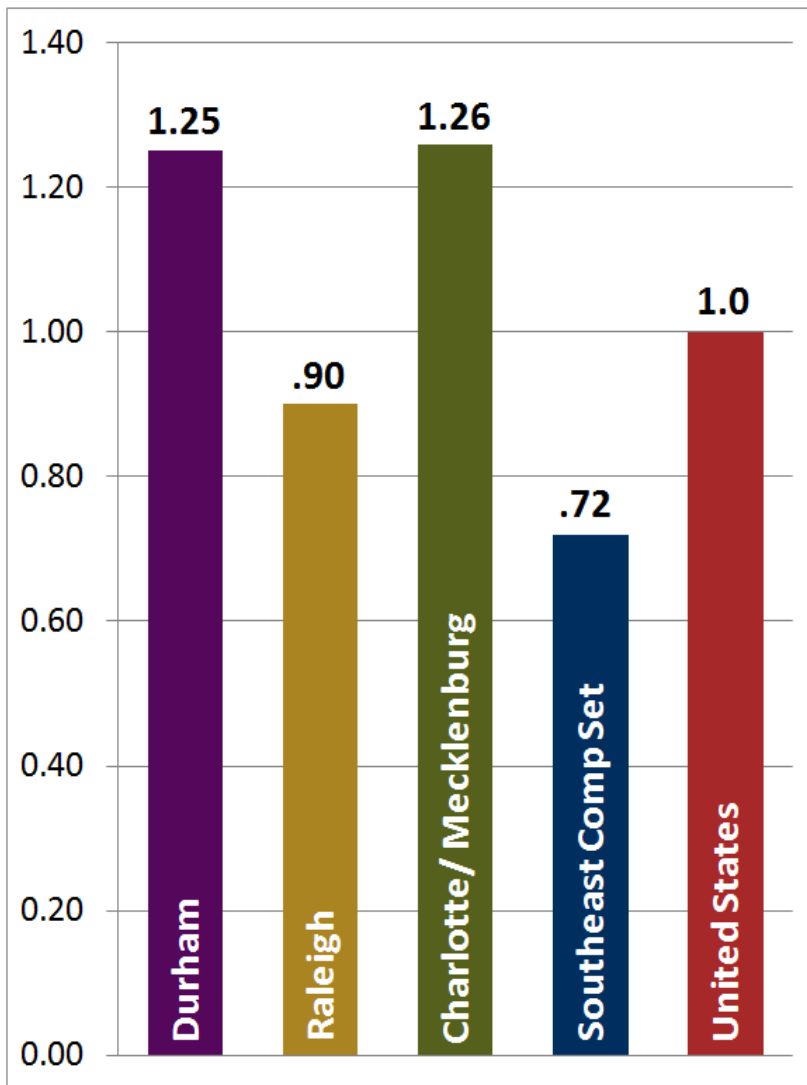
- The 2011 CVI index value for Durham is 1.25; well above the national average of 1.00. Durham had a minimal decline of 8 tenths of a point in 2011 compared to the prior year and reached a high of 1.33 in 2010. This was the top score of metro areas in North Carolina.
- Durham's overall CVI outperformed the State of North Carolina by 93% and the Southeast Comparative MSA regions by 69%.
- There are 7,335 creative jobs in Durham, up 22% in five years.
- Durham's creative jobs exceed the nation's creative jobs baseline by 76.3% (index 1.76) and exceeds the state's baseline by 119% (index 2.19).



The **Creative Vitality Index™** was conceived as a tool used by states, counties, cities and towns to assess and enhance their creative edge.

This report illustrates how Durham measures up statewide, nationally and to a competitive set of 10 MSAs of similar size to Durham.

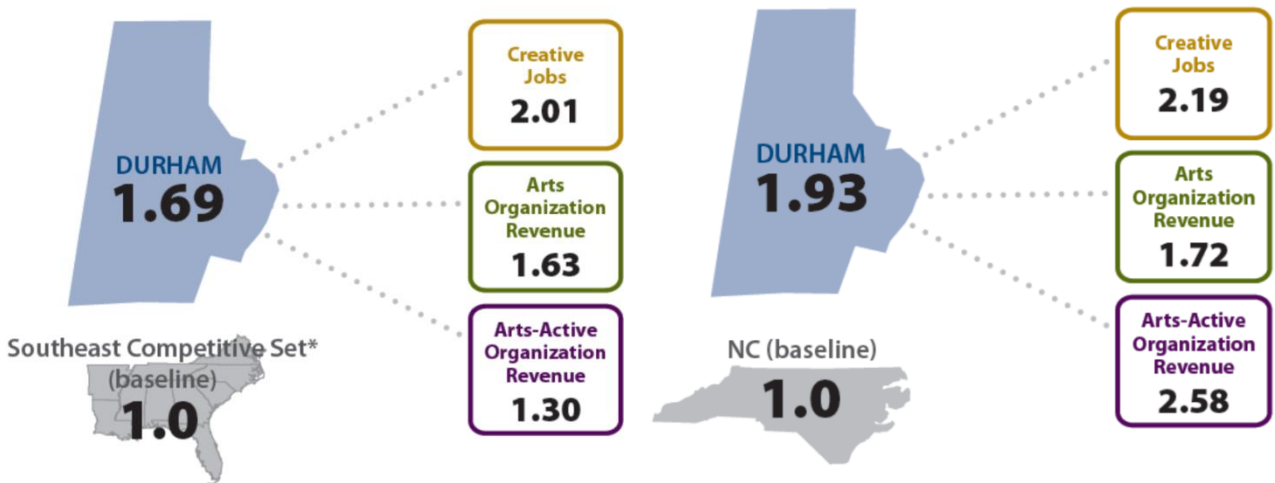
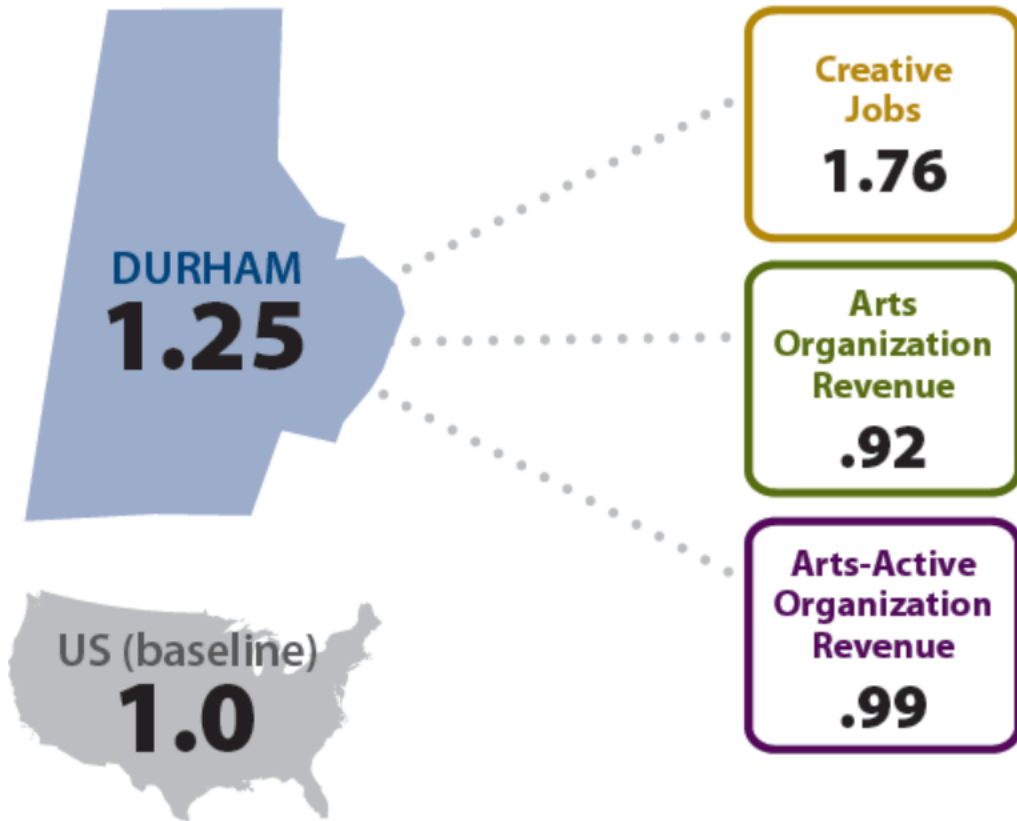
CREATIVE VITALITY INDEX™ 2011



- An index is a number that is used to express relationships between different data sets.
- An index is usually expressed in terms of a change from a base value.
- In this report Durham is compared against a base value that equals either the national average, the state average, or its comp set average.
- In this report, a 1 is used to indicate the base value.
- If Durham has an index of 1.25 it is 25% higher than the average.
- Sometimes an indicator is indexed against a state average AND a national average.










DURHAM INDEXED TO THE US, SOUTHEAST AND NC 2011



**The Southeast Competitive Set includes the MSAs from the following destinations: Augusta; Baton Rouge; Greensboro; Little Rock; Montgomery; Norfolk; Raleigh; Richmond; Shreveport and Winston-Salem.*



CVI COMPONENTS BY REVENUE AND INDICIES 2006-2011

		Revenue	Indexed to US	Indexed to SE Comp Set	Indexed to NC	TRENDING
Photography Store Sales	2011	\$0.46 Million	0.46	1.02	0.98	Declining 
	2008	\$1.87 Million	1.52	n/a	2.60	
	2006	\$1.12 Million	0.77	n/a	1.14	
Music Store Sales	2011	\$3.35 Million	1.3	1.51	1.72	Recovering 
	2008	\$1.16 Million	0.44	n/a	0.55	
	2006	\$3.32 Million	1.16	n/a	1.43	
Book and Record Store Sales	2011	\$10.1 Million	1.46	1.87	2.03	Recovering 
	2008	\$8.4 Million	1.13	n/a	1.50	
	2006	\$14.6 Million	1.67	n/a	2.51	
Art Gallery and Artist Sales	2011	\$26.8 Million	0.81	2.22	2.05	Recovering 
	2008	\$27.7 Million	0.94	n/a	2.55	
	2006	\$23.2 Million	0.86	n/a	2.27	
Performing Arts Participation	2011	\$4.69 Million	0.35	0.74	1.05	Improving 
	2008	\$2.21 Million	0.18	n/a	0.71	
	2006	\$2.24 Million	0.21	n/a	0.75	
Non-Profit Arts Organization Revenue	2011	\$10.9 Million	0.92	1.63	1.72	Declining 
	2008	\$13.3 Million	1.06	n/a	2.10	
	2006	\$10.9 Million	1.06	n/a	2.04	
Arts-Active Organization Revenue	2011	\$14.3 Million	0.99	1.3	2.58	Declining 
	2008	\$15.5 Million	1.16	n/a	1.80	
	2006	\$10.9 Million	1.00	n/a	2.28	

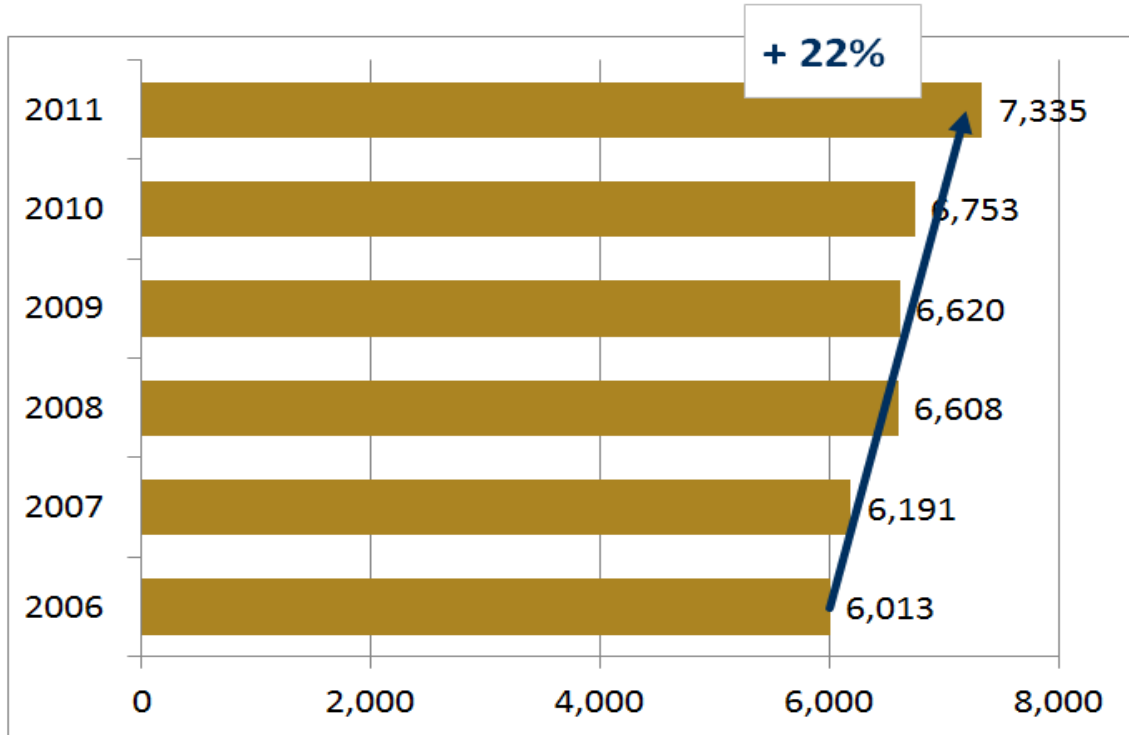


TOTAL CREATIVE JOBS IN DURHAM, 2006-2011

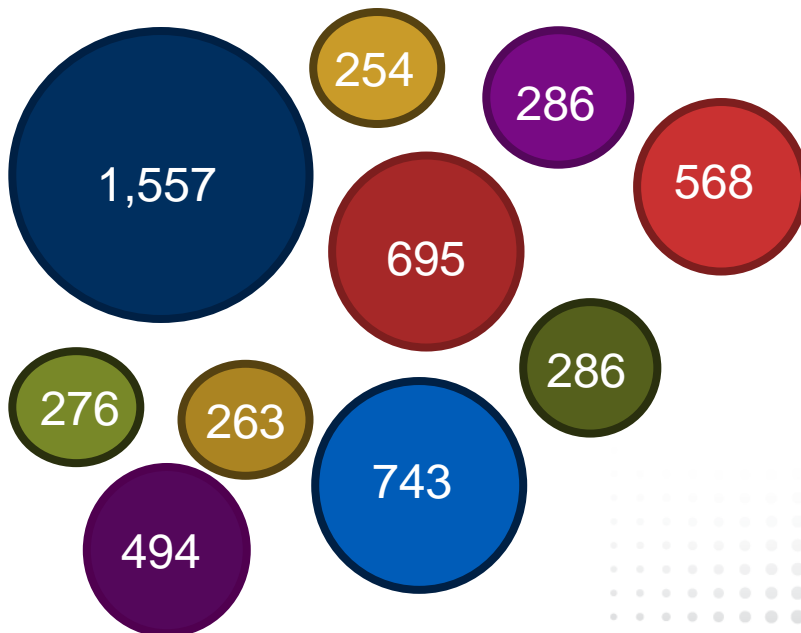
	2011	2008	2006	3-year change	5-year change
Photographers	1,557	1,246	1,126	25.0%	38.3%
Writers and Authors	743	664	611	11.9%	21.6%
Musicians and Singers	695	288	281	141.3%	147.3%
Graphic Designers	568	383	336	48.3%	69.0%
Public Relations Specialists	494	568	466	-13.0%	6.0%
Librarians	286	328	382	-12.8%	-25.1%
Architects, Except Landscape and Naval	276	240	226	15.0%	22.1%
Multi-Media Artists and Animators	274	205	176	33.7%	55.7%
Art Directors	263	145	146	81.4%	80.1%
Editors	254	282	198	-9.9%	28.3%
Music Directors and Composers	191	223	217	-14.3%	-12.0%
Technical Writers	173	251	239	-31.1%	-27.6%
Producers and Directors	136	174	150	-21.8%	-9.3%
Directors, Religious Activities	135	140	146	-3.6%	-7.5%
Public Relations Managers	129	126	106	2.4%	21.7%
Media and Communication Workers, All Other	114	211	187	-46.0%	-39.0%
Audio and Video Equipment Technicians	110	84	61	31.0%	80.3%
Fine Artists including Painters, Sculptors, Illustrators	107	153	140	-30.1%	-23.6%
Radio and Television Announcers	104	65	29	60.0%	258.6%
Interior Designers	104	67	65	55.2%	60.0%
Actors	78	87	79	-10.3%	-1.3%
Agents/Business Managers of Artists, Performers, Athletes	77	63	49	22.2%	57.1%
Floral Designers	67	87	87	-23.0%	-23.0%
Advertising and Promotions Managers	56	54	54	3.7%	3.7%
Camera Operators, Television, Video and Motion Picture	50	43	27	16.3%	85.2%
Commercial and Industrial Designers	48	69	69	-30.4%	-30.4%
Film and Video Editors	45	35	32	28.6%	40.6%
Broadcast Technicians	39	55	80	-29.1%	-51.3%
Set and Exhibit Designers	34	57	50	-40.4%	-32.0%
Landscape Architects	32	87	73	-63.2%	-56.2%
Choreographers	29	13	15	123.1%	93.3%
Media/Communication Equipment Workers	20	16	16	25.0%	25.0%
Fashion Designers	14	54	50	-74.1%	-72.0%
Sound Engineering Technicians	13	13	13	0.0%	0.0%
Dancers	13	13	18	0.0%	-27.8%
Musical Instrument Repairers and Tuners	7	19	13	-63.2%	-46.2%
TOTAL	7,335	6,608	6,013	11.0%	22.0%



DURHAM CREATIVE JOBS 2006-2011



TOP TEN DURHAM CREATIVE JOBS - 2011



○ Photographers	1,557
○ Writers/Authors	743
○ Musicians	695
○ Graphic Designers	568
○ PR Specialists	494
○ Librarians	286
○ Architects	276
○ Animators	274
○ Art Directors	263
○ Editors	254



IN SUMMARY

- Durham's Creative Vitality Index is strong at 1.25 overall; 25% above national average.
- Durham's overall CVI outperformed state of North Carolina by 93%, and Southeast Comparative MSAs Region by 69%.
- Durham outperformed the state of North Carolina in 7 out of 8 CVI categories.
- Durham's overall CVI dropped slightly from 2010 to 2011 due to nonprofit arts revenues and art gallery/artist sales:
 - Non-profit arts organization revenues dropped 18% from 2008 to 2011, reflecting continued impact of recession and funding cuts across the non-profit sector.
 - Art Gallery and Individual Artist Sales totaled \$26,766,000 in 2011, down 22% vs. 2010.
- Performing arts revenues grew from \$3.7 million in 2010 to \$4.7 million in 2011.
- There are 7,335 creative jobs in Durham, up 22% in 5 years.
- Durham's creative jobs exceeds the nation's creative jobs baseline by 76.3% (index 1.76), and exceeds the state's baseline by 119% (index 2.19).

In Closing: A Tool for Growth

The Creative Vitality Index can inform public policy decision-making and support the work of advocates for the development of the creative economy. Among many projected uses, the Index can:

- Educate the community at large concerning the components and dynamics of the creative economy.
- Promote the concept that the creative economy includes both for-profit and not-for-profit arts-related activities.
- Monitor trends and inform public arts policy, such as preserving arts space and providing public funding for the arts.
- Call attention to significant changes in the creative economy ecosystem, such as sustained revenue drops in portions of the sector or specific job sector growth or decline.
- Provide a framework upon which a coalition to support and expand the creative economy can be built
- Serve as a diagnostic tool to provide a baseline and then annually measure changes in the creative economy.