

Cultural Mapping: Growing Toronto's Culture Sector

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To:	Economic Development Committee
From:	General Manager, Economic Development & Culture
Wards:	All
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SUMMARY

A strong cultural industries sector creates distinctive experiences that draw tourists, revitalize neighbourhoods and brings significant social and economic benefits to the city.

Supporting the growth of culture sector jobs in the city requires several approaches including protecting and creating affordable cultural space to facilitate the expansion of existing businesses and attract new entrants. To do this requires knowledge of where cultural industry firms, workers and facilities are located, and an understanding of the conditions that enable their success.

Tools such as cultural mapping support decision makers, businesses and residents in understanding what is in their community, and where it is taking place. Most importantly, cultural mapping will help the City of Toronto to collaborate across divisions and with the public to identify where culture sector jobs are growing, and where they have the potential to grow.

Key findings of the *From the Ground Up: Growing Toronto's Culture Sector* report (Attachment 1) show that the areas of highest concentration are also the most diverse in terms of the variety of cultural occupations that are co-located, are connected to public transit and major transportation routes, and have affordable cultural space.

RECOMMENDATIONS

The General Manager of Economic Development and Culture recommends that:

1. City Council recognize the culture sector, including design, fashion, film and digital media as a key driver of Toronto's economic growth, prosperity and quality of life;
2. City Council direct the General Manager, Economic Development & Culture and the Chief Planner & Executive Director of City Planning to take the information and analysis in the report *From the Ground Up: Growing Toronto's Cultural Sector* into consideration to:
 - a. reinforce existing and/or draft new policies to retain, nurture and grow culture sector jobs and businesses in the city as part of the Official Plan Review, and through a review of Secondary Plan policies for Regeneration Areas; and
 - b. ensure implementation of the *Creative Capital Gains: An Action Plan for Toronto* so as to achieve a supply of affordable, sustainable spaces and support the development of creative clusters and cultural scenes.

FINANCIAL IMPACT

There are no financial implications resulting from the adoption of this report.

DECISION HISTORY

At its meeting on December 1, 2, 3, 2008, City Council directed the General Manager, Economic Development and Culture, to work with City Planning to: (1) advance cultural mapping to identify areas of high cultural industry concentration or potential; (2) develop a shared definition of the culture sector; and (3) retain and create cultural space through targeted programs and increased collaboration between City divisions.

<http://www.toronto.ca/legdocs/mmis/2008/ed/bgrd/backgroundfile-17311.pdf>.

At its meeting on May 17, 18, 19, 2011, City Council endorsed the *Creative Capital Gains: An Action Plan for Toronto*. One of the *Creative Capital Gains* report recommendations is that the City support the development of creative clusters and emerging cultural scenes to capitalize on their potential as generators of jobs and economic growth. Specifically, Action 3.1 calls for the City to continue to study and map the cultural districts in Toronto and recommend policy tools to foster and protect existing cultural clusters.

<http://www.toronto.ca/legdocs/mmis/2011/ed/bgrd/backgroundfile-37784.pdf>

ISSUE BACKGROUND

Toronto's culture sector is a major industry in its own right, as well as a major contributor to Toronto's international competitive position. A strong culture sector positively impacts job and business growth in virtually every sector by attracting international attention and highly talented people, and increasing the quality of life of local residents.

People who work in the culture sector pay taxes and generate revenue. In the City of Toronto about 83,000 people, or 6 per cent of the total labour force, work in the culture sector. In the Toronto Census Metropolitan Area (CMA) about 130,000 people work in culture sector.

The culture sector is also a major contributor to the city's economy generating \$9 billion GDP and has been growing rapidly. Between 1991 and 2009 creative industries, grew at a rate of 2.9 per cent, exceeding other key sector such as financial services (2.4%), medical and biotechnology (1.7%) and the food and beverage industry (1.4%).

Identifying where the culture sector is located in Toronto is challenging. Unlike manufacturing plants, office towers, and retail outlets that are clearly visible from the street, the location of culture work is with some exceptions virtually invisible. Cultural work can happen in home offices, in temporary spaces, and outside typical work hours and work spaces.

In addition, cultural scenes, or dense concentrations of highly talented people, are difficult to start or replicate. For example, the revitalization of King Street East and West took place over two decades following the introduction of flexible zoning policies. These Regeneration Areas offered cheap space in old industrial buildings for cultural businesses and workers. Overtime these spaces became more attractive to residential development that increased the surrounding property values and consequently made the cultural work spaces less affordable.

COMMENTS

From the Ground Up: Growing Toronto's Cultural Sector (Attachment 1), made possible by a grant from the Government of Ontario Creative Communities Prosperity Fund, is the result of two years of work, and a deliberately multi-disciplinary approach to identifying *where* culture sector jobs and businesses are located in Toronto.

The report examines the cultural sector through an economic lens of cultural occupations and businesses, and cultural products as goods and services sold and bought in the economy. The report does not track culture as system of values or beliefs by a community, or the social networks and cultural activities that communities share, unless some aspect of that activity interacts with the economy.

There are three main outcomes of the *From the Ground Up* report. First, a consolidated definition of the culture sector; second, advanced cultural mapping that identifies areas of

high concentration or potential; and third, a new tool to support the retention and creation of affordable cultural space through target programs and increased collaboration between City divisions.

Consolidated Definition:

The consolidated definition of the culture sector used in the *From the Ground Up* report is the exact same as Statistics Canada's *Canadian Framework for Culture Statistics* (2004). The 'culture sector' includes a broad group of occupations and industries that is primarily concerned with cultural goods and services at all stages of the production chain. It is important to note that the term 'culture sector' *includes* for profit creative industries such as design, fashion, film and digital media.

Cultural Mapping:

Through mapping the culture sector, it became clear that no one data set could accurately describe the entire culture sector. Therefore the Martin Prosperity Institute developed a new tool called the 'Cultural Location Index'. The index combines three data sources: concentration of cultural occupations by place of work; concentration of cultural occupations by place of residence; and total number of cultural facilities.

The Cultural Location Index provides a quick snapshot of the cultural sector across the city, and quantifies the concentration of the cultural sector by census tract so that it can be compared to other census tracts. These data provide a rich base of information at the local level which can be used to benchmark and track changes over time.

By mapping the cultural sector, the study found that the cultural sector is present across the city although highly concentrated in downtown areas. While many cultural workers live and work downtown, there are also many cultural workers who choose to live and work outside the downtown core. General characteristics of these places across the city offer affordable cultural work space, and connections to public transportation and major transportation routes.

Another key finding of the report is that the census tract with the highest total number of cultural workers in the city, by place of work, is the Downtown Cultural Work District. This census tract is bounded by Queen Street West, Simcoe Street, Front Street and Bathurst Street, and is right beside the city's Financial District. There are over 8,000 cultural workers in this area, or about 20 per cent of the total labour force in that area. All 48 culture occupations defined by Statistics Canada are represented in this area. Other areas that are highly concentrated in terms of culture sector place of work are King Street East and Liberty Village. Although the downtown has a high number of cultural workers, the study found that cultural workers work in all four districts of the city.

Affordable Cultural Space:

One of the key recommendations from the *Creative Capital Gains: An Action Plan for Toronto* (2011) speaks to the development of creative clusters and the protection and creation of affordable cultural space in Toronto. Affordable cultural space and creative clusters are a key resource for the cultural sector, and helps support the development of creative clusters and emerging cultural scenes. Most importantly, affordable cultural space and creative clusters are necessary for a healthy cultural sector that generates employment and economic growth.

Toronto's Official Plan (2002) clearly outlines a role for the City to promote concentrations of cultural activities, to create arts districts and corridors, and to support a full range of cultural activities from community-based endeavours to nationally prominent institutions.

The results of the *From the Ground Up* report found that two of the city's highest culture sector place of work areas are in the city's 'Regeneration Areas', King Street East and King Street West. More should be done to assess and review whether the Secondary Plans and policies can ensure the retention and creation of affordable cultural space in Regeneration Areas to help grow culture sector jobs and businesses as part of the Official Plan Review.

Overall, *From the Ground Up: Growing Toronto's Cultural Sector* (Attachment 1) supports Toronto's long-term prosperity and competitiveness through new information and tools to help grow jobs and businesses in the culture sector. Cultural industries are a major component of Toronto's economy, and contribute to the growth of other key sectors by attracting talent, and are among the fastest growing industries in the city in terms of employment. City Council should adopt policies to stimulate job growth and economic activity by supporting and building the strength of the existing cultural industries.

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SIGNATURE

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ATTACHMENTS

Attachment No. 1: From the Ground Up: Growing Toronto's Cultural Sector