Date: March 5, 2019

To: Chair and Members
   Committee of the Whole – Community Development

From: Paul Moore
       General Manager, Community Development

1.0 Type of Report
Consent Item [ ]
Item For Consideration [X]

2.0 Topic
Arts and Culture Impact Study [Financial Impact: None]

3.0 Recommendation

A. THAT Report No. 2019-40 regarding the City of Brantford Arts and Culture Impact Study BE RECEIVED; and

B. THAT the recommendations in the City of Brantford Arts and Culture Impact Study BE APPROVED in order to further cultural growth and economic development from this growing sector in the City of Brantford.

4.0 Purpose and Overview

The purpose of this report is to bring forward the City of Brantford Arts and Culture Impact Study Final Report for Council review and approval.

5.0 Background

The Arts and Culture Impact Study was identified and approved by Council as a strategic action of the Municipal Cultural Plan Update in May 2014. The purpose
of the study is to set benchmarks as well as identify opportunities to strengthen or enhance the economic impact of arts and culture in the City of Brantford.

An RFP was issued and was awarded to MDB Insight in May 2018 to complete the Study. As anticipated, the project began in May 2018 and took approximately 8 months to complete, culminating in this final report. Between May and December 2018, MDB Insight completed the following project deliverables:

- a detailed literature review of existing community studies, reports and strategic plans;
- preliminary cultural mapping to identify an inventory of local arts and cultural assets;
- survey of best practices for cultural development in comparable-sized municipalities;
- benchmarking of cultural sector activity;
- data collection from a range of community arts and culture organizations as to their current and future needs regarding arts services; working relationships and networks; facilities access and usage; funding levels; resources offered and accessed; and capacity building;
- an economic impact assessment to create a profile of the economic value of the current arts and culture sector in Brantford, including employment information and identification of any clusters of relevant activity among commercial arts industries and the cultural tourism sector; and
- recommendations to enhance the development of the cultural economy in Brantford.

The final report is organized into four sections:

1. Research Findings
2. Engagement Findings
3. Economic Impact Assessment
4. Recommendations
6.0 Corporate Policy Context

This report supports the 2014-2018 Community Strategic Plan Goal 1: Economic Vitality and Innovation Strategic Action 1.7: Continue to develop, expand and promote tourism opportunities in all sectors and strengthen the relationship between arts, cultural, sports and heritage assets of the city.

Enabling Brantford citizens and visitors the opportunity to enjoy a full range of well-supported and maintained arts, heritage, culture, sports, and recreational facilities and programs is one of the long-term desired outcomes under Goal 2: High Quality of Life & Caring for All Citizens in Brantford’s Community Strategic Plan.

Preserving, protecting, and promoting the City's built heritage and natural assets are long-term desired outcomes under the Community Strategic Plan’s Goal of Managed Growth and Environmental Leadership.

Finally, support for arts and culture also furthers with the implementation of the updated Economic Development Strategy (2016) and the Municipal Cultural Plan (2014). The Arts and Culture Impact Study completes Strategic Direction 5C of the Municipal Cultural Plan to undertake an economic impact assessment to define and measure the economic contribution of arts, culture and heritage to Brantford’s economy; the study also provides a starting point to meet Strategic Direction 1G: to undertake a cultural mapping exercise to accurately identify and map Brantford’s cultural assets.

7.0 Input From Other Sources

The completion of the Arts and Culture Impact Study involved the participation of many people and groups, including the Brantford Cultural Advisory Committee, members of the Brant Museums and Galleries Association and Brant Performing Arts Network, and many other industry partners and citizens. MDB Insight was retained to complete the Economic Impact Study and the complete engagement process and results are summarized in the Final Report.

8.0 Analysis

8.1 Objectives and Project Deliverables

MDB Insight was asked to complete the following objectives as part of the Arts & Culture Economic Impact Study:
1. Assess and articulate the impact of the cultural sector on Brantford’s economy to provide important new data and bolster advocacy efforts to/from the business community, municipal council and the public at large;

2. Measure and promote the economic vitality of culture in Brantford;

3. Promote and inform strategic initiatives for developing and growing Brantford’s cultural sector and the area’s broader economic prosperity;

4. Develop an easy-to-use framework for updating economic data and performance statistics related to the cultural sector in Brantford and tracking economic impacts over time;

5. Identify the community’s strengths and weaknesses, including existing networks and working partnerships, thereby highlighting gaps/needs in the cultural community that need to be addressed; and

6. Identify next steps.

8.2 Research Findings

MDB Insight conducted a comprehensive assessment of the current cultural sector (arts, cultural industries, and heritage) in Brantford, including an understanding of current cultural assets, strengths, weaknesses, opportunities, and a strategic analysis of the current planning environment as it relates to arts and culture. A number of background municipal documents were reviewed, and are listed as an appendix to the Arts & Culture Impact Study Final Report.

8.2.1 Preliminary Cultural Mapping Exercise

MDB Insight also conducted a preliminary cultural mapping exercise. Cultural mapping is an ongoing process that identifies community cultural assets to broaden and deepen information on cultural resources in a community over time. The consulting team worked with staff to identify a Brantford-specific Cultural Resource Framework (CRF) within which a range of existing information could be consolidated. The CRF developed for Brantford included three broad categories: Arts, Cultural Industries, and Heritage.
The preliminary cultural mapping exercise identified approximately 235 assets in Arts, Cultural Industries, and Heritage. Of the 235 assets identified, the majority are in the Arts with a total of 146 assets; 44 assets are in the Cultural Industries, followed by 45 assets in Heritage (Figure 1).

Figure 1: Preliminary Cultural Map, MDB Insight, 2018

MDB Insight identified the Brantford Cultural Advisory Committee as an ideal group to continue as an ongoing Cultural Mapping Working Group. Representation from across all relevant departments is essential to the effective ongoing continuation of the cultural mapping work.

8.2.2 Cultural Sector Assessment

This study also included a cultural sector assessment, which is intended as an educative piece for the City to illustrate the current nature and composition of cultural goods and services in the community, the connections to other industry sectors and contributions to economic growth. Cultural industries are defined as those businesses with a primary focus of creating, producing, distributing cultural goods and services, and trade in intellectual property rights. A complete list of the industries included in this definition can be found as an appendix to the Final Report.
The assessment also included comparisons to similarly-sized municipalities. The cultural sector assessment identified the following:

- The proportion of cultural industries in Brantford (6%) is lower than provincial and national averages of 10% and 9%, but is comparable to the proportion of cultural industries in Guelph and Cambridge;

- The top cultural industries in Brantford are *full-service restaurants* (81 enterprises) and *computer systems design and related services* (except video game design and development) (59 enterprises);

- Cultural industries in Brantford grew by 10% (40 enterprises) from 2014 to 2017;

- Growth in the Cultural Industry Labour Force in Brantford was 15% (1,004 jobs) from 2006 to 2016 is comparable to growth in Cambridge (1,581 jobs);

- Approximately 1,611 (3%) of all occupations in Brantford were cultural occupations, which is comparable to provincial and national averages of 5% and 4%; the top cultural occupations in Brantford were Professional occupations in advertising, marketing and public relations (12.8%);

- Cultural occupations in publishing, motion pictures, broadcasting and performing arts, visual artists, artisans, craftspersons and creative designers are limited in Brantford; and

- The cultural occupations experiencing the most growth are: musicians and singers; graphic designers and illustrators; and interior designers and interior decorators; while the occupations experiencing the most decline are: authors and writers and photographers.

### 8.3 Engagement Findings

This project involved direct, targeted consultation with staff and the broader arts and culture community in the form of one-on-one interviews, an online survey, and two focus groups. Each stakeholder was asked a series of questions pertaining to the current opportunities available locally and regionally, and the challenges that need to be overcome to achieve the sustainability and prosperity of the arts and culture sector.
In October of 2018, a telephone survey was administrated to a random selection of businesses across Brantford. A total of 25 businesses were surveyed. The businesses surveyed included non-profit cultural groups and for-profit cultural businesses and creative industries. Businesses were surveyed to gain insight on Business Climate, Future Needs, and Economic Impact. The results of the survey included:

- 28% of businesses surveyed anticipate expanding or undertaking renovations with the next three years;

- 40% of businesses identified that over the past 12 months the business revenue has increased, while another 40% identified that revenue has not changed substantially over the past year. Businesses are optimistic that over the next 12 months their revenue will increase or remain the same;

- Businesses are choosing to stay in Brantford and are optimistic about Brantford as a favourable environment to expand and grow business revenue;

- 48% of businesses rated Brantford as an 'excellent' place to grow arts and cultural industries while 20% rated Brantford as 'fair';

- Access to private sector funding (donations or sponsorships) and access to philanthropic support were factors with low levels of satisfaction at only 48% and 44%, respectively. Those who were dissatisfied agreed in saying that arts and culture do not seem to be a priority for the local government.

When businesses were asked about the most important initiative that could be undertaken to strengthen the arts and culture sector in Brantford, the majority of businesses indicated: the need to increase the funding and grant opportunities for this sector; the need to continue to revitalize the downtown in Brantford as the main cultural core of the city; and the possibility of building a medium-size capacity venue for events.

Two focus group sessions were also conducted in October 2018, which engaged thirty members of the local creative industry community. The two focus groups discussed the topics of “Marketing Culture: Collaborative Approaches” and “Growing Brantford’s Creative Industries and Creative Entrepreneurs”.

While generally there is a strong foundation on which to develop an argument for the economic contributions of arts and culture to Brantford, a number of themes emerged throughout the engagement sessions that pointed to issues, gaps and opportunities that could be addressed in order to sustain and support arts and culture as an economic driver in Brantford. These themes include:

1. Developers and cultural enhancements
2. Home grown cultural vibrancy
3. More support systems for grassroots cultural organizations needed
4. Embrace a collaborative environment across all partners
5. Regulating imagination and innovation
6. Local businesses need to buy into cultural development
7. Lack of creative space in Brantford
8. Cultural momentum/appetite for culture at an all-time high

Further information about the current issues, gaps and opportunities that could be addressed can be found in the Final Report (Appendix A, pp. 29-30).

8.4 Economic Impact Assessment

This section of the report assessed the following:

1. The relative size of the Brantford Census Metropolitan Area (CMA)’s Arts and Culture industry overall in terms of both GDP and employment (2016);

2. The past (2001-2018) and projected future (2019-2031) trends in the Arts and Culture industry in Brantford in terms of both GDP and employment; and

3. The economic impact of the Arts and Culture industry in Brantford on the broader economy.

Some of the key findings of this study in terms of economic impact include:
• 34 Arts and Culture industries in the Brantford CMA directly generate $523 million of gross domestic product (GDP);

• The Arts and Culture industries indirectly generate $708 million of spending, $242 million of GDP, $144 million of labour income, and 2,582 jobs;

• $383 million of direct impact wages and salaries for Arts and Culture industries workers generates $315 million of household spending in the CMA, further generating $82 million of GDP, $39 million of salaries and wages, and 722 jobs;

• The total direct and indirect impacts of the CMA’s Arts and Culture industries result in $2.1 billion of spending (output or sales), $847 million of GDP, $566 million of wages and salaries and 11,849 jobs.

Overall, the Arts and Culture GDP accounts for 10% of the CMA’s total GDP, and has remained consistent year-to-year. However, employment in the Arts and Culture industries continues to grow (currently 8,545 jobs) and represents 16.5% of the total number of jobs in the CMA. Specifically, there is a growing role for accommodation and food for professional, scientific, and technical service within the CMA’s Arts and Culture GDP and employment.

### 8.5 Recommendations

The Arts and Culture Impact Study provides the City with recommendations to help position and prepare the City for future arts and culture strategic planning and investment. Based on their findings, MDB Insight identified the following six recommendations:

1. Establish a Cultural Team composed of City of Brantford staff and meet quarterly to share information and build understanding related to cultural development and planning culturally.

2. Establish a Cultural Leadership Roundtable to advocate and support the growth of the arts and culture economy in Brantford.

3. Convene an Annual Cultural Summit to communicate achievements in the arts and culture sector and to seek community input in identifying new and emerging issues.
4. Acknowledge and collect a database of home grown talent and communicate that message at large to boost the identity of the city beyond that of its core offerings.

5. Continue to promote and foster opportunities to connect local creative individuals with local business support services.

6. Examine the feasibility of introducing appropriate cultural spaces suited to addressing specific cultural development needs or opportunities.

8.5.1 Roles

MDB Insight noted in the Recommendations section of the report that there is a shift occurring in all levels of government from the traditional “planner-provider-deliverer” model to an increasingly collaborative “enabler-convener-catalyst-broker” approach to advancing public agendas. Throughout the engagement sessions, there was a call for the City to play various roles to support the development of the arts and culture sector. These roles include:

- Planning and Policy - integrating culture into plans and policies across all departments. Applying a cultural lens to municipal planning and decision-making;

- Partner - establishing and sustaining relationships with external partners, with organizations within the cultural sector and with community and business partners;

- Facilitator and Convenor – building connections, strengthening collaboration;

- Promoter and Champion – acting as an advocate for cultural development within the City and beyond; and,

- Funder and Provider – continuing to invest in cultural development and deliver programs and activities.

8.5.2 Key Performance Indicators (KPIs)

Performance measures and indicators have become increasingly utilized by Canadian municipalities over the past decade. The five KPIs as recommended by the Canadian Urban Institute in
Municipal Cultural Planning Indicators and Performance Measures Guidebook (2011) are:

1. Fostering Creativity
2. Creating Wealth
3. Creating Quality Places
4. Strengthening Social Cohesion
5. Organizational Change

Developing KPIs for the City of Brantford is determined by what “story” the City wants to tell, which is generally tied to City plans and priorities. Once a suite of indicators has been selected, it is recommended the City work collaboratively with arts and culture leaders to monitor progress in the sector through a regular Report Card (building upon the current monitoring process of the current Municipal Cultural Plan Annual Report). This Report Card would update Council, the arts and culture sector, and the community at large on progress in the sector, as well as highlighting new initiatives.

The recommendations assume that current staffing and budget levels will be used to implement the Plan and does not require the commitment of additional resources at this time. Where special projects or future growth require additional resources beyond what is included in the annual operating budget, these requests will be brought to Council for further consideration.

8.6 Implementation

Many of the recommendations within the Arts and Culture Impact Study have been addressed within the Economic Development Strategy (2016) and the Municipal Cultural Plan (2017). The strategic actions within the Municipal Cultural Plan are reported on annually through the Brantford Cultural Advisory Committee. Staff will also be undertaking a capital project update to the Municipal Cultural Plan in 2020 and will ensure that all recommendations in the Arts and Culture Impact Study are reflected, prioritized and assigned to appropriate staff and partners.

9.0 Financial Implications
There are no immediate financial implications as a result of this report. Many of the recommendations are already included in the work plans of staff.

One-time costs associated with the implementation of any additional activities will be included in the operating or capital budgets for the appropriate budget year, or will be brought directly to Council for consideration. Any applicable capital projects and operating cost adjustments will be proposed through the Estimates process annually.

Where possible, funds may be leveraged from other sources, including senior levels of government, to support the implementation of the Arts and Culture Impact Study and the Municipal Cultural Plan.

The total budget for this project was $75,000, funded through the Economic Development and Tourism Department’s Capital Budget (ED1702). All final invoices have been paid; this project cost $42,000 resulting in a surplus of $33,000.

10.0 Conclusion

The Arts and Culture Impact Study was an 8-month process that engaged a variety of stakeholders while researching comprehensive data about the economic impact of arts and culture in Brantford. MDB Insight conducted a comprehensive review of corporate plans and policies, recent data, and community engagement to develop clear recommendations, roles and key performance indicators to benchmark and guide Brantford’s cultural development moving forward.

Staff recommends that Council approve the Arts and Culture Impact Study Final Report and proceed with implementation of the Final Report Recommendations.

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Attachments:

Appendix A: Arts & Culture Impact Study Final Report (January 2019), MDB Insight

In adopting this report, is a by-law or agreement required? If so, it should be referenced in the recommendation section.

By-law required [ ] yes [X] no
Agreement(s) or other documents to be signed by Mayor and/or City Clerk [ ] yes [X] no
Is the necessary by-law or agreement being sent concurrently to Council? [ ] yes [X] no