

LONDON CULTURAL PROFILE REPORT

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**Canadian
URBAN
Institute**

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We gratefully acknowledge the collaboration and assistance of the Culture Office, the Creative City Committee Working Group and the Steering Committee (including the London Arts Council (LAC) and the London Heritage Council (LHC)) and particularly the City of London's GIS Technical Services Division.

The project study team consisted of the Canadian Urban Institute, Sierra Planning and Management and Novita Interpares.



Key Messages

Economic Impact

1. The cultural sector makes a direct contribution to the City of London of \$540 million per annum. The City spends \$60 per capita on culture and receives a direct contribution of \$1,475 per capita in return.
2. There are 1,298 cultural industries and businesses in London.
3. There are 7,703 cultural jobs in the City of London (2011), contributing to an additional impact of just over 3,100 jobs in the region outside of the City of London.

Cultural Facilities and Infrastructure

1. Culture creates identity. Culture attracts and retains talent. London is a greater city than it appears to be but it is losing its national profile. There is a gap between what the City claims to believe about the value of culture and how it actually behaves.
2. Rather than focus on specific projects, the City should immediately develop a vision and plan for cultural facilities as an important investment in city-building.

London Cultural Resource Database

1. The Culture Office and GIS Technology Services have successfully built the London Cultural Resource Database (LCRD) working with their primary data sharing partners – the Planning Division, London Arts Council (LAC) and London Heritage Council (LHC).
2. The LCRD is fully compatible with the City's ArcGIS system. Information you request from the LCRD can be visualized and communicated to you in the form of a map. The LCRD is a powerful information source and analytical tool. Culture Maps are powerful learning tools. Without the LCRD there can be no Culture Map.
3. The LCRD is a centralized inventory of information about London's cultural resources. It contains more than 9000 entries identifying key information about cultural industries and businesses, cultural occupations, cultural spaces and facilities, cultural heritage, natural heritage, cultural organizations, and additional resources including sports venues, and bikeways & routes.
4. The LCRD was built using information from more than 40 datasets at the City and the LAC and LHC. This creates "a made in London" cultural resource database and a baseline from which to assess performance and economic impact going forward. The LCRD also contains Statistics Canada data that allows us to compare London to other cities in Ontario and Canada.
5. It provides a framework for City staff in every department to understand London's unique cultural landscape. It provides standard concepts, definitions and categories to ensure comprehensive, consistent and comparable statistics on culture and provides the basis for evidence based decision-making.
6. The LCRD can only be useful if it contains up to date information. The responsibility for managing the maintenance process – ensuring timely updates that meet the LCRD's standards – will be the City's. Contributing updated data to the LCRD will be the responsibility of the data sharing partners (LAC, LHC and any future data partners).
7. Downtown London and the Old East Village display a notable concentration of cultural resources.



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Executive Summary

In 2011, the City of London engaged the Canadian Urban Institute (CUI) as the lead consultant with Sierra Planning and Management and Novita Interpares to help the City develop a cultural resource database and mapping capability, provide a calculation of the economic impact of culture in the city and an assessment London's cultural facilities infrastructure. This report consists of three parts.

- **Part 1** : *The London Cultural Profile Report* (CUI) describes the framework and methodology used to identify cultural resources; the sources of cultural resources data in London and their limitations; some of the challenges identified in creating a Cultural Resource Database and recommendations for expanding and maintaining the database in the future. It also provides a framework for identifying and analyzing the potential for placemaking in cultural nodes like the Old East Village and a prototype web-based Culture Map for the City of London.
- **Part 2**: *The Economic Impact Analysis for London's Cultural Sector* (Sierra Planning and Management) describes a methodology for generating a dollar value (\$540 million) of the direct economic contribution of a defined cultural sector to London's economy.
- **Part 3**: *Cultural Facilities and Infrastructure: Conversations with Cultural Leaders* (Novita Interpares) provides an overview of the current state of cultural facility planning in London.

This summary provides a brief description of each part of the study.

Part 1

The London Cultural Profile Report and the London Cultural Prosperity Plan

The cultural profile and economic impact study was initiated to help the City of London understand the city's cultural resources, their locations and economic impact in order to be able to assess London's unique identity and to support its economic prosperity and vibrancy. It was undertaken at the same time as London's Cultural Prosperity Plan was being developed by another firm (Dialog) through a separate community engagement process and set of consultations.

The cultural resource database, the economic impact methodology and the other resources developed by the Cultural Profile study team can be seen as tools to help City staff and the staff of its Arts and Heritage Councils to establish a baseline and measure the impacts and outcomes of the actions recommended in London's Cultural Prosperity Plan.

The London Cultural Resource Database

The primary outcome of the cultural profile study was the creation of the **London Cultural Resource Database (LCRD)**. The LCRD is a centralized inventory of information about London's cultural resources. It provides information that can be visualized and communicated in the form of a Culture Map. Without the LCRD there can be no Culture Map. The LCRD was developed in collaboration with the Culture Office, the Creative City Committee Working Group, the Steering Committee (including the London Arts Council (LAC)



and the London Heritage Council (LHC)) and the City's GIS Technology Services Division and is fully compatible with the City's ArcGIS system. The work was completed in two phases.

In Phase 1 the LCRD was built to include London's:

- Cultural Industries and businesses
- Cultural Occupations including cultural workers ' place of residence and cultural workers' place of work, and
- Cultural Spaces and Facilities.

In Phase 2 the project team, the Culture Office, the Creative City Committee Working Group and the Steering Committee expanded the database to include additional cultural resources in order to create a broader picture of culture in London. The four additional categories included in the LCRD were:

- Cultural Heritage
- Natural Heritage
- Cultural Organizations, and
- Additional Resources.

It was decided that Cultural Festivals and Events and Intangible Culture would not be included at this time but would be included in an expanded database as required and as resources permit.

Building Blocks of the LCRD

- 1. The Cultural Resource Framework (CRF)** was used to organize and categorize London's broad and unique range of cultural resources. The CRF includes eight cultural resource categories: *Cultural Industries, Cultural Occupations, Cultural Spaces and Facilities, Cultural Organizations, Cultural Heritage, Natural Heritage, Cultural Festivals and Events* and *Intangible Culture*. A ninth category was used to capture the resources that are important to London's culture but not typically captured in the eight main categories. This included sports venues and bikeways & routes. Sports are not typically included as a cultural resource but due to its importance in London, sports venues were included.
- 2. The Canadian Framework for Culture Statistics (CFCS)** is a second framework that was used to select the NAICS and NOC-S codes to guide the collection of data that would be used to populate the LCRD and be the source for cultural mapping.

The CFCS is a tool that helps define culture by providing limits about what is included in culture and by classifying what belongs in each category. It is a document produced by Statistics Canada to provide standard concepts, definitions and categories to ensure comprehensive, consistent and comparable statistics on culture and provide the basis for evidence based decision-making.

The CFCS defines the culture sector through domains, which are used to classify cultural industries, products and occupations into recognizable groupings that are measurable for statistical purposes. Each domain has a set of standard classification codes used to collect data for industries or occupations. Industries are classified according to the North American Industry Classification System (NAICS) and occupations are classified according to the National Occupation Classification for Statistics (NOC-S).

The CFCS was used as a basis for developing a set of groupings that represented London's unique cultural landscape. They are:

1. Heritage (CFCS subdomains of archives, cultural heritage, natural heritage)
2. Libraries (CFCS subdomain of libraries)



3. Heritage and Libraries Unallocated (CFCS subdomain of unallocated)
4. Live Performance
5. Visual and Applied Arts
6. Written and Published Works
7. Audio-visual and Interactive Media
8. Sound Recording

The complete list of NAICS and NOC-S codes used in the LCRD can be found in Appendix A.

3. **NAICS and NOC-S codes** have both been used to classify cultural resources in the LCRD. The LCRD has a NAICS or NOC-S code assigned to each resource included in the database. This classification facilitates data analysis that is consistent, reliable, comparable and ensures that standard definitions are used.
- NOC-S codes are used to classify *Cultural Occupations*.
 - NAICS codes are used to classify *Cultural Industries* and all other types of cultural resources including *Cultural Organizations, Cultural Heritage, Natural Heritage, Cultural Spaces and Facilities and Additional Resources*.

NAICS was developed by the statistical agencies of Canada, Mexico, and the United States to provide common definitions and a common statistical framework for analyzing data relating to industry and the economy. The unit of observation of the North American Industrial Classification System (NAICS) is the *establishment or the producing unit*.

NOC-S is based on the National Occupational Classification (NOC), which was developed by Human Resources and Social Development Canada (HRSDC) in consultation with Statistics Canada and is maintained jointly by HRSDC and Statistics Canada. It provides a systematic classification structure to identify and categorize the entire range of occupational activity in Canada. It organizes over 30,000 job titles into 520 occupational group descriptions. The unit of observation of the NOC-S is *the kind of work performed*.

NAICS and NOC-S systems were used to add additional layers of categorization to each cultural resource in the LCRD. They also presented some unique challenges the study team had to overcome. NAICS codes have been designed specifically to classify industries. Their unit of observation is the *establishment or producing unit*. Therefore, their application to other types of resources like organizations, spaces and facilities and festivals and events is not straightforward.

To improve the compatibility of the codes with these types of resources, the CUI developed a layered categorization structure that allowed us to organize the various types of resources in the LCRD using NAICS codes, and also provide a flexible system for analysis.

- In addition to tombstone data (the basic information about each resource which is least likely to change over time) and more detailed attribute data such as descriptions and contact information, each record in the LCRD was given four fields which categorize it to varying degrees of specificity. **The first layer** is the cultural resource category. This layer describes the part of the cultural resource framework to which it belongs. Is it a facility, a natural heritage asset, an organization, etc.? Once this first layer of categorization has been determined, the list of NAICS codes which belong to this category can be examined.
- **The second layer** is the NAICS code (or NOC-S code when describing Cultural Occupations).



- **The third layer** of classification is this NAICS definition. Each NAICS code has one definition. Essentially, the NAICS code and NAICS definition are the same thing, however one is represented numerically and the other is represented by a description.
- **The fourth layer** is a mapping title. Developed by the CUI for this project, the mapping title is a description that corresponds to the NAICS code and definition, and which more accurately reflects the resource being described. It connects the resource to the cultural resource category to which it belongs. For example, this allows the LCRD to distinguish between archives that refer to physical space and archives that refer to a collection.

For a complete list of mapping titles and corresponding codes, see Appendix A.

These various levels of categorization make searching the database and utilizing the data within the LCRD easy. One can perform a search by cultural resource category, by NAICS code, by NAICS definition or by mapping title. If one wants to find all the resources that belong to the Cultural Heritage cultural resource category, this is possible. If one wants to find all the resources that belong to NAICS code 519122 that is also possible.

4. Data Sources

For this project, we acquired and used data from three sources:

- Statistics Canada - to allow us to compare London to other cities in Ontario and Canada
- The City of London
- The London Arts Council & the London Heritage Council

Using Statistics Canada data allows us to compare London to other cities in Ontario and Canada. Using the City of London and LAC/LHC data creates a robust “made in London” LCRD and baseline that (if maintained) can be used to assess economic impact and to inform decision making and performance evaluation.

Section III describes each dataset in detail and the extensive work that was done with the City of London and Statistics Canada to determine which variables and geographies would be included in the data.

Statistics Canada Data

Three data sets were purchased from Statistics Canada.

- The Canadian Business Patterns industry data provided the number of business establishments in cultural industries in the City of London in December 2011.
- The Place of Work occupation data provided the number of cultural workers who work in the City of London using 2006 Census data.
- The Place of Residence occupation data provided the number of cultural workers who live in the City of London using 2006 Census data.

The most recent available occupation data is from the Statistics Canada’s 2006 Census. Beginning with the 2011 census, Place of Work and Place of Residence data is now collected through the national household survey which is not mandatory. For this reason, the 2011 cultural occupation data may present new challenges but nevertheless the LCRD should be updated to reflect data collected in 2011 as soon as it is available from Statistics Canada.



City of London Data

Information from 25 databases primarily collected and maintained by the City of London's Planning Division was integrated into the LCRD. While some inconsistencies in level of detail and some incomplete or outdated information was identified, the City's data presents no real limitations, because each data set can easily be updated and made consistent and accurate through regular maintenance and update cycles.

London Arts Council & London Heritage Council Data

Information from 9 data sets collected and maintained by the London Heritage Council (LHC) and the London Arts Council (LAC) was integrated into the LCRD. Most of this data is very robust, with detailed attribute information and descriptions of the various resources. Some data sets are missing complete street address data. They occasionally provide postal code data, but this information considerably reduces accuracy for mapping purposes.

The collection methodology and classification systems developed by the LAC and LHC were designed with much consideration for their individual needs, context and objectives, but not with a view to becoming integrated into a central database like the LCRD. So for instance each organization employs a separate categorization model (see Figure 10). After extensive discussions with both Councils, the decision was made to maintain separate classification systems for each record in the LCRD. This means that in addition to the four layers used to categorize every resource in the LCRD, data from the LAC contains additional fields that correspond to their categorization model and the LHC data contains additional fields that correspond to their categorization model. Where records are duplicated, there is a *Notes* field that indicates that the resource appears in both databases.

Information on close to 400 artists and heritage professional is included in the LCRD.

Other Data

The Culture Office assisted with the collection of several data sets that the group wanted to include in the LCRD, but wasn't otherwise available. These were markets, private elementary, secondary schools and colleges and public art. Several other suggestions are included for future expansion of the CRD in the recommendations section of the report.

Maintaining the LCRD

Regular, planned updates to the LCRD ensure that it will continue to be accurate, relevant and useful as the trusted place for information about cultural resources in London. The responsibility for managing the maintenance process – ensuring timely updates that meet the LCRD's standards – will be the City's. Contributing updated data to the LCRD will be the responsibility of the data sharing partners (LAC, LHC and any future data partners).

Section IV (Figure 12) describes a database management plan. It is a spreadsheet that lays out all information needed to track the maintenance of each dataset over time. The entries in the plan help explain what is contained in each component of the database, where it comes from and what arrangements have been made for its maintenance.

How London can use the LCRD

The LCRD is a powerful information management and analytical tool. It can be used to:



- Strengthen culture to build economic prosperity through the identification of cultural talent, occupations and businesses in London.
- Create a strong base of information that supports evidence-based decision making.
- Illustrate the presence of cultural resources in the community.
- Establish a cultural lens with which to view other policies and plans.
- 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.
- Present the opportunity to support the cultural sector by giving residents and visitors access to information about cultural activity.

But one of the most important uses for the LCRD is to provide the information to create culture maps that can inform strategic planning and decision-making in London. To illustrate this function, the study team used the LCRD to produce 11 maps.

- Two maps identify cultural resources in Downtown London (Map1) and the Old East Village (Map2) - two places with notable concentrations of cultural resources. The study provides an analysis of their urban form and public investment and the distribution of cultural resources as well as the number of cultural workers who work there and the number who live there.
- Nine maps show the concentration and distribution of cultural resource categories in the City of London.

Cultural Nodes and Clusters

Because the cultural industries or businesses included in the LCRD are all spatially referenced they can be seen on a map as a node or cluster of activity. Two areas or nodes that display a high concentration of cultural resources are Downtown London and Old East Village.

Knowing where concentrations of cultural workers and cultural businesses are located helps to inform policy and decision-making to support these resources and to make appropriate investments.

Downtown London

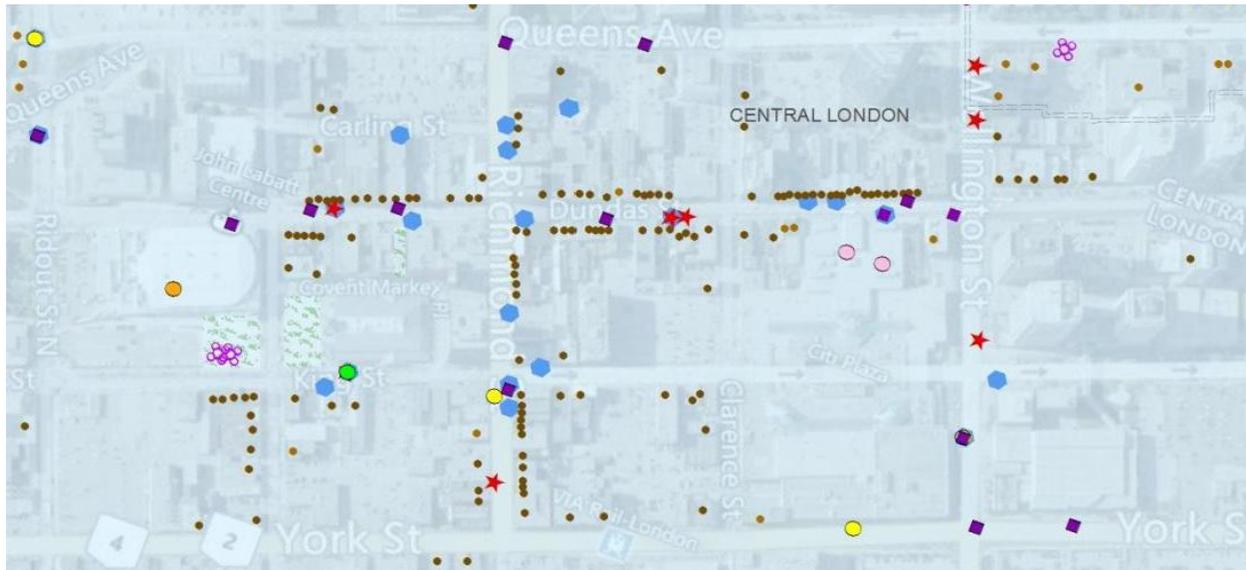
The Downtown node is part of the census tract that exhibits the highest number of cultural industries and the highest number of cultural occupations by Place of Work. There are 121 establishments in the downtown which represents about 10% of the City's cultural industries. The number of occupations by Place of Work is even higher, with 1455 people. Of the 121 cultural industries, the majority, 78, belong to the visual and applied arts category, with 16 in written and published works and 12 in audiovisual and interactive media. Of the total 1455 people who work in cultural occupations in the census tract, 515 work in the audiovisual and interactive media category, while 430 work in visual and applied arts and 130 work in heritage.

While many people work in this area, few people live there. While 80% of the city's office space is in the downtown, only 5,000 people live there.

The study notes that the City has invested significant resources in its downtown in the last twelve years. It has led by example in upgrading its heritage buildings and offered incentives to the private sector to do the same. It has invested in infrastructure, street trees, benches and other furniture, and more pedestrian-friendly streets and public spaces.



The LCRD, if it is maintained, will be able to provide the data that can evaluate the impact of these types of investments on the growth of cultural industries and cultural occupations over time.



Excerpted from Map 1 - Cultural Resources in Downtown London

Old East Village

The study found that the Old East Village exhibits a very high number of cultural resources in a variety of categories. The study notes that the Old East London Village Commercial Corridor Transition and Revitalization Study identified many opportunities including a central area location with outstanding heritage assets, a creative, diverse community, an active community, a strong sense of community, a strong culture and arts community, smart growth opportunities, intensification, utilization of existing services, and strengthening the downtown core with supporting residential and commercial areas.

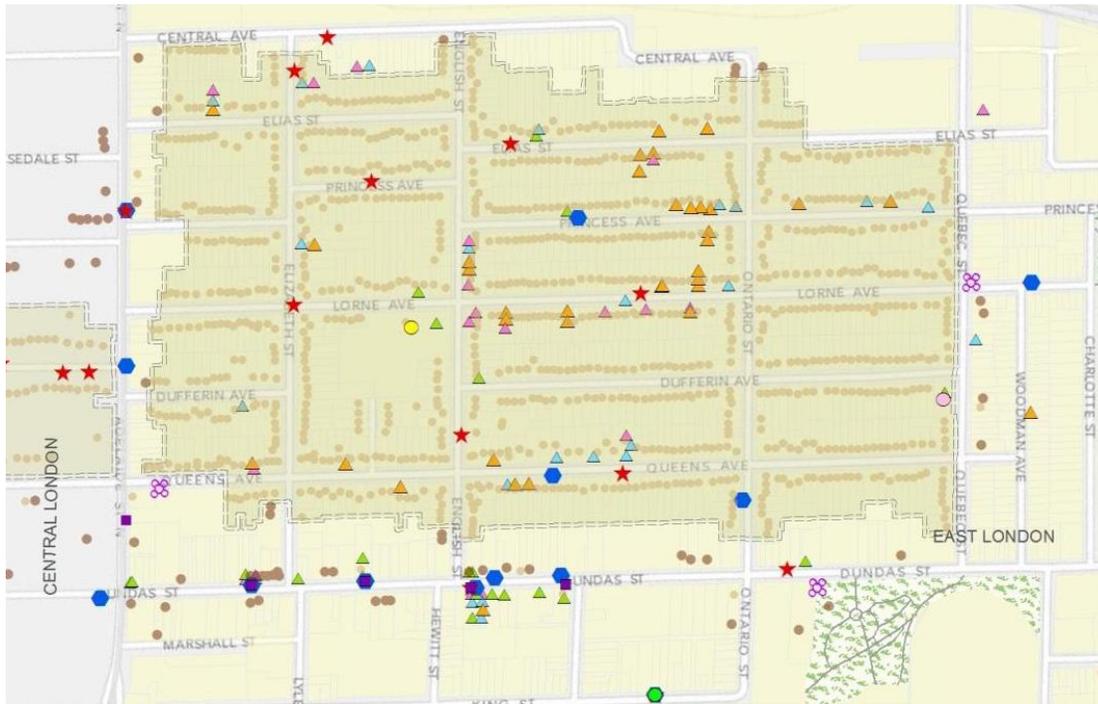
Through a Community Improvement Plan for the Old East Village established by the City in 2004, financial incentives have been put in place and have stimulated private investment, façade restoration property upgrades and better property maintenance. The study notes that three developments will create 684 new residential units on the Dundas Street corridor, many new stores will be created on Dundas Street by 2013, approximately 40 properties have been renovated or are undergoing renovation since 2008 and 3 infill projects are scheduled to be completed by 2012.

Like the downtown, the Old East Village is home to significant numbers of cultural resources and important pieces of cultural infrastructure. It is the location of the Western Fair Farmers and Artisans Market, which has become a hub for cultural activity and innovation in London. It contains 28% of the City's listed and designated heritage properties as well as some key venues that serve the whole City. Dundas Street is home to the London Potters Guild, the Palace Theatre and the Aeolian Performing Arts Centre as well as many cultural organizations including the East Village Arts Coop, Afrofest London and London Community Players.

In terms of cultural occupations, there are 25 cultural workers on the north side of the village all of whom work in live performance. However on the south side of Dundas Street there are 145 people with cultural occupations working – 60 of them in visual and applied arts, 35 in audiovisual and interactive media, 25 in live performance and 25 in written and published works. The number of cultural workers who live in the



census tract north Dundas Street is high, at 105 people, while south of Dundas; the numbers are among the lowest in the City with 10 working in visual and applied arts.



Excerpted from Map 2 - Cultural Resources in the Old East Village, London

Potential Cultural Nodes

The study found that there were some areas of the city where there is a clustering of certain resources that could benefit from special attention to the urban structure and public realm. Investments in walkable streets, an attractive public realm, a mix of uses that cater to a diversity of needs, and good access to public transit support the development of cultural resources.

The two census tracts that exhibit the potential to become nodes are located immediately to the north and east of downtown (see Map 5). These are areas that would likely benefit from an improved public realm and as they are developed, could connect the two main nodes of Downtown and the OEV. Other areas that exhibit potential to become cultural nodes are Wortley Village, North London and Lambeth.

Cultural Resource Categories

The LCRD was used to produce maps to identify the distribution of specific categories of cultural resources in London. They are:

- concentrations of cultural resources including (Map 3) and excluding listed and designated heritage properties (Map 4)
- highest cultural occupation census tracts (Map 5)
- cultural industries (Map 6)
- cultural occupations by place of work (Map 7)
- cultural occupations by place of residence (Map 8)
- cultural organizations (Map 9)
- cultural spaces and facilities (Map 10)
- cultural heritage resources (Map 11)



In general these maps tell us:

- the distribution of 1,300 cultural industries across London
- the distribution of cultural spaces and facilities in London
- where the people working in cultural occupations work and live
- where the 300 cultural organizations in London are located
- where the 5000 heritage resources are located (districts, plaques, collections, sites, cemeteries, areas of archaeological significance, public art and listed & designated heritage properties)

Additional outcomes of the study were a placemaking framework for cultural nodes and how the LCRD can be used in London to improve customer service and enhance the visitor experience.

A Placemaking Framework for Cultural Nodes

The study identifies seven kinds of placemaking elements (see Figure 13) that are common to engaging, lively and richly textured places where people want to live and visit. Active efforts by municipalities to improve their public realm and create an urban structure attract accessible and affordable cultural resources that play a central role in creating vibrant, livable inclusive communities; contribute directly and indirectly in supporting both the daytime and evening economy; reflect and celebrate the culture, histories and traditions of a community; and create strong social environments that support community building.

Improve Customer Service and the Visitor Experience

The data in the LCRD can be made available to the public and shared with external organizations and the public through a web-based interface. This would allow culture, tourism and economic development organizations to better understand their target markets and audiences in order to improve the products and services they offer. It would also serve to enhance the visitor experience of London and be a self-serve source of information for residents. Because the information is stored in a digital format, it can also be made accessible to visitors and residents through their handheld devices and other portable electronic devices (notepads, tablets, etc.).

Recommendations

The study offers 5 recommendations for the maintenance of the LCRD and 7 recommendations to increase its accuracy and utility. See Section VI for a list of specific recommendations.

Part 2

The Economic Impact Analysis for London's Cultural Sector

This part the study describes the economic impact analysis of the cultural sector. It was undertaken for the primary purpose of generating a dollar value of the direct economic contribution of a defined cultural sector for the City of London.

The cultural sector was defined broadly to include “creative talent as it relates to: the arts, heritage, libraries, festivals, film and audio recording, cultural tourism, diversity and immigration, youth, science



and technology, urban planning and design, education and business.” The scope of this analysis excluded sporting and culinary activities.

Scope of Analysis

This assessment of the direct/local impact of culture, addressed:

- workforce, employment and income in the City’s cultural sector;
- revenues and expenditures generated by cultural businesses and organizations;
- public spending and investment in cultural programs, services and facilities;
- spending and investments in cultural education; and
- cultural tourism.

Essential to this exercise was the need to collaborate with City Hall, members of the Creative City Committee, the London Arts Council, London Heritage Council and other key stakeholders to assess the cultural landscape of the City and the nature of data available for analysis.

The Economic Impact of London’s Cultural Sector

The overall contribution of the cultural sector to the City of London in direct terms (i.e. operating expenditures or revenues, income and spending) is an estimated \$540 million per annum (this excludes any capital expenditures).

The implications of the estimate are as follows:

1. The direct contribution of the cultural sector in the City is \$1,475 Per Capita; and
2. The City of London spent \$60 Per Capita on culture in 2011.

While this figure varies significantly between municipalities, the estimate is not inconsistent with a number of other jurisdictions.

In 2011, there were an estimated 7,703 cultural jobs in the City of London, contributing to an additional multiplier impact of just over 3,100 jobs outside of the City of London.

The cultural sector in the London CMA generated an estimated \$580 million in direct contribution to London’s economy. Based on this figure, the direct contribution of the cultural sector in the London CMA is potentially \$1,222 to \$1,285 Per Capita.

Capturing ‘Culture’

The cultural sector is by its definition, innovative, creative and a key provider of a social contribution that, together with other lifestyle amenities, helps keep communities cohesive, sustainable and growing. This includes cultural expression in all forms and in all venues whether public or private, in schools or in civic spaces, and between businesses. This dynamic is not expressly captured in these estimates which are by definition an historic snap shot of annual contributions in financial terms.

Added to this, capturing the full extent of activity in the sector is difficult as there exists a proportion of the cultural workforce that is unidentifiable through normal statistical means as they are not primarily employed as cultural workers.



This analysis focuses on operational activity in cultural sectors and does not assess the impact of capital investment/costs. However, additional research into the potential contribution of capital investments should be part of the larger strategic plan currently underway.

Part 3

Cultural Facilities and Infrastructure: Conversations with Cultural Leaders

The purpose of this part of the study was to provide an overview of the current state of cultural facility planning in London. The principal method of the study was personal interviews with 30 cultural leaders in London (see Part 3, page 7). The goal of these questions was to find themes which were shared collectively by the majority of the respondents. These themes could then be used to inform the next steps which need to be taken to develop London's cultural infrastructure.

The overall message from the respondents about cultural facilities in London is clear: we're going nowhere fast and nobody seems to be prepared to lead.

Step One

The first step is for the City to acknowledge cultural facilities as valuable and distinct assets and to see this as an issue of city-building which is to be carried out on a city-wide basis.

Step Two

In order to appreciate value, the city must first know what cultural assets are in the community. The second step is for the City to adopt an asset-based framework for cultural facility data collection and analysis (e.g., zoning and site, ownership, building typology, usage, condition, building area, etc).

Step Three

The third step is for the City to create a city-wide data base and to analyze the results. The results from step three provide a solid foundation for the development of a Cultural Facility Feasibility Plan, which aligns with the City's corporate asset management:

- Vision and goals
- Policy framework
- Business model for capital development
- Delivery model for capital projects



Part 1

London's Cultural Resource Database
Canadian Urban Institute



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I. Introduction

What We Were Asked To Do

In 2011, the City of London engaged the Canadian Urban Institute as the lead consultant to facilitate the development of a Cultural Profile/Cultural Resource Mapping project and to provide an assessment of the Economic Impact Calculation of Culture for the City. The project team included Sierra Planning and Management and Novita Interpares who were sub-contracted to provide expertise related to the economic impact of culture, and an infrastructure assessment of London's cultural facilities, respectively. This report describes the Cultural Profile and Cultural Resource Mapping project – the background; framework and methodology used; data sources and their limitations; analysis of the Cultural Resource Database and recommendations for expanding and maintaining the database in the future. Sierra and Novita's reports can be found in Parts 2 and 3.

The City asked that we develop a Cultural Profile/Cultural Resource Mapping system that would:

- identify cultural resources in the City;
- identify potential opportunities for the further development of culture; and
- facilitate the alignment of culture with current community and City initiatives.¹

The project builds on the work of the City's 2005 Creative City Task Force Report (CCTF), which recognized the importance of culture as a significant economic engine for cultural vitality, ethnic diversity and the attraction and retention of talent. The CCTF also defines culture very broadly to include creative talent in the sectors of arts, heritage, libraries, festivals, film and audio recording, cultural tourism, diversity and immigration, youth, science and technology, planning, urban design and cultural district development, healthy environment, education liaison, and economic prosperity and business liaison.² The project was initiated to help understand the City's cultural resources and their locations in order to be able to assess London's unique identity and to support its economic prosperity and vibrancy. At the same time, the London Cultural Prosperity Plan was developed by another firm through a set of separate consultations and community engagement.

What We Did

The Cultural Profile/Cultural Resource Mapping project was undertaken in two phases. Phase 1 was a systematic approach to identifying and recording the following local cultural resources:

- Cultural Industries (referred to as cultural businesses in the RFP)
- Cultural Occupations (including cultural workers' place of residence and cultural workers' place of work)
- Cultural Spaces and Facilities

¹ As defined by the City's Request for Proposal.

² City of London, 2005. *Creative City Task Force Report*. p. 12. Retrieved from: http://www.london.ca/Committees_and_Task_Forces/PDFs/creative_city_final.pdf



At the conclusion of Phase 1, a prototype map with over 50 entries was produced to demonstrate the London Cultural Resource Database (LCRD) and its applications. From the outset of the project, the database was designed to be compatible with the City's ArcGIS system. To ensure compatibility, to maximize utility for the City, and to foster regular maintenance and updates, the LCRD was developed in consultation with the City's technical Geographic Information Systems (GIS) staff. Throughout the development of the LCRD, regular communication took place between the project team, Culture Office, Creative City Committee Working Group and Steering Committee (including the London Arts Council (LAC) and the London Heritage Council (LHC)), particularly with the City's GIS Technology Services Division. Through this process we have been able to exceed the required deliverable and create a searchable database that contains many more than 50 records.

Phase 2 expanded the database developed in Phase 1 by identifying and recording cultural resources from four additional categories:

- Cultural Heritage
- Natural Heritage
- Cultural Organizations
- Additional Resources

These categories were determined in collaboration between the project team, Culture Office, the Creative City Committee Working Group and the Steering Committee in order to create a broader picture of culture in London. It was decided that Cultural Festivals and Events and Intangible Culture would not be included in the scope of this project, and would be revisited as possible future categories to include in an expanded database as required and as resources permit.³

See Figure 14 in Appendix A for a complete list of resources included in the London Cultural Resource Database (LCRD).

What is Cultural Mapping?

Cultural Resource Mapping is a systematic approach to identifying, recording and classifying a community's cultural resources in order to visualize and describe them.

The practice of mapping cultural resources has developed in the context of Municipal Cultural Planning (MCP). MCP is defined by the Ontario Ministry of Tourism, Culture and Sport as "a municipal government-led process, approved by Council, for identifying and leveraging a community's cultural resources, strengthening the management of those resources, and integrating those cultural resources across all facets of municipal government planning and decision making."⁴

The first major step in this process involves building a database of cultural resources to identify and understand a community's cultural resources. The data that is part of the database can then be visualized in a variety of ways, most commonly through a map-based interface or GIS, and also through graphs, charts and dashboards, among other tools.

³ See Section VI for recommendations related to these categories.

⁴ Municipal Cultural Planning Incorporated. 2011. *Municipal Cultural Planning: A Toolkit for Ontario Municipalities*. Retrieved from <http://www.ontariomcp.ca/library>.



What is a Cultural Resource Database?

London's Cultural Resource Database is a centralized inventory of information about London's arts, culture and heritage resources.

- *It is a key information, planning and decision-support tool.*
- *It is based on a broad definition of cultural resources.*
- *It includes information about public, private and not-for-profit sectors.*
- *It is primarily a digital tool and a digital database.*
- *It can be viewed through a map-based interface.*
- *It is a geo-database, meaning that whenever possible, the information includes a geographic reference point.*

Through collaboration with the Culture Office, the Creative City Committee Working Group and the Steering Committee London's unique Cultural Resource Database has been built with three principles in mind:

Simplicity. A simple structure and processes have been established so that understanding and maintaining the LCRD does not become an overwhelming task. Where necessary, detailed descriptions have been provided about how new resources can be coded and integrated easily.

Accessibility. The database has been deliberately and carefully designed to be compatible with the City's ArcGIS system so that information can easily be shared internally with City staff and to ensure that the capacity to publish selected data to the web (e.g. CityMap) is possible as required in the future.

Relevance. A framework for a database management plan has been developed to ensure that regular planned efforts to update data take place to ensure the relevance and consistency of the database.

What can it Accomplish in London?

London's Cultural Resource Database:

- Strengthens culture to build economic prosperity through the identification of cultural talent, occupations and businesses in London.
- Creates a strong base of information that supports evidence-based decision making.
- Illustrates the presence of cultural resources in the community.
- Establishes a cultural lens with which to view other policies and plans.
- Presents information visually in ways that are easy to understand and have a strong impact.
- Establishes a group of partners in government and civil society committed to planning for cultural vitality.
- Presents the opportunity to support the cultural sector by giving residents and visitors access to information about cultural activity.

London's Cultural Resource Database has a wide range of potential applications and audiences. The data that is part of it can be visually presented in a variety of ways to communicate effectively to different audiences and for different purposes. The data can also be used for statistical and analytical purposes, and as indicators to assess progress toward specific outcomes.



The first Strategic Direction of the London Cultural Prosperity Plan is to strengthen culture to build economic prosperity. The LCRD contributes to prosperity by identifying, recording and classifying cultural talent – included as cultural occupations and cultural industries - in London. For the first time, the LCRD can be used to identify, organize and integrate London’s cultural resources into one database. This allows the City’s cultural resources to be visualized together for the first time, thus illustrating not only the breadth of London’s resources, but also the distribution of them.

Information in the LCRD can be visualized in ways that are easy to understand and have a strong impact. For instance, the data within the LCRD can be combined and overlaid with other types of data the City has access to, including transit routes, ethnocultural information or housing prices. Combining various data sets often helps describe situations and demonstrate trends.

Illustrating the presence of cultural resources in the City creates a baseline that can be used to support evidence-based decision-making. At a time of increased scrutiny of municipal budgets, it is important for municipal staff to be able to develop evidence that demonstrates the important contributions culture makes to communities, and to support continued investment in municipal cultural planning initiatives. The baseline that has been created through the development of the LCRD provides a snapshot of the current situation regarding London’s cultural resources. This snapshot allows for decisions to be made based on accurate and current data, rather than out-dated or anecdotal evidence.

Once the baseline has been established and resources have been identified and visualized, they can begin to be strengthened. Understanding where concentrations of cultural workers and cultural businesses are located helps to inform policy and decision-making to support these resources and to make appropriate investments. For example, areas with notable clusters of daytime cultural workers who live elsewhere may benefit from public realm improvements that help to animate the area in the evenings. Much of this strengthening relies on data to understand the current situation and then to evaluate and monitor progress toward specific outcomes. The Culture Office or other City departments can evaluate progress toward specific outcomes by using the baseline data collected through this process to develop a set of indicators which can be tracked over time by updating particular data sets on a regular basis.

The data can also be made available to the public. If desirable, the data can be shared with external organizations and the public through a web-based interface. This would allow culture, tourism and economic development organizations to better understand their target markets and audiences in order to improve the products and services they offer. It would also serve to enhance the visitor experience of London and be a self-serve source of information for residents. Because the information is stored in a digital format it can also be made accessible to visitors and residents through their handheld devices and other portable electronic devices (notepads, tablets, etc.).



II. Framework and Methodology for Data Collection and Analysis

The Cultural Resource Framework

The Cultural Resource Framework is a tool that can be used to organize and categorize cultural resources in a given place, like a neighbourhood, city or region. The Framework is designed to encompass a broad range of cultural resources, including the tangible and intangible resources that exist in a community. It is also designed to be flexible; to be applied to a wide variety of settings and scenarios and adapted as necessary. It is a tool to guide the organization of the LCRD, and also to frame how cultural resources are conceptualized. It has worked well to capture London's broad and unique definition of culture and to build knowledge and understanding of the cultural resources in London.

The Framework includes eight cultural resource categories: *Cultural Industries*, *Cultural Occupations*, *Cultural Spaces and Facilities*, *Cultural Organizations*, *Cultural Heritage*, *Natural Heritage*, *Cultural Festivals and Events* and *Intangible Culture* (see Figures 1 & 2). Although this Framework paints a broad picture of cultural resources, depending on local circumstances or needs, it may not be comprehensive. Therefore, a ninth category, *Additional Resources* is part of the Framework to capture any other resources that are important to a community's culture and not typically captured in the eight main categories. Sports are not included in the definition of culture used by the Canadian Framework for Culture Statistics which informed this project. However, due to its importance in London, sports venues have been included as part of *Additional Resources* and professional sports organizations have been suggested as part of future data collection efforts.

Figure 1 - Cultural Resource Framework

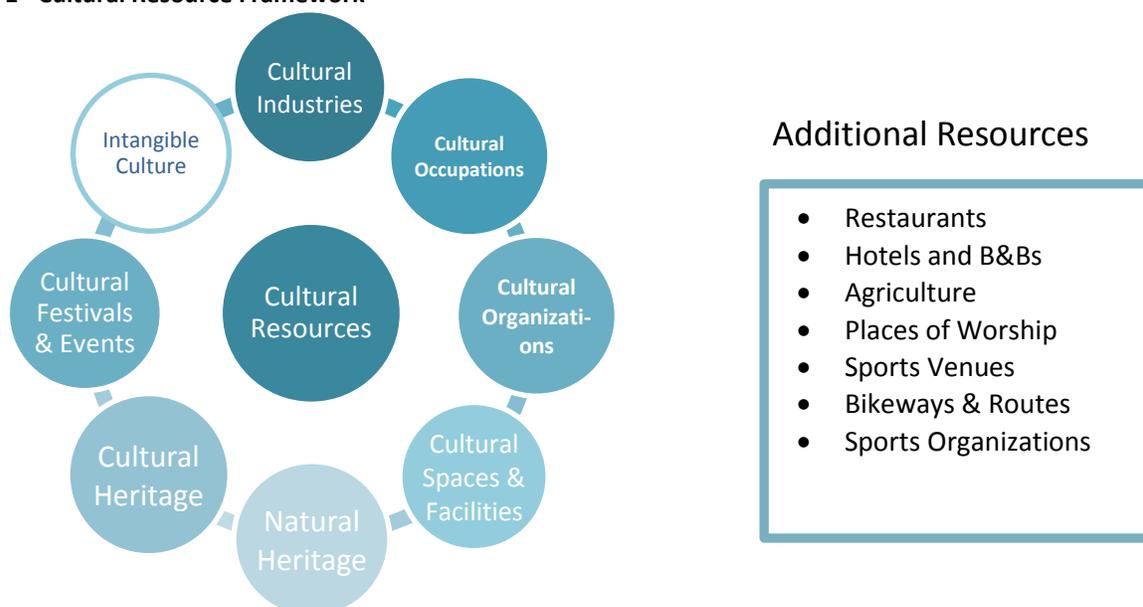


Figure 2 - Cultural Resource Categories⁵

Cultural Resource Category	Description
Cultural Industries	<p>Cultural industries are businesses involved in the creation, production and dissemination and use of culture products.</p> <p>The classifications in this category are based on Statistics Canada’s Canadian Framework for Culture Statistics, and reflect the North American Industry Classification System (NAICS) codes.</p> <p>Note that industry data does not distinguish between occupations. For example, industry data could tell you how many people are employed by a museum, and this would include everyone from the curator to the parking attendant.</p>
Cultural Occupations	<p>Cultural occupations describe employment in the various jobs that people perform as cultural workers.</p> <p>The occupation categories correspond to the Canadian Framework for Culture Statistics, and are organized according to North American Occupational Classification System (NOC-S) codes.</p> <p>They include cultural occupations that people perform in cultural industries as well as many of those performed outside of cultural industries. For example, occupation data could tell you how many graphic designers are employed in your community, whether they are employed by a museum or a hospital.</p>
Cultural Spaces & Facilities	<p>Spaces and facilities that host cultural activity. These include spaces in the public, private and non-profit sectors, and include everything from purpose-built facilities, to facilities that include cultural programming.</p>
Cultural Organizations	<p>Cultural organizations involved in arts, heritage and ethno-cultural activities. They are usually non-profit organizations and include arts and heritage advisory committees, ethno-cultural associations, local arts councils and community advocacy groups and many others.</p>
Cultural Heritage	<p>Establishments involved in the management, preservation and exhibition of objects and sites of historical, cultural and educational significance. They include built heritage, public art and archive collections.</p>
Natural Heritage	<p>Landscapes and areas of natural heritage and environmental significance. They include municipal parks, conservation areas and botanical gardens.</p>
Cultural Festivals & Events	<p>Festivals recur on a regular and predictable basis and events are not as predictable. They include performing arts events, tours of culturally significant places, seasonal celebrations, street festivals and many others.</p>
Intangible Culture	<p>Assets that are not necessarily manifest in physical form. They include stories, legends, craftsmanship and many others.</p>
Additional Resources	<p>Resources considered important to a community that are not captured as part of the other eight categories. They include sport and recreation resources, food-related resources, hospitality resources and many others.</p>

⁵ Descriptions based on those included in *Municipal Cultural Planning: A Toolkit for Ontario Municipalities* (2011).



The Canadian Framework for Culture Statistics (2011)

The Cultural Resource Framework is a tool that guides the organization of the Cultural Resource Database. A second framework, the Canadian Framework for Culture Statistics, is a tool that helps define culture by providing limits about what is included in culture and by classifying what belongs in each category.

The Canadian Framework for Culture Statistics (CFCS), 2011⁶ is a document produced by Statistics Canada to provide standard concepts, definitions and categories to facilitate comprehensive, consistent and comparable statistics on culture and support evidence based decision-making.⁷

The framework defines the culture sector through domains, which are a set of purpose-built categories. Domains are used to classify cultural industries, products and occupations into recognizable groupings that are measurable for statistical purposes. Each domain has a set of standard classification codes used to collect data for industries or occupations. Industries are classified according to the North American Industry Classification System (NAICS) and occupations are classified according to the National Occupation Classification for Statistics (NOCS).

The framework includes six culture domains (see Figure 3):

- A. Heritage and Libraries;
- B. Live Performance;
- C. Visual and Applied Arts;
- D. Written and Published Works;
- E. Audiovisual and Interactive Media; and
- F. Sound Recording.

In addition to these culture domains, which are divided into core and ancillary sub-sets, the framework includes two transversal domains, meaning that they are measured across all culture domains. These are (G) Education and Training, and (H) Governance and Funding and Professional Support. Finally, the framework includes two infrastructure domains: (I) Mediating Products and (J) Physical Infrastructure. The 2011 Framework does not include tourism, sports and information technology as part of its definition or measurement of culture.

⁶ The 2011 Classification Guide for the Canadian Framework for Culture Statistics (CFCS) is an updated version of the 2004 CFCS, Canada's first conceptual model for culture statistics that provided a systematic approach to measurement and analysis of the culture sector in Canada.

⁷ Statistics Canada, 2011. *Canadian Framework for Culture Statistics: Conceptual Framework for Culture Statistics*. p. 8.



Figure 3 - Domains in the Canadian Framework for Culture Statistics (CFCS), 2011

Culture Domains					
A. Heritage and libraries	B. Live performance	C. Visual and applied arts	D. Written and published works	E. Audio-visual and interactive media	F. Sound recording
Core Culture Sub-domains					
<ul style="list-style-type: none"> Archives Libraries Cultural heritage Natural heritage 	<ul style="list-style-type: none"> Performing arts Festivals and Celebrations 	<ul style="list-style-type: none"> Original visual art Art reproductions Photography Crafts 	<ul style="list-style-type: none"> Books Periodicals Newspapers Other published works 	<ul style="list-style-type: none"> Film and video Broadcasting Interactive media 	<ul style="list-style-type: none"> Sound recording Music publishing
Ancillary Culture Sub-domains					
		<ul style="list-style-type: none"> Advertising Architecture Design 	<ul style="list-style-type: none"> Collected information 		
Transversal domains					
G. Education and training					
H. Governance, funding and professional support					
Infrastructure domains					
I. Mediating products					
J. Physical infrastructure					

In discussions with the Culture Office, the Creative City Committee Working Group and the Steering Committee, it was agreed that the CFCS would be used as a framework to help determine the scope and definition of culture for the project. It was also agreed that the selection of NAICS and NOC-S codes to be considered for data collection purposes, and therefore, cultural resource database development and cultural mapping would be guided by those included in the CFCS.

While both the LCRD and the Cultural Resource Framework support an expansive view of culture, the CFCS includes some domains that are too broad to be useful for the purposes of this project. Some of the domains (and the codes they include) describe industries and occupations that are more expansive than the culture sector, and are impossible to separate from those industries and occupations what would be considered cultural. For this reason, some key decisions about which domains to exclude (and therefore which codes to exclude) from the scope of data collection were made by the project team, Culture Office, the Creative City Committee Working Group and the Steering Committee collectively. It was decided to:

1. Exclude the transversal domains of (G) Education and Training and (H) Governance, Funding and Professional Support.



This decision was necessary because the codes included in these domains are not specific to culture and include a broad range of occupations and industries outside of the culture sector. In other words, it would be impossible to determine how many professors included in the Education and Training domain are professors in subjects related to culture. Similarly, there is no way to determine how many of the organizations included in the Governance domain are cultural organizations. If these domains were included, there would be misleadingly high numbers for cultural industries and cultural occupations that were likely not representative of the culture sector.

2. Exclude the infrastructure domains of (I) Mediating Products and (J) Physical Infrastructure.

Although infrastructure is necessary for the participation in and consumption of culture, it is not considered part of culture under the framework. Therefore, there are no NAICS or NOC-S codes provided for these domains.⁸

3. Exclude some industry codes related to Craft industries when mapping.

Although data for all of the codes included in the domains described was collected, the codes which constitute the Craft industries sub-domain of the Visual and Applied Arts domain were not included in the mapping of cultural industries. This is because the Craft sub-domain includes activities that are not entirely representative of the cultural sector and/or are too broad in scope to include.

4. Separate (A) Heritage and Libraries domain into two groups for the purposes of this project.

Due to the importance of heritage in London, it was agreed that the Heritage and Libraries components of the domain would be separated. The result of this is three new groupings – Heritage; Libraries; and Heritage and Libraries Unallocated – the third group being necessary for those codes which couldn't easily be separated.

The resulting groupings are as follows:

1. Heritage (CFCS subdomains of archives, cultural heritage, natural heritage)
2. Libraries (CFCS subdomain of libraries)
3. Heritage and Libraries Unallocated (CFCS subdomain of unallocated)
4. Live Performance
5. Visual and Applied Arts
6. Written and Published Works
7. Audio-visual and Interactive Media
8. Sound Recording

The complete list of NAICS and NOC-S codes used in the LCRD can be found in Appendix A.

⁸ Statistics Canada, 2011. *Canadian Framework for Culture Statistics: Conceptual Framework for Culture Statistics*. p. 54.



Categorizing Culture (NAICS & NOCS)

Statistics Canada uses a variety of standard classification systems to categorize much of the data it collects. By using standard classifications, data can be meaningfully compared. Two standard classification systems used in this project are the North American Industry Classification System (NAICS) and the National Occupation Classification for Statistics (NOC-S). Each system is a set of codes which can be applied to industries and occupations respectively. Each code corresponds to a definition.

London's CRD has a NAICS or NOC-S code assigned to each resource included in the database. This classification facilitates data analysis that is consistent, reliable, comparable and ensures that standard definitions are used.

North American Industry Classification System (NAICS 2007)

The system was developed by the statistical agencies of Canada, Mexico, and the United States to provide common definitions and a common statistical framework for analyzing data relating to industry and the economy.⁹ The unit of observation of the North American Industrial Classification System (NAICS) is *the establishment or the producing unit*.

The coding structure of NAICS is a hierarchy (see Figure 4). At the two digit level, there are 20 sectors; at the three digit level, there are 99 sub-sectors; at the four-digit level, there are 321 industry groups; at the five-digit level, there are 734 industries; and at the six digit level, there are 931 national industries.

Figure 4 - NAICS Coding Structure

2 digits	Sectors (20)
3 digits	Sub-sectors (99)
4 digits	Industry groups (321)
5 digits	Industries (734)
6 digits	National industries (931)

Wherever possible, the codes used in the LCRD are six digit NAICS codes, the finest grain possible.

It is important to note that industry data does not distinguish between occupations. For example, industry data could tell you how many people are employed by a museum, and this would include everyone from the curator to the parking attendant. Occupation data, on the other hand, would tell you how many people at the museum had occupations that were considered cultural in nature.

⁹ Statistics Canada, 2011. *Canadian Framework for Culture Statistics: Conceptual Framework for Culture Statistics*. p. 10.



National Occupational Classification for Statistics (NOC-S 2006)

The National Occupational Classification for Statistics (NOC-S) is based on the National Occupational Classification (NOC), which was developed by Human Resources and Social Development Canada (HRSDC) in consultation with Statistics Canada and is maintained jointly by HRSDC and Statistics Canada.¹⁰ It provides a systematic classification structure to identify and categorize the entire range of occupational activity in Canada. It organizes over 30,000 job titles into 520 occupational group descriptions.¹¹

The unit of observation of the NOC-S is *the kind of work performed*. Occupations are grouped primarily in terms of the work usually performed, which is determined according to the tasks, duties, and responsibilities of the occupation.

Unlike NAICS, NOC-S is organized using an alpha-numeric classification system which separates occupations by the sector in which the work is performed and the skill level required to perform the work (see Figure 5).

Figure 5 - NOC-S Matrix, 2006¹²

	Skill Level A	B	C	D
0 Management Occupations				
1 Business, Finance and Administration Occupations				
2 Natural and Applied Sciences and Related Occupations				
3 Health Occupations				
4 Occupations in Social Science, Education, Government Service and Religion				
5 Occupations in Art, Culture, Recreation and Sport				
6 Sales and Service Occupations				
7 Trades, Transport and Equipment Operators and Related Occupations				
8 Occupations Unique to Primary Industry				
9 Occupations Unique to Processing, Manufacturing and Utilities				

Occupation data, distinguishes by occupation, but not by industry. Using the museum example, the curator and graphic designer employed at the museum would be captured in the occupation data, but the

¹⁰ Statistics Canada, 2011. *Canadian Framework for Culture Statistics: Classification Guide for the Canadian Framework for Culture Statistics, 2011*, p. 94.

¹¹ Human Resources and Skills Development Canada. *About NOC-S*. Retrieved from: <http://www30.hrsdc.gc.ca/NOC/english/NOC/2006/AboutNOC.aspx>

¹² Human Resources and Social Development Canada *National Occupation Classification Matrix, 2006*. Retrieved from: <http://www30.hrsdc.gc.ca/NOC/english/NOC/2006/pdf/Matrix.pdf>



establishment itself (the museum) would not be captured. In the same way, the curator and graphic designer would be included in cultural occupation data whether they worked at a museum or at a hospital.

Applying NAICS & NOC-S to the Cultural Resource Database

The NAICS and NOC-S classification systems are useful tools to apply to the Cultural Resource Database. We've used these systems to add additional layers of categorization to each record in the database. This approach standardizes the way the information is organized and can be especially useful for performing economic analysis. For example, using NAICS or NOC-S codes allows the City to perform an analysis of the growth in the number of cultural resources with a certain code. In doing so, the City would be able to track growth in the number of dancers (NOC-S, F034), for instance. The 2006 census data has provided a baseline. The subsequent measurement of F034 from the 2011 census will demonstrate an increase or decrease in the number of dancers in London. The NAICS codes also allow for comparisons to be made with other municipalities in Canada by analysing how many resources with a given code exist in different places.

NAICS and NOC-S codes have both been used to classify cultural resources in the LCRD. NOC-S codes can be used to classify Cultural Occupations. NAICS codes can be used to classify Cultural Industries and all other types of cultural resources including *Cultural Organizations, Cultural Heritage, Natural Heritage, Cultural Spaces and Facilities and Additional Resources*. The challenge we were presented with, however, is that NAICS codes have been designed specifically to classify industries. Recall that the unit of observation is *the establishment or producing unit*. Therefore, their application to other types of resources like organizations, spaces and facilities and festivals and events is not straightforward. To improve the compatibility of the codes with these types of resources, we have developed a layered categorization structure that allows us to organize the various types of resources using NAICS codes, and also provides a flexible system for analysis.

In addition to tombstone data (the basic information about each resource which is least likely to change over time) and more detailed attribute data such as descriptions and contact information, each record in the LCRD has four fields which categorize it to varying degrees of specificity. There are essentially four layers of categorization for each resource (see Figure 6). The **first layer** is the cultural resource category. This layer describes the part of the cultural resource framework to which it belongs. Is it a facility, a natural heritage asset, an organization, etc.? Once this first layer of categorization has been determined, the list of NAICS codes which belong to this category can be examined.

The **second layer** is the NAICS code (or NOC-S code when describing Cultural Occupations). Each NAICS code has one definition. Essentially, the NAICS code and NAICS definition are the same thing, however one is represented numerically and the other is represented by a description. This NAICS definition is the **third layer** of classification. Select the NAICS code and corresponding definition that best describe the resource.

Finally, once the cultural resource category, NAICS code and NAICS definition have been established, a mapping title can be selected. Developed by the CUI for this project, the mapping title, the **fourth layer** of categorization, is a description that corresponds to the NAICS code and definition, and which more accurately reflects the resource being described. It connects the resource to the cultural resource category to which it belongs. For instance, NAICS code 519122 corresponds to the NAICS definition *Archives*. When classified as part of the *Cultural Spaces and Facilities* category, this refers to buildings or



physical structures, so the mapping title *Archives* is used. However, when used under the *Cultural Heritage* category, it refers to a collection. In this case, the mapping title *Archive Collections* is used. In this way, the resources can be distinguished. The mapping title also allows for easy mapping as it provides the finest level of categorization and indicates most accurately what the resource is. For a complete list of mapping titles and corresponding codes, see Appendix A.

These various levels of categorization make searching the database and utilizing the data within the LCRD easy. One can perform a search by cultural resource category, by NAICS code, by NAICS definition or by mapping title. If one wants to find all the resources that belong to the *Cultural Heritage* cultural resource category, this is possible. If one wants to find all the resources that belong to NAICS code 519122, that is also possible.

Figure 6 – Using NAICS to categorize resources included in the LCRD

Cultural Resource Category	NAICS Code	NAICS Definition	Mapping Title
The Cultural Resource Category is the most general level of classification. It describes the category of the Cultural Resource Framework to which the resource belongs. (E.g. <i>Cultural Heritage</i>)	Six digit numerical code assigned to each industry. (E.g. <i>519122</i>)	Description assigned to each numerical code. (E.g. <i>Archives</i>)	Developed by CUI, this is a written description of the NAICS code which corresponds to the Cultural Resource Category for database and mapping purposes. (E.g. <i>Archive Collections</i>)



III. Data Sources and Limitations

For this project, we acquired and used data from three sources:

- Statistics Canada
- The City of London
- The London Arts Council & the London Heritage Council

Using Statistics Canada data allows us to compare London to other cities in Ontario and Canada. Using the City of London and LAC/LHC data creates a robust “made in London” cultural data baseline that (if maintained) can be used to assess economic impact and to inform decision making and performance evaluation.

Statistics Canada Data

Data Sets

Three data sets were purchased from Statistics Canada for this project: Canadian Business Patterns Industry Data, Place of Work Occupation data, and Place of Residence Occupation data (see Figure 7). The 2006 Census information offered the latest available data on employment in the cultural sector.¹³ Extensive work was done with the City of London and Statistics Canada representatives to determine which variables and geographies would be included in the data request.

Figure 7 - Statistics Canada Data Included in the LCRD

Data Set	Data Source
Cultural Industries (Cultural Business Establishments)	Statistics Canada (Canadian Business Patterns)
Cultural Occupations by Place of Work	Statistics Canada (2006 Census)
Cultural Occupations by Place of Residence	Statistics Canada (2006 Census)

1. Canadian Business Patterns

2011 Canadian Business Patterns (CBP) data from Statistics Canada provided a count of the number of business establishments (by 9 employment size ranges) in cultural industries located in the 82 census tracts of the City of London by 6 digit NAICS code. The data published reflects the number of business locations or establishments identified from the Canadian Business Register Database for the year 2011.

The particular data set requested for the purposes of this project was December 2011 business location counts by 6-digit NAICS code for all of the 104 census tracts in the CMA of London, Ontario. Statistics Canada collects data for a CMA comprised of 104 census tracts of which 82 correspond to the City of London. The economic impact analysis used all 104 census tracts while the LCRD drew information from the 82.

¹³ The 2011 census data will be released in 2013, at which time an update of this data can be performed as recommended in Section VI.



For this industry data, the "Indeterminate" variable was included. The establishments in the Indeterminate category do not maintain an employee payroll, but may have a workforce which consists of contracted workers, family members or business owners. However, the Business Register does not have this information available, and has therefore assigned the establishments to an Indeterminate category. This category also includes employers who did not have employees in the last 12 months. By including the Indeterminate category of businesses, the industry data included in the LCRD is a more accurate reflection of businesses in the culture sector.

2. Cultural Occupations by Place of Work (POW) - 2006 Census

In order to capture "where cultural workers live and where cultural workers work" as was requested in the RFP, two separate Statistics Canada data tables were required for occupation data; one for Place of Work and one for Place of Residence.

Place of Work (POW) occupation data captures the employed labour force 15 years and over, who had a place of work status for *worked from home* and *usual place of work*, and included full and part-time workers. The decision to include people who worked from home and part-time workers was made after discussion with the Culture Office and Steering Committee in order to capture the broadest number of cultural workers - those who perform cultural work part time or not from a usual place of work. This data was requested for the London CMA and the 104 Census Tracts in the London CMA; only the 82 census tracts in the City of London were used in the LCRD.

3. Cultural Occupations by Place of Residence (POR) - 2006 Census

Place of Residence (POR) occupation data captures those who are part of the total labour force 15 years and over and their place of residence. This includes the employed labour force and the unemployed labour force (those who were unemployed the week prior to the 2006 census), and both full and part-time workers. The decision to include part-time workers was made after discussion with the Culture Office and Steering Committee in order to capture the broadest number of cultural workers. A similar rationale supports the decision to include the unemployed labour force - those who were unemployed the week prior to the 2006 census. By including these people, the data captures the potential pool of cultural workers in London. However, to maintain reliability and accuracy, the unemployed labour force did not include those who last worked in 2006 or 2005 or before or never worked. This data was requested for the London CMA and the 104 Census Tracts in the London CMA; only the 82 census tracts in the City of London were used in the LCRD.

Data Challenges and Limitations

There are several data limitations to note with respect to Statistics Canada data. When the geography is small, or when the variables requested include only a small portion of the population, there are concerns that the privacy of individuals may be compromised. Statistics Canada takes steps to protect privacy through a variety of means. These include data suppression, random rounding and sample size, among others.

The source of the NAICS industry data is Canadian Business Patterns which is based on the Business Register Database. This data is not rounded. Therefore, the number of businesses in each census tract is an exact number. This data is available every six months. The industry data included in the LCRD is from December, 2011 – the most recent available at the time of the work.



The NOC-S occupation data's source is the Census, so the Place of Work and Place of Residence data present several limitations not seen in the industry data.

1. The most recent available occupation data is from the Statistics Canada's 2006 Census.
2. Census tracts don't align perfectly with the City of London boundaries or with the boundaries of London's neighbourhoods/planning districts, which presents challenges for data analysis.
3. Area Suppression - No census data are released for areas (including census tracts) below a population size of 40.
4. Cell Suppression - All statistics are suppressed if the number of actual records used in the calculation (not rounded or weighted) is less than 4 and all statistics are suppressed if the sum is less than 10.
5. Random Rounding - For 100% data, all counts are rounded to a base of 5. This means that all counts will end in either 0 or 5. 20% data requires a slightly different random rounding algorithm. All counts greater than 10 are rounded to base 5, as is done for 100% data. Counts less than 10 are rounded to base 10. This means that any 20% counts less than 10 will always be changed to 0 or 10. POW and POR data are 20% data.
6. Beginning with the 2011 census, Place of Work and Place of Residence data is now collected through the national household survey which is not mandatory. For this reason, the 2011 cultural occupation data may present new challenges or increased suppression and rounding.

There is an additional data challenge presented by the culture sector in general, but not particular to these data sets. This challenge is that the culture sector often exists in informal places or through informal activities. Many cultural workers may have day jobs to support themselves, but consider themselves artists first. Similarly, many cultural businesses are operated out of homes rather than offices or storefronts. This makes identifying and capturing these types of occupations and industries very difficult – especially through the census where many of these activities would not be self-identified by respondents.

While there are limitations to keep in mind when using Statistics Canada data, it remains the most comprehensive, accurate and consistently collected data available in Canada. Every effort has been made to minimize the limitations of the data used in the LCRD. The variables selected for the tables were chosen very carefully in consultation with Statistics Canada, the Culture Office and the Steering Committee to ensure that a broad representation of culture was captured without compromising accuracy by casting the culture net too widely. In order to overcome some of these challenges and limitations, the decision was made to create groups of codes. By creating groups of codes that correspond to the domains selected from the Canadian Framework for Culture Statistics, the variables requested from Statistics Canada were totals of the groups, rather than totals for each NOC-S code, thereby reducing the random rounding. This provides more accurate numbers, but does not eliminate rounding altogether.



Existing City of London Data

Much of the data that was integrated into the LCRD was data that was already being collected by the City of London, primarily collected and maintained by the Planning Division. These data sets populated several cultural resource categories. Data sets obtained from the City of London are listed in Figure 8.

Figure 8 - Existing City of London Data Included in LCRD

Data Set	Data Source
Libraries	Planning Division
Community Centres	Planning Division
Arenas	Planning Division
Public and Separate Elementary and Secondary Schools	Planning Division
Listed and Designated Heritage properties	Planning Division
Heritage Conservation Districts	Planning Division
Cemeteries	Planning Division
Archaeological Sites	Planning Division
Multiuse Pathways	Planning Division
Conservation Areas	Planning Division
Parks	Planning Division
Community Gardens	Planning Division
Sports Venues	Planning Division
Baseball diamonds	Planning Division
Tennis courts	Planning Division
Football fields	Planning Division
Soccer fields	Planning Division
Golf courses	Planning Division
Multi-use pads	Planning Division
Outdoor ice rinks	Planning Division
Play structures	Planning Division
Skateboard parks	Planning Division
Wading pools/spray pads	Planning Division
Basketball courts	Planning Division
Community pools	Planning Division
Bikeways & Routes	Planning Division

The City data that is part of the LCRD presents few challenges. It is, however, sometimes inconsistent in terms of the level of detail provided and some tables have incomplete or outdated information. It presented no real limitations, because each data set can easily be updated and made consistent and accurate through regular maintenance and update cycles.



London Arts Council & London Heritage Council Data

Much of the data included in the LCRD is from the online portals administered by the London Heritage Council (LHC)¹⁴ and the London Arts Council (LAC)¹⁵ (See Figure 9 for a list of LAC and LHC data included in the LCRD). Most of this data is very robust, with detailed attribute information and descriptions of the various resources. Some data sets are missing complete street address data. They occasionally provide postal code data, but this information considerably reduces accuracy for mapping purposes. There are a few other challenges presented by the data collected and maintained in these two portals with respect to integrating the information into a larger cultural resource database.

Figure 9 - LAC & LHC Data Included in LCRD

Data Set	Data Source
Artists	London Arts Council
Heritage Professionals	London Heritage Council
Historic Plaques	London Heritage Council
Historic Collections	London Heritage Council
Historic Sites	London Heritage Council
Arts Organizations	London Arts Council
Heritage Organizations	London Heritage Council
Venues	London Arts Council; London Heritage Council

Each of the two portals, their collection methodology and their classification systems were designed with much consideration for their individual needs, context and objectives, but not with a view to becoming integrated. This raises several challenges for building a community-wide cultural resource database:

1. Due to the voluntary nature of the data collection methodology for the two portals (information is voluntarily provided by constituents through the website), it is not possible to determine what percentage of the arts or heritage sector in London is captured by them.
2. Similarly, it is not possible to verify the accuracy or relevance of the data included in the database. Organizations, artists, and venues can sign up on either or both of the portals and select which categories describe their work. This may result in incomplete, inaccurate or duplicated information.
3. Finally, each of the two portals employs a different categorization model (see Figure 10 for a sample). For this reason, it is not possible to know how the artists, organizations and venues have chosen to categorize themselves and which definitions they are using. This makes a consistent categorization model very difficult across the two systems and more difficult still to integrate with other resources from different data sources. In addition to these different models, there is no prioritization given to the various categories selected - in order to capture the breadth of culture in London, new records on the portals are encouraged to check all categories that apply. This works well for the LAC and LHC contexts, however makes selecting a NAICS code very difficult.

¹⁴ www.londonheritage.ca

¹⁵ www.londonarts.ca



Figure 10 – A Sample of the LAC and LHC Categorization Models

LHC Venue Categories	LAC Venue Categories
Archaeological Site	Theatre
Gallery	Music
Museum	Literature
Educational Institution	Dance
Heritage Site	Design
Heritage District	Crafts
Library	Visual Arts
Park	Electronic/Digital Arts
Theatre	Other
Rental/Wedding	Multi-Cultural
	Museums/Galleries
	Commercial Galleries
	Cinemas
	Arts Education
	Libraries
	Foundations
	Educational Institutions
	Resources
	Suppliers

In order to mitigate these challenges, the decision was made after extensive discussions with both Councils, to maintain their individual classification systems for each record. This means that in addition to the four layers used to categorize every resource in the database, data from the LAC contains additional fields that correspond to their categorization model and the LHC data contains additional fields that correspond to their categorization model. Where records are duplicated, there is a *Notes* field that indicates that the resource appears in both databases.

In the case of Artists (from the LAC) and Professionals (from the LHC), the data has been included in the LCRD as is. These two tables have not been coded with NOC-S codes for two reasons. Firstly, due to the concerns with accuracy and completeness described previously. The artists and professionals listed in these two databases may not be an exhaustive list of London’s cultural occupations. For this reason, Statistics Canada POR and POW data was purchased because it is the most accurate occupation data available for the City of London. Secondly, due to the categorization limitations described previously, it would be very difficult to assign occupational codes to each record when many artists have checked several boxes to describe themselves or their work. Lastly, it is unclear if the addresses provided by the artists and professionals indicate their place of residence or place of work. It is likely a mix, but it is not possible to confirm this as we can for POW and POR data.

Despite these challenges, the data for artists and heritage professionals in London is very useful information, totalling close to 400 records. We have included these data sets in the database to provide context, depth of information and useful profiles on artist who have submitted their information voluntarily. There may be some concerns about sharing personal information on a future web application of the data, and this layer of information can be turned off if necessary. It is a very useful complementary layer to the Statistics Canada POW and POR data.



Other Data

After the completion of Phase 1, discussions began around what types of data should be included as part of Phase 2. Many of the data sets suggested were not available within the City, LAC, LHC or in other organizations in London. Due to the limited scope of the project, only small amounts of custom data could be collected. The Culture Office assisted with the collection of several data sets that the group wanted to include in the database, but wasn't otherwise available. These were markets, private elementary, secondary schools and colleges and public art (see Figure 11). Several other suggestions are included for future expansion of the LCRD in the Recommendations, Section VI of this report.

These data sets didn't present any major challenges or limitations, however they are quite limited in terms of the detail and diversity of information provided – attribute data. More information should be collected to describe markets, in particular.

Figure 11 - Other Data Included in the LCRD

Data Set	Data Source
Markets	Culture Office
Public art	Culture Office
Private Schools	Culture Office



IV. The Database

Database Schema

All of the data sets referred to in this report are connected to form the Cultural Resource Database. The database schema is a visualization of the database structure and these interconnections (see Appendix A). In order for searches and queries to be performed and maps created, certain tables (data sets) need to be linked together through the design of the database. The schema depicts the different tables (and the fields within each) of data that are part of the database grouped by data source. It also depicts the relationships between each of tables and to which others they are connected. If additional tables are added as the database is expanded in the future, the new tables can be connected to the existing tables.

How to Use a Database Management Plan

In conjunction with the database, a database management plan has been developed which ensures that the database will be kept up to date. The database management plan is essentially a protocol to ensure that the data included in the database is updated on a regular basis.

Regular, planned updates to the LCRD ensure that it will continue to be accurate, relevant and useful as the trusted place for information about cultural resources in London. The responsibility for managing the maintenance process – ensuring timely updates that meet the LCRD’s standards – will be the City’s. Contributing updated data to the LCRD will be the responsibility of the data sharing partners (LAC, LHC and any future data partners).

The database management plan is a useful tool to organize these efforts. The plan is essentially a spreadsheet that lays out all information needed to track the maintenance of each dataset over time (see Figure 12). The entries in the plan are a type of metadata – or “data about data”. They help explain what is contained in each component of the database, where it comes from and what arrangements have been made for its maintenance.

Figure 12 - Database Management Plan

Cultural Resource Database Management Plan	Dataset Name	Source	Partner responsible for update	Update Frequency	Contact Person	Contact Phone	Contact Email	Data Privacy Restrictions	Date of last update
Entry Format				Monthly				None	DD/MM/YYYY
				Quarterly					
				Annually					
				Automatic (User generated)					



V. Maps and Analysis

To illustrate the application of the database and mapping to inform strategic planning and decision-making in London, the following analysis examines the data in three different ways. Firstly, an exploration of the two major cultural nodes and other potential nodes that have emerged from the mapping exercise; secondly, an analysis of the cultural resource categories mapped in London; and thirdly, using the two established cultural nodes and current community initiatives taking place in the City, a framework is developed to encourage placemaking in the potential nodes.

Cultural Nodes and Clusters

An important application of cultural mapping is the identification of cultural nodes. We have defined Cultural Nodes as places with notable concentrations of cultural resources. They are also typically places with an urban structure that is well suited to support cultural resources: walkable streets, an attractive public realm, a mix of uses that cater to a diversity of needs, and good access to public transit among other things.

While there is generally an even distribution of many types of cultural resources across the populated areas of the City, the Cultural Resource Database identifies two particular areas in London with a notable concentration of cultural resources - Downtown London and the Old East Village. In between these two areas, and just north of downtown are the two areas of the City that exhibit the highest combinations for place of work and place of residence data. There are also clusters of cultural resources in South London, North London, Lambeth, Wortley Village and SOHO, among others.

1. Downtown Node

The node which displays the most distinctive concentration of cultural resources in the City is downtown London, located in the Central London planning district (see Map 1).

Urban Form

The downtown occupies only 0.2%¹⁶ of the City's land area, but is located in the planning district with the highest concentration of cultural resources anywhere in the City. It features cultural facilities, government operations, transit and entertainment opportunities.

The City has invested significant resources in its downtown in the last twelve years. Council has approved a Downtown Heritage Conservation District as part of the Downtown Master Plan and the City has prepared Downtown Urban Design Guidelines. The City has focused on enhancing its public realm by restoring, repurposing and adapting its own heritage buildings. It has also created financial incentives to support the private sector in upgrading their heritage building stock through interest free loans and grants to improve facades.¹⁷

¹⁶ Canadian Urban Institute (2012). *The Value of Investing in Canadian Downtowns: London*. p 102.

¹⁷ Ibid. p. 107.



The downtown's public realm has also been enhanced through the introduction of new infrastructure, street trees, benches and other furniture, and more pedestrian-friendly streets. The Downtown Master Plan Report, 2010 identified the need for "smaller 'pocket parks', small squares and seating areas".¹⁸ The City has created public squares and spaces at Talbot and York Street and the John Labatt Centre. Covent Garden Market has also developed a significant public space that features picnic tables, café tables with umbrellas and street vendors in front. There has also been significant investment in parks just outside the downtown boundaries - Victoria Park and the Forks of the Thames.¹⁹

Access to transit is another critical success factor in the downtown. The municipal transit hub is located here as well as the Greyhound bus station and Via Rail terminal. The downtown is also connected to 70% of the City's 38 transit routes.²⁰

Cultural Resources

The downtown is home to a very high concentration of cultural resources in the City of London. The area features many important cultural resources including the John Labatt Centre, Covent Garden Market and the Central Library. The downtown (including Victoria Park) is the location of 50% of the City's public art pieces and about 22% of the cultural organizations in the City. Although most of the downtown is not part of a Heritage Conservation District, the area still has about 6% of the City's total listed and designated heritage properties, with a particular strip along Dundas Street.

An analysis of the Statistics Canada data for cultural industries and occupations presents challenges because the census tract boundary doesn't align perfectly with the downtown boundary. It is clear, however, that downtown is part of the census tract that exhibits the highest number of cultural industries and the highest number of cultural occupations by Place of Work. There are 121 establishments in the downtown which represents about 10% of the City's cultural industries. The number of occupations by place of work is also very high, with 1455 people. Of the 121 cultural industries²¹, the majority, 78, belong to the visual and applied arts category, with 16 in written and published works and 12 in audiovisual and interactive media. Of the total 1455 people who work in cultural occupations in the census tract, 515 work in the audiovisual and interactive media category, while 430 work in visual and applied arts and 130 work in heritage.

This trend does not continue for cultural occupations by Place of Residence. Place of Residence data is in the mid-range, with 95 people with cultural occupations living in the census tract. Of the 95, 40 work in visual and applied arts, 30 in written and published works and 25 in libraries. These numbers may be relatively low because while many people work in this area, few people live there. In 2006, downtown's population was 3430 residents and now it is approximately 5000.²²

¹⁸ City of London. (2010). *Downtown Master Plan - New Ideas, Options, Recommendations and Implementation*. Retrieved from: <http://www.london.ca/Planning/PDFs/newideasoptionsimplemmentationreport.pdf>. Accessed 2012 October 28.

¹⁹ Canadian Urban Institute (2012). *The Value of Investing in Canadian Downtowns: London*. p 112.

²⁰ Ibid. p. 108.

²¹ Note that crafts industries are also high (32), but due to the inability to distinguish cultural craft industries from manufacturing craft industries, these numbers are not included for mapping purposes. These numbers are, however part of the database so they can be included or excluded depending on future data analysis needs.

²² Canadian Urban Institute (2012). *The Value of Investing in Canadian Downtowns: London*. p. 106.



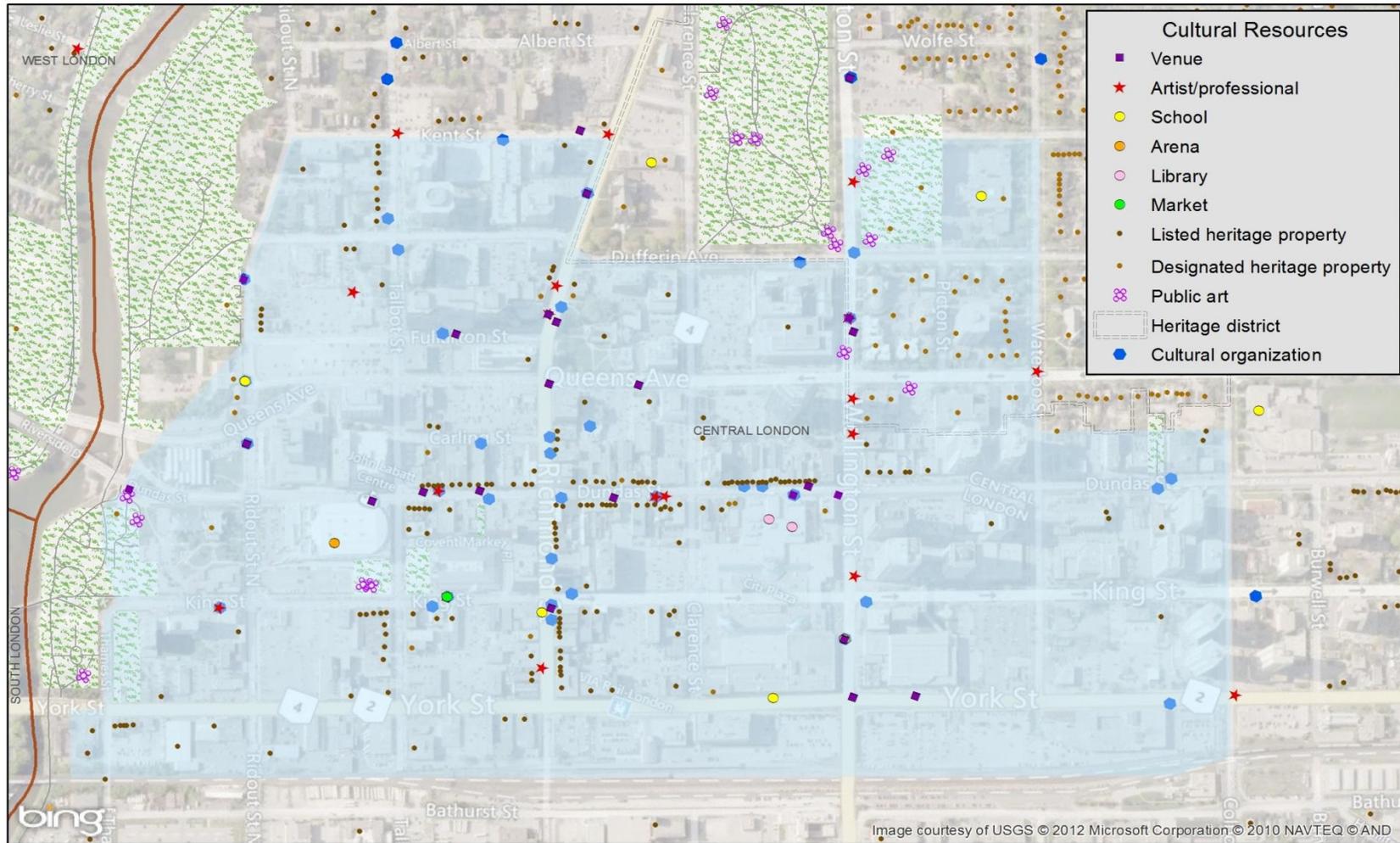
80% of the City's office space is located in the downtown.²³ For these reasons, downtown London still relies heavily on its day time population for vitality with a ratio of day time to nighttime population of 10:1.²⁴

²³ Ibid. p. 104.

²⁴ Ibid, p. 106.



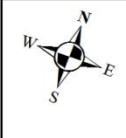
Cultural Resources in Downtown London



Cultural Profile/Cultural Resource Mapping

Date created: Nov. 2012
 Coordinate system: UTM17N
 Projection: NAD1983
 Scale: 1:9,000

Data source:
 1) Planning District file: City of London, 2011
 2) Cultural Resources file: City of London, 2012;
 London Heritage Council, 2012; and London Arts
 Council, 2012



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0 0.125 0.25 0.5
 Kilometres

Name: CuiRRDtw110812_

Date: 09/11/2012

Map 1 - Cultural Resources in Downtown London

2. Old East Village Node

To the east of the downtown node is the Old East Village (OEV) node which also exhibits a very high number of cultural resources in a variety of categories. This area, shown on Map 2 by the boundary for the Old East Village Community Association is part of the East London planning district. The OEV Community Association boundary encompasses the OEV Heritage Conservation District and the OEV Community Improvement Plan area.

Urban Form

In February of 2002, the Old East Village BIA launched the Old East London Village Commercial Corridor Transition and Revitalization Study to begin to tackle the redevelopment of the Dundas Street commercial corridor.²⁵ The study identified several challenges in the area including deteriorating building stock, urban blight in the key central area, major socio-economic issues, loss of opportunity for a quality urban neighbourhood and commercial area, a struggling business corridor that no longer related to the residential district, and a lack of investment and loss of tax dollars.²⁶

The study also identified many opportunities including a central area location with outstanding heritage assets, a creative, diverse community, an active community, a strong sense of community, a strong culture and arts community, smart growth opportunities, intensification, utilization of existing services, and strengthening the downtown core with supporting residential and commercial areas.²⁷

Stemming from this study, the City of London established a Community Improvement Plan for the Old East Village in 2004 which allowed financial incentives to be in place in the area and was intended to stimulate private investment and property maintenance.²⁸ Three financial incentives were offered to property owners in the Village: the Façade Restoration Loan Program, the Upgrade to Building Code Loan Program, and the Rehabilitation and Redevelopment Grant Program. These incentives are also offered in the City's core.

Through the continued efforts of the BIA and the incentives provided through the CIP, the community has seen many improvements. Three developments will create 684 new residential units on the Dundas Street corridor, many new stores will be created on Dundas Street by 2013, approximately 40 properties have been renovated or are undergoing renovation since 2008 and 3 infill projects are scheduled to be completed by 2012.²⁹

Cultural Resources

Like the downtown, the Old East Village is home to significant numbers of cultural resources and important pieces of cultural infrastructure. It is the location of the Western Fair Farmers and Artisans Market, which has become a hub for cultural activity and innovation in London. It is also

²⁵ Old East Village Business Improvement Area. *Revitalization Plan*. Retrieved from http://www.oldeastvillage.com/rev_study/rev_plan.php.

²⁶ Ibid.

²⁷ Ibid.

²⁸ City of London Planning Division. 2004. *Draft Old East Village Community Improvement Plan*. Retrieved from http://www.oldeastvillage.com/pdf_reports/CIP-2004.pdf, p. 9.

²⁹ Old East Village Business Improvement Area. Retrieved from http://www.oldeastvillage.com/plan_outcomes/imp_out.php



home to one of the City's four Heritage Conservation Districts (established in 2006). It contains 28% of the City's listed and designated heritage properties as well as some key venues that serve the whole City.

In addition to the vast numbers of listed and designated heritage properties that populate the Heritage Conservation District, many of the area's cultural resources are located on Dundas Street. These include the London Potters Guild, the Palace Theatre and the Aeolian Performing Arts Centre. Many cultural organizations are also located on Dundas Street, including the East Village Arts Coop, Afroresta London and London Community Players, among others. The area is also home to several public art pieces.

The Old East Village crosses three census tracts, but doesn't encompass the total area of any. One census tract covers a very small part of the community association. This poses challenges for the analysis of the cultural industries and occupations in this area, however the dividing line between the other two census tracts is Dundas Street, so there can be some generalizations made about activity that takes place north and south of this commercial corridor. In terms of cultural industries, both north and south of Dundas Street are in the same range, with a total of 12 and 17 establishments respectively, both with high numbers in visual and applied arts.³⁰ Combined, these establishments represent about 2% of the total cultural industries in the City.

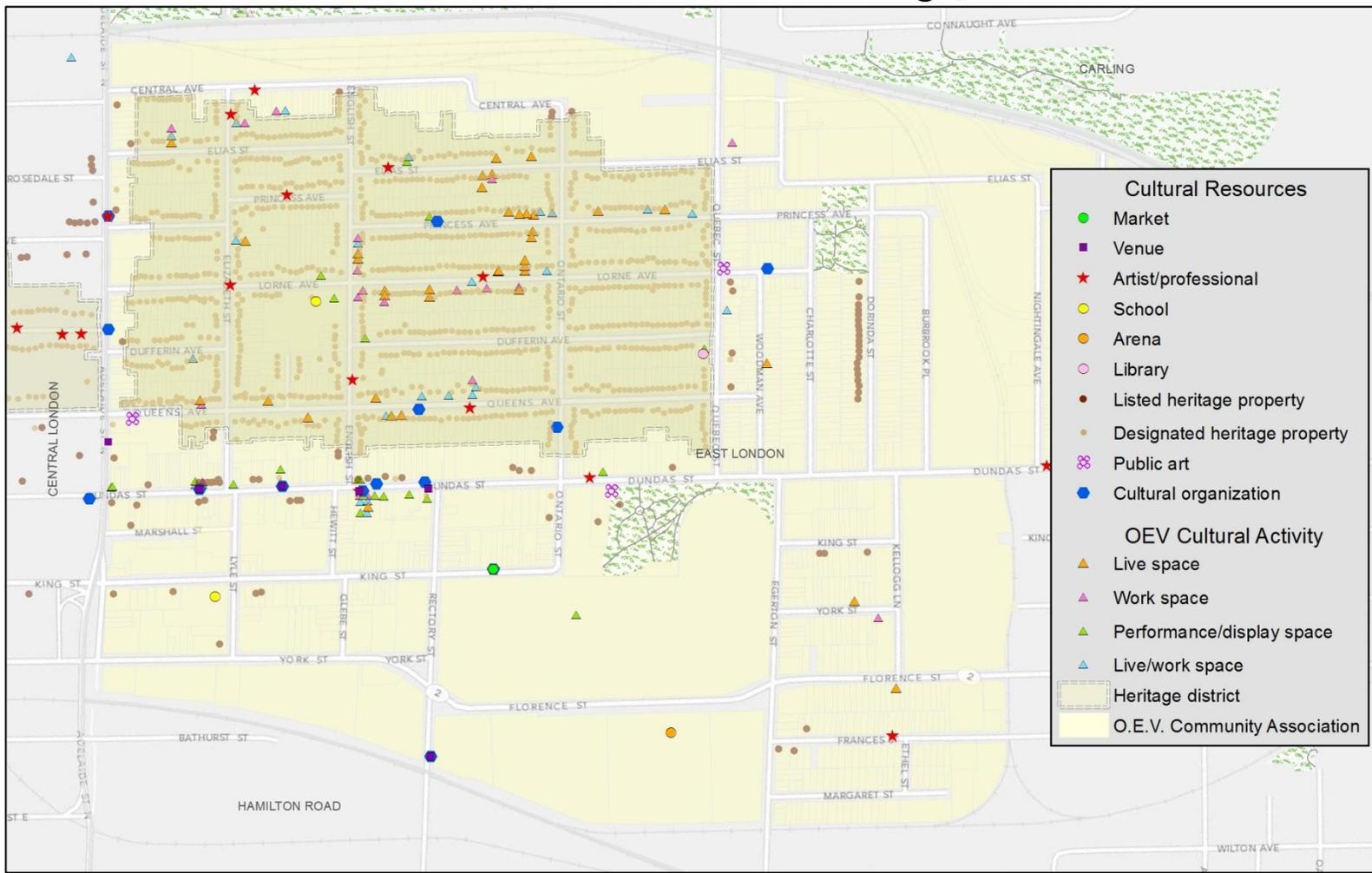
In terms of cultural occupations, there is a considerable difference between the number of cultural workers working north and south of Dundas Street. In the census tract on the north side of the village, there are 25 cultural workers, all of whom work in live performance. The census tract on the south side of Dundas Street tells a different story, with 145 people with cultural occupations working – 60 of them in visual and applied arts, 35 in audiovisual and interactive media, 25 in live performance, and 25 in written and published works.

In contrast, the data for Place of Residence is quite the opposite. The number of cultural workers who live in the census tract north Dundas Street is high, with 105 people, split fairly evenly among visual and applied arts, written and published works and live performance. In the census tract south of Dundas, the numbers of cultural workers living are among the lowest in the City with 10 working in visual and applied arts.

³⁰ Note that both of these census tracts are very high on crafts, with 5 establishments in crafts industries north of Dundas St. and 16 south of Dundas St. These numbers were not included for mapping, but are part of the database for future data analysis purposes. (See footnote 21 for more detail).



Cultural Resources in the Old East Village, London



Cultural Profile/Cultural Resource Mapping

Date created: Nov. 2012
 Coordinate system: UTM17N
 Projection: NAD1983
 Scale: 1:12,500

Data source:
 1) Planning District file: City of London, 2011
 2) Cultural Resources files: City of London, 2012; London Heritage Council, 2012; and London Arts Council, 2012
 3) OEV Cultural Activity files: Old East Village BIA

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Name: CuIRROldEastVlg110812

Date: 14/11/2012

Map 2 - Cultural Resources in the Old East Village, London

3. Other Potential Nodes

While the Downtown and Old East Village demonstrate obvious clustering of cultural resources, other parts of London don't emerge from the baseline mapping as distinctive nodes. There are however, areas of the city where there is some clustering of certain resources that could benefit from special attention to the urban structure and public realm. Areas that are well suited to support cultural resources typically have walkable streets, an attractive public realm, a mix of uses that cater to a diversity of needs, and good access to public transit, among other things.

Areas that are mixed use also have the potential to support and sustain cultural resources. For this reason, we've included a map that displays data for place of work and place of residence combined, to highlight the areas that are high on both (see Map 5). The two census tracts that exhibit the highest range of both POW and POR are the ones located immediately to the north and east of downtown. These are areas that would likely benefit from an improved public realm and as they are developed, could connect the two main nodes of Downtown and the OEV.

Maps 3 and 4 demonstrate the concentration of cultural resources across the City's planning districts. Due to the high number of listed and designated heritage properties relative to the number of overall cultural resources, we've prepared two different maps. Map 3 includes listed and designated heritage properties and Map 4 excludes them. While similar, the maps demonstrate that the Central London planning district has a high concentration of cultural resources both when including and excluding heritage properties in the analysis. When including heritage properties, South London and North London emerge as the next highest concentration of cultural resources after the Central London and East London planning districts.

South London and Wortley Village in particular, exhibits a balance of cultural resources. A significant portion of Wortley Village and its surrounding area is currently under assessment for recognition as a heritage conservation district under the Ontario Heritage Act given the number of identified heritage resources there and the historical evolution of that area. It has a museum and a cinema on its western boundary, several cultural organizations, falls in the mid-range for industries and Place of Work, and is high for Place of Residence. It also demonstrates a high number of artists as indicated by the LAC data.

North London also demonstrates a high number of a combination of cultural resources, both when including and excluding listed and heritage properties. It is the location of one of the City's four heritage conservation districts and displays a balanced mix of many other types of cultural resources. It is the location of several galleries and a theatre, ten cultural organizations, some public art pieces and displays cultural industries in the mid-range as well as Place of Residence numbers in the mid-range.

While Lambeth is more rural than many areas in London, it exhibits a small cluster of cultural resources on which it can build. The area contains some listed and designated heritage properties at the intersection of Colonel Talbot Road and Main Street and several cultural organizations. It is located in a census tract that exhibits low Place of Work numbers, mid-range industry numbers and mid-range Place of Residence numbers. It is not however, well-served by transit which could prevent it from developing into a more distinct cultural node.

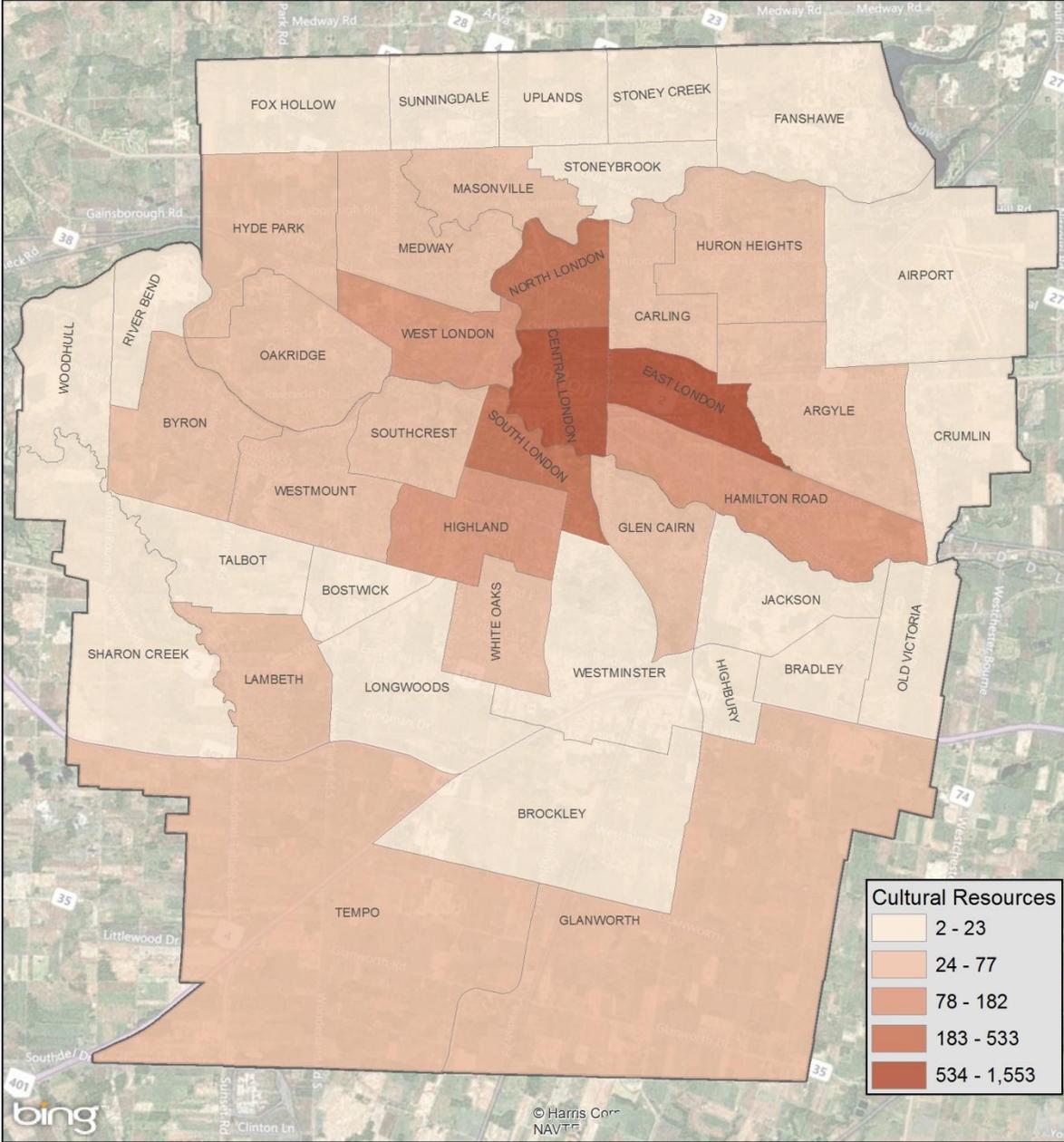


Many types of analysis can be conducted using the baseline data included in the LCRD. To perform an analysis of the potential cultural nodes raised here and their likelihood to develop further, one could overlay the City's public transit routes and bike routes on top of the cultural resources to determine if they are areas that are well-served or poorly served by public transit and active transportation routes. Added to this could be the City's tree canopy and streetlight information which would provide some information about walkability in these areas, which is a feature that also supports cultural nodes.

Another type of analysis could be conducted to understand how housing prices are related to location decisions for cultural workers. A link could be suggested by overlaying data about housing prices on top of Place of Residence information for cultural occupations. Trends would likely emerge that would help to support the case for public realm investment to improve particular areas or perhaps reveal certain areas with low housing prices that may begin to attract cultural workers in the future.



Concentration of Cultural Resources in the City of London Including Listed and Designated Heritage Properties



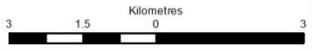
Cultural Profile/Cultural Resource Mapping

Date created: Nov. 2012
Coordinate system: UTM17N
Projection: NAD1983
Scale: 1:115,000

Data source:
 1) Planning District file: City of London, 2011
 2) Cultural Resources file: City of London, 2012; London Heritage Council, 2012; and London Arts Council, 2012



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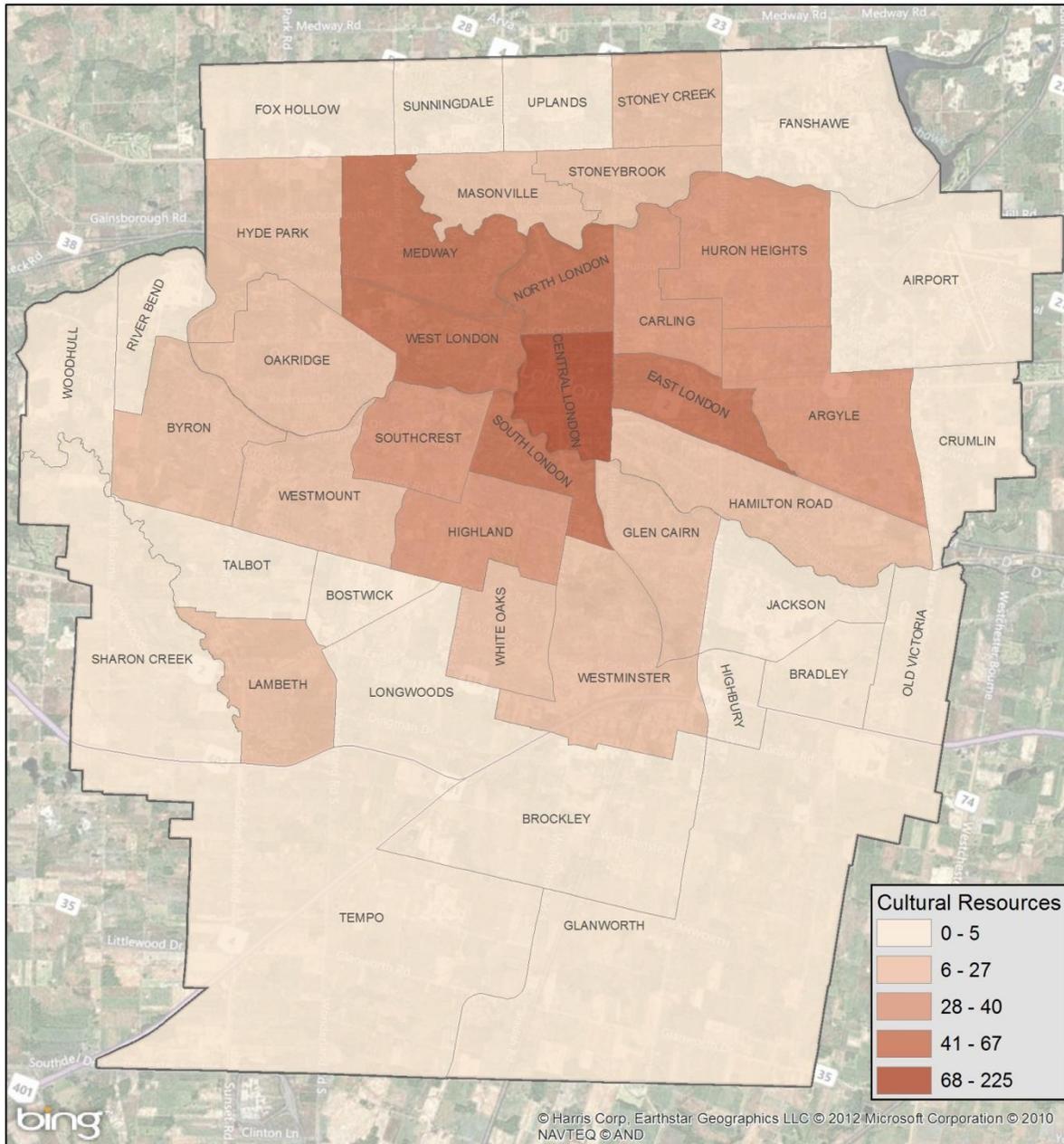
Name: CulRRAggHerPtyHisStelnc110912

Date: 14/11/2012

Map 3 - Concentration of Cultural Resource in London (Including Listed and Designated Heritage Properties)



Concentration of Cultural Resources in the City of London Excluding Listed and Designated Heritage Properties



Cultural Profile/Cultural Resource Mapping

Date created: Nov. 2012
 Coordinate system: UTM17N
 Projection: NAD1983
 Scale: 1:115,000

Data source:
 1) Planning District file: City of London, 2011
 2) Cultural Resources file: City of London, 2012;
 London Heritage Council, 2012; and London Arts
 Council, 2012



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Name: CulRRAggHerPtyHisSteExc110912

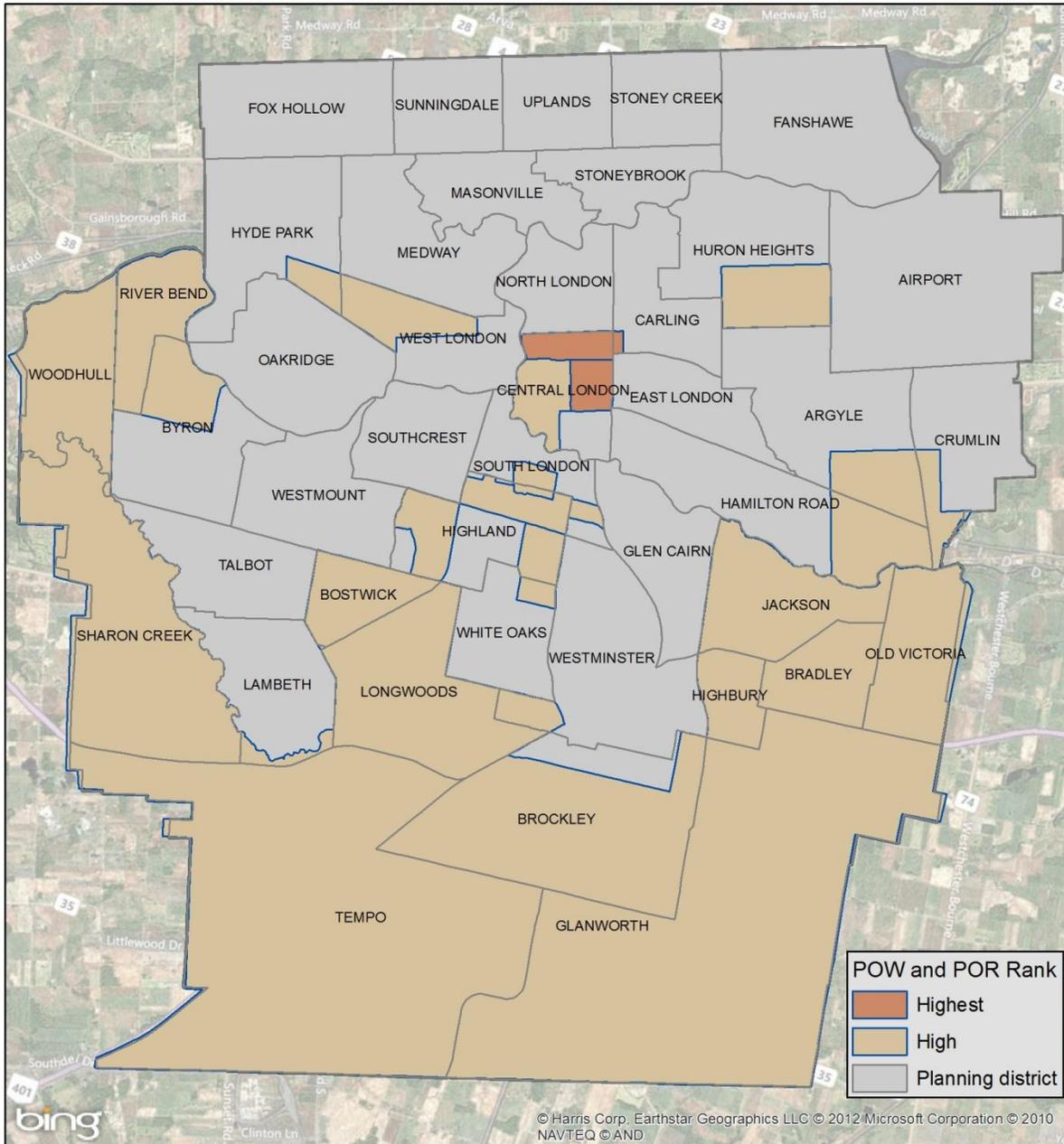
Date: 09/11/2012

Map 4 - Concentration of Cultural Resource in London (Excluding Listed and Designated Heritage Properties)



Highest Cultural Occupation Census Tracts in London

Place of Work and Place of Residence Combined



Cultural Profile/Cultural Resource Mapping

Date created: Nov. 2012
 Coordinate system: UTM17N
 Projection: NAD1983
 Scale: 1:115,000

Data source:
 1) Planning District file: City of London, 2011
 2) Cultural Occupation data: Statistics Canada, 2006

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Name: HigCulOccCTs110912

Date: 09/11/2012

Map 5 - Highest Cultural Occupation Census Tracts in London



Cultural Resource Categories

The following section describes the distribution of each of the cultural resource categories across the City of London. While many of the resources are distributed fairly evenly across the populated areas of the City, some categories demonstrate clustering in certain areas.

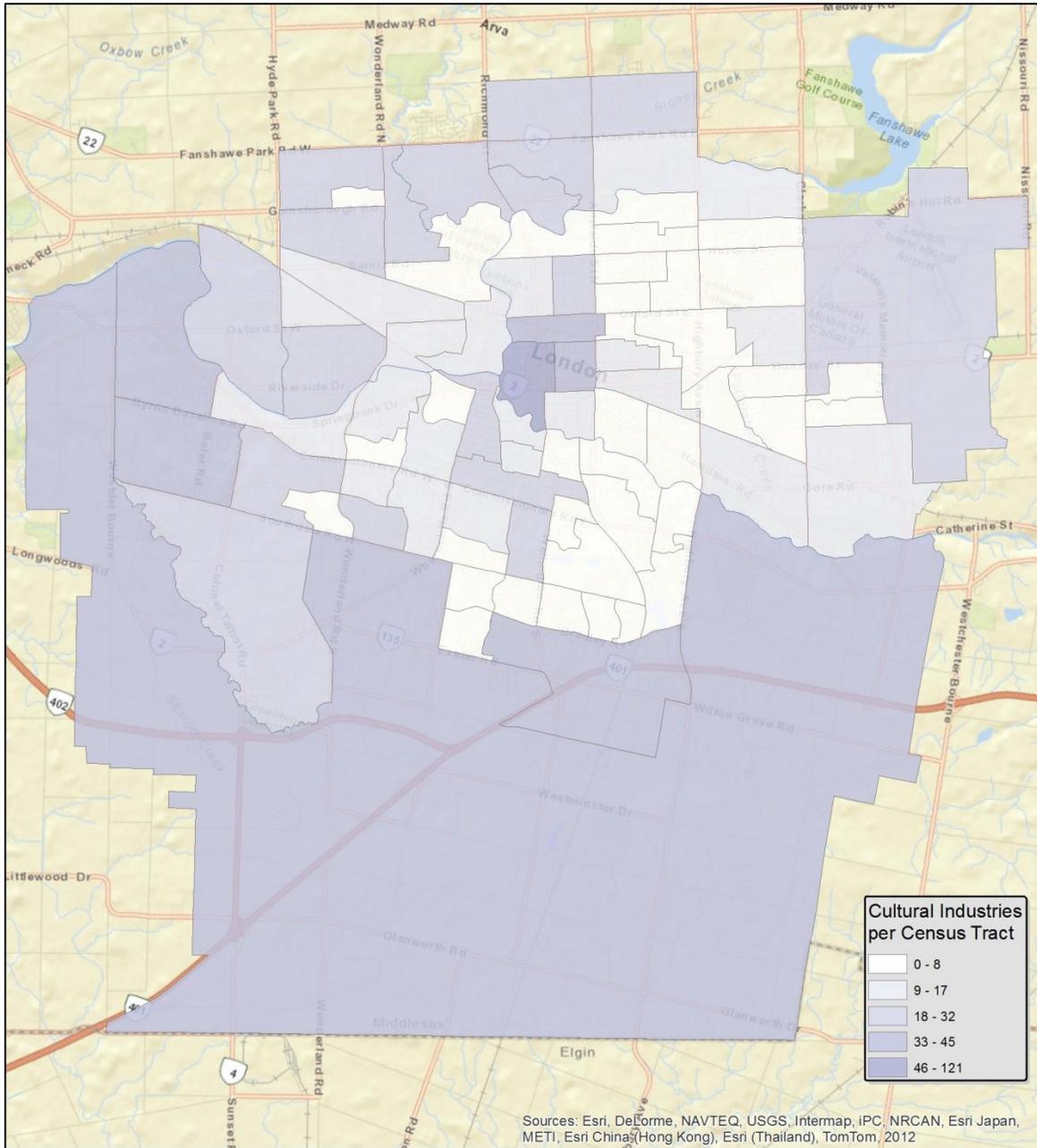
Cultural Industries

The highest concentration of cultural industries exists in the downtown core, with 121 establishments, the highest number by far (see Map 6). This number represents about 10% of the total of all cultural industries in London. This census tract includes most of the downtown BIA, some of the Richmond Row BIA and the area known as SOHO (South of Horton). Two other census tracts, one to the north and one to the east also display high numbers of establishments in the cultural industries, with 43 and 39 respectively. Both are within the Central London planning district.

Other areas with relatively high numbers of cultural industries include the south part of the Westminster planning district with 45, the north end of the Central London planning district which includes part of the Richmond Row BIA with 43 and the Byron planning district with 42.



Cultural Industries in London, Ontario



Document Name: Cullnd110912



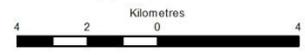
Cultural Profile/Cultural Resource Mapping

Date created: Nov. 2012
 Coordinate system: UTM17N
 Projection: NAD1983
 Scale: 1:160,000

Data source:
 1) Cultural Resources data: Statistics Canada, 2006 and Canadian Business Patterns, Dec. 2011



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Date: 13/11/2012

Map 6 - Cultural Industries in London



Cultural Occupations

An analysis for cultural occupations can be accomplished by examining two separate data sets, complemented by data collected by the London Arts Council and the London Heritage Council. Place of Work data indicates where people with cultural occupations work in London, and Place of Residence data indicates where people with cultural occupations live in London. The locations and clustering of the data for artists and heritage professionals can be used to complement this data³¹.

Place of Work

The census tract that demonstrates the highest number of people working in cultural occupations is downtown, with 1455 jobs (see Map 7). This high value is consistent with the cultural industries numbers, indicating that the area with the most cultural businesses also has the most cultural occupations. Again, the census tracts to the north and to the east, both in the Central London planning district, are very high with 305 and 320 jobs respectively. The other census tracts with high numbers of cultural occupations by Place of Work are those that include the airport (565) and the University of Western Ontario (470).

Place of Residence

Place of Residence data shows the opposite situation for the airport, which makes sense given that while many people work there, few live there. The numbers for the University area are in the mid-range, with 45 people with cultural occupations living there.

The census tract with the highest number of people with cultural occupations living in it is the area just north of downtown which includes the northern part of the Richmond Row BIA, with 230 cultural occupations (see Map 8). This area is high on POR, POW and cultural industries, which indicates a good distribution of commercial and residential spaces. Conversely, the downtown is very high on POW and cultural industries, but is in the mid-range on POR, with 95 residents working in culture. This indicates that while people with cultural occupations clearly work downtown, most seem to live in the range of about 3-4 km north, east or south of it, which means they could use active transportation methods like cycling or walking to get to work.

This assessment is supported by the other census tracts that demonstrate high POR numbers. The census tract located to the south of downtown in the South London planning district is home to 190 cultural workers. Stoney Creek is home to 170 and the census tract between the downtown and the Old East Village has 155 residents with cultural occupations.

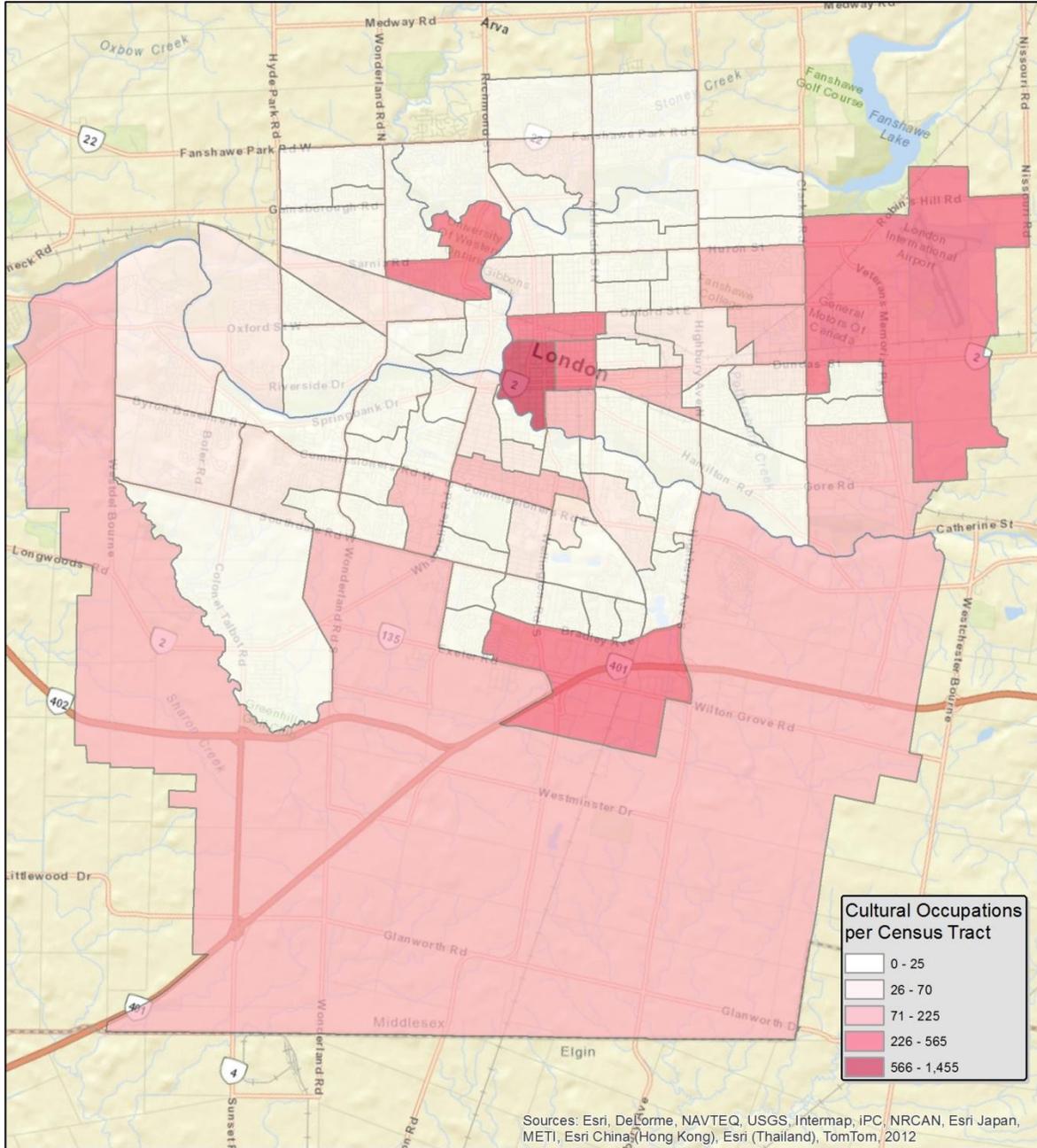
Artists & Heritage Professionals

Data collected through the LAC and LHC portals for artists and heritage professionals demonstrates clustering in the downtown, South London planning district, the Old East Village and to the north and east of downtown.

³¹ It is important to note that this data from the LAC and LHC online portals does not capture every artist or professional in the City; they choose to voluntarily share their information. There are likely some artists and heritage professionals that are not captured in this data. Further, it is impossible to know whether the addresses they provide indicate their place of work or place of residence.



Cultural Occupations by Place of Work, London, Ontario



Cultural Profile/Cultural Resource Mapping

Date created: Nov. 2012
 Coordinate system: UTM17N
 Projection: NAD1983
 Scale: 1:160,000

Data source:
 1) Cultural Resources data: Statistics Canada, 2006



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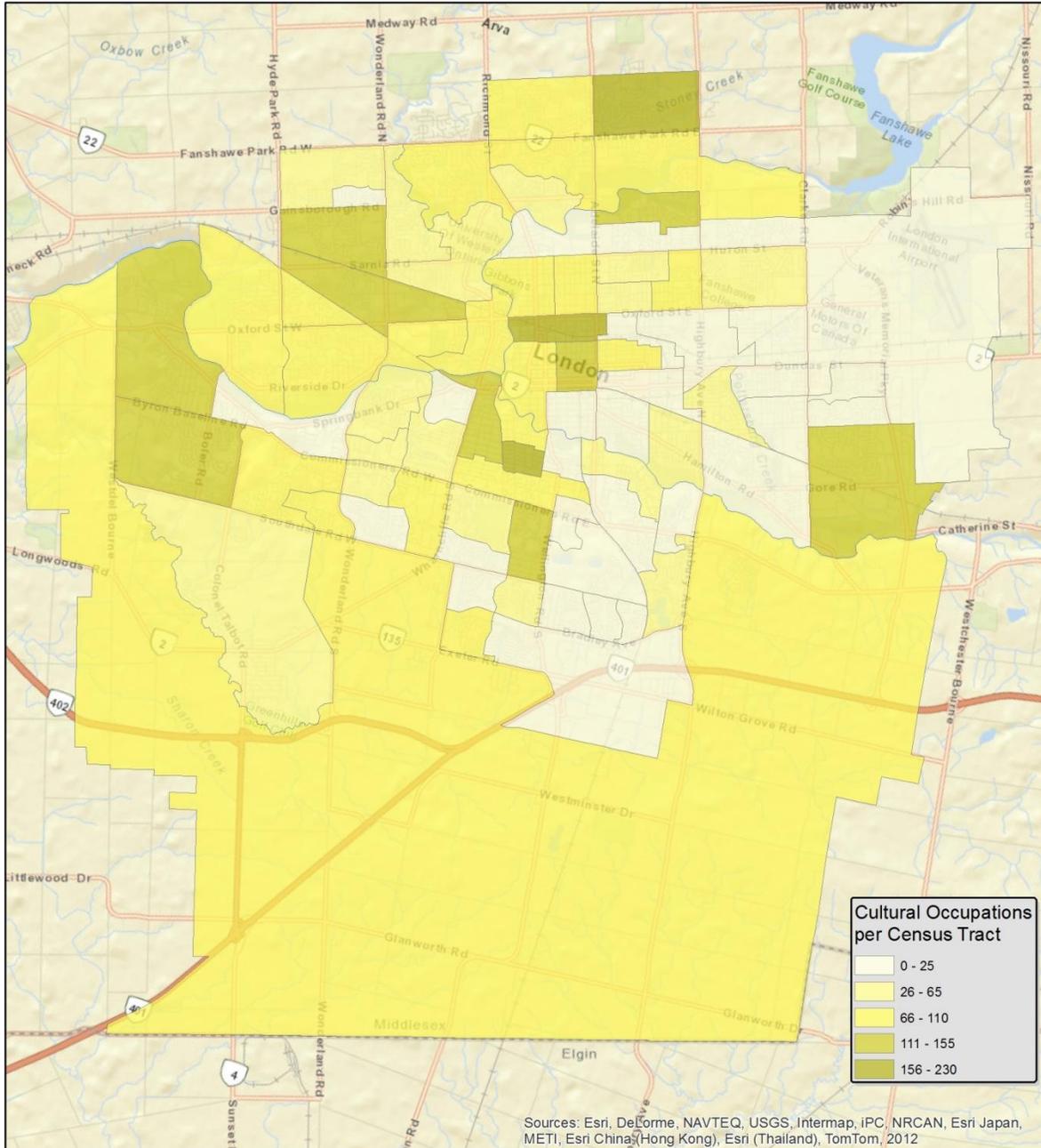
Document Name: CulOcupPlcWrk110912

Date: 09/11/2012

Map 7 - Cultural Occupations by Place of Work



Cultural Occupations by Place of Residence, London, Ontario



Cultural Profile/Cultural Resource Mapping

Date created: Nov. 2012
 Coordinate system: UTM17N
 Projection: NAD1983
 Scale: 1:160,000

Data source:
 1) Cultural Resources data: Statistics Canada, 2006



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Document Name: CulOccupPicRes110912

Date: 13/11/2012

Map 8 - Cultural Occupations by Place of Residence



Cultural Organizations

There are nearly 300 cultural organizations in London³², including ethnocultural organizations, culture professional, labour and business organizations and many more (see Map 9). The majority of the cultural organizations are arts organizations (80%), with the next highest categories being foundations (5%) and ethnocultural organizations (4%). The ethnocultural organizations included in the LCRD are those that are part of the LAC and LHC portals. Data on additional ethnocultural organizations which have not registered on the portals have been suggested as part of future data collection efforts (see recommendations in Section VI.) Cultural organizations are well distributed throughout the populated areas of the City, with a notable cluster in the downtown including a visible strip along Dundas Street and another cluster on Richmond Street, just south of Oxford Street. There is also a cluster in Wortley Village in the South London planning district, with several arts organizations located there.

Cultural Spaces & Facilities

Cultural Spaces & Facilities include facilities owned by the municipality, including libraries, community centres, arenas and schools. They also include private spaces like theatres, galleries, museums, other performance venues and many more³³. The municipal facilities are distributed quite evenly across the populated areas of the City (see Map 10). Private venues³⁴ are primarily clustered in and around the downtown core. Most are located in the downtown, with a strip along Dundas Street in the Old East Village and another pocket at the University of Western Ontario. There are also several galleries along Main Street in Lambeth.

Cultural Heritage

London is rich in cultural heritage resources (see Map 11). These include Heritage Conservation Districts, historic plaques, historic collections, historic sites, cemeteries, areas of archaeological significance, public art and listed and designated heritage properties. There are about 5000 resources that make up this category. Not surprisingly, the majority of the heritage resources congregate in and around the four heritage districts in the City, with the about 25% of the listed and designated heritage properties in the Old East Village Heritage Conservation District. There are also two notable clusters of listed and designated heritage properties in Lambeth planning district at the intersection of Main Street and Colonel Talbot Road, and in Hyde Park planning district at Hyde Park Road and Gainsborough Road.

Areas of archaeological significance form a semi-circle along the northwestern edge of the City with an additional cluster in the Jackson planning district; not surprising given that these are undeveloped parts of the City. Of the 32 public art pieces, about a third can be found in and around Victoria Park and the Forks of the Thames.

³² It is important to note that data for cultural organizations is from the LAC and LHC online portals, which do not capture every organization in the City; organizations choose to voluntarily share their information. There are likely some organizations that are not captured in this data.

³³ See Appendix A for complete list.

³⁴ It is important to note that data for these venues is from the LAC and LHC online portals, which do not capture every venue in the City; venues choose to voluntarily share their information. There are likely some venues that are not captured in this data.

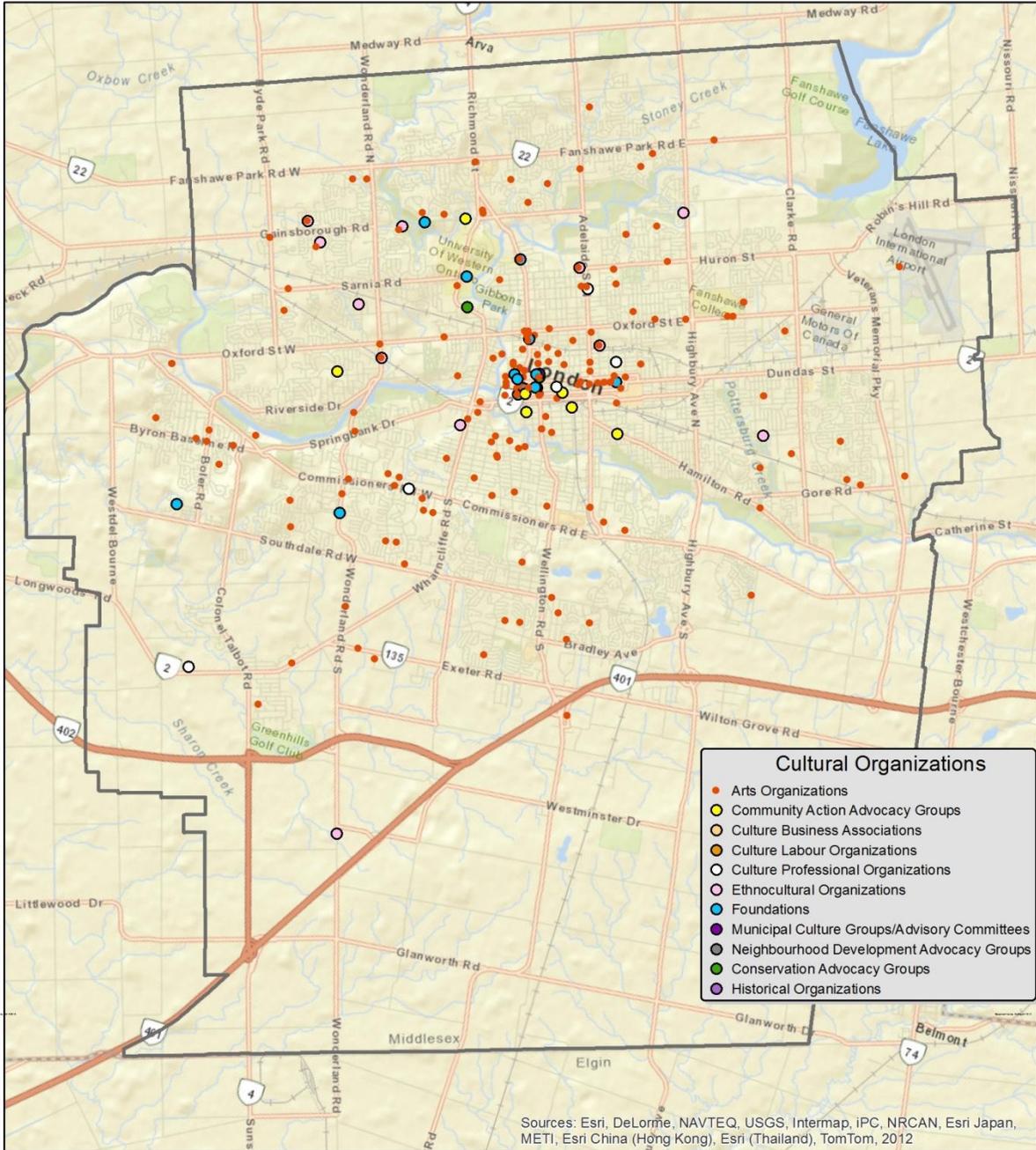


Natural Heritage

London is fortunate to have a significant natural heritage asset in the Thames River. It runs through the entire city, with its fork in the centre. This resource has resulted in significant park space and multi-use pathways created along the river. These are largely evenly distributed across the populated parts of the City.



Cultural Organizations, London, Ontario



Cultural Profile/Cultural Resource Mapping

Date created: Nov. 2012
 Coordinate system: UTM17N
 Projection: NAD1983
 Scale: 1:160,000
 Data source: 1) Cultural Resources data: London Arts Council and London Heritage Council, 2012



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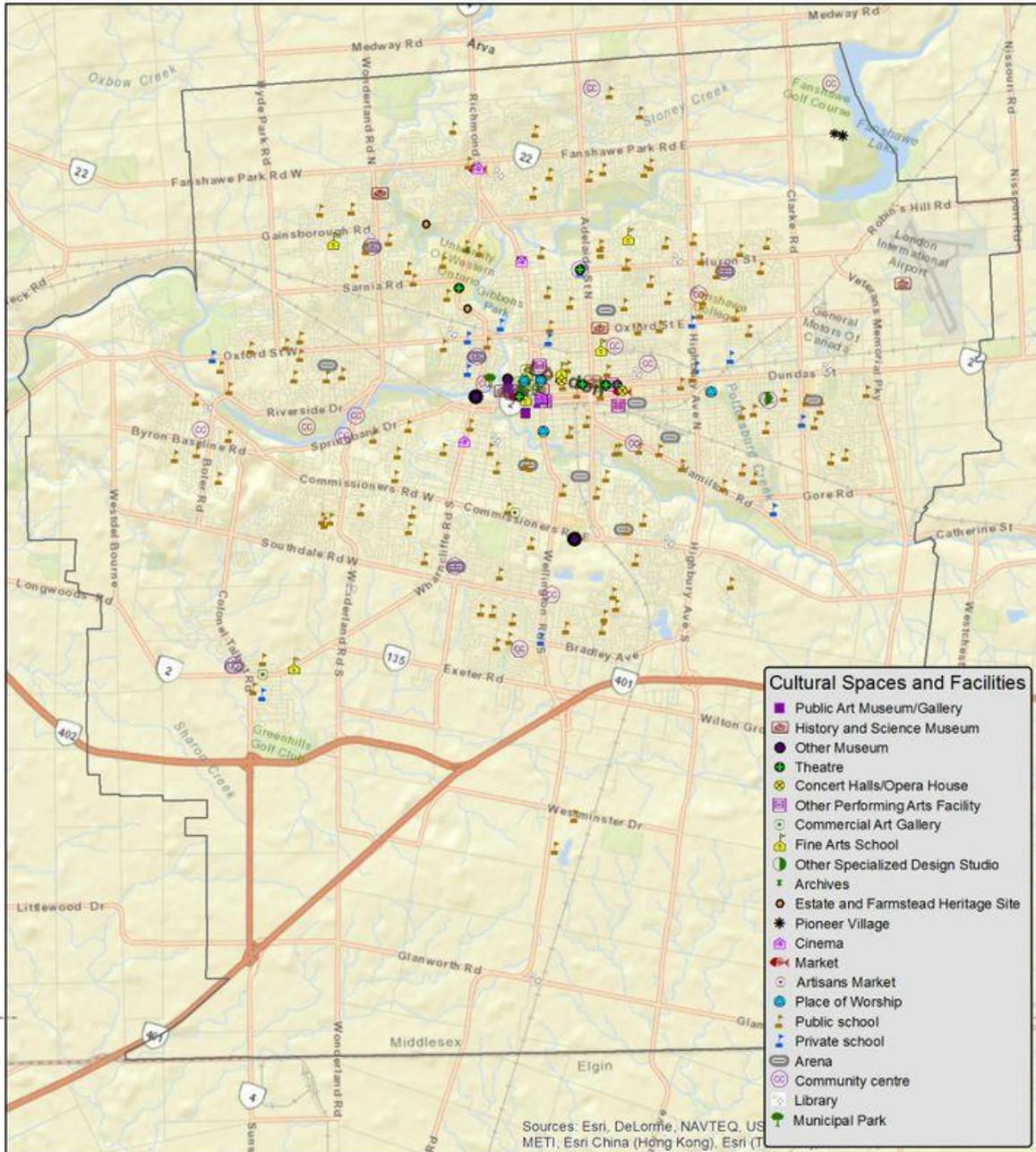
Document Name: CulOrgs111212

Date: 06/12/2012

Map 9 - Cultural Organizations in London



Cultural Spaces and Facilities, London, Ontario



Cultural Profile/Cultural Resource Mapping

Date created: Nov. 2012
 Coordinate system: UTM17N
 Projection: NAD1983
 Scale: 1:150,000

Date source:
 1) Cultural Resources data: London Arts Council
 2012; London Heritage Council, 2012 and
 City of London, 2012



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4 2 0 4
 Kilometres

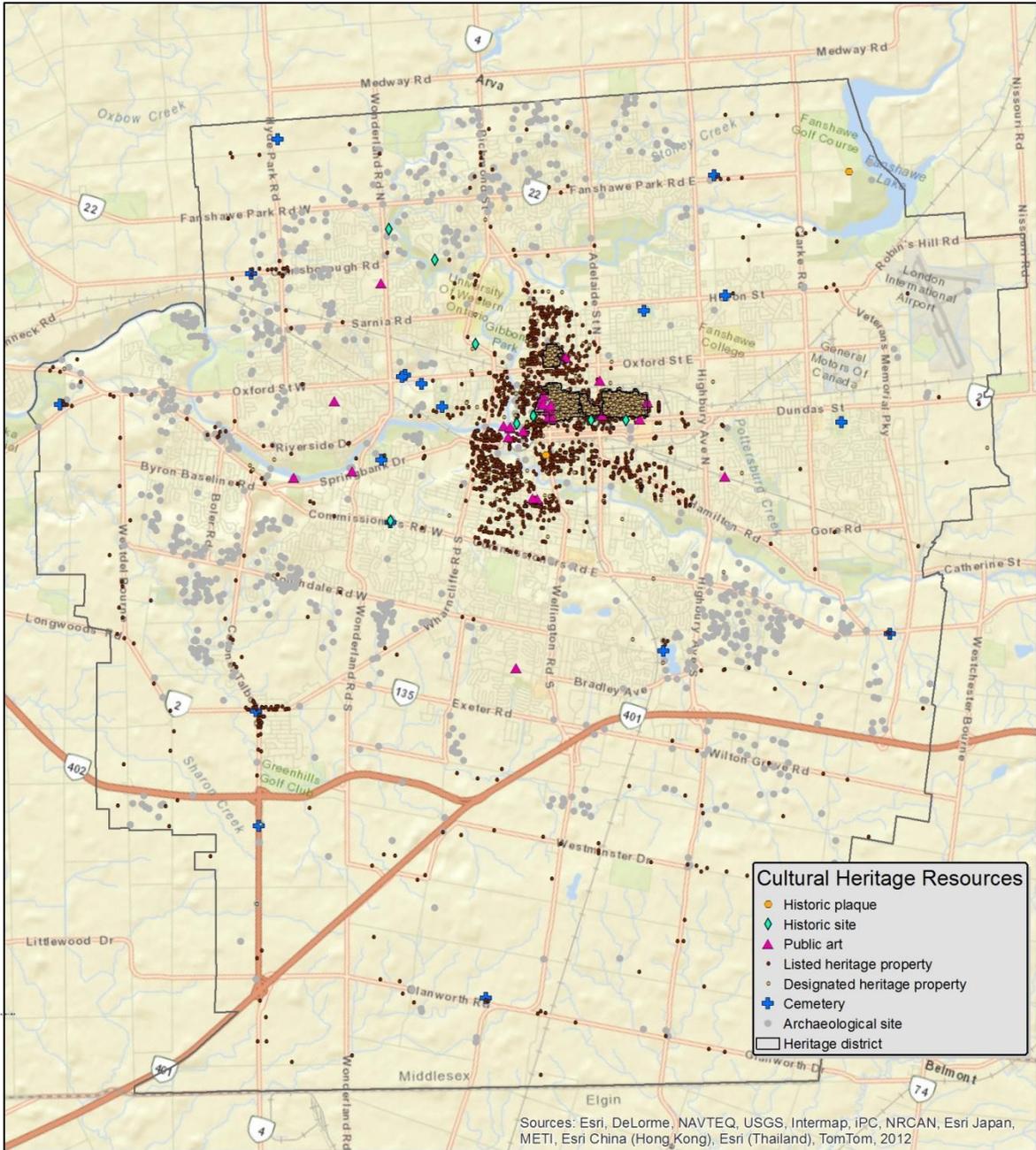
Document Name: CulSpaFac111212

Date: 21/11/2012

Map 10 - Cultural Spaces and Facilities in London



Cultural Heritage Resources in London, Ontario



Cultural Profile/Cultural Resource Mapping

Date created: Nov. 2012
 Coordinate system: UTM17N
 Projection: NAD1983
 Scale: 1:160,000

Data sources:
 1) Cultural Resources data: London Arts Council, 2012; London Heritage Council, 2012 and City of London, 2012

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Document Name: CulHer111212

Date: 13/11/2012

Map 11 - Cultural Heritage Resources in London



Creating a Placemaking Framework for Cultural Nodes

Research and Data Collection in the Old East Village

The Old East Village BIA has conducted its own cultural mapping exercise which has been integrated into London's LCRD. It provides a level of detail not possible through the Statistics Canada data or City data and captures some of the informal activity that is taking place in the area. The BIA has conducted nearly 2000 surveys, participatory mapping exercises, interviews and discussions with local residents to collect qualitative data about cultural activity in the OEV. The data shows the formal as well as informal places where culture workers live, work, perform or display their work.

The BIA and its partners are undertaking this research in order to create a local economic development plan (LEDP) and a neighbourhood development corporation (NEDC). The research includes an attempt to understand the economic activity that is occurring in the Community Improvement Plan Area with respect to cultural activity.

To date the research has included:³⁵

1. Establishing a picture of the cultural activities in the Old East Village in the commercial corridor and residential district.
2. Establishing the economic impact of the main cultural venues on neighbouring businesses.
3. Establishing customer spending and habits in the shopping and culture district.
4. Identifying where customers come from and how they travel to the shopping and culture district.
5. Identifying business best practices in order to understand what has contributed to the resiliency of the commercial corridor.

The data collected by the Old East Village has captured some of the informal places where workers reside, produce and display their work. In examining the OEV data (see Map 2), it is clear that there are places where cultural activity is occurring that have not been captured through the other data sets. There are 115 locations where cultural activity is taking place; 37 live spaces, 29 work spaces, 25 performance/display spaces and 24 live/work spaces. This is very useful data. It effectively addresses some of the challenges of cultural data by capturing informal cultural activity taking place in the culture sector. Furthermore, it illustrates that there are artists, organizations and venues that have not registered their information on the London Arts Council or London Heritage Council databases.

If other communities across the City of London were to collect the same types of information on a neighbourhood scale, it could be added to the LCRD to provide a more robust picture of cultural activity in London. If other communities were to undertake such research, it would be recommended that in addition to address or location data, they also collect attribute data for these points including the name of the establishment, a description of it, contact information, etc. (See Section VI Recommendations for a complete list of suggested fields.)

Towards a Placemaking Framework

An examination of the Old East Village and the downtown, both with community improvement plans in place, highlights the success of certain placemaking elements and tools to achieve them. Other areas

³⁵ Email correspondence with Old East Village BIA.



identified in this report could look to using these elements to improve their public realm and create an urban structure that is more conducive to supporting cultural industries and occupations, thereby strengthening London's culture sector.

Cultural resources contribute to the development of compact mixed use neighbourhoods. They support economic activity and play a key role in creating the engaging, lively and richly textured places where people want to live and visit. Accessible and affordable cultural activities and facilities play a central role in creating vibrant, livable inclusive communities; contribute directly and indirectly in supporting both the daytime and evening economy; reflect and celebrate the culture, histories and traditions of a community and create social environments which support community building.³⁶

Looking at the success the OEV and the downtown have had in terms of investment and cultural vitality, the characteristics they share point to a common set of placemaking elements (see Figure 13). These elements should be considered in areas that have been identified as potential nodes or areas that exhibit high concentrations of cultural resources, especially those that are high on Place of Work and Place of Residence. Mixed use areas with public realm improvements can go a long way to fostering the kinds of places people want to be and making them active places both day and night.

³⁶ Canadian Urban Institute, 2009. *Mississauga Culture Master Plan*, p. 45.



Figure 13 - Placemaking Elements

Placemaking Element	Rationale
1. Provide ample sidewalks and differentiated paving (e.g. stone or cement pavers) in high traffic pedestrian areas.	Customized paving that is climate appropriate and wider sidewalks provide a safer, more inviting and accessible pedestrian environment, and create opportunities for more activity in the public realm (e.g. sidewalk patios, street performances).
2. Street furniture: benches, light standards, waste/recycling bins, transit shelters, bike locking posts	Street furniture helps create a safer, cleaner, more inviting and accessible pedestrian environment, by providing amenities that encourage people to spend more time in the public realm. Customizing the design of these elements is also an opportunity to reinforce London's identity, or that of a specific area.
3. Accommodate design and construction of accessible sidewalk and courtyard patios	Sidewalk and courtyard patios increase the commercial viability of businesses and provide an additional space for people to enjoy the public realm in the presence of others.
4. Designate opportunity sites for public art projects	Public art can tell the story of a place and its people, while also enriching the aesthetic quality of a street.
5. Commercial façade improvements	The ability of business owners to design a façade that complements their building and the nature of their business is important to their commercial success and the street's cultural vitality. The larger-scale result is a diversity of façades that together depict the diversity of activity on a street.
6. Planting and /or maintenance of street trees and other plantings	Trees help create a more attractive public realm, produce shade and oxygen. They are an important feature contributing to the cultural and economic vibrancy of many renowned streets and reflect and reinforce London's identity as the forest City.
7. Preservation of heritage buildings, structures or sites	Strong economic, environmental, educational and aesthetic rationales have been established for the preservation and restoration of historically significant structures and sites. Among them is the role these assets play in telling the story of a place, while still often providing great spaces for contemporary cultural activity to take place.



VI. Recommendations

Recommendations for the Maintenance of the Cultural Resource Database

There are several general recommendations related to the maintenance of the LCRD to ensure that it remains relevant.

1. Ensure that sufficient resources (e.g. data steward, database administrator) are allocated to maintain and manage the cultural resource database and to categorize new resources that are integrated into the database in the future.
2. Repeat the data collection and analysis for Cultural Occupations and Cultural Industries using 2011 Statistics Canada Census data and the most recent Canadian Business Patterns data available.
3. Build an interactive online cultural resource map to provide access to cultural information for residents and visitors alike.
4. Continue to link other strategic (private and public) community initiatives to the cultural resource database.
5. Develop a set of indicators using the baseline data collected in the LCRD to monitor and evaluate progress toward specific municipal cultural planning objectives in London. Align these indicators with the strategic objectives of the London Cultural Prosperity Plan.

Recommendations for the Expansion of the Cultural Resource Database

The development of London's first cultural resource database creates a baseline for the City. Data related to some resources was not collected within the scope of this project. There are, therefore, several recommendations related to the future expansion of the LCRD.

1. Expand the LCRD to include some of the following cultural resources (in no particular order). These cultural resources were suggested by members of the Creative City Committee Working Group at various points during the project, and were determined to be out of scope. Many of these data sets will require custom data collection, and all will require resources to maintain the data sets over time.
 - a. Restaurants
 - b. Hotels and B&Bs
 - c. Neighbourhood arts centres
 - d. Youth spaces
 - e. Youth cultural programs
 - f. Places of worship
 - g. Festivals and events
 - h. Ethno-cultural organizations (Some have been captured through the Cultural Organizations in the LAC and LHC portals, and the list could be expanded.)
 - i. Professional sports organizations



In order to be compatible with the existing geographic and relational structure of the LCRD it is recommended that new resources added to the database contain the following fields.

UniqueID	Cultural Resource Category	NAICS Code	NAICS Definition	Mapping title	Resource Name	Description

Street Number	Street Name	Street Type	Street Direction	Postal Code	City	Province

Contact Name	Contact Number	Contact Address	Contact Email	Website	Photo	Other Info

Using complete street address data allows for detailed mapping of cultural resources. Using postal codes only considerably reduces the ability to identify the exact location of these cultural resources. For this reason it is recommended that each existing and new cultural resource have all the street address fields complete. Specific recommendations related to particular data sets will also improve the compatibility and functionality of the database.

2. Examine LAC and LHC files to ensure they include complete street address data. The Cultural Organizations, Historic Plaques and Historic Collections data in particular include about thirty entries that are missing street address data.
3. Update the Historic Sites file from the LHC portal to identify street segments (represented on a map by lines). There are many historic streetscapes included in the file for which there is no address information, only street names. This means that, although these records are included in the database, they cannot currently be mapped accurately. In order to assign the most appropriate geography (point or line segment) to these resources it is recommended to request the assistance of a GIS specialist.
4. Collect more attribute information to describe markets. Currently, only address and name data are part of the database.

In order to maximize compatibility with the LCRD, the LHC and the LAC should consider adapting the data collection methodologies of the two portals to allow for more streamlined integration into the LCRD. There are several suggestions for improving compatibility.

5. Adjust the LAC and LHC portals to introduce a maximum character count of 255 characters in the description fields. This will ensure that the portals' tables will have a description field that is concise and compatible with most text fields, allowing the entire description entry to be captured in the LCRD and easily displayed on a webmap.
6. Introduce a *primary category* to assist with categorization. For instance, when registering their information with the portal, an organization, venue or artist would first select a primary category that best described the work they do. This would enable categorization of all resources for the LCRD to be much simpler and would allow artists and professionals (which have not been assigned NOC-S codes as part of this baseline LCRD) to be coded and categorized. Each new registrant would still have the opportunity to select all the other categories that describe their work, but they would need to decide which best described them first.



7. Introduce an additional field under the artist and professionals category which requires artists and professionals registering with the portals to indicate whether the address information they provide describes their place of work, place of residence or both. This would allow the artist and professional data to be better mapped and analyzed. It will also allow residence information to be filtered to ensure that private addresses are not published as part of an online LCRD in the future.



Appendix A

- i. Cultural Resources Included in the LCRD (Figure 14)
- ii. Complete list of NAICS and NOC-S codes and mapping titles for each Cultural Resource Category
- iii. Data schema

Figure 14 - Cultural Resources Included in the LCRD

Cultural Resource Category	Data Set	Data Source	Phase
Cultural Industries	Cultural Business Establishments	Statistics Canada (Canadian Business Patterns)	1
Cultural Occupations	Cultural Occupations by Place of Work	Statistics Canada (Census 2006)	1
	Cultural Occupations by Place of Residence	Statistics Canada (Census 2006)	1
	Artists	London Arts Council	1
	Heritage Professionals	London Heritage Council	1
Cultural Spaces & Facilities	Arts Council Venues	London Arts Council	1
	Heritage Council Venues	London Heritage Council	1
	Libraries	Planning Division	1
	Community Centres	Planning Division	1
	Arenas	Planning Division	1
	Public Schools	Planning Division	2
	Private Schools	Culture Office	2
	Markets	Culture Office	2
	Cultural Heritage	Listed and Designated Heritage properties	Planning Division
Heritage Conservation Districts		Planning Division	2
Historic Plaques		London Heritage Council	2
Historic Collections		London Heritage Council	2
Historic Sites		London Heritage Council	2
Cemeteries		Planning Division	2
Archaeological Sites		Planning Division	2
Public Art		Culture Office	2
Natural Heritage	Multiuse Pathways	Planning Division	2
	Conservation areas	Planning Division	2
	Parks	Planning Division	2
	Community Gardens	Planning Division	2
Cultural Organizations	Arts Organizations	London Arts Council	2
	Heritage Organizations	London Heritage Council	2
Additional Resources	Sports Venues	Planning Division	2
	Baseball diamonds	Planning Division	2
	Tennis courts	Planning Division	2
	Football fields	Planning Division	2
	Soccer fields	Planning Division	2



Golf courses	Planning Division	2
Multi-use pads	Planning Division	2
Outdoor ice rinks	Planning Division	2
Play structures	Planning Division	2
Skateboard parks	Planning Division	2
Wading pools/spray pads	Planning Division	2
Basketball courts	Planning Division	2
Community pools	Planning Division	2
Bikeways & Routes	Planning Division	2



Complete list of NAICS and NOC-S codes and mapping titles for each Cultural Resource Category

Cultural Spaces and Facilities		
NAICS CODE	DEFINITION	MAPPING TITLE (for Cultural Spaces & Facilities)
453920	Art Dealers	Commercial Art Galleries
512110	Motion Picture and Video Production	Film and Video Production Studios
512240	Sound Recording Studios	Sound Recording Studios
515110	Radio Broadcasting	Radio Broadcasting Studios
515120	Television Broadcasting	Television Broadcasting Studios
515210	Pay and Specialty Television	Pay and Specialty Television Studios
512130	Motion Picture and Video Exhibition	Cinemas
519121	Libraries	Libraries
519122	Archives	Archives
541310	Architectural Services	Architectural Design Studio
541320	Landscape Architectural Services	Landscape Architectural Design Studio
541410	Interior Design Services	Interior Design Studios
541420	Industrial Design Services	Industrial Design Studios
541430	Graphic Design Services	Graphic Design Studios
541490	Other Specialized Design Services	Other Specialized Design Studios
541511	Computer Systems Design and Related Services	Digital and Media Studios
611610	Fine Arts Schools	Fine Arts Schools
711120	Dance Companies	Dance Studios
711111	Theatre (Except Musical) Companies	Theatres
711112	Musical Theatre and Opera Companies	Concert Halls and Opera Houses
711311	Live theatres and Other Performing Arts Presenters with Facilities	Other Performing Arts Facilities
712111	Non-Commercial Art Museums and Galleries	Public Art Museums and Galleries
712115	History and Science Museums	History and Science Museums
712119	Other Museums	Other Museums
453999	All Other Miscellaneous Store Retailers (except Beer and Wine-Making Supplies Stores)	Artisans Markets
445230	Fruit and Vegetable Markets	Farmers Markets
611110	Elementary and Secondary Schools	Elementary and Secondary Schools
611210	Community Colleges and CEGEPs	Colleges
611310	Universities	Universities
611510	Technical and Trade Schools	Technical and Trade Schools
711319	Sports Stadiums and Other Presenters with Facilities	Arenas
713940	Fitness and Recreational Sports Centres	Community Centres
813110	Religious Organizations	Places of Worship
Cultural Heritage		
NAICS CODE	DEFINITION	MAPPING TITLE (for Cultural Heritage)
	Material Culture (Collections)	
519122	Archives	Archive Collections
712111	Non-Commercial Art Museums and Galleries	Public Art
712111	Non-Commercial Art Museums and Galleries	Public Art Museum and Gallery Collections
712119	Other Museums	Other Museum Collections
712115	History and Science Museums	History and Science Museum Collections
	Built Heritage	
712120	Historic and Heritage Sites	Built Heritage Properties
712120	Historic and Heritage Sites	Listed Heritage Properties
712120	Historic and Heritage Sites	Designated Heritage Properties
712120	Historic and Heritage Sites	Heritage Conservation Districts
712120	Historic and Heritage Sites	Historic Sites and Monuments
712120	Historic and Heritage Sites	Battlefields, Fortifications, Military Sites
712120	Historic and Heritage Sites	Heritage Villages
712120	Historic and Heritage Sites	Industrial and Transportation Heritage Sites
712120	Historic and Heritage Sites	Pioneer Villages
712120	Historic and Heritage Sites	Estate and Farmstead Heritage Sites
712120	Historic and Heritage Sites	Archaeological Sites
712120	Historic and Heritage Sites	Streetscapes and Vistas
712120	Historic and Heritage Sites	Historic Plaques
812220	Cemeteries	Cemeteries



Natural Heritage		
NAICS CODE	DEFINITION	MAPPING TITLE (for Natural Heritage)
712130	Zoos and Botanical Gardens	Zoos and Botanical Gardens
712190	Nature Parks and Other Similar Institutions	Bird and Wildlife Sanctuaries
712190	Nature Parks and Other Similar Institutions	Conservation Areas
712190	Nature Parks and Other Similar Institutions	Natural Wonders
712190	Nature Parks and Other Similar Institutions	Nature Centres
712190	Nature Parks and Other Similar Institutions	Nature Parks & Reserves
712190	Nature Parks and Other Similar Institutions	National Parks
712190	Nature Parks and Other Similar Institutions	Provincial Parks
712190	Nature Parks and Other Similar Institutions	Municipal Parks
712190	Nature Parks and Other Similar Institutions	Watersheds
712190	Nature Parks and Other Similar Institutions	Heritage Rivers
712190	Nature Parks and Other Similar Institutions	Heritage Farms and Gardens (managed lands)
712190	Nature Parks and Other Similar Institutions	Multi-Use Pathways
712130	Zoos and Botanical Gardens	Community Gardens
Cultural Organizations		
NAICS CODE	DEFINITION	MAPPING TITLE (for Cultural Organizations)
813210	Grant-Making and Giving Services	Charitable trusts
813210	Grant-Making and Giving Services	Foundations
813310	Social Advocacy Organizations	Conservation Advocacy Groups
813310	Social Advocacy Organizations	Environmental Advocacy Groups
813310	Social Advocacy Organizations	Natural Resource Preservation Organizations
813310	Social Advocacy Organizations	Neighbourhood Development Advocacy Groups
813310	Social Advocacy Organizations	Community Action Advocacy Groups
813310	Social Advocacy Organizations	Wildlife Preservation Advocacy Organizations
813410	Civic and Social Organizations	Historical Organizations
813410	Civic and Social Organizations	Ethnocultural Organizations
813410	Civic and Social Organizations	Aboriginal (Cultural) Organizations
813910	Business Associations	Culture Business Associations
813920	Professional Organizations	Culture Professional Organizations
813930	Labour Organizations	Culture Labour Organizations
813990	Other Membership Organizations	Arts Organizations
913910	Other Local, Municipal and Regional Public Administration	Municipal Culture Groups/Advisory Committees
Festivals and Events (events are considered to be ad-hoc or one time and festivals are regular planned occurrences)		
NAICS CODE	DEFINITION	MAPPING TITLE (for Cultural Festivals and Events)
512130	Motion Picture and Video Exhibition	Film Events
512130	Motion Picture and Video Exhibition	Film Festivals
711311	Live theatres and other performing arts presenters with facilities	Factory Tours
711311	Live theatres and other performing arts presenters with facilities	Gallery and Studio Tours and Events
711311	Live theatres and other performing arts presenters with facilities	Museum and Art Gallery Programs and Events
711321	Performing Arts Promoters (Presenters) without facilities	Aboriginal Events
711321	Performing Arts Promoters (Presenters) without facilities	Artist or Artisan Events
711321	Performing Arts Promoters (Presenters) without facilities	Performing Arts Events
711321	Performing Arts Promoters (Presenters) without facilities	Literary Events
711321	Performing Arts Promoters (Presenters) without facilities	Ethno-cultural Events
711321	Performing Arts Promoters (Presenters) without facilities	Music Events
711321	Performing Arts Promoters (Presenters) without facilities	Natural Heritage Events
711321	Performing Arts Promoters (Presenters) without facilities	Cultural Heritage Events
711322	Festivals without facilities	Aboriginal Festivals
711322	Festivals without facilities	Artist or Artisan Festivals/Craft Shows
711322	Festivals without facilities	Agricultural and Country Fairs
711322	Festivals without facilities	Performing Arts Festivals
711322	Festivals without facilities	Literary Festivals
711322	Festivals without facilities	Ethno-cultural Festivals
711322	Festivals without facilities	Music Festivals
711322	Festivals without facilities	Natural Heritage Festivals/Tours
711322	Festivals without facilities	Cultural Heritage Festivals/Tours
711322	Festivals without facilities	House or Garden Tours
711322	Festivals without facilities	Public Art Tours
711322	Festivals without facilities	Seasonal Celebrations
711322	Festivals without facilities	Street Festivals



Additional Resources		
NAICS CODE	DEFINITION	MAPPING TITLE (for Additional Resources)
721111	Hotels	Hotels
721114	Motels	Motels
721191	Bed and Breakfast	Bed and Breakfasts
	Food-Related Resources	
445210	Meat Markets	Meat Markets
445220	Fish and Seafood Markets	Fish and Seafood Markets
722110	Full-Service Restaurants	Full-Service Restaurants
722210	Limited-Service Eating Places	Limited-Service Eating Places
722310	Food Service Contractors	Food Service Contractors
722320	Caterers	Caterers
722330	Mobile Food Services	Mobile Food Services
722410	Drinking Places (Alcoholic Beverages)	Drinking Establishments
	Sports-Related Resources	
711211	Sports Teams and Clubs	Sports Teams and Clubs
711213	Horse Race Tracks	Horse Race Tracks
713110	Amusement and Theme Parks	Amusement and Theme Parks
713910	Golf Courses and Country Clubs	Golf Courses
713920	Skiing Facilities	Skiing Facilities
713930	Marinas	Marinas
713940	Fitness and Recreational Sports Centres	Outdoor Ice Rinks
713940	Fitness and Recreational Sports Centres	Wading Pools/Spray Pads
713940	Fitness and Recreational Sports Centres	Tennis Courts
713950	Bowling Centres	Bowling Centres
713990	All Other Amusement and Recreation Industries	Baseball Diamonds
713990	All Other Amusement and Recreation Industries	Football Fields
713990	All Other Amusement and Recreation Industries	Soccer Fields
713990	All Other Amusement and Recreation Industries	Multi-Use Pads
713990	All Other Amusement and Recreation Industries	Play Structures
713990	All Other Amusement and Recreation Industries	Skateboard Parks
713990	All Other Amusement and Recreation Industries	Basketball Courts
713990	All Other Amusement and Recreation Industries	Bikeways & Routes
713990	All Other Amusement and Recreation Industries	Community Pools
	Cultural Industries	
NAICS CODE	DEFINITION	CFCS DOMAIN
519121	Libraries	Libraries
519122	Archives	
712111	Non-Commercial Art Museums and Galleries	
712115	History and Science Museums	
712119	Other Museums	Heritage
71212	Historic and Heritage Sites	
71213	Zoos and Botanical Gardens	
71219	Nature Parks and Other Similar Institutions	
711111	Theatre (except Musical) Companies	
711112	Musical Theatre and Opera Companies	
71112	Dance Companies	
71113	Musical Groups and Artists	
71119	Other Performing Arts Companies	Live Performance
711311	Live Theatres and Other Performing Arts Presenters with Facilities	
711321	Performing Arts Promoters (Presenters) without Facilities	
711512	Independent Actors, Comedians and Performers	
711322	Festivals without Facilities	



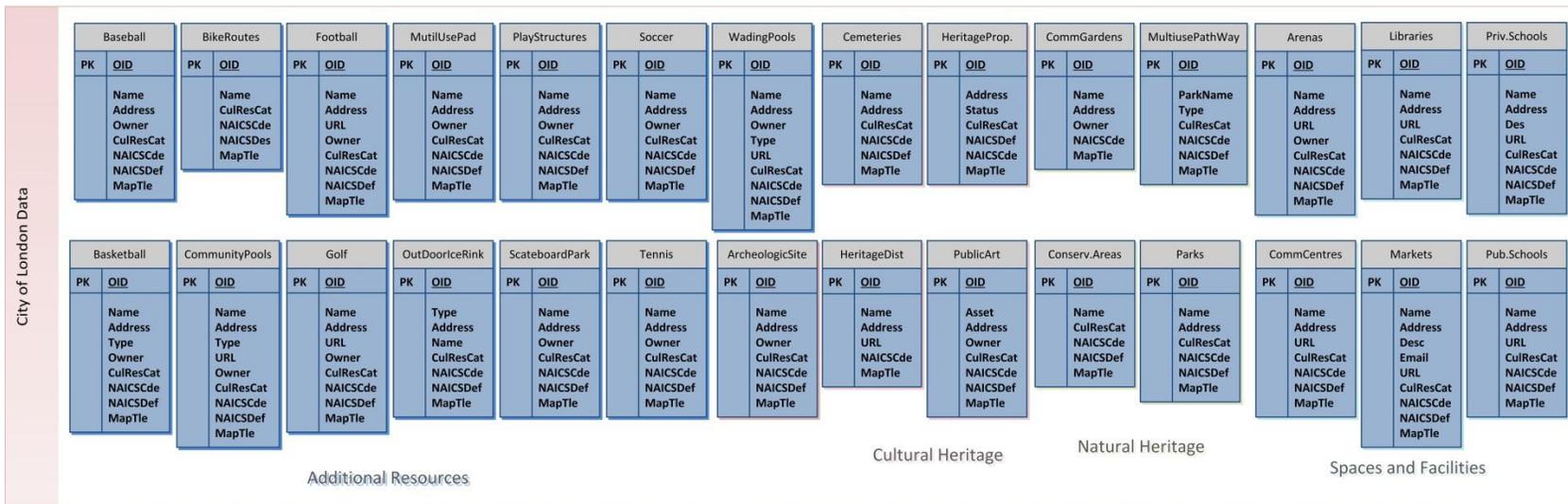
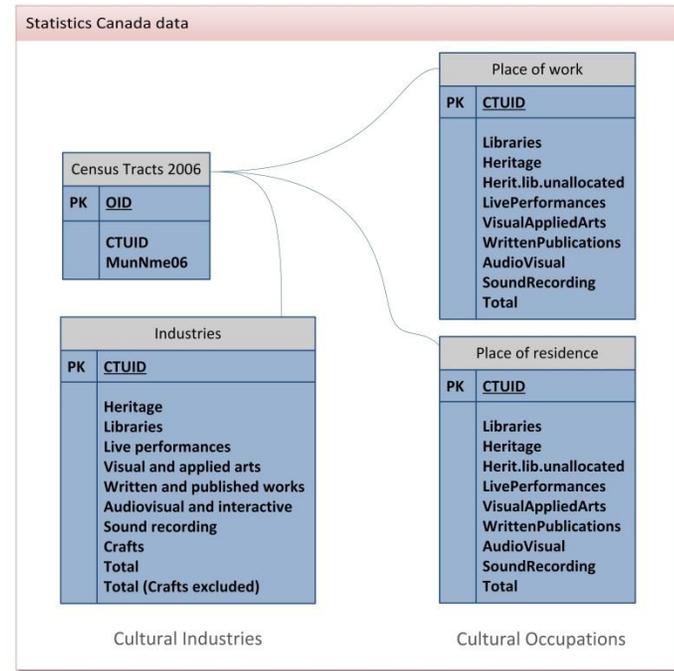
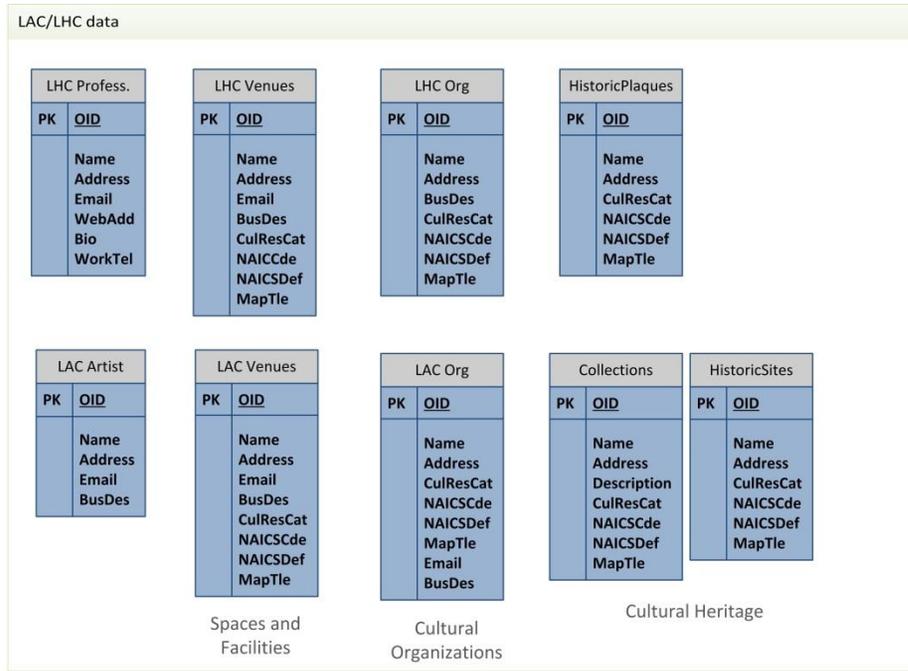
45392	Art Dealers	Visual and Applied Arts	
711511	Independent Artists, Visual Arts		
442292	Print and Picture Frame Stores		
51919	All Other Information Services		
54192	Photographic Services		
812921	Photo Finishing Laboratories (except One-Hour)		
812922	One-Hour Photo Finishing		
54181	Advertising Agencies		
54185	Display Advertising		
54186	Direct Mail Advertising		
541891	Specialty Advertising Distributors		
541899	All Other Services Related to Advertising		
54131	Architectural Services		
54132	Landscape Architectural Services		
54134	Drafting Services		
54141	Interior Design Services		
54142	Industrial Design Services		
54143	Graphic Design Services		
54149	Other Specialized Design Services		
54151	Computer Systems Design and Related Services		
313	Textile Mills	CFCs Sub-domain of Crafts (Part of Visual and Applied Arts Domain)	
314	Textile Product Mills		
315	Clothing Manufacturing		
316	Leather and Allied Product Manufacturing		
321	Wood Product Manufacturing		
323113	Commercial Screen Printing		
327	Non-Metallic Mineral Product Manufacturing		
332	Fabricated Metal Product Manufacturing		
337	Furniture and Related Product Manufacturing		
339	Miscellaneous Manufacturing		
4143	Home Furnishings Wholesaler-Distributors		
41441	Jewellery and Watch Wholesaler-Distributors		
4483	Jewellery, Luggage and Leather Goods Stores		
45322	Gift, Novelty and Souvenir Stores		
51113	Book Publishers		Written and Published Works
51112	Periodical Publishers		
51111	Newspaper Publishers		
51911	News Syndicates		
51119	Other Publishers		
51114	Directory and Mailing List Publishers		
323119	Other Printing		
32312	Support Activities for Printing		
41442	Book, Periodical and Newspaper Wholesaler-Distributors		
41912	Wholesale Trade Agents and Brokers		
45121	Book Stores and News Dealers		
54193	Translation and Interpretation Services		
711513	Independent Writers and Authors		
41445	Video Cassette Wholesalers	Audio-visual and Interactive Media	
51211	Motion Picture and Video Production		
51212	Motion Picture and Video Distribution		
51213	Motion Picture and Video Exhibition		
51219	Post-Production and Other Motion Picture and Video Industries		
53223	Video Tape and Disc Rental		
51511	Radio Broadcasting		
51512	Television Broadcasting		
51521	Pay and Specialty Television		
517112	Cable and Other Program Distribution		
45112	Hobby, Toy and Game Stores	Sound Recording	
51121	Software Publishers		
41444	Sound Recording Wholesalers		
45122	Pre-Recorded Tape, Compact Disc and Record Stores		
51221	Record Production		
51222	Integrated Record Production/Distribution		
51224	Sound Recording Studios		
51229	Other Sound Recording Industries		
45114	Musical Instrument and Supplies Stores		
51223	Music Publishers		



Cultural Occupations (NOC-S codes)		
NOCS CODE	DEFINITION	CFCS DOMAIN
F013	Archivists	Heritage
B513	Records Management and Filing Clerks	
F012	Conservators and Curators	
F112	Technical Support Occupations Related To Museums and Art Galleries	
C124	Conservation and Fishery Officers	
C121	Biological Technologists and Technicians	
C123	Forestry Technologists and Technicians	
F011	Librarians	Libraries
B413	Supervisors, Library, Correspondence and Related Information Clerks	
B551	Library Clerks	
A341	Library, Archive, Museum and Art Gallery Managers	Heritage and Libraries Unallocated
F111	Library and Archive Technicians and Assistants	
F031	Producers, Directors, Choreographers and Related Occupations	Live Performance
F033	Musicians and Singers	
F034	Dancers	
F035	Actors and Comedians	
F132	Other Performers	
B316	Conference and Event Planners	
F036	Painters, Sculptors and Other Visual Artists	
F121	Photographers	
J184	Photographic and Film Processors	
F144	Artisans and Craftspersons	
C051	Architects	
C052	Landscape Architects	
C053	Urban and Land use Planners	
A123	Architecture and Science Managers	
C125	Landscape and Horticultural Technicians and Specialists	
C151	Architectural Technologists and Technicians	
C153	Drafting Technologists and Technicians	
C075	Web Designers and Developers	
C152	Industrial Designers	
F141	Graphic Designers and Illustrators	
F142	Interior Designers	
F143	Theatre, Fashion, Exhibit and Other Creative Designers	
F145	Patternmakers – Textile, Leather and Fur Products	
F123	Graphic Arts Technicians	
F021	Authors and Writers	Written and Published Works
F022	Editors	
F023	Journalists	
F025	Translators, Terminologists and Interpreters	
B523	Desktop Publishing Operators and Related Occupations	
H018	Supervisors, Printing and Related Occupations	
H521	Printing Press Operators	
J181	Printing Machine Operators	
J182	Camera, Platemaking and Other Pre-Press Occupations	
J183	Binding and Finishing Machine Operators	
B552	Correspondence, Publication and Related Clerks	
F122	Film and Video Camera Operators	Audio-visual and Interactive Media
F131	Announcers and Other Broadcasters	
A015	Senior Managers – Trade, Broadcasting and Other Services, N.E.C.	
F124	Broadcast Technicians	
C074	Computer Programmers and Interactive Media Developers	
F032	Conductors, Composers and Arrangers	Sound Recording



Data Schema



Part 2

Economic Impact Analysis for London's Culture Sector
Sierra Planning and Management



London Cultural Profile



Economic Impact Analysis for London's Cultural Sector

Final Report

Sierra Planning and Management

November 2012

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An aerial photograph of a city skyline, featuring a prominent skyscraper on the left side. The image is overlaid with a semi-transparent blue filter. The title 'Snapshot of London's Cultural Sector' is positioned in the upper right corner in a bold, yellow font.

Snapshot of London's Cultural Sector

The City of London is a hub of cultural activity, where innovation and creativity transcend traditional spaces of cultural expression to include local artisan shops and cross a range of businesses and industries. Design and Civic Arts-based industries (e.g. computer systems design, architecture) continue to be a major source of cultural employment in the City of London. Almost 90% of the cultural jobs in the London Census Metropolitan Area are located in the City.

In 2011, the cultural sector contributed an estimated \$540 million to the City of London's Gross Domestic Product (GDP) and employed an estimated 7,703 cultural workers. A comparison of the 2006 POR and POW data shows the number of cultural jobs in the City was at parity with its cultural labour force. With over 6,000 individuals currently enrolled in cultural programs at the university/college level, the City's Cultural Prosperity Plan should consider priorities/opportunities for future job development and growth in the cultural sector.

Notwithstanding, the City of London had a significantly higher concentration of cultural workers (4.2% of all workers were employed in cultural occupations) than the Canadian average (3.3%) in 2006, ranking reasonably well against some of Canada's large cities such as Calgary (3.6% of all workers were employed in cultural occupations). The City has a significant cultural employment base that should continue to be strengthened.

A total of 1,298 cultural enterprises (many of which are small businesses) were located in the City of London as of 2011. Continued financial and developmental supports for these small establishments are expected to contribute to the growth of the sector.

Additionally, cultural planning strategies should build on the momentum and success of existing funding programs such as the Community Arts Investment Program and the Community Heritage Investment Program; identifying opportunities to promote and nurture job growth and enhance the prosperity of the sector via education/training, new cultural tourism opportunities and creative industry attraction, which are estimated to account for 85% of GDP contribution from the cultural sector. The spillover effects of cultural investment will have broader implications for community vibrancy and economic development.

The direct contribution of the cultural sector (based on GDP) in the City is \$1,475 Per Capita. By means of comparison, direct (GDP) contribution of the cultural sector in Toronto is \$3,595 Per Capita and \$1,751 Per Capita for Ottawa. A variety of locational and socio-economic factors contribute to a vibrant cultural economy. Continued investment in job development, education, access to programming and creative industry attraction can be expected to impact the health and prosperity the City of London's cultural sector.

1. Executive Summary

In 2011, the City of London retained consultants to undertake a Cultural Profile for London. This is to inform the City of London Economic Prosperity Strategy. The Canadian Urban Institute was retained as a consultant. Sierra Planning and Management was sub-contracted to conduct an economic impact analysis of the cultural sector, for the primary purpose of generating a dollar value of the direct economic contribution of a defined cultural sector for the City of London.

The cultural sector was defined broadly to include “creative talent as it relates to: the arts, heritage, libraries, festivals, film and audio recording, cultural tourism, diversity and immigration, youth, science and technology, urban planning and design, education and business.”¹ The scope of this analysis excluded sporting and culinary activities.

Scope of Analysis

This assessment of the direct/local impact of culture, addressed:

- Workforce, employment and income in the City's cultural sector;
- Revenues and expenditures generated by cultural businesses and organizations;
- Public spending and investment in cultural programs, services and facilities;

- Spending and investments in cultural education; and
- Cultural tourism.

Essential to this exercise was the need to collaborate with City Hall, members of the Creative City Committee, the London Arts Council, London Heritage Council and other key stakeholders to assess the cultural landscape of the City and the nature of data available for analysis.

The Economic Impact of London's Cultural Sector

The overall contribution of the cultural sector to the City of London in direct terms (i.e. operating expenditures or revenues, income and spending) is an estimated \$540 million per annum (this excludes any capital expenditures).

The implications of the estimate are as follows:

1. The direct contribution of the cultural sector in the City is \$1,475 Per Capita; and
2. The City of London spent \$60 Per Capita on culture in 2011. While this figure varies significantly between municipalities, the estimate is not inconsistent with a number of other jurisdictions.

In 2011, there were an estimated 7,703 cultural jobs in the City of London, contributing to an additional multiplier impact of just over 3,100 jobs outside of the City of London.

¹ As defined for this project by the City of London.

The cultural sector in the London CMA generated an estimated \$580 million in direct contribution to London's economy. Based on this figure, the direct contribution of the cultural sector in the London CMA is potentially \$1,222 to \$1,285 Per Capita.

Capturing 'Culture'

The cultural sector is by its definition, innovative, creative and a key provider of a social contribution that, together with other lifestyle amenities, helps keep communities cohesive, sustainable and growing. This includes cultural expression in all forms and in all venues whether public or private, in schools or in civic spaces, and between businesses. This dynamic is not expressly captured in these estimates which are by definition an historic snap shot of annual contributions in financial terms.

Added to this, capturing the full extent of activity in the sector is difficult as there exists a proportion of the cultural workforce that is unidentifiable through normal statistical means as they are not primarily employed as cultural workers.

This analysis focuses on operational activity in cultural sectors and does not assess the impact of capital investment/costs. However, additional research into the potential contribution of capital investments should be part of the larger strategic plan currently underway.

2. Recognition

With our appreciation, the following organizations assisted in providing information:

City of London Departments

Asset Management
Finance
Planning
Culture Office
Parks and Recreation
Community Services
London Police Department

Tourism

Tourism London

Councils and Organizations

London Arts Council
London Heritage Council
Old East Village Business Improvement Area (BIA)
Downtown London

Institutions and Businesses

University of Western Ontario
Fanshawe College
Canadian Medical Hall of Fame
London Regional Children's Museum
Centennial Hall
Eldon House
Museum London
The Grand Theatre
London Public Library
Orchestra London
Fanshawe Pioneer Village
London Convention Centre
John Labatt Centre
The Arts Project
Western Fair
Macintosh Gallery
Ontario Museum of Archeology

3. Introduction and Purpose

3.1. Objectives

The City of London acknowledges “culture” as an economic driver, recognized in the vitality and diversity of the local landscape and encouraging the attraction and retention of talent to the City. The task of measuring the economic impact of the cultural sector of the City of London is an attempt to primarily demonstrate and communicate the role of culture in the economic system locally – and subsequently provincially and nationally. ***The main objective of this exercise was to generate a dollar value of the direct economic contribution of a defined cultural sector for the City of London.*** Where the City was not an appropriate or available measure, the wider London Census Metropolitan Area (CMA) is used.

For the purposes of this project, the cultural sector is defined broadly to include “creative talent as it relates to: the arts, heritage, libraries, festivals, film and audio recording, cultural tourism, diversity and immigration, youth, science and technology, urban planning and design, education and business.” As such, the scope of this analysis excluded sporting and culinary activities (for example, commercial restaurants)².

² While culture is expressed across many individual sectors, limitations on the ability to clearly define certain occupations and/or types of commercial establishments require a more scoped definition of culture for analytical purposes. Without such a bar, the definition would be potentially too

Key to identifying, collating, and measuring impact was:

- The essential need to collaborate and draw upon expertise within City Hall, members of the Creative City Committee and other key stakeholders to assess the cultural landscape of the City and the nature of data available for analysis; and
- Developing an appropriate Economic Contribution Model that reflects the existing metrics of the sector, locational dynamics, employment and investment, existing and proposed built assets, as well as organizational assets, cultural tourism drivers and more.

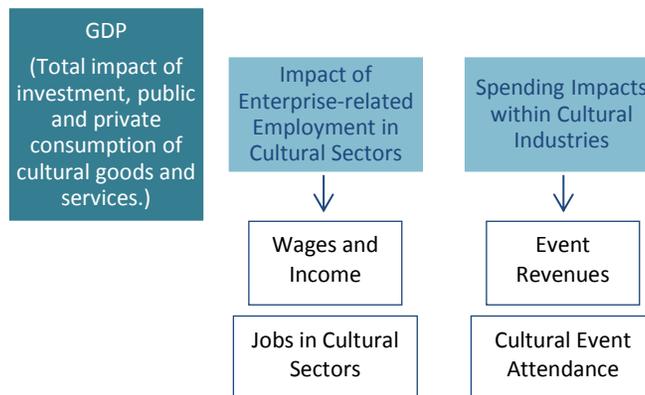
broad to be meaningful as a measure of the core sectors of cultural development in the City.

As defined for this project by the City of London.

3.2. Range of Measures & Methods (Examples of Impact)

In order to facilitate a holistic understanding of the full range of impact of culture of the local economy, a range of analytic measures were employed:

Exhibit 1: Range of Measures and Methods of Impact



3.3. Limitations

This analysis of the impact of culture in the City of London focuses on operational activity in cultural sectors and does not assess the impact of capital investment/costs. We recommend that an assessment of future capital contributions to the sector (investments in buildings and development as well as soft

investments) be included in future updates of this work, as these investments occur in the years ahead.

Some aspects are intangible, defy easy measurement, yet are crucial and should be recognized. There are both statistical reporting limitations as well as intangibles which nonetheless are important aspects of the cultural wealth of communities. Specifically:

1. Statistics Canada's 2006 Census (Place of Work and Place of Residence data) offered the latest available employment and income data for the London CMA/City of London based on the necessity to drill down to the 4 digit level of NOC-S (National Occupational Classification for Statistics). Employment data available for 2011 for the CMA as a whole via the Historical Labour Force Survey does not provide sufficient distillation of industrial sectors to the 4 digit level and encompasses too many sectors to be a useful measure of the cultural sector as defined for this study;
2. Data for occupational classifications is not available at the level of detail needed for 2011;
3. The analysis is therefore necessarily constrained by the availability and historic nature of some of the data;
4. This analysis is also a portrait of the sector taken as a snapshot; it does not project the impact or contribution over time as the sector and the City develops;
5. The size of the voluntary and hobbyist market - there is a proportion of the cultural workforce that is unidentifiable through normal statistical means as they are not primarily

employed as cultural workers. However, this study includes a range of estimates of volunteer hours and associated monetary value;

6. The full extent of business activity in the cultural sector is difficult to capture as statistical data on operational activity is limited. According to the 2011 Canadian Business Patterns data, only 43% cultural businesses in the City of London had identifiable employment numbers³; and
7. The process of assessing the various forms of economic contribution of the City's arts and culture sector involved the engagement of a number of cultural organizations and educational institutions. There are a great many non-profit, private and community-based arts and culture organizations in the City. There are around 400 cultural organizations and groups listed on the London Arts Council database. Within the limits of the project, it was not possible to contact each group, or to assess their operational accounts for employment, volunteerism and expenditures/revenues. Select organizations engaged this exercise had: a) audited or traceable financials and reporting systems b) recurring annual activities with stable revenue bases and c) were either well recognized groups, events or cultural buildings and hence could be included. For these groups, we have demonstrated the impacts of the top private and non-profit groups in contributing to the economy of the cultural sector in the City. This provides a greater grain of analysis but

does not ignore the potential impacts of other un-reported establishments or groups. As noted above, where these groups have reported employment, these estimates are covered in the range of official data sources listed above. In the case of the number of establishments, this is current as of 2011.

This report offers a range of figures and estimates of the economic impact of the cultural sector in the City of London. *Further details regarding the methodology used are contained in Appendix A.*

³ These businesses maintained an employee payroll which could be accounted for by the Canadian Business Register.

4. Methodology

4.1. Geography

The City of London is the heart of the London CMA. The London CMA includes a much larger area consisting of several important additional communities including the City of St. Thomas, Strathroy-Caradoc, the Township of Middlesex Centre, the Municipality of Thames Centre, the Municipality of Central Elgin, the Township of Southwold and the Township of Adelaide- Metcalfe.

In 2006, the London CMA had 457,720 residents, of which 352,395 persons lived in the City of London. In 2011, the population of the London CMA grew by 3.7% to 474,786 residents, of which 366,151 persons resided in the City of London. The City of London had a higher population growth rate than the London CMA, growing by 3.9% between 2006 and 2011. In 2011, 77% of the population of the London CMA resided in the City of London.

4.2. Impact Calculations

Economic impact varies in meaning at different geographic scales. Foundational to this analysis was the exploration of the impact of culture on the economy of the City of London (direct impact).

Exhibit 2: Map of the London CMA and the City of London, Ontario

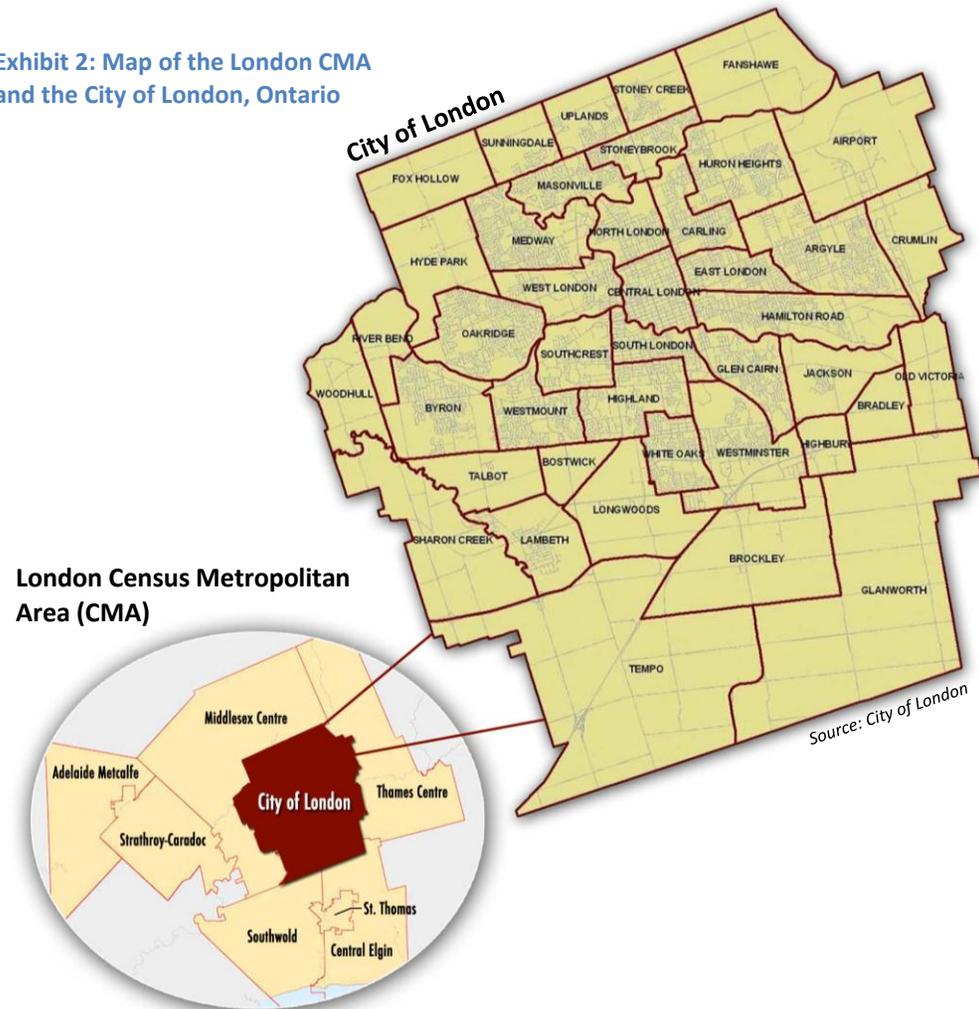
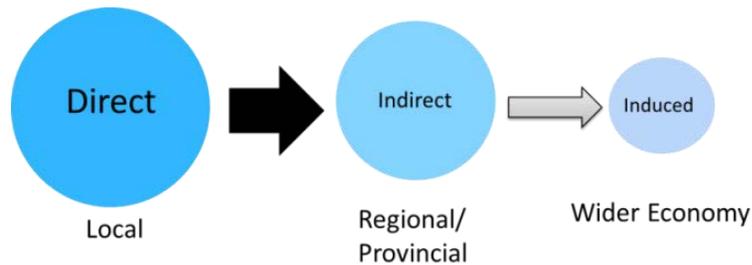


Exhibit 3: Range of Impact of Culture



4.2.1. Direct Impact

Direct effects are associated with immediate changes in demand generated by employment, personal and household income, governmental expenditures, and private and public capital investment and formation. In the present context, they are the direct contribution of expenditures and revenues in the cultural sector, original investment in construction, the spending and wages in the facility, and the spending outside of the facility by patrons. Direct impacts can be measured in a number of ways – all of which are alternatives and not cumulative measures. These include: total spending, Gross Domestic Product (GDP), income, employment and of other related measures such as sales and income taxes generated. Direct investment and employment will create iterative rounds of income, employment creation and spending. These multiplier impacts are referred to as indirect effects and induced impacts.

4.2.2. Indirect Impact

Indirect effects essentially are inter-industry impacts. Changes in employment, household income, governmental expenditures, and private and public capital investment added from industry purchases of all items needed to furnish a product or service are measured. Indirect effects measure the impacts of these purchases.

In terms of the employment impacts during construction, indirect employment refers to the employment created in other industries which supply the materials (goods) and other inputs (services) necessary for the construction work. In terms of the ongoing operations of any facility, indirect impact relates to employment created in businesses which supply goods and services necessary for the ongoing operations of the facility.

4.3. Induced Impact

Input-Output modeling also can potentially estimate induced effects. Induced effects are changes in spending patterns of households caused by changes in household income – generated by direct and indirect effects. These new expenditures are reintroduced into the economy as a new demand. Induced employment refers to the employment created in the total economy as a result of the so-called “Keynesian Multiplier” effect. This latter impact equates to employment created throughout the economy resulting from the expenditure of incomes generated through the direct and indirect impacts. In terms of the scale of impacts on local and regional economies, direct impacts are the most significant. Indirect and induced impacts are more broadly dispersed through the wider economy.

The analysis does not include estimates of induced impact given the focus on Provincial and Regional scale impacts. Induced effects are shallow and wide, and typically generate impacts which in proportionate terms can appear large and comparative to the original direct impacts. However, because they are so dispersed, they indicate little in terms of the impact on the local region or even the Province.

Our analysis relies on the Provincial Input-Output Multipliers (2008)⁴ (Statistics Canada) which assumes an open output model and excludes the estimation of induced multipliers.

4.3.1. Variables Measured

The direct measure of economic contribution are measured based on available information. For example:

- Statistics Canada 2006 Census and 2011 Canadian Business Pattern data: actual 2006 Labour Force⁵, actual labour income, 2011 estimates of employment and income;
- Primary financial information provided by the City of London, agencies, institutions and select organizations: either revenues or operational expenditures as appropriate and available.

⁴ Ontario Input-Output model, 2008 is latest available.

⁵ Refers to the population 15 years of age and over. The labour force includes the employed and the unemployed (persons looking for work a week prior to Census Day).

In terms of operation related multiplier impacts, the following variables are measured:

- Employment Impacts from operation;
- Direct Spending Impacts;
- Gross Domestic Product (GDP) Impacts; and
- Tax Impacts from Operation (not included in this analysis).

Generally, the following estimates of indirect impact are expressed in terms of Gross Domestic Product (or value added). These estimates are provided for the Province of Ontario as a whole as well as for the rest of Canada.

4.4. Data Sources

Our assessment of the direct/local impact of culture, addressed:

- **Workforce, employment and income in the City's cultural sector:** 2006 Census information offered the latest available data on cultural employment and income for the London CMA/City of London based on occupational classifications.

Statistics Canada's Place of Work (POW) data identified the number of jobs in cultural industries in the London CMA/City of London as well as total income for the local cultural workforce employed the London CMA/City of London. This data set provided a count of the number individuals (15 years and over having a Usual Place of Work or Working at Home) working in defined cultural industries

in the London CMA/City of London by cultural occupation⁶ (based on National Occupational Classification for Statistics NOC-S).

Statistics Canada's Place of Residence (POR) data identified the total income for the London CMA cultural labour force. This data set provided a count of the number residents of the London CMA/City of London with cultural occupations⁷ (based on National Occupational Classification for Statistics NOC-S).

For a detailed methodology on the classification of cultural occupations and industries, see Appendix A.

- **Revenues and expenditures generated by cultural businesses and organizations:** 2011 Canadian Business Patterns (CBP) data from Statistics Canada provided a count of the number of establishments (by employment size range) in cultural industries⁸ located in the City of London by 6 digit North American Industry Classification System (NAICS) code. Using this data, our team was able to identify the number of cultural establishments in the City of London and provide an estimate of total employment for these establishments. Estimates of average individual income based on 2006 POW data were then applied to estimates of

the 2011 employment to facilitate an evaluation of labour income by establishments.

Our team also engaged various private and non-profit cultural organizations throughout this project. A review of audited financials and financial reports provided a picture of the economic contributions of some of London's most popular cultural venues, attractions and organizations.

For a detailed methodology on the classification of cultural industries, see Appendix A.

- **Public spending and investment on cultural programs, services and facilities:** This report also assesses the impact of municipal expenditure on culture as outlined in the City of London's 2011 Operating Budget.

This report also investigates the operational activities of the London Arts Council and London Heritage Council – two key cultural advisory and funding organizations charged with the responsibility of administering two municipally-funded cultural investment grant programs.

- **Spending and investments in cultural education:** Essential to the sustainability of the cultural sector in the City is the contribution of post-secondary educational institutions - directly impacting the development of the sector through education, training, research and networking. As such, our team engaged the City of London's major tertiary institutions – The University of Western Ontario (UWO) and Fanshawe College – in this exercise. Both schools offer

⁶ As defined in Statistics Canada's Canadian Framework for Culture Statistics (2011).

⁷ Ibid.

⁸ As defined in Statistics Canada's Canadian Framework for Culture Statistics (2011).

varied and extensive programming in the Arts. The data which facilitated this calculation included:

- Annual revenues and expenditures for arts and culture focused programs/faculties (non-sporting, non-culinary); as well as
- Any departmental/program donations and funding received within the last year.

For a detailed description of the select program/courses reviewed, see Appendix A.

- **Cultural Tourism:** 2009 Regional Tourism Profiles produced by the Ministry of Tourism, Culture and Sport provided annual visitor expenditures (ticket sales) on cultural events

and activities. This however constitutes only some of the expenditure by tourists in the City and CMA. Hence, we provide an additional estimate of the direct spending on other goods and services provided to tourists engaged in cultural activities – anything from gasoline to food and beverage.

Based on the above analysis, select figures were applied to Provincial and National employment and GDP multipliers (informed by the latest available 2008 Ontario L-level Provincial Multipliers from Statistics Canada) for arts, recreation and culture, in order to assess the impact of City of London's cultural sectors on the local, provincial and national economy.

5. The Framework of Contribution by Cultural Industries

5.1. Introduction

The following framework is appropriate for understanding the relationships which exist between elements of the local cultural economy. In estimating both direct and indirect economic contributions, it is important to avoid duplication of estimates of employment, income and GDP.

The following categories should not therefore be considered as cumulative categories of economic contribution, but rather as ways to understand the manner in which cultural activities occur – they include employment whether in a business, in government or institutions, or at an event. Cultural workers include volunteers, as well as a range of non-employment related expenditures in buildings, equipment and other capital and operating areas. As discussed in Section 3.0, it is not possible to capture all of the non-employment-related operating expenses in the cultural sector as the majority of these expenses are not captured easily – and require detailed review of the accounts of each organization and building in the City in which cultural activities occur. Such is not possible and hence we have focused on the most significant of these buildings and organizations.

The following breakdown therefore is illustrative of the ways to conceptualize the depth of contribution to the local economy by the cultural sector.

5.2. People

Based on the methodology which includes a broad assessment of sectors and estimates of activity as of 2011, the size of the employment contribution can be expressed either in terms of the labour force or as actual jobs located in the City.

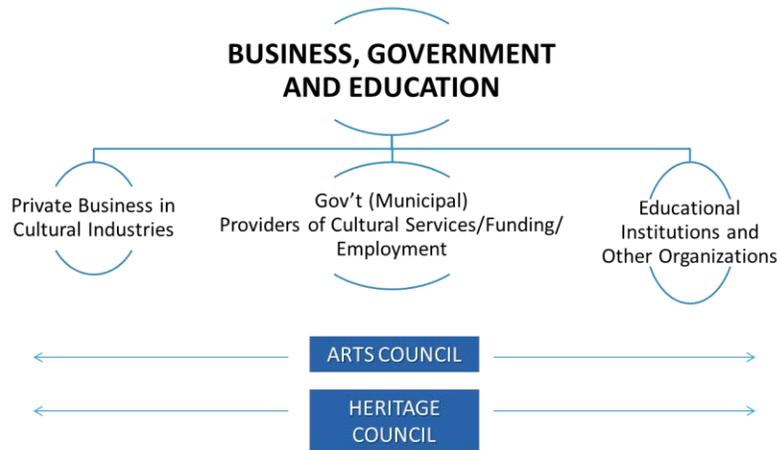
Exhibit 4: Framework of Contribution from Employment and Labour Force Activity



5.3. Business, Government and Institutional Sector (including Buildings)

Businesses, government and institutions employ people and undertake a range of expenditures, some of which directly support employment wages in the cultural sector. The purpose of this assessment is to drill down to understand the depth and range of the contributions not only by the municipal sector, but also that of the broader secondary and tertiary sectors of the economy.

Exhibit 5: Framework of Contribution from Business, Government and Institutions



1. The comprehensive depth and range of the cultural sector is shown by the analysis of private (and quasi-public business establishments such as the Library) businesses;
2. The important role that the City of London performs in funding the sector, agencies of the City, and in maintaining properties which house cultural activities of regional significance (e.g. performing arts spaces, the John Labatt Centre, the Grand Theatre and Centennial Hall) is analyzed; and
3. The existing role of the educational sector is outlined to showcase how significant this sector is in providing for

human resource investment in future cultural development. As a result, how the City and region can ensure that those who are trained in London are afforded maximum opportunity to build their careers in the City/Region is an important policy and investment strategy question which is raised by this study.

5.4. Activities: Events, Festivals and Tourism

Events, festivals and broader cultural tourism draw visitors and spending as well as spending by local residents. Cultural tourism is both an export industry for the City/region but also a vehicle for cultural expression of the City and its creative industries. While the creativity and innovation that defines many of the cultural pursuits in the City cannot be defined and measured in economic or financial terms, the sustainability of a number of these key outlets of cultural expression is measured through the selective inclusion of revenues or expenditures by annual events, festivals or other venues as described in later sections of this report.

Exhibit 6: Framework of Contribution from Cultural Tourism



6. Direct Estimates of Economic Contribution

6.1. Workforce/Jobs/Income

The following summarizes the direct estimate of employment and labour force in the selected cultural industries in the City of London, with comparisons to the London CMA.

6.1.1. Direct Impact

Jobs in Cultural Industries in the City of London and the London CMA

The City of London is home to the vast majority of cultural jobs in the London CMA. In 2006, 88% of cultural jobs in the London CMA were located within the City. The 2006 Place of Work (POW) (NOC-S) data indicates there were 7,355 cultural occupations in the City of London with cultural workers generating \$328,250,524 in total income⁹. Cultural occupations represented 4.2% of total occupations in the City of London, compared to 3.8% of total jobs in the London CMA. Industries in Visual and Applied Arts accounted for 30% of cultural employment in the City; followed by Audio-visual and Interactive Media (23%) – a key industry being computer programming and interactive media development.

A further analysis of 2011 Canadian Business Pattern (CBP) data (the latest available) provided a reasonable and more current assessment of the number of jobs in the City’s cultural sector. CBP

⁹ Statistics Canada defines total income as income from all sources, including employment income.

Exhibit 7: Jobs in Cultural Industries in the City of London and the London CMA, POW 2006

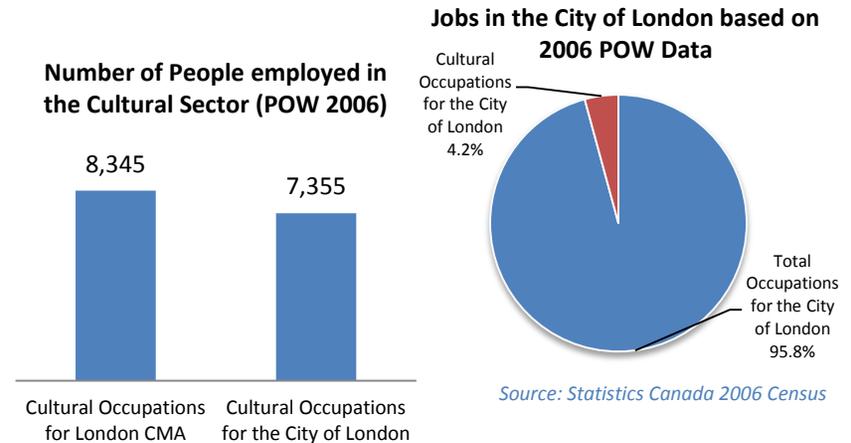
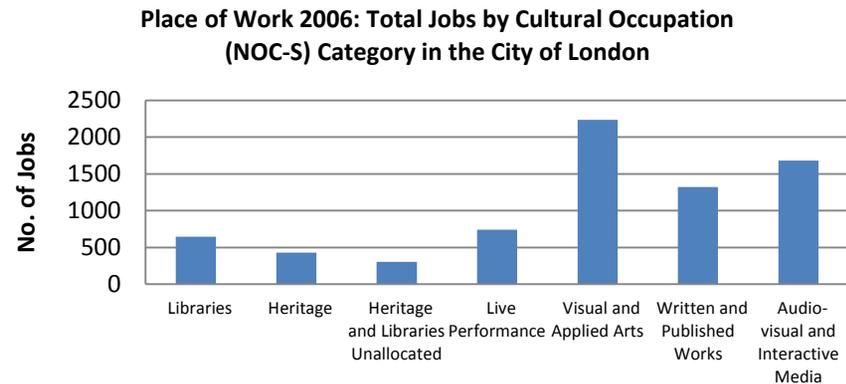
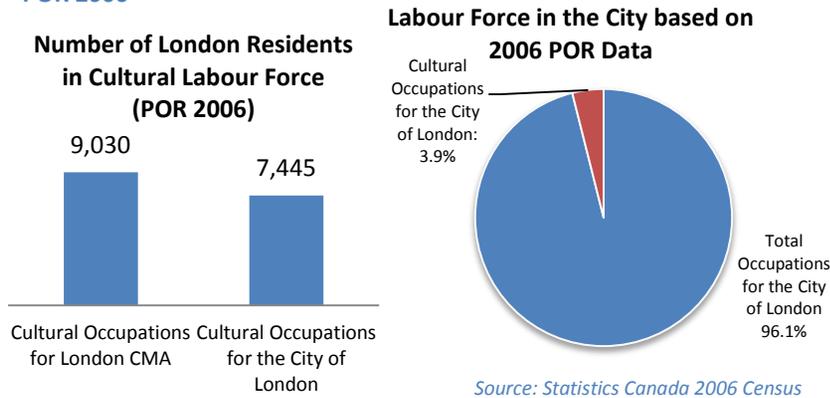


Exhibit 8: Jobs in the City of London - Cultural Industries by Category (POW 2006)



data showed there were an estimated 7,703 cultural jobs within the City of London in 2011, with workers generating an estimated \$329,705,349 in total income.

Exhibit 9: Cultural Labour Force in the City of London and the London CMA, POR 2006



Cultural Labour Force in the City of London and the London CMA

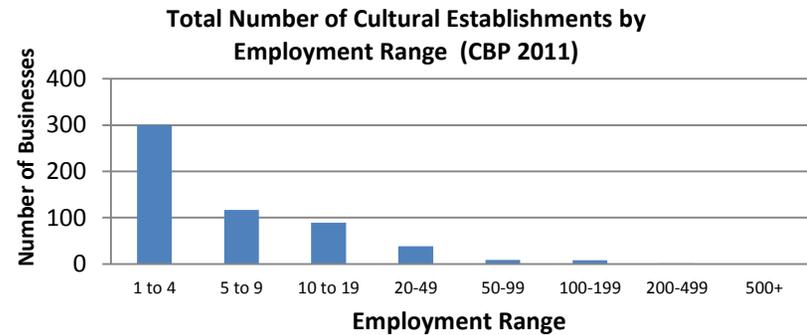
Roughly 82% of the cultural labour force in the London CMA resided in the City. The 2006 Place of Residence (POR) (NOC-S) data showed there were 7,445 individuals in the City of London’s cultural labour force. The cultural labour force represented 3.9% of the City’s total labour force (compared to 3.6% for the London CMA). Resident cultural workers in the City generated \$309,137,952 in total income in 2006.

A comparison of the 2006 POR and POW data shows the number of cultural jobs in the City is at parity with its cultural labour. On the other hand, the London CMA is an exporter of cultural labour (i.e.

has less jobs within the CMA in the sector than labour force in the sector).

An analysis of Canadian Business Patterns (CBP) data showed there were 1,298 cultural business located in the City of London in 2011 (many of which were small to medium-sized enterprises). CBP data did not provide employment information for 57% of these businesses¹⁰.

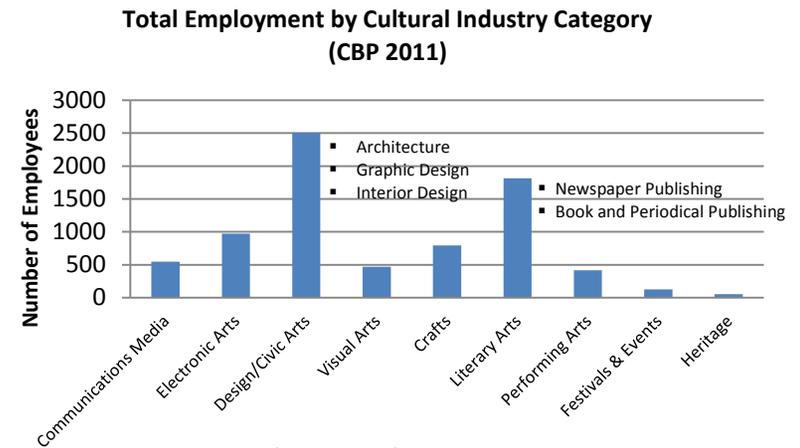
Exhibit 10: Breakdown of Cultural Businesses in the City of London by Employment Size, CBP 2011



¹⁰ Such establishments are classified as "Indeterminate" and do not maintain an employee payroll, but may have a workforce which consists of contracted workers, family members or business owners. However, the Canadian Business Register does not have this information available, and has therefore assigned the establishments to an "Indeterminate" category. This category also includes employers who did not have employees in the last 12 months.

Approximately 562 cultural business in the City had determinable employment numbers and were estimated to have spent \$329,705,349 in wages and salaries. An estimated sum of 7,703 persons were employed across the 562 businesses. Based on the Canadian Business Pattern data, cultural industries employing the largest number of cultural workers were those involved in Civic and Design Arts (also referred to as Visual and Applied Art)¹¹. This is consistent with observations from the 2006 POW analysis.

Exhibit 11: Breakdown of Cultural Employment in the City of London by Industry Category, CBP 2011



Source: Statistics Canada 2011 Canadian Business Patterns

¹¹ Classification based on NAICS.

6.1.2. Indirect Impact

6.1.2.1. Employment (Jobs)

Indirect employment as a result of the direct employment in the City is estimated for the Province of Ontario as a whole. Exhibit 12

shows alternative estimates for the City based on the 2006 Census and latest available data (2011).

Exhibit 12: Employment Impacts from Identified Cultural Sectors

Cultural Sector Employment	Number of Direct Employment	Total Income*	Multiplier (In Province)	Indirect Employment In Province	Sub-Total Direct and Indirect Employment	Multiplier (Out of Province)	Indirect Employment Out of Province	Total
Based on (NOC-S) National Occupational Classification for Statistics								
2006 Census: City of London	7,355	\$328,250,524	0.357	2,628	9,983	0.047	343	10,326
2006 Census: London CMA	8,345	\$366,299,172	0.357	2,982	11,327	0.047	389	11,715
Based on (NAICS) North American Industry Classification System								
2011 Canadian Business Patterns: City of London	7,703 *	\$329,705,349 *	0.357	2,752	10,455	0.047	359	10,814

Arts, Entertainment and Recreation	
Employment Multipliers, in province	0.357
Employment Multipliers, all provinces	0.404
Employment Multipliers, all other provinces	0.047

*Unless otherwise noted, total income is based on figures reported in the 2006 Census. Total income represents income from all sources, including employment income.

*Estimate of employment for 2011.

*Estimate of total income.

While it is not known whether all of these jobs are full-time or part-time, an estimate for jobs in the City for 2011 based on Canadian Business Pattern data shows just over 7,700 jobs in the sector. The City contributes to indirect job creation/retention in the City in other sectors and beyond in the Province as a whole. The total direct and indirect job totals in the Province based on the direct employment levels estimated for 2011 in the City of London, is just under 10,500 jobs.

6.1.2.2. Income Generation

Income generation (which includes more than employment income) can provide a measure of Gross Domestic Product (GDP). GDP is an alternative measure of impact and conceptually equates to measures of economic production (output), income (employment income plus profit for owners and corporations) and spending¹². It is essentially a measure of value added as a result of a particular economic activity. At the scale of the national economy, gross value added, plus any taxes generated on products, and less any subsidies provided by government, represents Gross Domestic Product. For purposes of this analysis, GDP multipliers for the relevant sectors have been drawn from the 2008 Input-Output tables produced by Statistics Canada.

¹² The production approach to measuring GDP estimates the value of an output (goods or services) less the value of inputs used in the output's production process. The income approach to measuring GDP estimates the wages (individuals) and profits (owners and corporations) arising from the production of good and services; and, the spending approach to measuring GDP estimates total expenditure on finished or final goods and services produced in the domestic economy.

The estimate of indirect additional income to the Province as a whole generated by the cultural industries in the City of London is shown in Exhibit 13.

Exhibit 13: GDP Impacts from Identified Cultural Sectors based on 2006 POW (NOC-S) Data

2006 Census: Estimated Total Income from Cultural Sectors in the City of London		
In Province		
	Multiplier	Total Estimated Impact GDP
Direct		\$328,250,524
Indirect	0.596	\$195,478,654
Total:		\$523,729,178
Indirect (Out of Province)		
	0.089	\$29,370,373
Total:		\$553,099,551

Exhibit 14: GDP Impacts from Identified Cultural Sectors based on 2011 CBP (NAICS) Data

2011 Canadian Business Patterns: Estimated Total Income from Cultural Establishments in the City of London		
In Province		
	Multiplier	Total Estimated Impact GDP
Direct		\$329,705,349
Indirect	0.596	\$196,345,026
Total:		\$526,050,376
Indirect (Out of Province)		
	0.089	\$29,500,544
Total:		\$555,550,920

6.2. Select Organizations

6.2.1. Performance and Event Spaces

Five (5) of London’s popular performance spaces (out of 13) including John Labatt Centre, the Grand Theatre and Museum London generated almost \$25 million in revenues in 2011.

Other spaces such as Western Fair and the London Convention Centre host cultural proceedings as well as an array of other events. Due to confidentiality requirements, annual revenue and expense details for each organization cannot be published. However, the aggregate revenues include the following:

- Centennial Hall
 - John Labatt Centre (non-sports)
 - Museum London
 - The Grand Theatre
 - Western Fair
 - The London Convention Centre
 - The Arts Project
 - Other select venues¹³
- \$57 Million**

This excludes the wider impact of this spending specifically to the London economy. A high proportion of spending is by visitors to the City that spend additionally on a range of other services including food and beverage, accommodations and transportation. As an

¹³ There was information on a large number of other popular spaces that was unattainable.

example, the cultural events held at the John Labatt Centre are estimated to draw 40% percent of patrons from outside of the City.

These additional local expenditures are themselves direct spending in the local area. Section 9.0 outlines the estimated spending that is associated with attending cultural events in the City.

6.2.2. Indirect Impact

Based on the estimated revenue for the selected organizations, the GDP arising from this annual amount is estimated in Exhibit 15.

Exhibit 15: GDP Impacts from a Cross-section of Performance/Event Spaces and Other Cultural Organizations

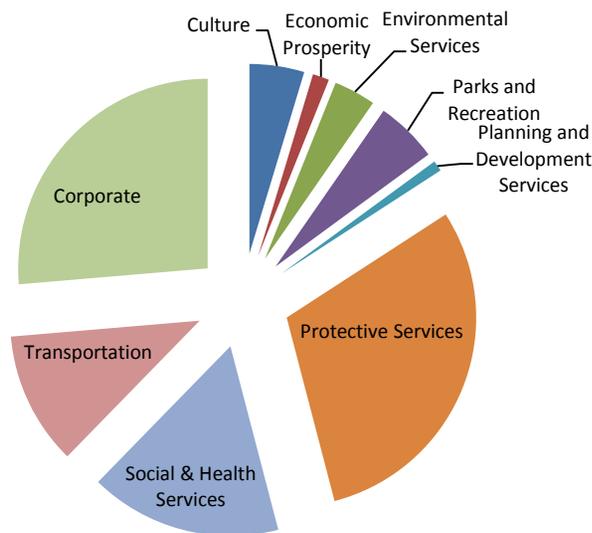
Contributions from Cross-section of Cultural Establishments (Performance Spaces, Non-profit and Other Private Organizations)				\$57,825,926	
Ontario			Outside Ontario (All Other Provinces)		
	Multiplier	Total Estimated Impact GDP		Multiplier	Total Estimated Impact GDP
Direct	0.514	\$29,731,548	Indirect (Out of Province)	0.089	\$2,660,245
Indirect	0.596	\$17,705,632			
Total In Province: \$47,437,180			Total Out of Province: \$2,660,245		

7. The City (Programs, Buildings and Services)

In 2011, 5% of the City of London's Operating Budget (\$21,619,000) was allocated to the administration of cultural organizations/facilities and programs. A total of \$2,107,000 of the City's Capital Budget was allocated to the maintenance of cultural facilities.

Exhibit 16: The City of London's 2011 Operating Budget

Breakdown of the City of London's 2011 Operating Budget



Source: City of London (2011) Operating Budget

The majority of the municipal cultural operating budget was allocated to the following facilities: London Public Library, Centennial Hall, Museum London and various heritage sites.

Around \$2 million was allocated to arts, culture and heritage advisory and funding activities, the majority of which was invested in the Community Arts Investment Program (CAIP) I and II (See Exhibit 17).

- **Community Arts Investment Program I:** Grants provide operational funding to incorporated, non-profit arts organizations (with a board of directors) that report revenues in excess of \$1 million.
- **Community Arts Investment Program II:** Grants provide operating and project funding to non-profit arts organizations and individuals that report revenues of less than \$1 million. This grant program is administered by the London Arts Council.

Other City-financed cultural programs include the Community Heritage Investment Program (managed by the London Heritage Council), the Creative City Fund (which supports creative, collaborative projects across sectors) and the Public Art fund.

7.1. Other City Initiatives

Exhibit 17: Breakdown of the Operating Budget for the City of London, 2011

City of London 2011 Operating Budget: Culture	
Centennial Hall	\$98,000
Museum London	\$1,595,000
Arts, Culture, and Heritage Advisory & Funding (including but not limited to the items below)	\$2,042,000
CAIP I	\$1,000,000
CAIP II	\$250,000
CHIP	\$75,000
Heritage	\$90,000
London Public Library	\$17,794,000
Total:	\$21,619,000

Source: City of London (2011) Operating Budget

In addition to these identified expenditures, it is generally recognized that municipal corporations promote cultural exchange and development to a wide range of means, including:

- Direct programming of arts and leisure activities;
- Provision of community space;
- Promotion of local artisans and others by enabling gallery space and temporary exhibits as well as performance space, in its portfolio of buildings; and
- Street closures and assistance with community events.

All of these additional actions represent a cost and are part of the City's expenditure as a partner to culture in the City. The estimates of spending on culture by the municipality also therefore exclude

the costs of operating the public spaces (such as arenas) that are used in part for cultural activities.

7.1.1. Community Improvement Program Incentives

In addition to direct allocations to culture and cultural services, in 2011 the City of London invested another \$220,000 in Community Improvement grants and loans to cultural establishments (ranging from architecture firms to jewelry and music production stores) located in the designated Community Improvement Areas (CIPA) of Downtown London and Old East Village. These grants and loans supported expenditures such as façade improvements and building code upgrades for the development of cultural businesses and spaces.

7.2. Cultural Advisory and Funding

Around \$600,000¹⁴ in revenue collectively generated by the London Arts Council and the London Heritage Council has been important in supporting cultural organizations beyond the list of cultural facilities and venues supported by the City.

¹⁴ Based on audited financial statements for both councils for 2010.

7.2.1. London Arts Council

The London Arts Council (LAC) is a non-profit advisory organization which provides various resources for the arts community including career development, networking and grant funding. The organization supports many of London's popular cultural organizations including the London Youth Symphony and the London Community Players. The City of London channels funding through the organization for the disbursement of Community Arts Investment Program (CAIP) II grants to the local arts community.

In 2010, CAIP II grants valued at \$200,000 helped to support 46 arts organizations and projects which collectively had \$4 million in revenues and \$3 million in expenditures. A detailed breakdown of revenues and expenses cannot be disclosed due to confidentiality restrictions.

7.2.2. London Heritage Council

The London Heritage Council (LHC), like the LAC, is a non-profit heritage advisory organization which provides education, consultation and funding opportunities for the City of London's heritage sector. The LHC supports valued heritage institutions such as the Ontario Museum of Archeology and the Canadian Medical Hall of Fame; consistently contributing to the preservation of local, Provincial and National heritage assets.

The London Heritage Council (LHC) is responsible for the administration of the Community Heritage Investment Program (CHIP) which is solely funded by the City of London. The Community Heritage Investment Program (CHIP) provides project funding to non-profit organizations and individuals to support various heritage

and cultural heritage projects. In 2010, CHIP grants valued at \$75,000 helped to support 15 arts organizations and projects which collectively had \$240,000 in revenues and \$220,000 in expenditures. Again, a detailed breakdown of revenues and expenses cannot be disclosed due to confidentiality restrictions.

The organization continues to develop its programs to cater to the cultural heritage community, moving to expand CHIP grants to offer operational funding to heritage organizations in the City of London.

7.3. Volunteerism

The LAC and LHC supported organizations that reported having 3,500 volunteers working a total 108,000 volunteer hours in 2010. This represents only a proportion of the number of volunteers working in the cultural sector. Volunteers were estimated to have contributed in-kind work valued at around \$1.2 million¹⁵.

¹⁵ Based on the current Ontario Ministry of Labour general minimum wage rate of \$10.25 per hour.

8. The Education Sector

The University of Western Ontario (UWO) and Fanshawe College offer an extensive range of arts and culture programs which generated some \$60 million in revenue in 2011. In the same year, 6,383 students across both institutions were enrolled in these programs, the majority of whom specialized in courses in contemporary media and design such as multi-media design, broadcast television, graphic design and landscape design. See *Appendix A* for a list of courses and programs included in this analysis.

The revenues broadly cover the direct expenses of the programs. However, undoubtedly, additional indirect operating costs associated with the facilities, as well as occasional capital expenditures on facility renewal, are costs which should also be recognized. The estimate of \$60 million in annual funding therefore represents an underestimate of total economic contribution.

A detailed breakdown of revenues and expenses cannot be disclosed due to confidentiality restrictions.

The impact of the education sector – defined only by the most relevant programs – is considerable. This excludes two important additional direct contributions to the local economy:

1. The contribution to the London economy of student household spending by those students enrolled in the programs; and
2. The less tangible but significant contribution associated with the development of leading academic and culturally progressive institutions.

Exhibit 18: GDP Impacts from Tertiary Training and Education in Arts and Culture

2011 University/College Revenues from Cultural Programs in the City of London*				\$58,057,325	
Ontario			Outside Ontario (All Other Provinces)		
	Multiplier	Total Estimated Impact GDP		Multiplier	Total Estimated Impact GDP
Direct	0.514	\$29,850,523	Indirect (Out of Province)	0.089	\$2,670,890
Indirect	0.596	\$17,776,484			
Total In Province:		\$47,627,007	Total Out of Province:		\$2,670,890

* Figure based on total revenues from cultural programs at the University of Western Ontario and Fanshawe College

9. Cultural Tourism

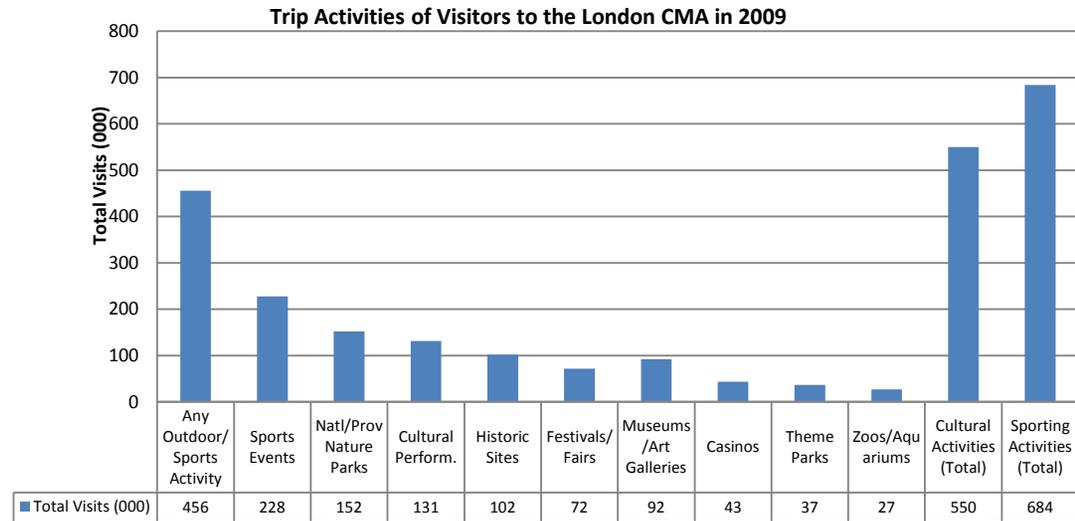
According to the 2009 Regional Tourism Profiles (latest available) published by the Ontario Ministry of Tourism, Culture and Sport, the London Census Metropolitan Area (CMA) had 4,927,000 visitors, with guests spending a total of \$476 million in trip expenses (transportation, accommodation, entertainment etc.). Tourism London and the Canadian Tourism Research Institute, in a report of the Economic Impact Analysis of Tourism in the City of London, estimated that in 2010 total visitor spending increased by 3.2% to \$491 million.

11% of visitors in 2009 (550,000 individuals) participated in cultural activities during their trip, generating \$20 million in ticket sales for the London CMA. Estimates¹⁶ show that in 2010, there was only a marginal increase (0.8%) in visitor spending on culture and recreational activity, as opposed to trip spending on accommodations (4.1%), food and beverage (4.1%) and retail (6.1%) – indicating a potential need to develop and expand cultural tourism attractors¹⁷. National/Provincial Park visits, cultural performances and visits to historic sites were the most popular cultural activities among tourists.

¹⁶ Tourism London & the Canadian Tourism Research Institute (2011) Economic Impact Analysis of Tourism in the City of London

¹⁷ *Ibid.*

Exhibit 19: Trip Activities of Visitors to the London CMA 2009



Source: Ontario Ministry of Tourism, Culture and Sport: Regional Tourism Profiles (2009)

Festivals and fairs were also among the activities visitors to the area engaged in. In 2010, 13 festivals held in the City of London – including renowned events like Sunfest and the London Jewish Film Festival – generated around \$1.5 million in revenue.¹⁸

¹⁸ Based on revenues reported in London Arts Council and London Heritage Council 2010 grant reports.

Exhibit 20: Trip Activities of Visitors to the London CMA 2009

Activity	Total Visits (000s)					Overnight Visits (000s)				
	Total	Ontario	Other Canada	U.S.	Overseas	Total	Ontario	Other Canada	U.S.	Overseas
Any Outdoor/Sports Activity	456	402	13	36	5	199	156	13	29	1
Sports Events	228	208	3	13	4	86	68	3	12	2
Cultural Activities (Total)	550	262	33	143	113	371	219	26	95	32
Nat'l/Prov. Nature Parks	152	78	13	25	36	107	75	8	16	8
Cultural Performances	131	76	6	38	11	85	55	5	21	4
Historic Sites	102	31	4	37	31	69	29	3	28	10
Festivals/Fairs	72	28	5	20	19	48	25	5	15	3
Museums/Art Galleries	92	49	5	22	16	61	34	5	16	6
Casinos	43	25	3	11	4	35	20	3	11	1
Theme Parks	37	25	2	5	5	27	21	1	2	2
Zoos/Aquariums	27	5	5	2	15	11	3	0	2	5

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

Exhibit 21: Trip Expenditures of Visitors to the London CMA 2009

Expenditure Category	Visitor Spending (\$000s)					Overnight Visitor Spending (\$000s)				
	Total	Ontario	Other Canada	U.S.	Overseas	Total	Ontario	Other Canada	U.S.	Overseas
Total Visitor Spending	475,295	387,568	27,135	41,393	19,200	264,603	185,633	23,816	37,667	17,487
Transport (Total)	108,610	86,060	14,870	5,595	2,084	63,181	43,653	12,448	5,110	1,971
Public Transport	17,587	7,663	8,983	432	509	15,501	6,507	8,269	330	395
Canadian Fares*	179	n/a	n/a	0	179	66	n/a	n/a	0	66
Other Public Transport	17,407	7,663	8,983	432	329	15,435	6,507	8,269	330	329
Vehicle Rental	6,923	260	2,626	2,621	1,416	5,523	217	1,291	2,599	1,416
Vehicle Operations	80,607	75,446	2,896	2,175	90	39,308	34,642	2,762	1,814	90
Local Transport	3,494	2,691	365	367	70	2,849	2,287	125	367	70
Accommodation	57,031	35,408	2,904	14,336	4,383	57,031	35,408	2,904	14,336	4,383
Food & Beverage (Total)	169,529	148,845	5,264	10,870	4,550	83,709	65,852	4,704	8,999	4,154
Food & Beverage at Stores	43,562	38,150	1,734	2,470	1,208	20,682	16,075	1,532	1,976	1,098
Food & Beverage at Restaurants/Bars	125,967	110,695	3,530	8,399	3,342	63,027	49,776	3,172	7,023	3,056
Recreation/Culture (Total)	29,244	22,525	757	4,888	1,074	16,089	10,362	506	4,285	937

Recreation	9,242	8,425	276	513	28	4,584	3,957	148	454	24
Culture	20,002	14,100	481	4,374	1,046	11,505	6,404	358	3,831	913
Retail/Other (Total)	110,882	94,729	3,340	5,704	7,108	44,593	30,359	3,255	4,937	6,042
Clothing	73,285	62,404	3,054	3,466	4,361	22,837	13,258	2,969	2,971	3,640
Other Retail	37,597	32,325	286	2,238	2,747	21,756	17,101	286	1,967	2,402

* Canadian Fares are only available for international visitors. Canadian Fares for Canadian visitors are included in Other Public Transport.

Source: Ontario Ministry of Tourism, Culture and Sport: Regional Tourism Profiles (2009)

Cultural activities accounted for over one third of all visitors that stated activities pursued while visiting the CMA. Beyond direct spending on cultural activities, the broader estimate of direct spending in the London economy by those persons undertaking cultural activities is potentially \$70+ million.

9.1.1. Indirect Impact

The indirect economic impact from local cultural tourism expenditure is estimated in terms of likely GDP to the Provincial economy.

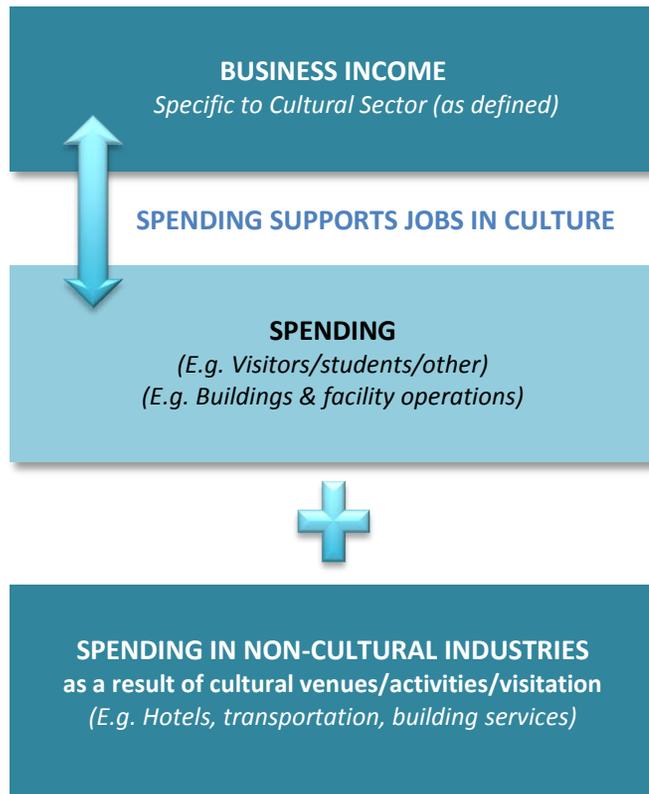
Exhibit 22: GDP Impacts from Visitor Expenditure on Cultural Activities in 2009

2009 Regional Tourism Profile: Estimate of Total Visitor Spending on Cultural Activities in the London CMA*					\$70,000,000	
Ontario			Outside Ontario (All Other Provinces)			
	Multiplier	Total Estimated Impact GDP		Multiplier	Total Estimated Impact GDP	
Direct	0.514	\$35,990,921	Multiplier (Out of Province)	0.089	\$3,220,305	
Indirect	0.596	\$21,433,193				
Total In Province:		\$57,424,115	Total Out of Province:		\$3,220,305	

* Estimate includes activity related costs e.g. transportation

10. Interpretation of Results

UNDERSTANDING ECONOMIC CONTRIBUTION OF CULTURE



Based on the analysis of selected data presented in the foregoing sections, the overall contribution to the City of London in direct terms (i.e. expenditures or revenues, income and spending) is as follows:

Exhibit 23: Direct Contribution of the Cultural Sector to the City of London’s Economy

Contributions to Culture (excluding Capital)	
	Direct Contributions
Business (Estimated Income) (2011)	\$330 million (London CMA: \$370- \$400+ million)
Cultural Tourism	\$70 million +
Selected Venues	\$60 million
Education	\$58 million
City (Operating Budget as of 2011)	\$22 million
Total: \$540 million (DIRECT)	

The estimate reflects direct contribution annually and excludes any capital expenditures. The estimate reflects operating expenditures, revenues, income and spending.

The estimated GDP for the direct contribution at the City-level is approximately \$540 million based on the above totals.

Interpretation of the estimate is essential and should include the following:

1. The estimate is a general statement of contribution based on available information;
2. In undertaking any form of economic impact assessment, it is important to avoid duplication of impact which can overstate the true contribution. With respect to the analysis contained herein and summarized above, the following should be recognized:
 - a. Revenues cannot be added to expenditures – because of the general flow through in which revenues support expenditures, these dollars are counted once only (either revenues or expenses);
 - b. Business income reflects by definition, revenues and net revenues after expenses, arising from the operations of those businesses. This would therefore include a portion of the revenues or expenditures represented in the other principal categories listed above;
 - c. However, business income is estimated only for those sectors classified as within the defined cultural sector as a whole – and exclude hotels, restaurants, retail, transportation expenditures, etc., as part of cultural tourism. It also excludes all of those service firms in the local area for which the education sector contributes by way of expenditure, as well as the government sector in pursuing its

cultural mandate. As a result, the estimated income of the defined businesses is very clearly only part of the direct economic contribution of cultural activities to the City;

- d. Accordingly, while the above estimate has some level of overlap between the categories (likely less than 10%-20%), it is very likely that the categories are broadly cumulative, such that the estimate of some \$550 million in direct contribution is a conservative and reasonable estimate.

The implications of the estimate in comparative terms are as follows:

1. The direct contribution of the cultural sector in the City is \$1,475 Per Capita;
2. The direct contribution of the cultural sector in the London CMA is potentially \$1,222 to \$1,285 Per Capita; and
3. The City of London spent \$60 Per Capita on culture in 2011. While this figure varies significantly between municipalities, the estimate is not inconsistent with a number of other jurisdictions.

A Broad Comparison to Toronto and other areas of Ontario

As an illustration of scale, the following provides a review of the performance of the cultural sector in Toronto, Ottawa, Hamilton and other select Canadian Cities, comparable to the City of London and the London CMA. It should be cautioned the definition, and

thus analysis of cultural activities likely differ to some extent across the various municipalities and regions. Therefore the results should not be viewed as a precise comparison. Indeed for this reason, comparisons of economic contribution in other centres are also likely to be less precise. Accordingly, policy decisions should not be based solely on these general comparisons which may have differing methodologies and scope.

A Comparison of Cities

The City of London's cultural sector had an estimated 7,703 cultural jobs and generated an estimated \$540million in direct contribution to the City's economy in 2011.

Latest available estimates from the *From the Ground Up: Growing Toronto's Cultural Sector (2011)* report identified that the cultural sector in the City of Toronto accounted for 83,000 jobs (based on 2006 Census data) and \$9 billion of Toronto's Gross Domestic Product (GDP). Cultural occupations represented 4.2% of the City of London's total workforce and 6% of the City of Toronto's workforce in 2006.

The City of London had a significantly higher concentration of cultural workers (4.2%) than the Canadian average (3.3%) in 2006¹⁹. Further to this, the *Mapping Artists and Cultural Workers in Canada's Large Cities (2010)* report by Hill Strategies shows that the concentration of cultural workers in the City of London ranked fair against some of Canada's large cities; with cultural workers

¹⁹ Hill Strategies (2010) Mapping Artists and Cultural Workers in Canada's Large Cities

representing 4.2% of total workers in the City of London compared to 7.2% in Vancouver, 6.4% in Montreal, 5.9% in Toronto, 4.7% in Ottawa and 3.6% in Calgary.

Exhibit 24 shows that as of 2006 the City of London had a greater concentration of cultural workers than the City of Calgary and the proportion of the total workforce employed in cultural occupations was almost comparable to the City of Ottawa.

Exhibit 24: Concentration of Cultural Workers in the City of London (Present Study) compared to other Cities in Canada (based on Hill Strategies 2010 Study)

City	Cultural Workers as a % All Workers (as of 2006)
Vancouver	7.2%
Montreal	6.4%
Toronto	5.9%
Ottawa	4.7%
London	4.2%
Calgary	3.6%

Sources: Sierra Planning and Management (2012) (London Estimate); Hill Strategies (2010) Mapping Artists and Cultural Workers in Canada's Large Cities.

See Exhibit 25 for a further comparison of the economic contribution of the cultural sectors in other areas Ontario.

The Intangibles

The cultural sector is by its definition, innovative, creative and a key provider of a social contribution that, together with other lifestyle amenities, helps keep communities cohesive, sustainable and growing. This includes cultural expression in all forms and in all

venues whether public or private, in schools or in civic spaces, and between businesses. Importantly, it includes the growing array of electronic media and means for communication and collaboration.

This dynamic is not expressly captured in these estimates which, as noted at the outset, are by definition an historic snap shot of annual contributions in financial terms. The reality that cultural development is about expression, recognition of heritage, growth and investment indicates that further analysis should be conducted as part of the sister project to the mapping and economic analysis. Specifically, the Culture Plan for the City should address the ways and means for maximizing the potential of the sector.

This should also include a strong emphasis on community planning and physical improvement of key areas of the City, as well as

facilitating new investment in the existing building stock, in defined neighbourhood nodes and in downtown London. These spaces operate within a hierarchy of public spaces, community service centres and business nodes. Cultural development in the City depends in part on incorporating the regeneration and development of key nodes in the City.

Additional research into the potential contribution of capital investments in these communities to cultural development should be part of the larger strategic plan currently underway.

Exhibit 25: Comparison of Economic Contributions for Cultural Sectors in the City of London (Present Study) and Select Areas of Ontario

City of London (2011)	London CMA (2011)	City of Toronto (2006)	Ottawa (2006)	Hamilton CMA (2001)
\$540 Million (Direct contribution)	\$580 Million (Direct contribution)	\$9 Billion (GDP estimate)	\$1.98 Billion (GDP estimate)	----
\$1,475 Per Capita	\$1,222 Per Capita	\$3,595 per capita	\$1,751 per capita	----
7,703 jobs in cultural sector	8,345 jobs in cultural sector (as of 2006)	83,000 jobs in cultural sector	22,500 jobs in cultural sector	11,600 jobs in cultural sector
4.2% (as of 2006)	3.8% of total workforce (as of 2006)	6% of total workforce	4.7% of total workforce	3.4% of total workforce

Sources: Sierra Planning and Management (2012) (London Estimate); City of Toronto (2011) From the Ground Up: Growing Toronto's Cultural Sector; City of Ottawa (2012) A Renewed Action Plan for Arts, Heritage and Culture In Ottawa (2013-2018); City of Hamilton (2007) Hamilton Creative City Initiative Phase I Report.

Part 3

Cultural Facilities and Infrastructure – Interview Results
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CITY OF LONDON

Cultural Facilities and Infrastructure

CONVERSATIONS WITH CULTURAL LEADERS

Interview Results



London
CANADA

September 2012

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INTRODUCTION

BACKGROUND

This brief report has been prepared as an adjunct to a larger study of the “Cultural Mapping and Economic Impact of Culture in the City of London.”

The purpose of this brief report is to provide an overview of the current state cultural facility planning in London. The principal method of the study was personal interviews with 30 cultural leaders in London.

INTERVIEW FORMAT AND LINE OF INQUIRY

Most of the interviews were conducted in person at City Hall in July 2012. Each of the respondents was asked to comment on the following eight questions:

- What are the challenges facing London’s cultural facilities today?
- What are London’s cultural facility priorities?
- How important is facility location?
- What kind of leadership role should the City be taking?
- What role should the City take in capital development?
- What role should the City take in operations?
- What is the strategic importance of cultural facilities to London as a city?
- What should be the goals for the next 5 years?

The goal of these questions was to find themes which were shared collectively by the majority of the respondents. These themes could then be used to inform the next steps which need to be taken to

develop London’s cultural infrastructure.

A list of the individuals who participated is included at the end of this document.

GENERAL CONCLUSIONS

Consider the Source

Collectively, the participants in this process represented a very high percentage of the senior cultural administrators in London and a significant number of them bring many years of experience to their perspective on London’s cultural facilities. Indeed, several respondents commented that they have had this very discussion many times before.

Overall, respondents felt that cultural facility development in London has been stalled for a long time and they expressed frustration at the inability to move the cultural facility agenda forward.

While some respondents referred to the specific needs of their own organization, virtually all of them saw the state of cultural facilities as a civic development issue.

Respondents believe that London is a greater city than it appears to be and that there is a gap between what the City claims to believe about the value of culture and how it actually behaves.

Respondents are looking to the City for leadership - they believe that the City has no vision or plan for cultural facilities. Not surprisingly, the answers to the last interview question (“What should be the goals for the next 5 years?”) were largely about the need for planning rather than about specific projects.

Next Steps

The overall message from the respondents about cultural facilities in London is clear: we're going nowhere fast and nobody seems to be prepared to lead.

Step One

The first step is for the City to acknowledge cultural facilities as valuable and distinct assets and to see this as an issue of city-building which is to be carried out on a city-wide basis.

Step Two

In order to appreciate value, the city must first know what cultural assets are in the community. The second step is for the City to adopt an asset-based framework for cultural facility data collection and analysis (e.g., zoning and site, ownership, building typology, usage, condition, building area, etc.)

Step Three

The third step is for the City to create a city-wide data base and to analyze the results.

The results from step three provide a solid foundation for the development of a Cultural Facility Feasibility Plan, which aligns with the City's corporate asset management:

- Vision and goals
- Policy framework
- Business model for capital development
- Delivery model for capital projects

THEMES FROM THE INTERVIEWS

CULTURE AND LONDON'S COMPETITIVE EDGE

Respondents generally recognized that the number and condition of cultural facilities was an indicator of civic status. In this regard, London was seen as having fallen behind. Comments on this topic included:

- London is losing its national profile; it is 15 years behind the times
- Cultural infrastructure helps fulfill the vision of the city and raises the city's profile
- We need to decide what kind of a city we want to be; we need to be able to say who we are
- We need to understand value and power of culture in making a great city – culture creates positive identity
- There is a big difference between the facilities we have and those we need
- Cultural infrastructure is an investment in city building
- London is losing its edge as a cultural destination; culture is a large part of the tourism and hospitality sector – it is at risk of becoming a cultural backwater
- A destination city requires high quality facilities and events
- London is losing its edge in attracting and retaining talent (especially the 30 to 40 year olds)
- Don't risk losing artists to other cities; when the artists go, culture dries up
- There is more here than people realize – re-evaluate, reassess, re-position – tell our story

CULTURE AS A KEY CITY STRATEGY IN LONDON

Respondents felt that the City was failing to “walk-the-talk” in regard to its position on culture. Comments on this topic included:

- Culture is vitally important to the London of the future
- The City needs to demonstrate that it is serious about culture
- The City needs to be the champion and show leadership
- London needs a broad vision for cultural facilities supported by good plan; planning needs to be a city wide process; first class but not elitist; placing a high value on excellence
- The plan should produce actionable items and measurable economic benefits
- The City should adopt a collective approach to all capital funding private and public

CULTURE AND DOWNTOWN DEVELOPMENT

Respondents generally viewed the downtown core as the locus for cultural development. Comments on this topics included:

- Downtown does not yet hang together as a place
- There is only one downtown; focus on Dundas/Richmond as the centre
- Learn from the JLC; its positive effects have been proven
- Densify downtown; it has 2% of the city's area but generates 9% of city's taxes
- Make downtown a whole and complete experience; make it everybody's downtown; make it THE place to go.
- Draw people to the Thames River

- Reinforce the investment in downtown and build critical mass; continue to provide financial incentives
- Make best use of re-design of Dundas Street as programmable space
- Create identifiable places so that the public will know where to go and what they can expect to see; this will build audiences
- Define cultural areas and zones; create districts -- no more stand alone facilities
- Cluster arts, food, shopping; get some short term “wins”
- Get access to under utilized buildings downtown
- Downtown is 1st priority, Old East is 2nd ; create a cultural corridor
- Don't spread cultural infrastructure too thin; the city is not big enough to support satellites
- Make partnerships with libraries as cultural delivery locations outside the downtown core

CHALLENGES TO CULTURAL INFRASTRUCTURE IN LONDON

Respondents felt that the source of London’s cultural infrastructure problem was obvious and so was the solution – a comprehensive city-wide plan. Comments on this topic included:

- London has great organizations poorly housed in facilities not meeting their needs now, let alone in the future
- London has too many aging facilities that are too spread out and most are not “market ready”; all small facilities are at risk
- Some facilities are supported by the City, some are not
- There is no comprehensive process to identify capital needs

and priorities; and no single authority to advocate and carry forward

- The City needs to assess the inventory city-wide and match the inventory to the needs; the City needs to be the integrator
- Make a plan which stops the response-to-crisis approach; the process should trump “priorities”
- Make the initial investment in key projects that are seen to be “winners”
- Create an economic model which links capital investment to potential revenue streams
- Market the benefits to the community with a good communications plan
- The City should develop a cultural identity and signage program
- Pursue architectural innovation and excellence

ARTS CLUSTER/GENERATOR

Several respondents alluded to the need for cultural development space to ensure continuing cultural growth and sustainability. Comments on this topic included:

- London must create the conditions for emerging and young artists and for artistic R+D; these artists are the future, don't let them leave
- Create places where there is a density of cultural activity
- London needs a combined facility with preparatory spaces, rehearsal spaces, artist live/work spaces
- This facility should be a “fusion centre” – arts, culture and new

technology

- This facility should be a place for youth and should include gathering places for specific artistic disciplines (e.g., writers)

PERFORMING ARTS FACILITIES

Respondents in the field of performing arts focused on a purpose built small theatre and a venue to replace Centennial Hall. Comments on these topics included:

- London needs a 400 seat theatre to support drama, dance and music theatre at the formative level; neither Wolfe Performance Hall or the Convention Centre can do this
- City of London's size must also have a Performing Arts Centre (PAC); while the PAC market has changed since the idea was first developed, a PAC is still needed
- For years, London has been losing business to other cities which have facilities in the 1500 seat range
- Get the entertainment business to pay attention to London
- A PAC located east of the core would strengthen links along Dundas
- The proposal by the Grand Theatre for expansion on its site is a good plan

CENTENNIAL HALL

While there were numerous references to Centennial Hall (none favorable) by respondents, there was a focused discussion with relevant City staff and advisors. This discussion reviewed Novita's 2007 report to the City on the future of Centennial Hall. The following points were covered in this discussion:

- Centennial Hall is a poorly designed structure whose re-development costs would equal new construction
- The structure is beyond its service life and the City's annual spending on capital repairs is money that could be better spent elsewhere. The building has been updated over the last 7 years (electrical, acoustics, interior/exterior, finishes, roof, equipment and many functional items) and made safe to operate with a minimal cost compared to replacement.
- Centennial Hall is badly designed performance facility; many acts cannot play there because of its limitations and revenue opportunities are being lost
- The site has become increasingly isolated from the other centres of London's culture; the site is more appropriate to other uses
- The City needs to examine its replacement options in context of a city-wide capital plan including the needs that a new hall might serve
- The estimated time frame to create a new facility is in the order of 10 years

HERITAGE PROPERTIES AND MUSEUMS

Respondents suggested that heritage properties and museums were somewhat the forgotten children in the world of cultural facilities. Comments on this topic included:

- The City is seen to be allowing inappropriate uses and poor enforcement – there are other cities who use their heritage assets very effectively
- Some respondents questioned the City's application of good heritage conservation practice in the maintenance of its buildings.

CITY AS CAPITAL DEVELOPMENT FUNDER FOR COMMUNITY FACILITIES

Respondents generally agreed that most organizations suffer from having the responsibility for managing their facilities -- that they often lack both the skills and budgetary resources. Comments on this topic included:

- City has to take more responsibility for building operations
- The City currently takes a different approach for different organizations; it needs clearer policy for support of facility operations
- The City should separate its support for facility operations from program delivery; the city has management resources to plan and manage cultural facilities
- Facility support decisions should not be the responsibility of Council, only budget decisions for a Capital Grants Program (Capital Agents Program)
- A community cultural facility sustainability plan is required which includes an agreement mechanism for funding the cost of facility operations

Once again, respondents expressed the need for leadership by the City in capital development and in funding innovative capital funding models:

- The City must be first in the game as the major player which would bring other funding partners to the table
- The City should lever its support to generate support from others
- The City should create a stable funding base
- The City does not necessarily need to be owner of property; there are many development models and financing models;

City policy needs to recognize autonomous and independent owners

- Old East is ripe for investment by private sector – investment by the City would build confidence in other investors
- The City should get some sites land banked and fund “beta” sites

SUBMISSIONS TO PROSPERITY COMMITTEE

Respondents were generally critical of this initiative. Comments on this topic included:

- Why are these proposals being requested when the City has said that there is no money?
- This request for proposals is damaging because it is raising expectations that cannot be met
- How are the proposals being evaluated and what commitments will be made?

CULTURAL TOURISM

Several respondents noted the need to draw visitors, not just from further away, but from inside London itself. This is a large and accessible market whose support through their votes and taxes is not incidental.

Connecting London’s cultural places and events with its agricultural heritage and current agricultural industry was also seen as important.

PARTICIPANTS

The following 30 individuals contributed to the comments which appear in the foregoing report:

Judy Amoils, CBRE Real Estate Consultants

Heather Blackwell, Western Fair

Clark Bryan, Aeolian Hall

Bill Campbell, City of London

Lori Da Silva, London Convention Centre

Sandra De Salvo, The Arts Project

John Devito, City of London

Harvey Filger, City of London

Deb Harvey, Grand Theatre

Andrea Hallam, London Heritage Council

Andrea Halwa, London Arts Council

Bernice Hull, Fanshawe College

Sheila Johnson, Fanshawe Pioneer Village

Tom Johnson, City of London

Greg Jones, Centennial Hall

Joan Kanigan, Museum of Ontario Archaeology

Maryse Leitch, Palace Theatre

Janette MacDonald, Downtown London BIA

Grant Maltman, Banting Museum

Brian Meehan, Museum London

Sarah Merrit, Old East BIA

Margaret Mitchell, London Public Library

Kathy Navakas, London Fringe Festival

Brian Ohl, John Labatt/Bud Centre

James Patten, McIntosh Gallery

Joe Swan, Executive Director of Orchestra London

Janet Tufts, Canadian Medical Hall of Fame

Bill Warner, City of London

Margaret Wilkinson, London Public Library

John Winston, Tourism London