



LONDON CULTURAL PROFILE

Presentation to Creative City Committee

Canadian Urban Institute
Sierra Planning and Management

May 3, 2012

Presentation Outline

- » Project Update
- » Cultural Resource Mapping and Database
 - » Data sources
 - » Phase 1 Deliverables
 - » Cultural industries, occupations, spaces & facilities
- » Economic Impact of Culture in the City
 - » Project Objectives and Approach, Methodology
 - » Defining Cultural Industries and Workers
 - » Culture: Range and Scope of Analysis
 - » Analysis – What Next?



Project Update

Work Plan

Assessment of
Cultural Resources
Information

Populated,
Searchable CRD

Economic Impact
Calculation Model

Opportunities to
Develop Nodal
Creative Spaces

Capital Resource
Requirements for
Cultural Facilities
and Spaces

Database
Management Plan

Expansion of CRD
(Phase 2)

Final Report

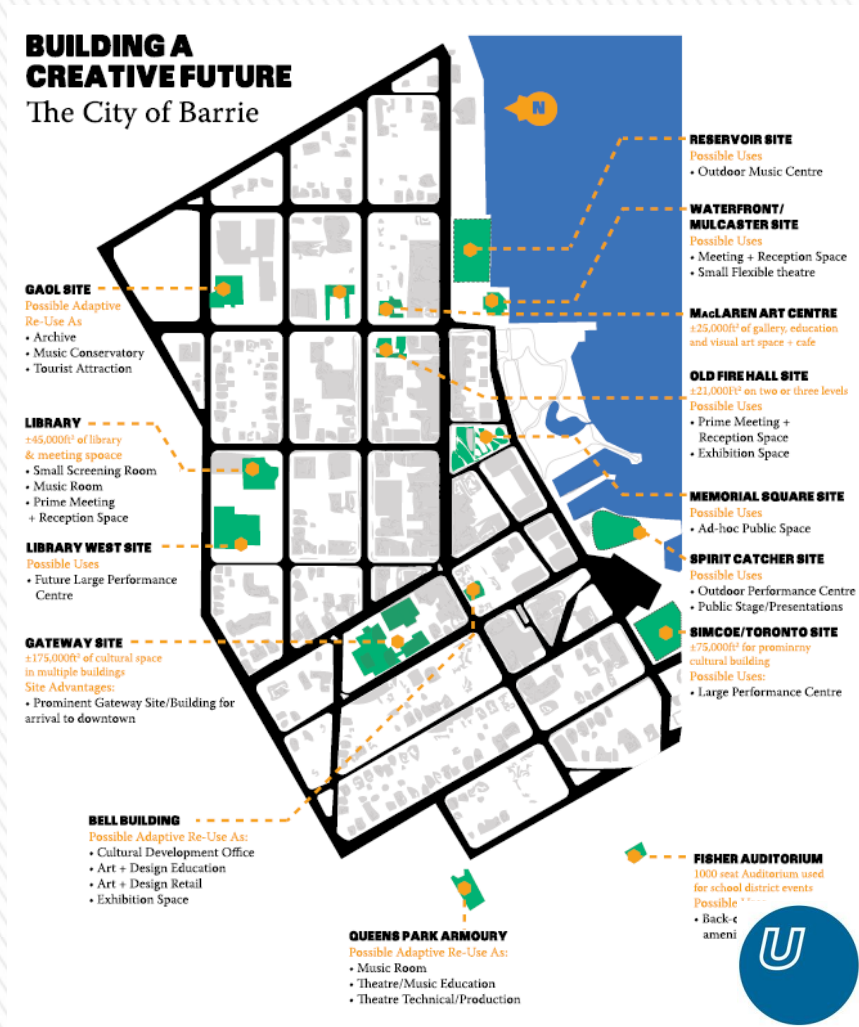
Final Presentation
to Creative City
Committee



Cultural Resource Mapping

Cultural Resource Mapping is a way to identify, visualize and describe a community's cultural resources.

- The first major step involves building a database of cultural resources



Building a CRD

A CRD is a centralized inventory of a community's cultural assets.

- Based on a broad definition of cultural resources
- Can include information about public, private and not-for-profit sectors
- Can be viewed through a map-based interface

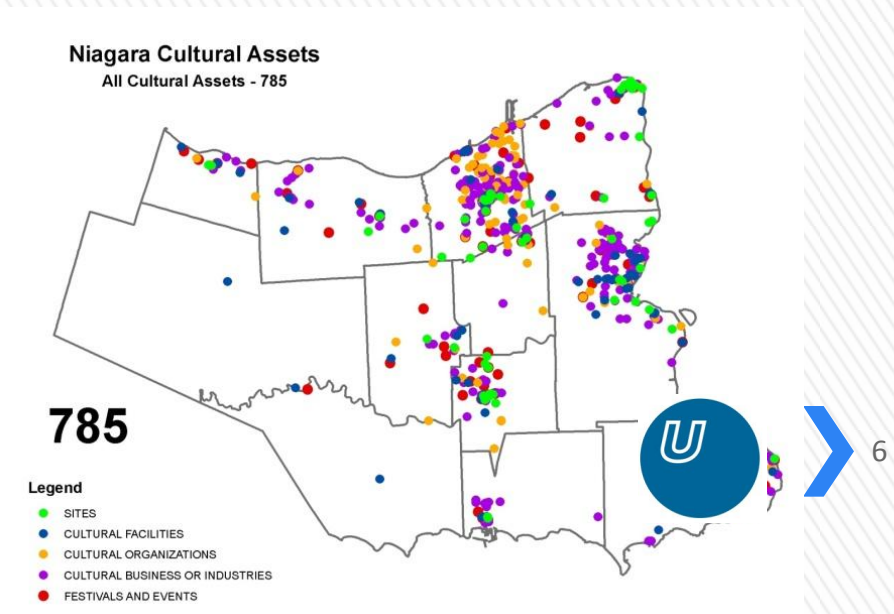
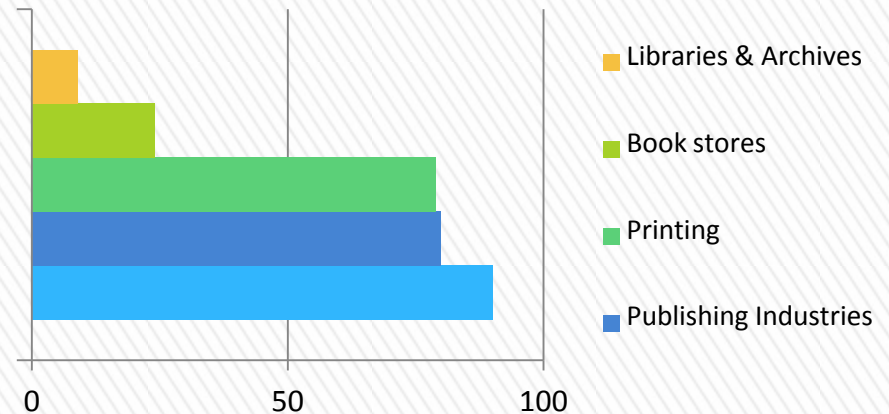
Principles for Building CRDs

- Simplicity
- Accessibility
- Relevance

What Can This Accomplish?

Cultural resource mapping can:

- > Illustrate the presence of cultural assets in the community
- > Create a strong base of information that supports evidence-based decision making
- > Establish a cultural lens with which to view other policies and plans
- > Support the cultural sector by giving residents and visitors access to info about arts and heritage activity
- > Present information visually in ways that are easy to understand and have a strong impact
- > Establish a group of partners in government and civil society committed to planning for cultural vitality



Cultural Resources Framework



Additional Resources

- Schools
- Community Facilities
- Social / Human Services
- Hospitality
- Agriculture
- Religious Organizations
- Information and Communications Technologies (ICT)



Data Sources for Phase 1

NAICS: North American Industry Classification System (unit of observation is the establishment or producing unit)

NOCS: National Occupational Classification for Statistics (unit of observation is the kind of work performed)

Canadian Framework for Culture Statistics (2011) used to select industry and occupation codes.

Cultural
Industries

» Canadian Business Patterns (Statistics Canada)

- > December 2011 business location counts by industry for all of the Census Tracts in London.

Cultural
Occupations

» Place of Work Data (2006 Census)

- > Employed Labour Force 15 years and over
- > Place of Work Status for worked from home and usual place of work combined
- > Includes full and part time

Cultural
Facilities
&
Spaces

» Place of Residence Data (2006 Census)

- > Total Labour Force 15 years and over
- > Includes Employed Labour Force and Unemployed Labour Force (those who were unemployed the week prior to the 2006 Census)
- > Includes full and part time

» Facilities and Spaces

- > City of London GIS database files
- > Venues in Arts and Heritage portals
 - + Working with LAC and LHC to categorize data



Next Steps

- » Phase 2 of the CRD will identify and record other cultural resources as determined in discussion with the working team.
- » Continue to work with LAC and LHC to categorize data.
- » Assess capital resource requirements for cultural facilities and spaces.
- » Review opportunities to develop nodal creative spaces.
- » Develop a database management plan.
- » Continue engagement with stakeholders.
- » Final report and presentation.





LONDON CULTURAL PROFILE

The Economic Impact Of Culture In The City

Presentation by Sierra Planning and Management

May 3, 2012



Agenda

- Introductions
- Project Objectives and Approach
- Methodology
- Defining Cultural Industries and Workers
- Culture: Range and Scope of Analysis
- Analysis – What Next?

Approach

- Engage City staff and other stakeholders in a ‘drill down’ of culture industry economic ‘throughput’;
- To develop an appropriate Economic Impact Model
- Analysis focuses on operational activity. We are generally not addressing capital – should – as a forward exercise (snapshot of capital in 1 yr. not representative)

Defining Cultural Industries

Categories	Industries
Communications Media	Broadcasting (Radio, Television and Internet)
Electronic Arts	Sound Recording, Motion Picture and Software Publishing
Design/Civic Arts	Architecture and related services, Graphic Design
Visual Arts and Crafts	Photography , Pottery, Textile and Jewelry Design
Literary Arts	Print Publications, Libraries and Archives
Performing Arts	Theatre, Music and Dance Companies, Live Performers
Heritage	Heritage and Historic Sites, Natural Heritage

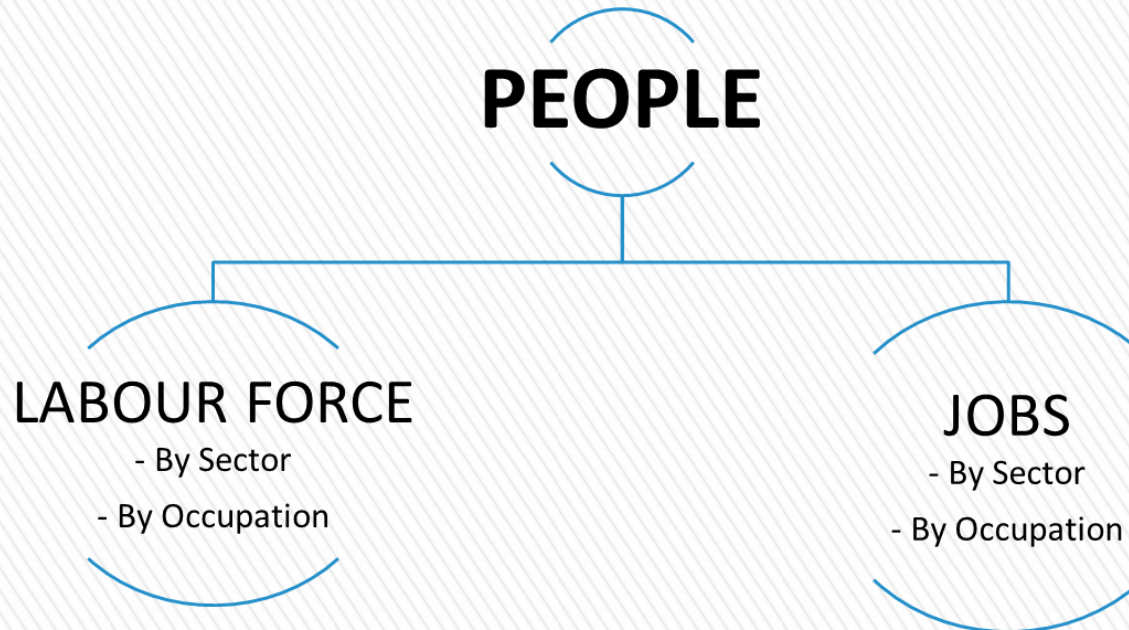
Based on North American Industry Classification System (NAICS) as outlined in Statistics Canada's 2011 Canadian Framework for Culture Statistics.

Defining Cultural Workers

Categories	Occupations
Live Performance (Performing Arts)	Event Planners, Producers and Choreographers
Visual and Applied Arts	Architects, Web Designers, Painters and Patternmakers
Audio-Visual and Interactive Media (Communications Media)	Interactive Media Developers, Film and Video Camera Operators and Broadcast Technicians
Sound Recording (Electronic Arts)	Conductors, Composers and Arrangers
Written and Published Works (Literary Arts)	Desktop Publishing Operators, Authors, Writers, Editors, and Journalists
Libraries (Literary Arts)	Correspondence and Library Clerks, Librarians
Heritage	Curators, Archivists and Museum Managers

Based on the National Occupational Classification for Statistics (NOC-S) as outlined in Statistics Canada's 2011 Canadian Framework for Culture Statistics.

Culture: Range in Scope of Analysis



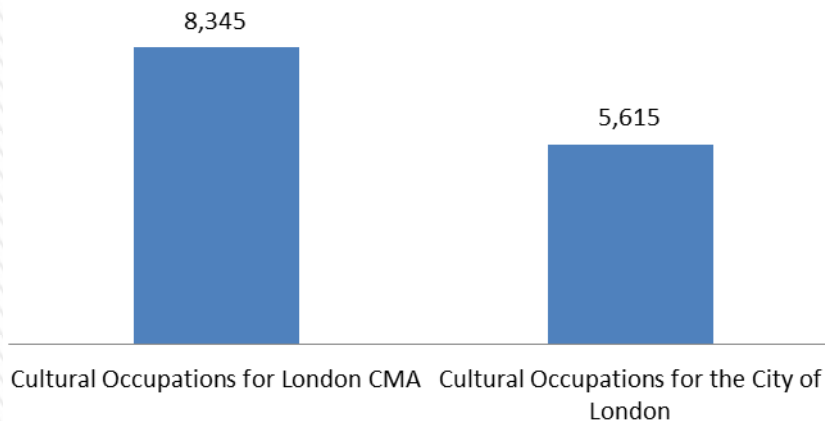
Statistics Canada 2006 Census Data:

- Place of Work by National Occupational Classification (NOC-S)
- Place of Residence by NOC-S

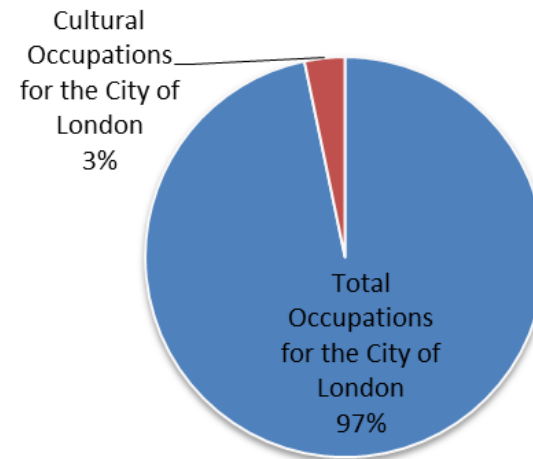
Culture: Jobs (Direct Only)

POW data indicates persons employed in cultural industries generated around **\$250,000 million** in income

Number of People employed in the Cultural Sector (POW 2006)

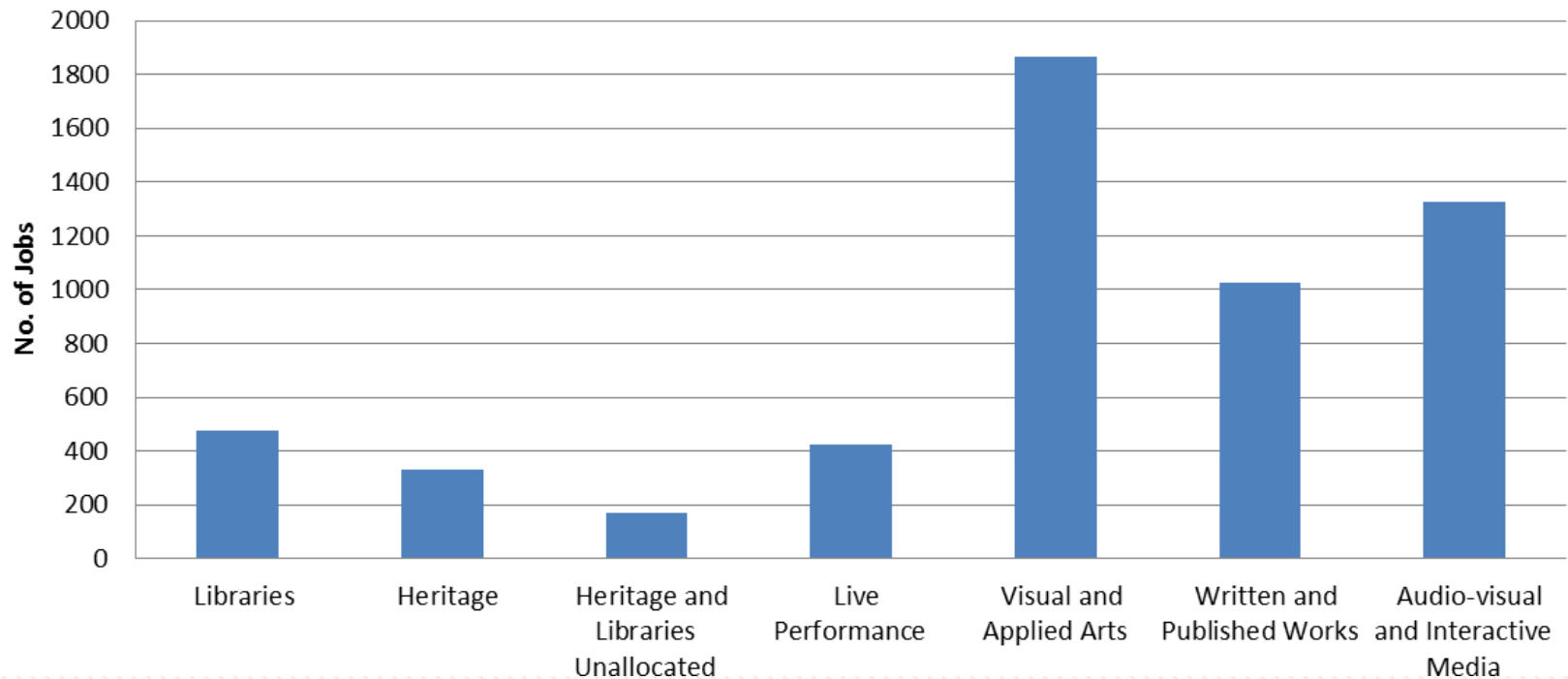


Jobs in the City based on 2006 POW Data



Culture: Jobs (Direct Only)

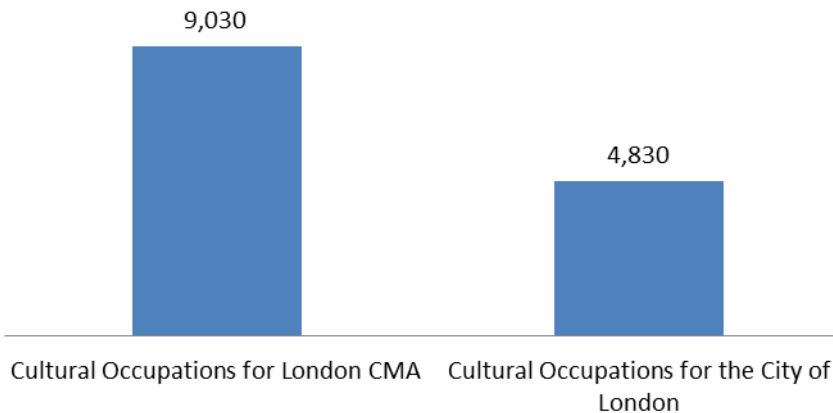
**Place of Work 2006: Total Jobs by Cultural Occupation (NOC-S)
Category in the City of London**



Culture: Labour Force

POR data indicates city residents employed in cultural industries generated around **\$200,000 million** in income

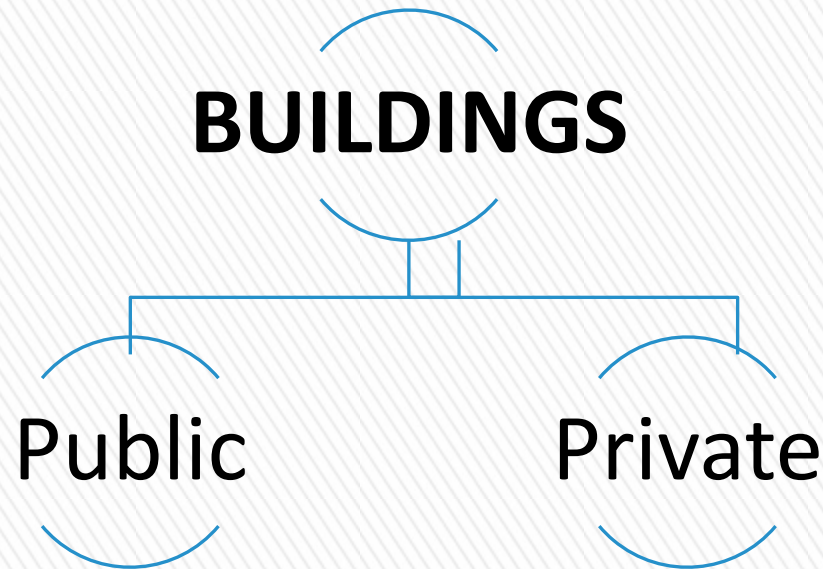
Number of London Residents in Cultural Labour Force (POR 2006)



Labour Force in the City based on 2006 POR Data



Culture: Key Buildings (non-exhaustive)



- Private and public buildings generated around **\$60 million** in 2011*
- Figures reflect operating revenues only
- Figures reflect a subset of buildings in the city (including some popular performance spaces).

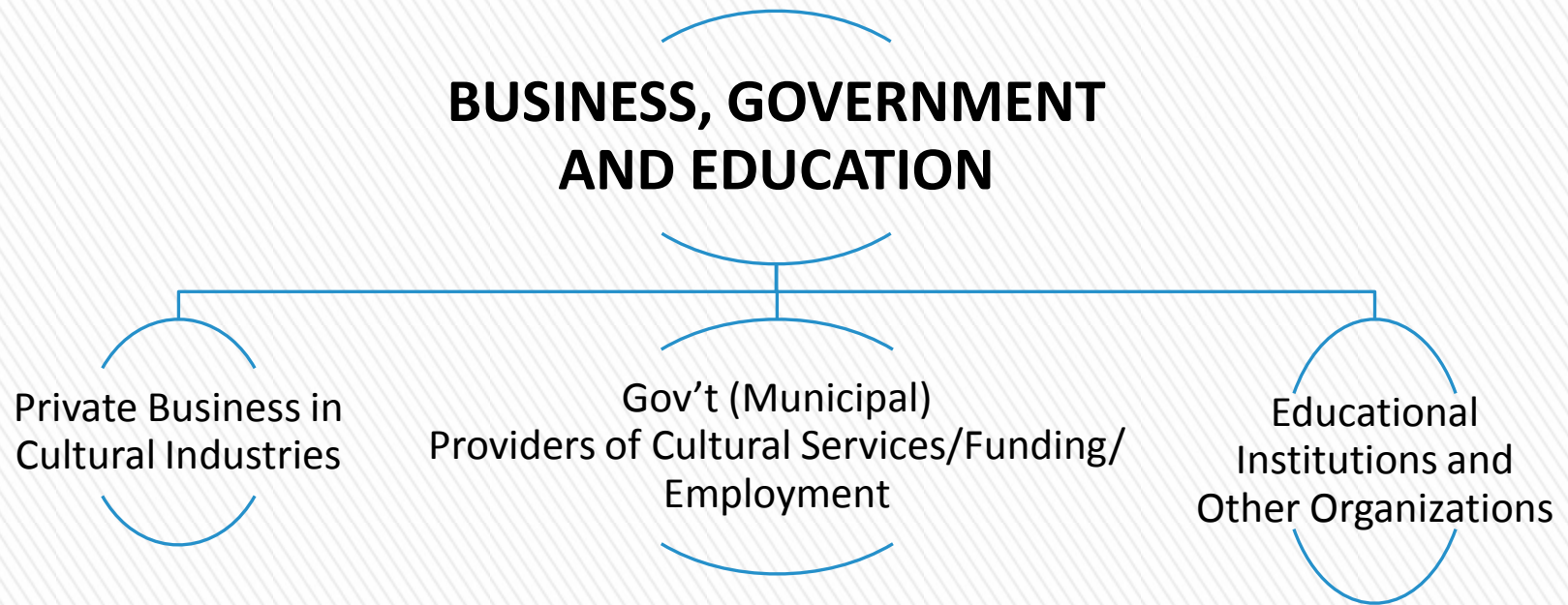
Culture: Key Buildings

Performance Spaces:

- 5 of London's popular performance spaces (out of 13) generated almost **\$25 million** in revenues in 2011
- The inclusion of performance and events spaces like Western Fair and the LCC increase this figure to almost **\$50 million**



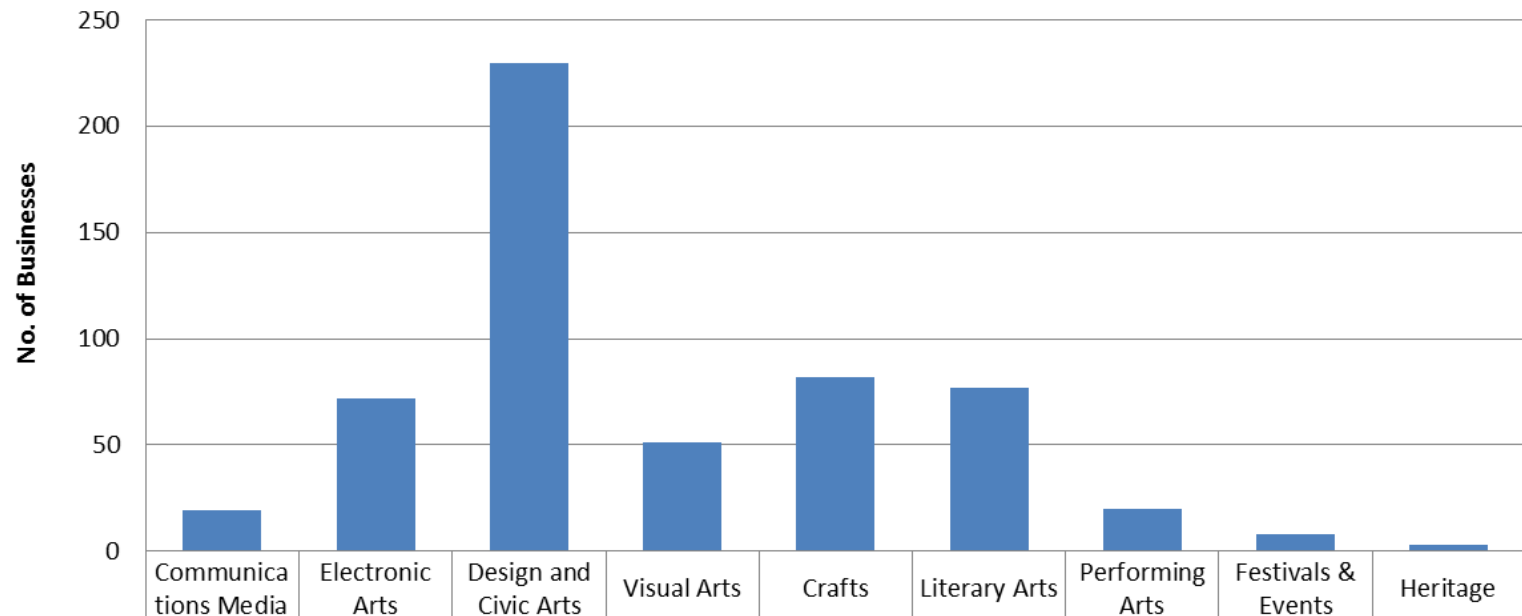
Culture: Private and Public



Culture: Establishments

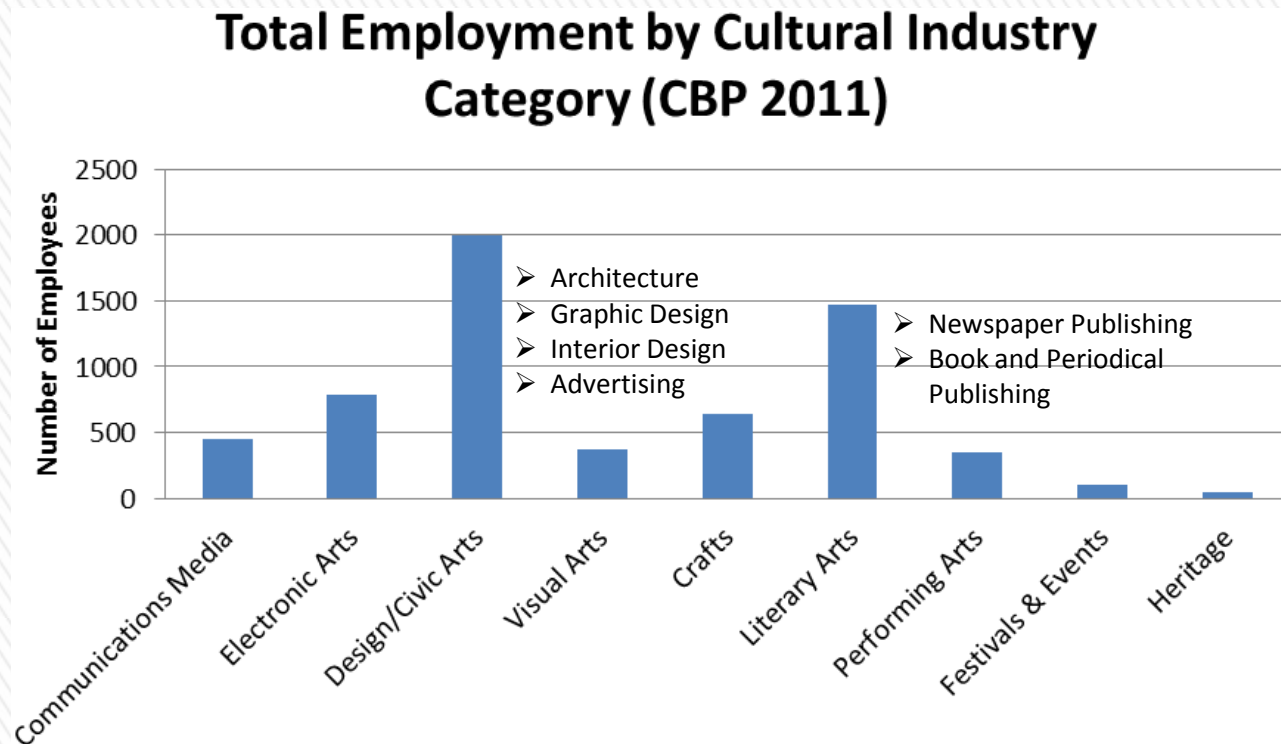
CBP shows there were **over 1200 arts and culture businesses** in the City of London in 2011. Only **562** had determinable employment numbers.

Total Businesses by Cultural Industry Category (CBP 2011)



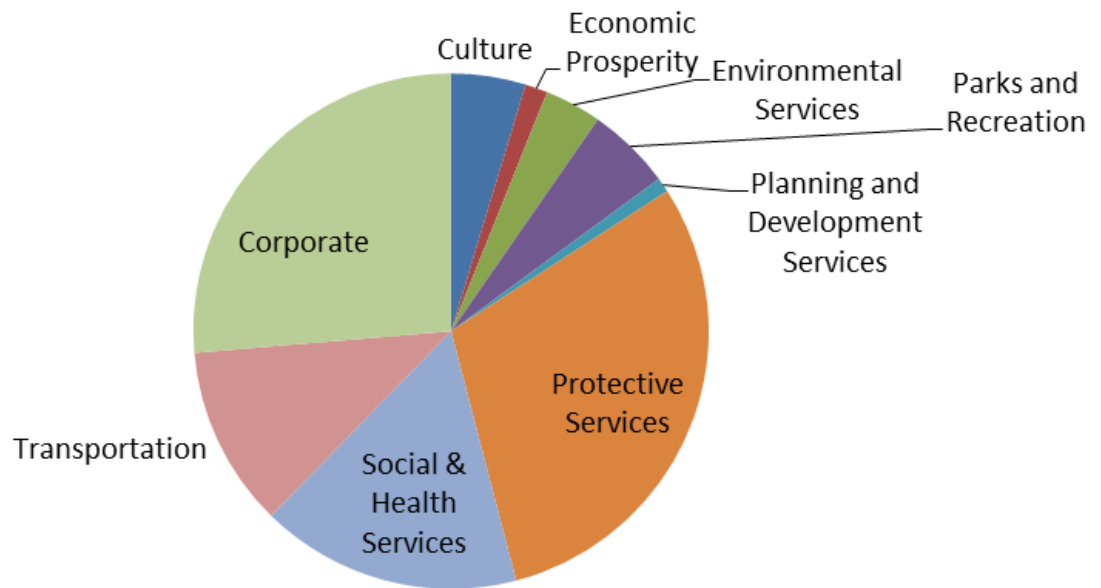
Culture: Establishments

- Total employment was estimated at **6220** in 2011
- **Design and Civic Arts** industries had the highest employment numbers, followed by **Literary Arts**



Culture: City Spending

**Breakdown of the City of London's 2011
Operating Budget**



City of London

- Operating Budget for Culture: **\$21,619,000**
- Capital Budget for Culture: **\$2,107,000**

Culture: Education

(limited to University and College)

- Over **6000** students enrolled in the Arts in 2011
- **Contemporary Media** and **Design programs** had the largest enrolment figures
- Universities and colleges generated almost **\$60 million** in revenues from arts and culture programs in 2011

Culture: Cultural Tourism

Events, Festivals and Tourism

Events/Festivals

- Annual Recurring (Operational Revenues/ Expenses)
- Market Draw (Participant Profile)

- **4,927,000** visitors to the London CMA in 2009
- **550,000** visitors engaged in cultural activities during their visit

Culture: Tourism

Visitor spending on cultural activities contributed around **\$20 million** to the local economy in 2009

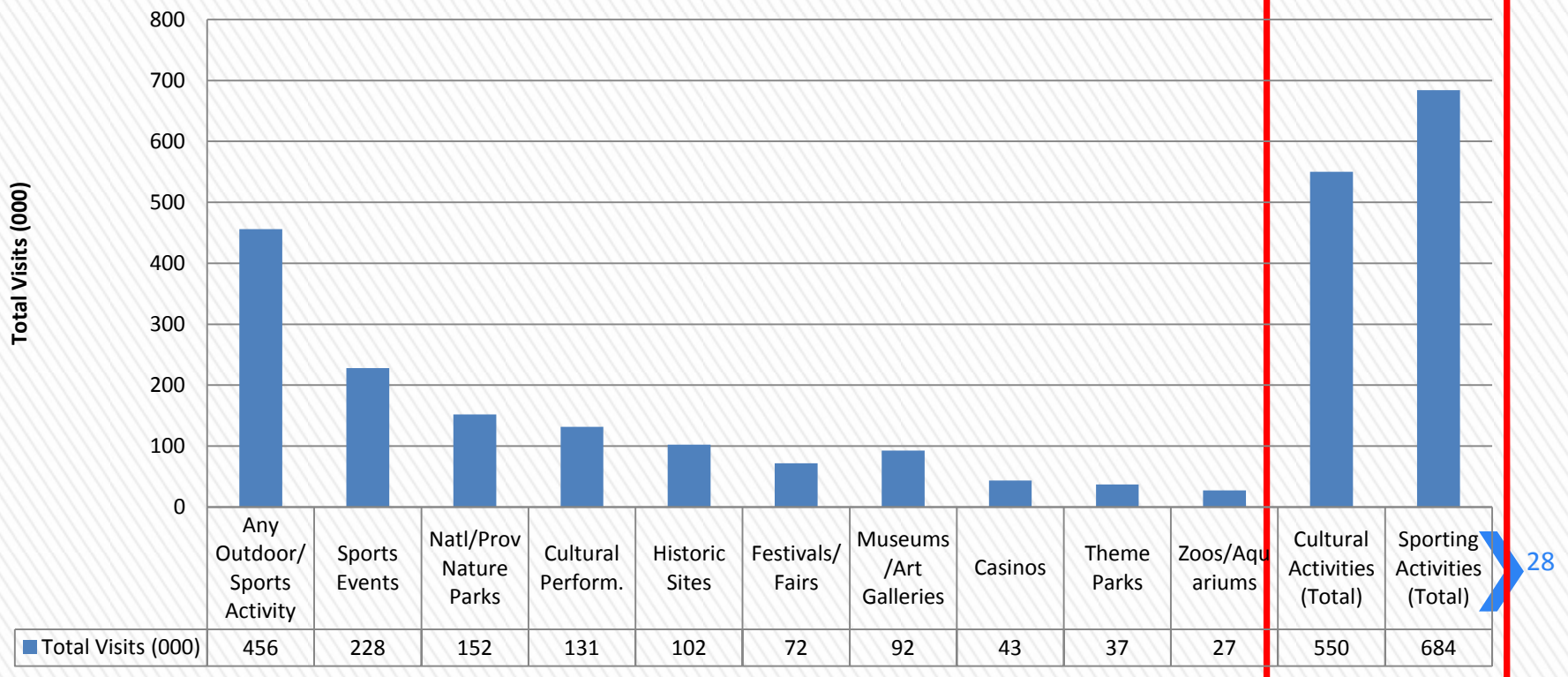
Activity	Total Visits (000s)				
	Total	Ontario	Other Canada	U.S.	Overseas
Any Outdoor/Sports Activity	456	402	13	36	5
Sports Events	228	208	3	13	4
Cultural Activities (Total)	550	262	33	143	113
Nat'l/Prov. Nature Parks	152	78	13	25	36
Cultural Performances	131	76	6	38	11
Historic Sites	102	31	4	37	31
Festivals/Fairs	72	28	5	20	19
Museums/Art Galleries	92	49	5	22	16
Casinos	43	25	3	11	4
Theme Parks	37	25	2	5	5
Zoos/Aquariums	27	5	5	2	15

Source: Ontario Ministry of Tourism, Culture and Sport - *Regional Tourism Profiles 2009*

Culture: Festivals and Events

Festivals generated over **\$1 million** in revenue in the last year

Trip Activities of Visitors to the London CMA in 2009



Analysis – What Next?

- The above is direct contribution
- They all are ways to express the same thing – but very importantly, in different ways, emphasizing the dynamics of the sector
- Next step: Refine the estimate of direct contribution
- Provide estimate of multiplier impact
- Fueling innovation: Key organizations