

IMPACT ASSESSMENT OF THE ARTS + CULTURE SECTOR

Vancouver Island + Gulf Islands
Super Region



DIGITAL INNOVATION GROUP



Agenda



1. Social and Community Impacts



3. Business Impacts



2. Economic Impacts



4. Looking Ahead

About Nordicity

Nordicity is a leading global consulting firm specializing in policy, strategy, and economic analysis in the media, creative, cultural and information and ICT sectors. Nordicity leads **arts impact studies and cultural planning** for a variety of clients, locally and globally.



Global firm with associates around the world
and offices located in:
Vancouver | Toronto | Ottawa | London (UK)

~1500 Responses

- Cross-regional representation including:
 - 800 artists
 - 150 cultural organizations
 - 160 representative of local businesses
- 80% of respondents identified as over 50
- Most respondents (77%) identified as female.



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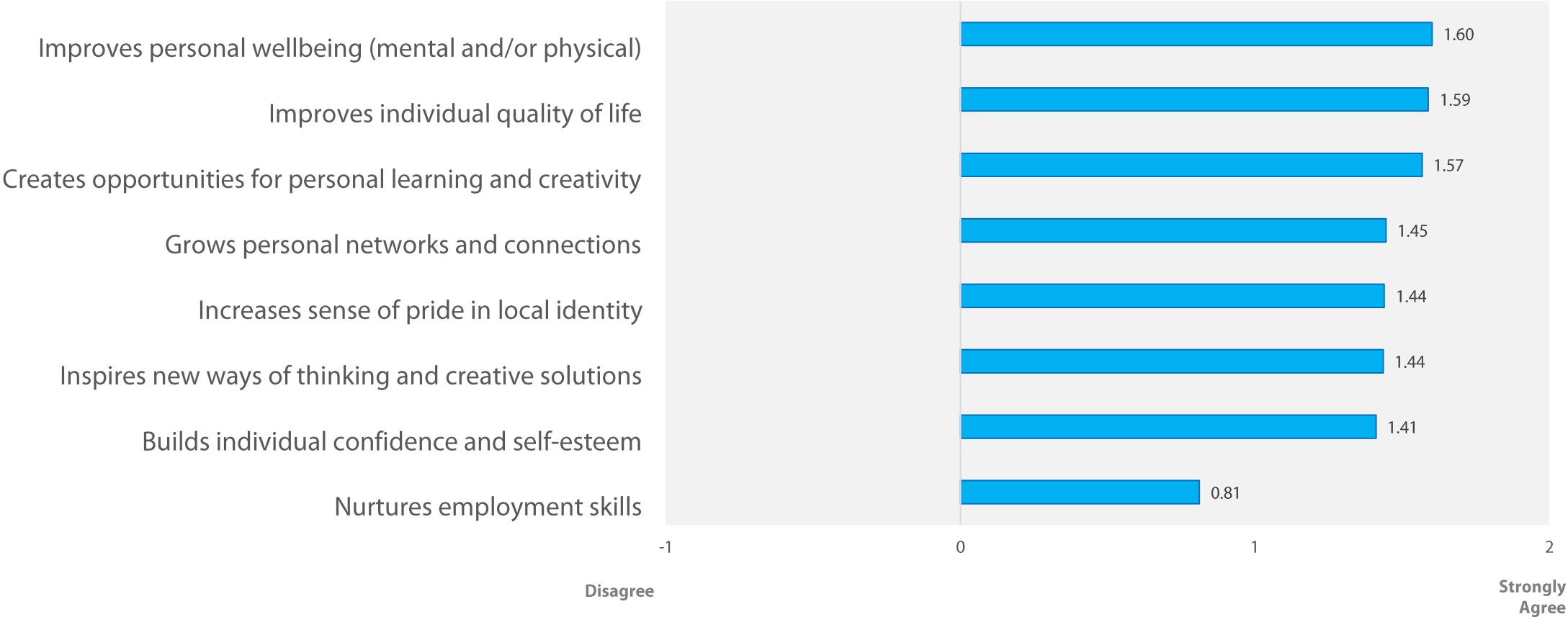
SOCIAL + COMMUNITY IMPACTS

Wide-ranging Participation

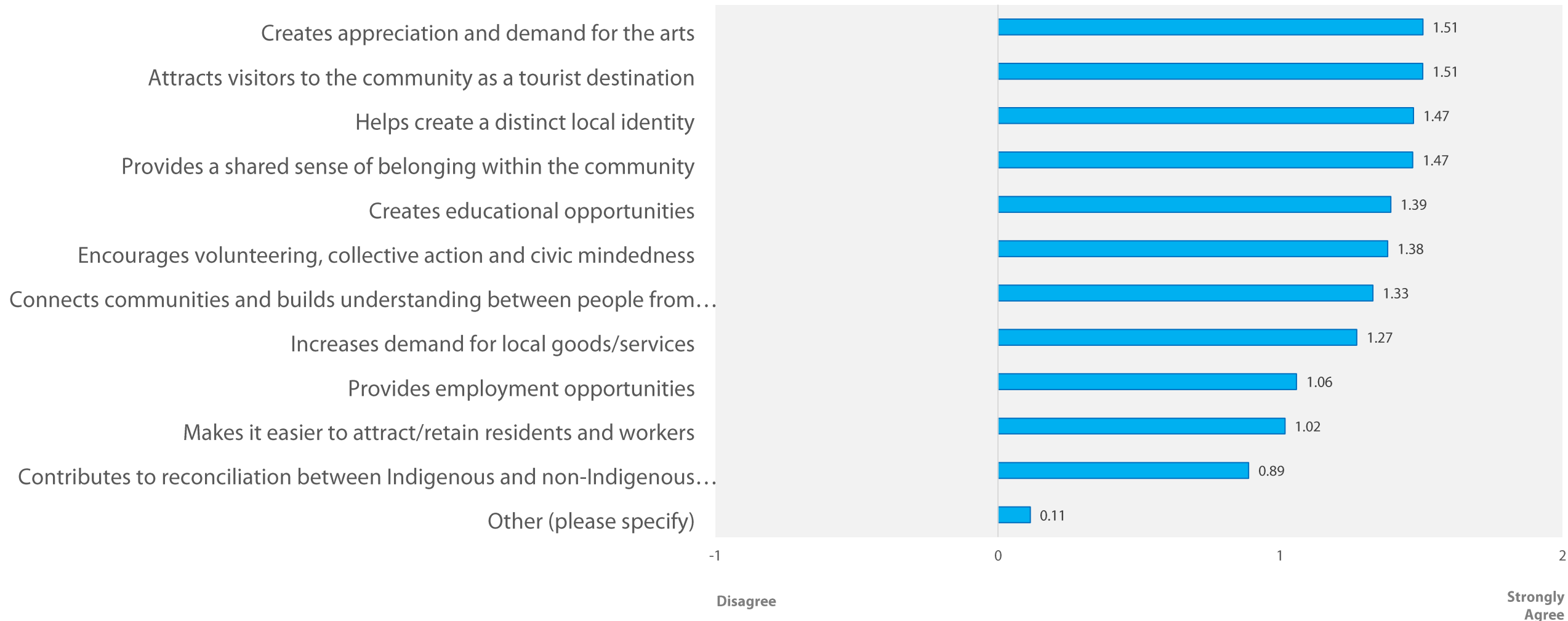
- **77% interact with digital content** and **68% create art** several times a week or more
- **Working, volunteering or collaborating** with cultural organizations
- **69%** indicated that they attend arts and culture **events more than once a month**

On average, respondents indicated spending roughly **\$300 per year on consuming art and culture** in the region

Social Impacts



Community Impacts



Social and Community Impacts

Analyzing **non-economic impacts** using Matarasso's thematic framework:

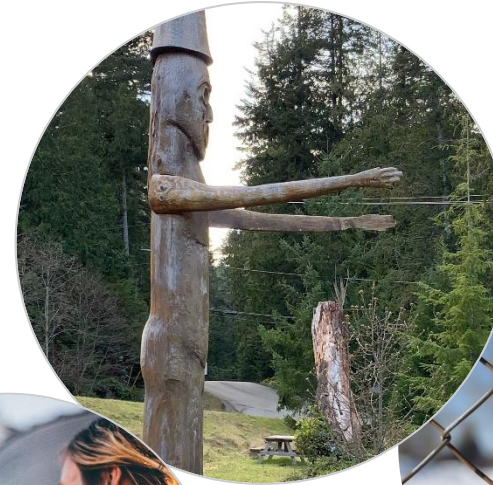
Community
Empower-
ment



Imagination & Vision



Local Image
& Identity



Personal
Development



Social
Cohesion



Health
& Wellbeing



Social and Community Impacts

Health and Wellbeing

- Improves mental health outcomes – individuals feel **happier and healthier**
- Encourages physical participation which leads to more **active citizens**
- Used as **therapy** in programming in different sectors, e.g. healthcare
- Seen as an essential service, making communities **better places to live**, contributing to a sense of wellbeing

As an individual with a disability, music is a social convener and therapy for my damaged brain.

Personally, it has helped my mental health, and provided me connections to other people with similar struggles.

Art is fundamental to quality of life, as places with vibrant arts are great places to live!

- Interview and Roundtable Participants



Social and Community Impacts



Social Cohesion

- Connects people across communities and cultures
- Encourages new **partnerships and inter-sector co-operation**
- Encourages **community involvement, civic mindedness** and volunteering
- Potential to promote inclusion and contribute further to **reconciliation**

Arts and culture is an increasingly inclusive sector that is helping to build understanding between people of different backgrounds.

Arts and culture can create new ways of connecting and interacting with one another.

- Roundtable Participants

Social and Community Impacts

Personal Development

- Creating opportunities for learning
- Encourages experimentation and innovation
- Improves quality of life through feeling more **independent and confident**
- Increases desire to pursue training which provides new **practical and social skills**



Art education nurtures an appreciation and understanding of the human condition.

Through art I learn from others and have [found] a sense of community.

- Survey Respondents

Social and Community Impacts

Community Empowerment

- Helps individuals and communities **build a sense of shared ownership**
- Nurtures **local democracy** and heightens **sense of individual rights**
- Can **raise difficult questions** and inspire debate on issues that affect society more broadly



Arts challenge the conversation and connect us to issues that may be difficult to talk about.

In an era when discourse can be quite fragile, arts [can be a way to] maintain and grow comradery with ourselves and others.

- Interview Participants

Social and Community Impacts

Local Image and Identity

- Builds stronger communities through creating a sense of **shared identity and place**
- Helps to make communities **distinct and unique**
- Individuals feel more **positive** about where they **live**
- Arts and artists play a key role in **community and downtown renewal**



Art brings colour and joy to the community!

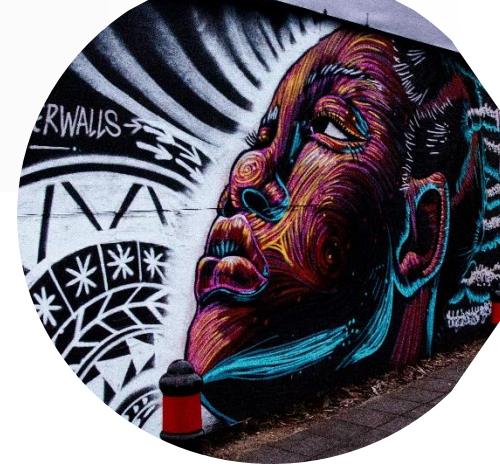
Art is how we make the image of how we feel and see ourselves as Canadian– what it means to be Canadian

- Interview and Roundtable Participants

Social and Community Impacts

Imagination and Vision

- **Artists are thought leaders** – clairvoyants addressing issues of future importance
- The local arts sector promotes human creativity, progress and **innovation**
- Develops individual and collective **ideas** and **understandings** of different issues



*Art expands the minds of people
and makes life more vibrant!*

*Arts allow people to express
things in ways that they may find
difficult to express.*

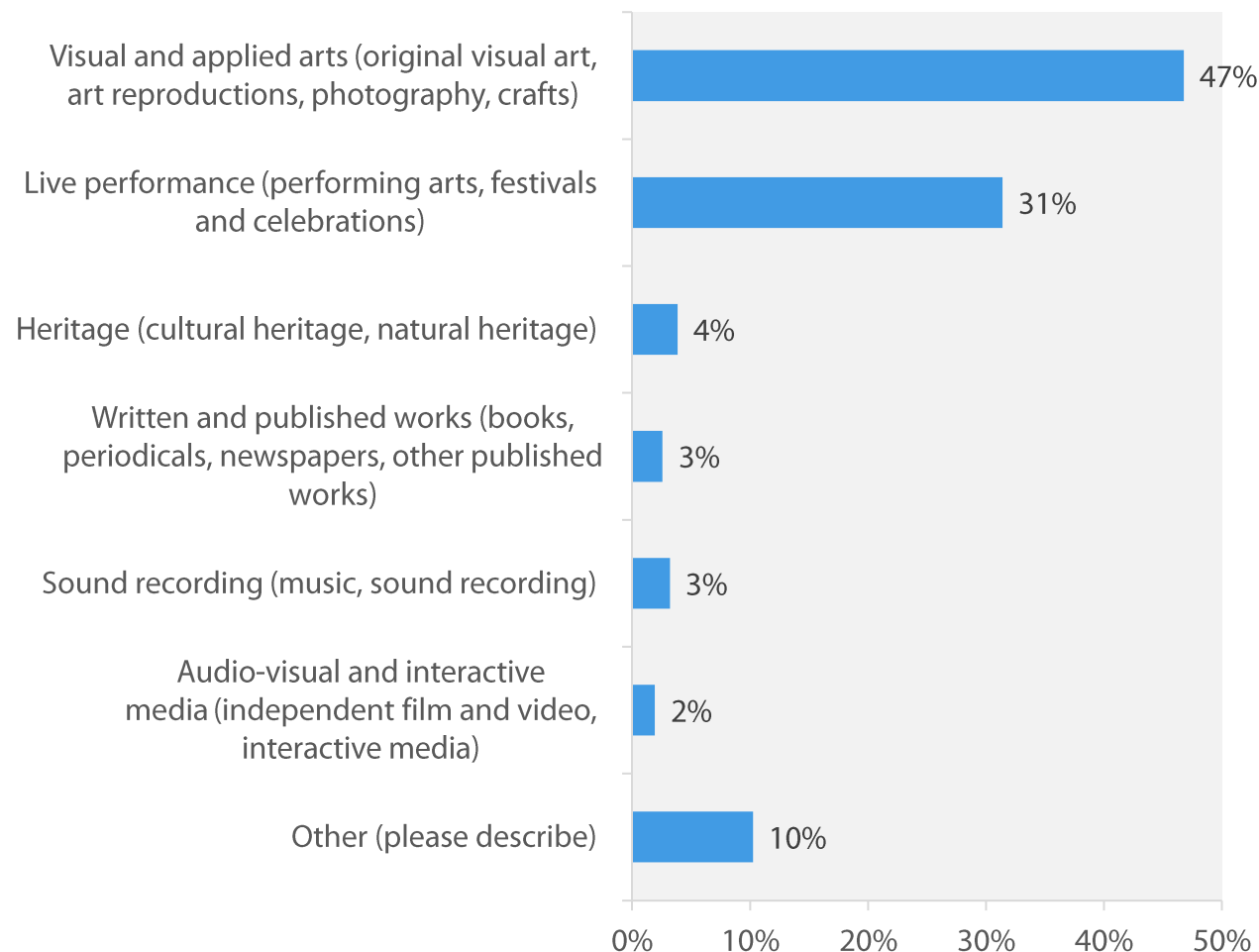
- Interview Participants

ECONOMIC PROFILE + IMPACTS



Cultural Organization Profile

- More than 1,100 organizations identified through the survey and online databases
- Large cohort of small, mature organizations mostly in visual arts and live performance
- Average revenue: ~\$147k
- Average expenditures: ~\$141k
 - Over 90% spent within the region.



Volunteer Contributions



Cultural organizations engaged **more than 40 volunteers in 2019**



Using an average of 120 hours per year and average hourly wage for arts workers, this contribution can **be valued at \$115 million**

Arts Councils

- Operating with few full-time staff, relying on the valuable inputs of volunteers
- Act as important convenors of communities and creatives
- They can also help leverage funding from diverse sources and help others to achieve certain economies of scale

The local Arts Council, through their strong presence and varied offerings, as well as the abundance of creative, highly skilled arts people has so enriched my living experience.

- Community Member

Artist Profile

- More than **35k artists** estimated in the region, with nearly **three quarters practicing visual arts**
- More than **20k artists that are revenue generating:**
 - Average income: ~\$18k
 - Average expenses ~\$14k

	Estimated # of Artists	Artist Population Breakdown	Regional Concentration Ratio
Revenue Generating Artists	22,700	61%	3%
Non-revenue generating	14,500	39%	2%
Total	37,200	100%	5%

Cultural Tourism Profile

- Roughly **three quarters** of organizations with audiences indicated welcoming **visitors from outside of the region**
- While there was a wide range, organizations hosted an **average of 2,000 visitors** from outside the region in 2019

Arts and Culture Tourists Spend More and Stay Longer

Cultural tourism is one of the **largest and fastest growing tourism markets** and research shows the arts and culture travelers:

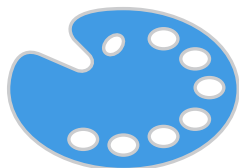
- spend more than other travelers.
- are more likely to spend \$1,000 or more during their stay.
- stay longer than other travelers

Economic Impact

Through more than **\$900 million** in direct economic activity, the arts contributes **\$675 million in GDP** and supports more than **20,000 jobs** (FTEs).

	Organizations	Artists	Tourism	Total
Direct Output (\$M)	174	401	335	910
Total GDP (\$M)	162	322	192	676
Total Employment (FTEs)	3,260	15,630	3,030	21,920
Total Labour Income (\$M)	139	249	138	526

Total Direct Outputs Compared to Other Industries



\$900 Million

**Islands/
Coast Arts
and Culture**



\$624 Million

**Vancouver
Island
University**



\$124 Million

**Victoria
Cruise Ship
Economy**



\$32 Million

**Regional
Dairy
Industry**

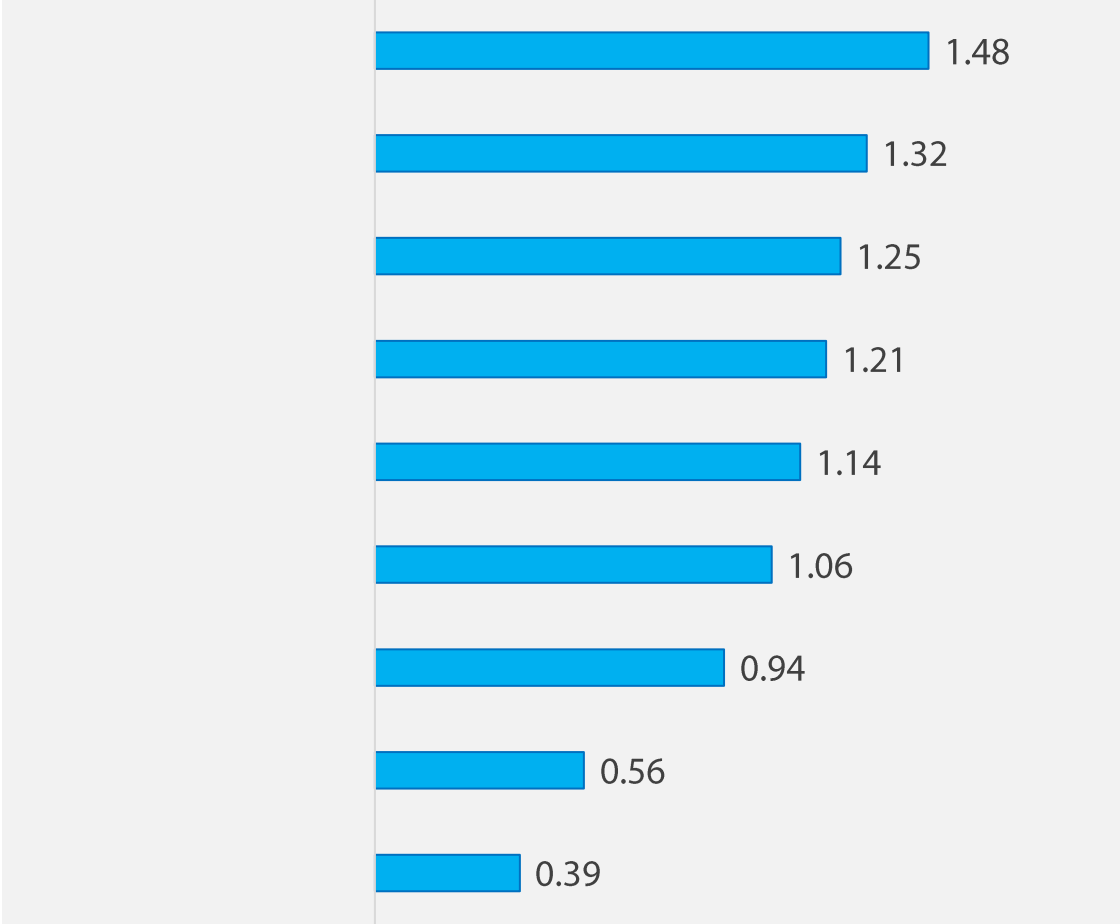
The arts also support ~35% more jobs than the region's forestry sector.

BUSINESS IMPACTS

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Business Impacts

- The local arts sector makes the community a better place to do business
- The local arts sector offers networking opportunities
- The local arts sector grows tourism, increasing demand for our products /services
- The local arts sector helps generate interest in the products/services we sell
- The local arts sector increases local wealth and spending on our products /services
- Artists, creators and/or cultural workers buy our products /services
- The local arts sector attracts more residents, increasing demand for our products /services
- The local arts sector makes it easier to attract/retain workers locally
- My business would not exist without the local arts sector



Business Impacts

Major Impact on Local Business

- Local arts help generate **interest and demand** for other businesses
- Increases **local wealth** and spending on products and services

Attraction of New Residents/Investment

- Arts and culture play an important role in creating **attractive communities** where people want to work and live

*Art assets such as public murals and infrastructure are an extremely important way to **attract people to and create a sense of place within a community.** Creating a sense of place [in turn] **encourages investment.***

- Roundtable Participant

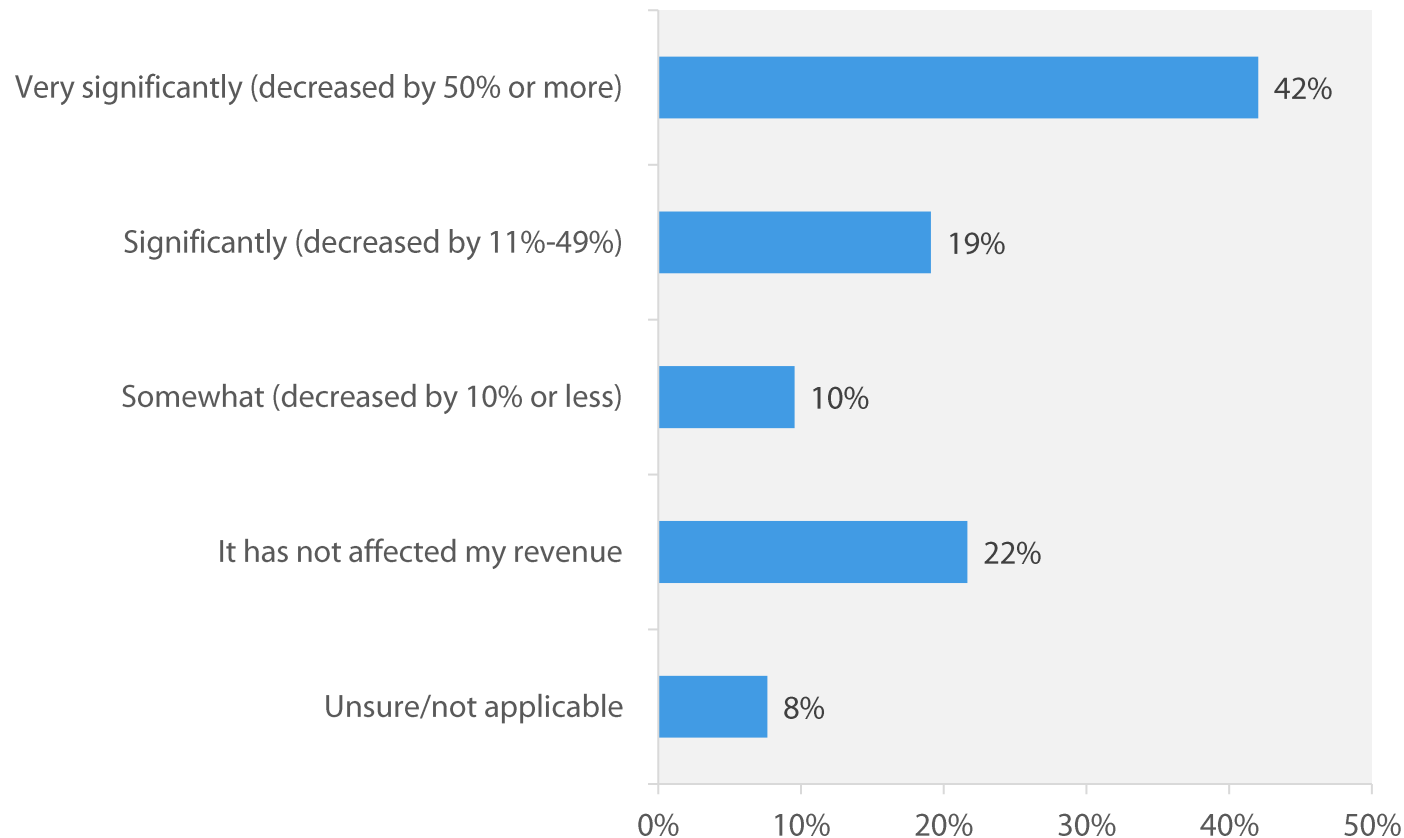
Local Business Spending

- **91%** indicated that they **spend money at local businesses** before/after cultural events
- This spending averaged more than **\$60 before/after participating** in a single cultural event
- Based on organizational audience estimates, this resulted in approximately **\$400 million spent at local businesses**



COVID Closures Impact Local Businesses

- 71% of businesses indicated that **arts and culture closures** negatively impacted their ability to generate revenues

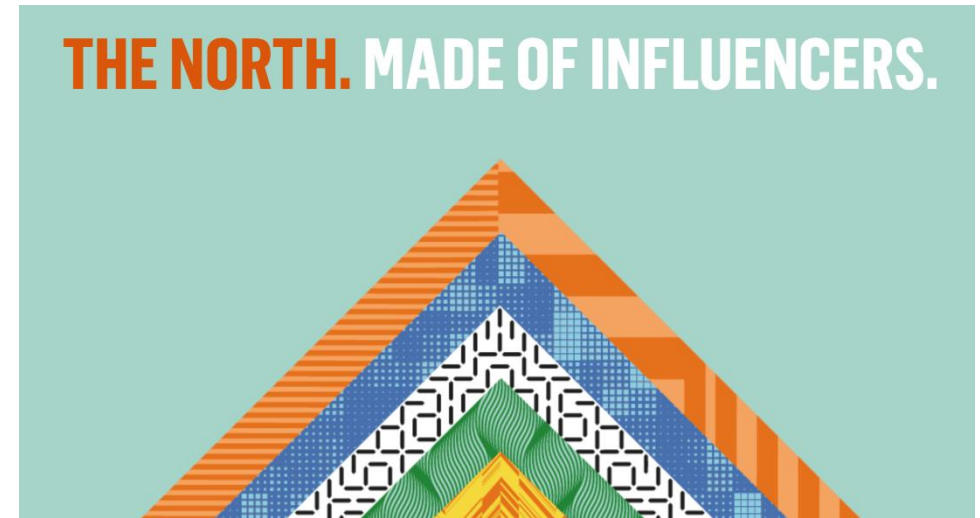


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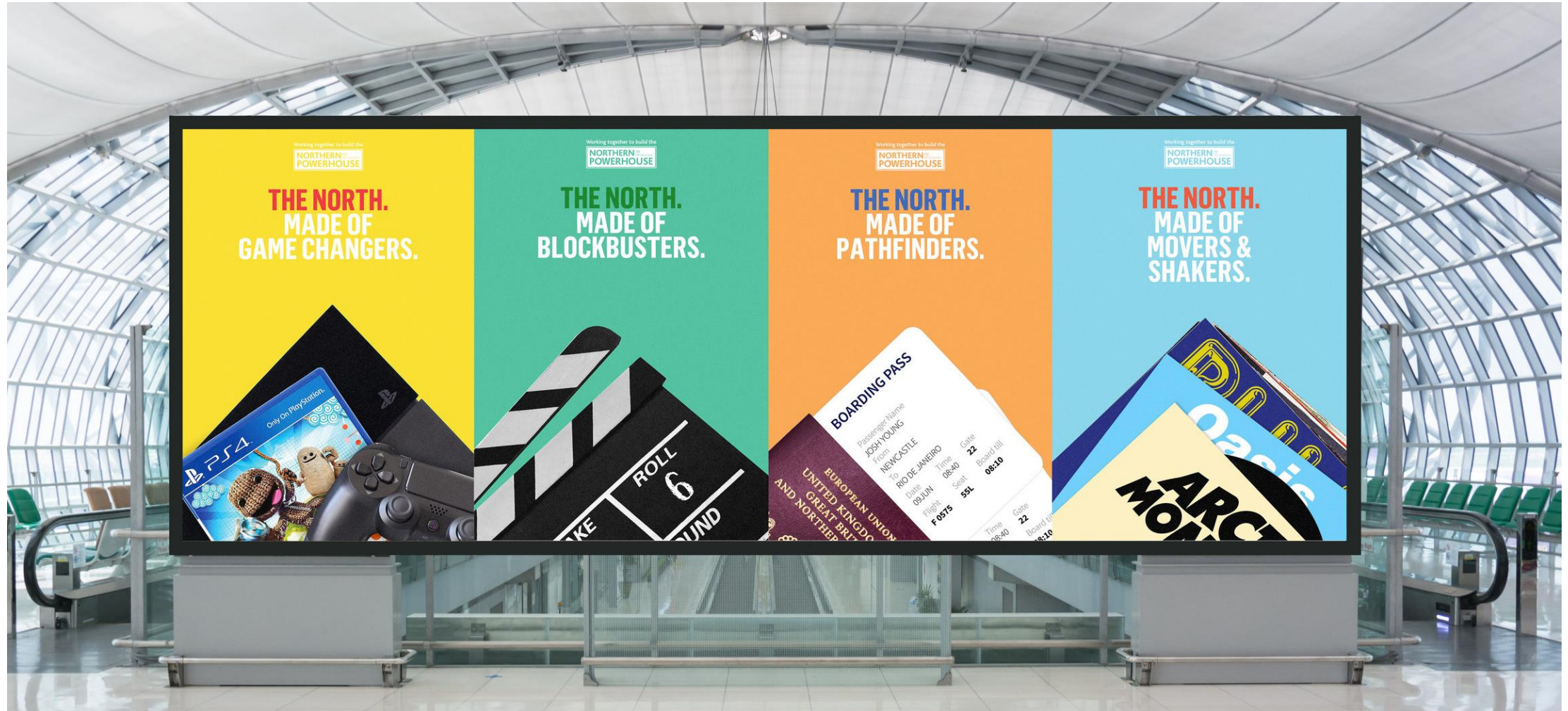
CASE STUDIES: ARTS + BUSINESS INTEGRATION

Case Study: Northern Powerhouse

- Regional economic regeneration strategy in the north of the UK
- Changing perceptions and building infrastructure **to attract tourism, businesses and investment**
- 4 pillar strategy including arts & culture investment
- Impact reports played key role in defining the strategy



Case Study: Northern Powerhouse



Case Study: Northern Powerhouse

**THE NORTH.
MADE OF
FORWARD THINKERS.**

Case Study: Northern Powerhouse

- Key impact study by Arts Council England:

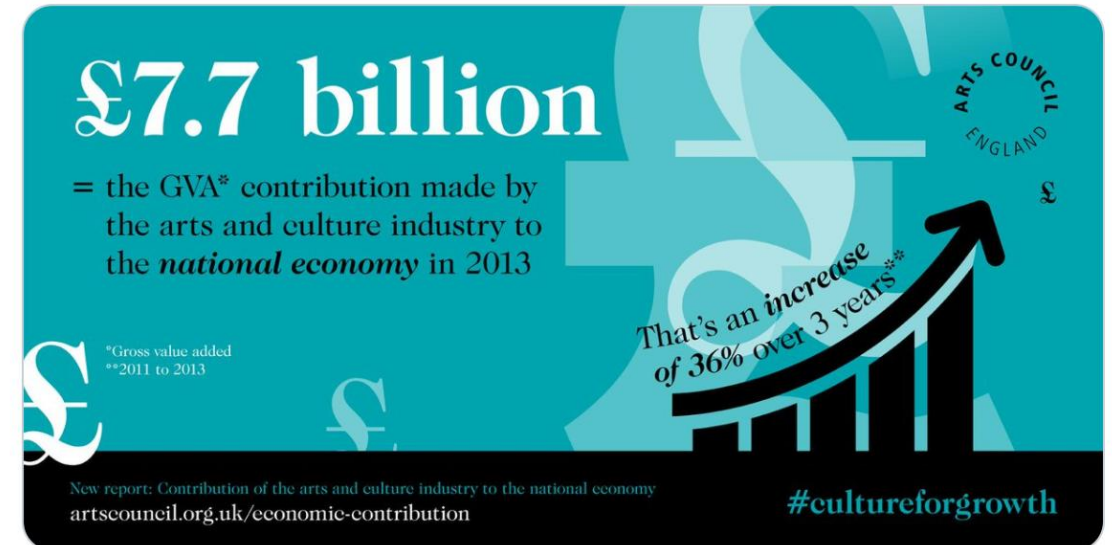
The contribution of the arts and culture to the national economy

- Rich heritage of arts & culture in the North – report demonstrated huge potential for growth in the region
- Informed government policy



Arts and culture industry contributed £7.7 billion to economy in 2013 (increase of 36% over 3 years).

#culturematters



Case Study: Northern Powerhouse

Outcomes to date:

- £20 million fund to help SMEs and £13 billion transport investment
- Great Exhibition of the North: 2-months celebrating art, culture, design
 - Attracted 3.8m visits
 - 90% of visitors said it changed perceptions of host city Newcastle-Gateshead; 84% recommend
- £15m Northern Cultural Regeneration Fund
 - already led to **£10bn increase** in economy size + **287,000 extra jobs**



Case Study: Montréal, Cultural Metropolis

*“Montréal’s ambition is to become a **world-renowned cultural metropolis**, and members of the cultural and business communities are active participants in this grand project.”*

- Montréal Cultural Metropolis Action Plan, 2007-2017

- First Cultural Policy 2005-2015
- 2006 UNESCO Creative City of Design



Image: Tourisme Montréal

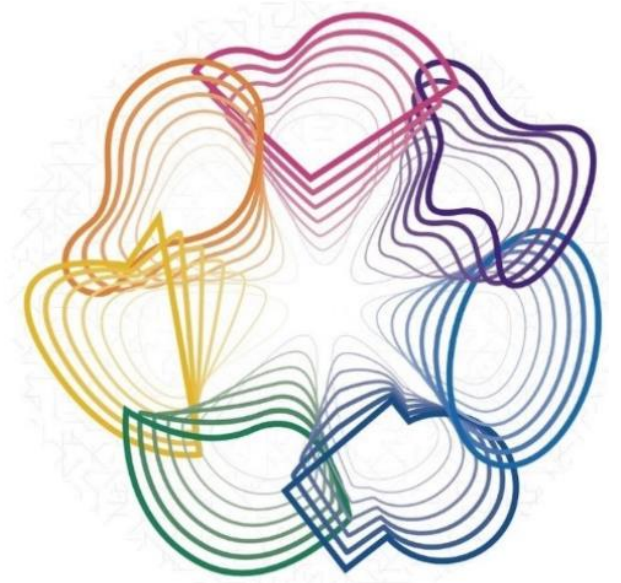
Case Study: Montréal, Cultural Metropolis

- **“Creative City of Design”**
 - UNESCO Creative Cities Network
- Montreal's **Bureau du Design**
 - Prix Commerce Design - adopted by 14 other cities in the world
 - Portes ouvertes (Open Doors) Design Montréal
 - CODE SOUVENIR MONTRÉAL
 - International Design Missions
 - Hosting World Design Summit 2017



MONTRÉAL
UNESCO CITY
OF DESIGN

**UNESCO
CREATIVE CITIES
NETWORK**



Case Study: Montréal, Cultural Metropolis

- 2007-2017 Montréal Cultural Metropolis Action Plan
- 2017-2022 Cultural Development Policy
 - Cultural Tourism key action area
- 2018–2022 Economic Development Strategy [Montréal Geared up for Tomorrow](#)
 - Strategic sectors: **Cultural and creative industries**, life sciences and health technologies, mobility and transport, digital industry, cleantech sector
 - 8 Action Plans, including “Create Montreal”
 - Aiming to attract foreign investments



Case Study: Montréal, Cultural Metropolis

Some highlights:

Quartier des spectacles (Place des Arts district)

- Major urban revitalization project in heart of city
- More than 40 cultural activities daily, free walking tours
- **1.6M spectators** per year
- La Vitrine – providing info on nearly 2,000 cultural organizations
- Total real **economic impacts \$1.5 to 1.6 Billion** (Ville de Montreal and Chamber of Commerce of Metropolitan Montréal, 2015)
- Investment in public squares, cultural quarters, artistic incubators, Creation Hubs for cultural workers
- **One quarter of tourists visit Montréal for its cultural attractions** (Tourisme Montréal, 2016)



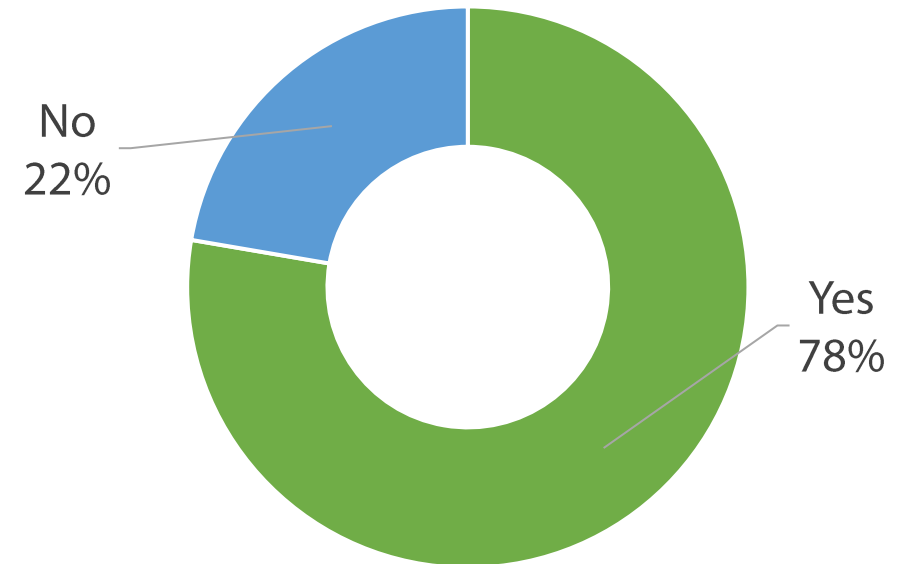
Image: Luminotherapie Festival, Quartier des spectacles, Tourisme Montréal

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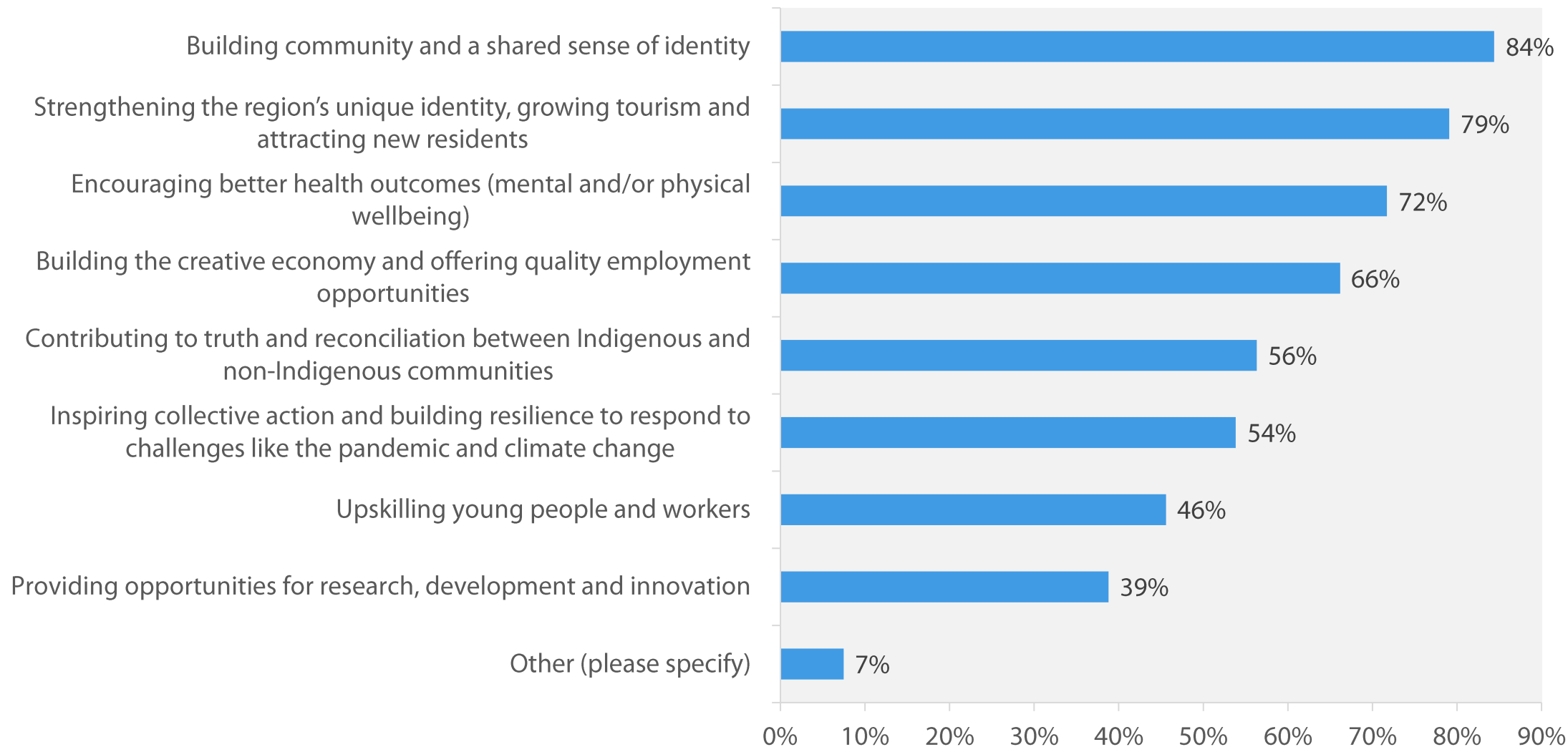
LOOKING AHEAD

Support for the Arts in COVID Recovery

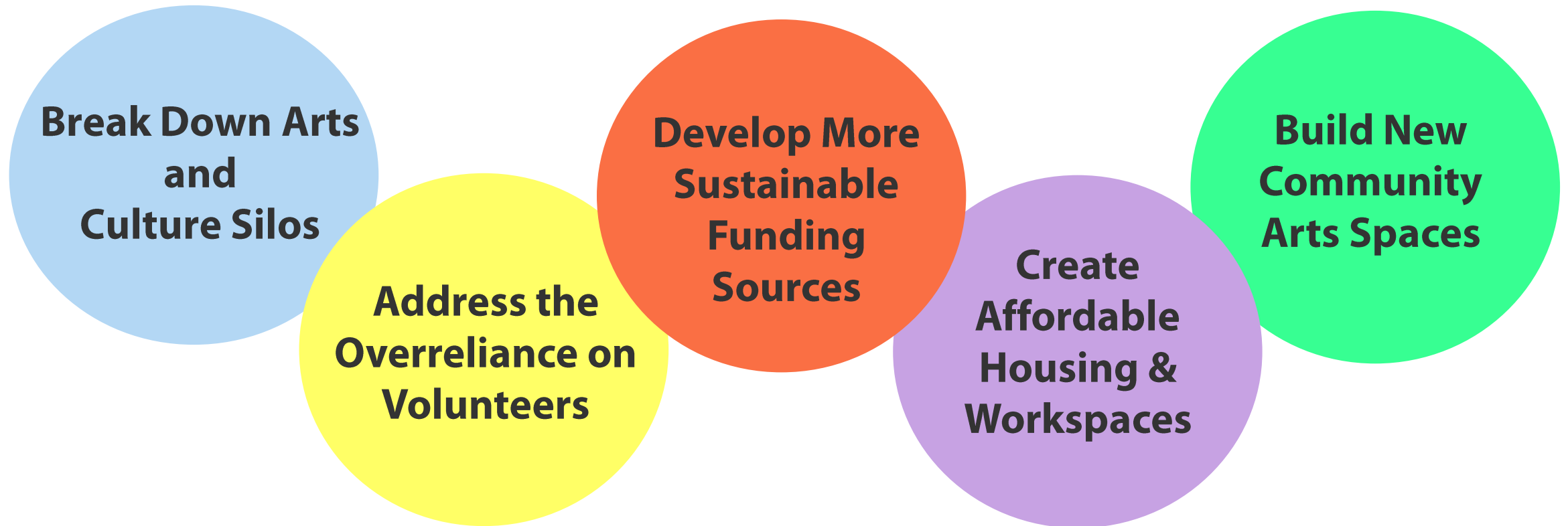
- More than **three quarters** indicated they would consider making an **annual contribution to support arts and culture** in a post-COVID world
- The majority indicated that they would contribute more than \$100, with the estimated **average Willingness to Pay at more than \$200**



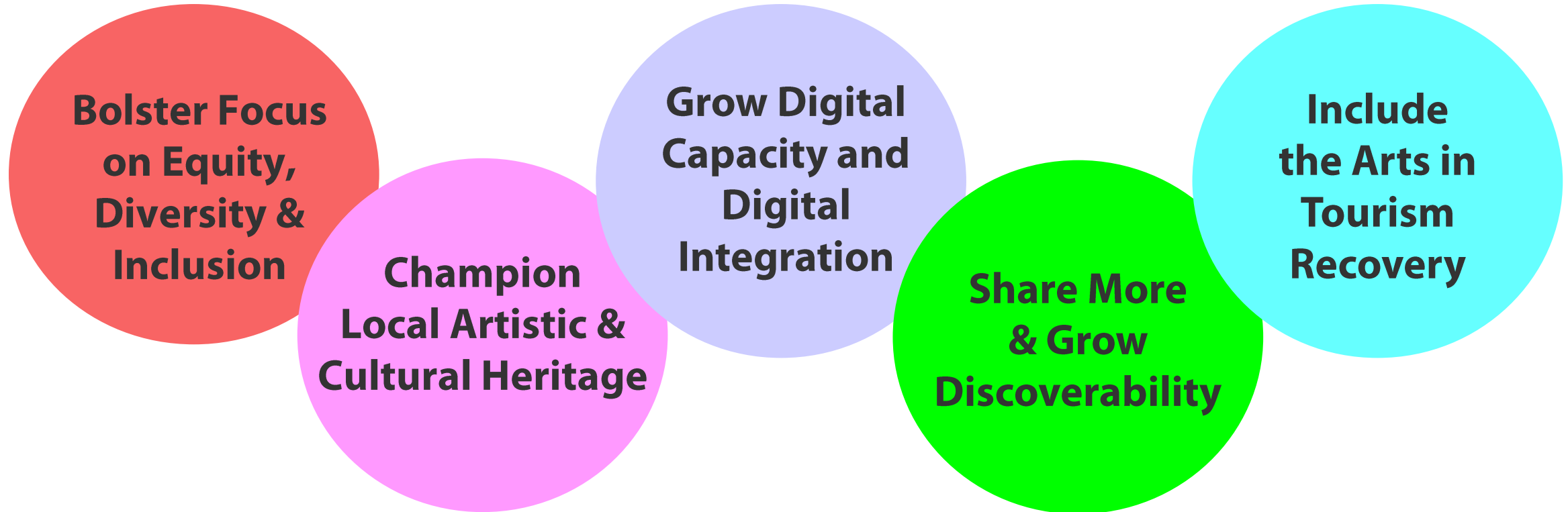
Arts and Culture in COVID Recovery



Opportunities to Enhance the Arts and Culture Offer



Opportunities to Enhance the Arts and Culture Offer



THANK YOU

QUESTIONS? PLEASE CONTACT:

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