

Environmental Scan of the Culture Sector

Ontario Culture Strategy Background Document

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by

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Executive Summary

The Ministry of Tourism, Culture and Sport commissioned this environmental scan of the culture sector as part of the development of the Ontario Culture Strategy. It complements the Discussion Paper *Telling our Stories, Growing Our Economy* with additional background and analysis of global trends shaping Ontario's culture sector and common strategic directions in other jurisdictions.

The Importance of Culture

A significant body of research shows strong evidence of the importance of culture to individuals, communities, and the economy:

- *Individual and social benefits:*
 - Intrinsic benefits include opportunities for entertainment, shared experiences, contemplation, enjoyment, inspiration, and celebration;
 - Social benefits include improved educational outcomes, enhanced quality of life, increased mental and physical wellness, increased social cohesion, and revitalized communities;
- *Economic benefits* include creating jobs, attracting tourism, spurring innovation, and contributing to GDP.

Like Ontario, many jurisdictions are developing or renewing their culture strategies and policies with a view to maximizing the individual, social, and economic benefits inherent in culture.

Forces Shaping the Future of Ontario's Culture Sector

With the **globalization** of capital, labour, information, and markets, Ontario's cultural products will have potentially unlimited scope. However, producers will be competing on a global level for both audiences and foreign investment.

The slowing global **economy** has given rise to private and public **fiscal restraint**, which is expected to continue in the foreseeable future. At the same time, the innovation fostered by culture is becoming more important in the emerging knowledge economy, and its contribution to GDP, through cultural tourism and revitalizing neighbourhoods for example, is becoming better understood. The private and public sectors are exploring ways to maximize its impact, but funds for culture will be deployed more strategically. The culture sector will need to respond to these changes with new approaches to generating revenue and seeking funding.

The **digital transformation** will continue to profoundly change the way culture is produced, distributed, and accessed. Its reach already extends beyond music and film and television production to digitized museum and public library collections. New ways for people to experience traditional or new cultural products will continue to emerge. The digital transformation is creating new business models and new opportunities, along with the challenge of finding and being found by target audiences or consumers among a vast, global array of offerings.

Against this background, Ontario is becoming increasingly diverse, getting older, and becoming more urban. Diversity is an important competitive advantage for Ontario in markets for cultural products around the world. At home, **changing demographics** call for governments and the culture sector to commit to inclusion and to making culture accessible to everyone, whether as creators or consumers.

Technology and changing demographics both contribute to changing consumer habits and expectations around cultural experiences. The proliferation of platforms and screen-based devices and a growing preference for interactive experiences will continue to influence commercial products like film and television, video games, and music, as well as interactions with museums and public libraries. Younger consumers, in particular, are also expressing their preference for socially and environmentally conscious products, produced sustainably. This preference will also be reflected in the culture sector.

Strategic Directions for Culture

Jurisdictions around the world are responding to these global forces in different ways, but several common strategic directions are emerging.

Recognizing diversity as an asset, many culture policies are **fostering inclusion**, and some are focusing on target groups such as youth, seniors, and people with disabilities. Jurisdictions are also creating policy to ensure inclusion and respect for Indigenous and Francophone cultures.

The role of culture in **strengthening communities** is increasingly being recognized. Many strategies incorporate culture into community planning to enrich quality of life for residents, create a unique sense of place, and reap economic benefits through revitalized neighbourhoods and cultural tourism.

With its direct and indirect contribution to GDP, many jurisdictions are examining ways of **enhancing the economic benefits of culture**, adopting measures to fuel innovation, promote their creative industries globally, and strengthen the financial capacity of companies and individuals producing creative products and services. They are designing policies to foster business innovation, assist producers in accessing international markets, and encouraging capital investment through new financing models.

Many jurisdictions are encouraging the culture sector in **leveraging digital technologies** for development and distribution. This is expected to increase the supply of digital cultural content and improve accessibility. The strategy generally includes fostering a supportive business environment, especially through intellectual property protection. Supporting the digital preservation and management of irreplaceable cultural heritage resources is another important element of this strategic direction.

In this changing environment, the need for new technical, business, and other skills has made **investing in the culture sector workforce** a high priority. In some jurisdictions, this begins with education and training in schools, especially training in digital skills. Leadership and management skills are another focus area as the aging population makes succession planning in culture organizations increasingly critical.

Most jurisdictions are **encouraging collaboration and partnerships** as a strategic direction. Partnerships and consortia can help creators and organizations meet financing and other resource requirements while sharing expertise. Collaboration across disciplines and sectors such as business, health, education, and technology can lead to innovation in art as well as new products and new revenue-generating opportunities.

1. About This Environmental Scan

The Ministry of Tourism, Culture and Sport commissioned MDR Communications to undertake this environmental scan on the culture sector in Ontario as part of the development of Ontario's first Culture Strategy. Findings are based on a review and analysis of secondary source national and international literature.

The paper is organized into eight sections:

- **Section 1:** Introduction;
- **Section 2:** Information on the individual, social, and economic benefits of culture;
- **Section 3:** Summary of the key driving forces of change in the culture sector: globalization, the economy and fiscal environment, digital transformation, and changing demographics;
- **Section 4:** Sector profile of the arts, including craft, dance, literary arts, media arts, music, opera, theatre, and visual arts;
- **Section 5:** Sector profile of cultural industries, including film and television production, interactive digital media (e.g., video games, apps), the music industry, and book and magazine publishing;
- **Section 6:** Sector profile of public libraries;
- **Section 7:** Sector profile of cultural heritage, including built heritage, cultural heritage landscapes, archaeology, and museums; and
- **Section 8:** Key trends in culture policies and strategies in other jurisdictions in Canada and internationally.

The Ministry recognizes that the scope of culture is very broad and includes many other forms of expression, creativity, traditions, and beliefs. This paper focuses on the key trends for the four sectors of culture currently supported by the Ministry.

2. The Importance of Culture

Culture is the lifeblood of a vibrant society, expressed in the many ways we tell our stories, celebrate, remember the past, entertain ourselves, and imagine the future. Our creative expression helps define who we are, and helps us see the world through the eyes of others. Ontarians participate in culture in many ways—as audiences, professionals, amateurs, volunteers, and donors or investors.¹

In addition to its intrinsic value, culture provides important social and economic benefits. With improved learning and health, increased tolerance, and opportunities to come together with

¹ WolfBrown, "Ontario Arts Engagement Study" (San Francisco: WolfBrown, September 2011); Nordicity, "2012 Canadian Interactive Industry Profile: Final Research Report" (Canadian Interactive Alliance (CIAIC), October 2013): 36; Canadian Media Production Association et al., "Profile 2014: Economic Report on the Screen-based Media Production Industry" (Canadian Media Production Association, 2015): 36, http://cmpa.ca/sites/default/files/documents/industry-information/profile/CMPA_2014_eng.pdf.

others, culture enhances our quality of life and increases overall well-being for both individuals and communities.²

2.1. Individual and Social Benefits of Culture

2.1.1 Intrinsic Benefits

Participating in culture can benefit individuals in many different ways, some of which are deeply personal. They are a source of delight and wonder, and can provide emotionally and intellectually moving experiences, whether pleasurable or unsettling, that encourage celebration or contemplation. Culture is also a means of expressing creativity, forging an individual identity, and enhancing or preserving a community's sense of place.

Cultural experiences are opportunities for leisure, entertainment, learning, and sharing experiences with others.³ From museums to theatres to dance studios to public libraries, culture brings people together.⁴

These benefits are intrinsic to culture. They are what attracts us and why we participate.

2.1.2 Improved Learning and Valuable Skills for the Future

In children and youth, participation in culture helps develop thinking skills, builds self-esteem, and improves resilience, all of which enhance education outcomes. For example, students from low-income families who take part in arts activities at school are three times more likely to get a degree than those who do not.⁵ In the US, schools that integrate arts across the curriculum have shown consistently higher average reading and mathematics scores compared with similar schools that do not.⁶ Many jurisdictions make strong linkages between culture and literacy and enhanced learning outcomes, in both public education and in the development of valuable workforce skills.⁷

² Abigail Gilmore, "Raising our quality of life: The importance of investment in arts and culture" (Centre for Labour and Social Studies, November 2014), http://classonline.org.uk/docs/2014_Policy_Paper_-_investment_in_the_arts_-_Abi_Gilmore.pdf.

³ Gilmore, "Raising our quality of life."

⁴ The Conference Board of Canada, "Valuing Culture: Measuring and Understanding Canada's Creative Economy" (The Conference Board of Canada, July 2008), http://www.cscd.gov.bc.ca/arts_culture/docs/aug2008_conference_board_of_canada_valuing_culture.pdf; Cornelia Dümcke and Mikhail Gnedovsky, "The Social and Economic Value of Cultural Heritage: Literature Review" (The European Network on Culture, July 2013), <http://www.eenc.info/wp-content/uploads/2013/08/CD%C3%BCmcke-MGnedovsky-Cultural-Heritage-Literature-Review-July-2013.pdf>; Business for the Arts, "A Strategic and Economic Business Case for Private and Public Sector Investment in the Arts in Canada" (Toronto: Business for the Arts, October 2009), <http://www.businessforthearts.org/wp-content/uploads/2012/02/BftA-business-case-for-funding-the-arts.pdf>.

⁵ Cultural Learning Alliance, "The Case for Cultural Learning: Key Research Findings, 2011," <http://www.culturallearningalliance.org.uk/evidence/the-case-for-cultural-learning-key-research-findings/>.

⁶ Cultural Learning Alliance, "The Case for Cultural Learning."

⁷ National Governors Association, "New Engines of Growth: Five Roles for Arts, Culture and Design" (Washington: National Governors Association, May 2012), <http://www.nga.org/files/live/sites/NGA/files/pdf/1204NEWENGINESOFGROWTH.PDF>.

Cultural heritage broadens opportunities for education and lifelong learning, including a better understanding of history. Ontario's cultural heritage sector develops educational products and learning resources in museums and designed around built heritage and cultural landscapes.

As trusted community hubs and centres of knowledge and information, public libraries play an important role in expanding education opportunities and literacy, overcoming the digital divide, supporting lifelong learning, and preparing people for work in the knowledge economy.⁸ Participation in library activities has been shown to improve literacy and increase cognitive abilities.⁹

E-learning is on the rise in both academic and professional settings. Games are being used to enhance math, writing, and other academic skills, and to motivate employees. There are over 120 specialized e-learning companies in Ontario.¹⁰

2.1.3 Better Health and Well-being

Participation in culture contributes to healthy populations in several ways. Creativity and cultural engagement have been shown to improve both mental and physical health.¹¹ Culture is being integrated into health care, notably in the UK, but also increasingly in other jurisdictions, including Canada.¹²

A growing body of research also demonstrates that the arts can improve the health and well-being of older adults. Participation in the arts can relieve isolation and promote identity formation and intercultural understanding.¹³ Vancouver's Arts, Health and Seniors Project found

⁸ Amy K. Garmer, "Rising to the Challenge: Re-imagining Public Libraries" (Washington: The Aspen Institute, October 2014), <http://csreports.aspeninstitute.org/Dialogue-on-Public-Libraries/2014/report>.

⁹ Cultural Learning Alliance, "The Case for Cultural Learning."

¹⁰ Canadian eLearning Enterprise Alliance, "Canadian eLearning Directory, 2015," <http://www.celea-aceel.ca>. Results obtained from "advanced search by province."

¹¹ For literature reviews, see Arts Council England, "The Value of Arts and Culture to People and Society: An Evidence Review" (Arts Council England, March 2014), <http://www.artscouncil.org.uk/media/uploads/pdf/The-value-of-arts-and-culture-to-people-and-society-An-evidence-review-Mar-2014.pdf>; Arts Council England, "The Impact of Arts and Health-the Evidence Base," in "A Prospectus for Arts and Health, Part 3" (Arts Council England, April 20, 2007), <http://www.artsandhealth.ie/wp-content/uploads/2011/09/A-prospectus-for-Arts-Health-Arts-Council-England.pdf>; Gilmore, "Raising our quality of life."

¹² Alice Muirhead and Sarah de Leeuw, "Art and wellness: the importance of art for Aboriginal peoples' health and healing" (Prince George, BC: National Collaborating Centre for Aboriginal Health, 2012), http://artshealthnetwork.ca/ahnc/art_wellness_en_web.pdf; Arts Council England, "The Impact of Arts and Health-the Evidence Base." See also "Invest to Save: Arts in Health," <http://www.miriad.mmu.ac.uk/investtosave/>, for information on a UK arts in health care settings project.

¹³ Sarah Ripley, "Culturally Diverse Arts and Culture Programming in After School Settings for Culturally Diverse Children and Youth: A Review of Literature" (Scarborough, ON: Creative Mosaics, 2010), <http://scarborougharts.com/wp-content/uploads/2012/10/Culturally-Diverse-Arts-and-Culture-Programming-in-After-School-Settings-for-Diverse-Children-and-Youth-Literature-Review.pdf>; John D. Carnwath and Alan S. Brown, "Understanding the Value and Impacts of Cultural Experiences" (Arts Council England, 2014), http://www.artscouncil.org.uk/media/uploads/pdf/Understanding_the_value_and_impacts_of_cultural_experiences.pdf.

that active participation in the arts had positive health benefits, such as social cohesion and emotional and physical well-being. Both the perceived health and chronic pain measures showed improvement over time.¹⁴

In First Nation, Métis and Inuit communities, culture is “simultaneously art, creative expression, religious practice, ritual models and markers of governance structures and territorial heritage, as well as maps of individual and community identity and lineage.”¹⁵ The link between past efforts to eradicate Indigenous cultures and health issues in today’s Indigenous communities is increasingly recognized. Research has shown that revitalization of Indigenous cultures plays a key role in supporting the health, well-being, and healing of individuals and communities.

2.1.4 Vibrant Communities

The benefits of culture for individuals can spill over to society as a whole.¹⁶

Culture helps build social capital, the glue that holds communities together. By bringing people together, cultural activities such as festivals, fairs, or classes create social solidarity and cohesion, fostering social inclusion, community empowerment, and capacity-building, and enhancing confidence, civic pride, and tolerance.¹⁷ The social capital created through culture increases with regular participation in cultural activities.¹⁸ Cultural engagement also plays a key role in poverty reduction and communities-at-risk strategies.¹⁹

¹⁴ Alison Phinney et al., “The Arts, Health and Seniors Project – A Three Year Exploration of the Relationship between Arts and Health” (Vancouver: The Arts, Health and Seniors Project, 2012), <http://vancouver.ca/files/cov/arts-health-seniors-project-full-report.pdf>.

¹⁵ Muirhead and de Leeuw, “Art and wellness.”

¹⁶ Canadian Index of Wellbeing, “How are Ontarians Really Doing? A Provincial Report on Ontario Wellbeing” (Waterloo: Canadian Index of Wellbeing and University of Waterloo, April 2014), available at https://uwaterloo.ca/canadian-index-wellbeing/sites/ca.canadian-index-wellbeing/files/uploads/files/ontarioreport-accessible_0.pdf.

¹⁷ CHCfE Consortium, “Cultural Heritage Counts for Europe: Towards a European Index for Cultural Heritage” <http://www.enctc.org/culturalheritagecountsforeurope/>; Dümcke and Gnedovsky, “The Social and Economic Value of Cultural Heritage: Literature Review”; Department of Arts, Heritage and the Gaeltacht, “National Landscape Strategy for Ireland 2015-2025” (Dublin: Ireland, 2015), <http://www.ahg.gov.ie/app/uploads/2015/07/N-Landscape-Strategy-english-Web.pdf>.

¹⁸ Liam Delaney and Emily Keaney, “Cultural Participation, Social Capital and Civil Renewal in the United Kingdom: Statistical Evidence from National and International Survey Data” (Dublin: Economic and Social Research Institute, and London: Institute for Public Policy Research, March 2006), <http://www.ippr.org/files/uploadedFiles/research/projects/Democracy/cultural%20participation%20social%20capital%20etc.pdf?noredirect=1>; Peter Taylor et al., “A Review of the Social Impacts of Culture and Sport” (UK: Culture and Sport Evidence Program, March 2015): 88, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/416279/A_review_of_the_Social_Impacts_of_Culture_and_Sport.pdf; Carnwath and Brown, “Understanding the Value and Impacts of Cultural Experiences.”

¹⁹ Museums Association, “Submission to Welsh Government call for evidence on ways in which cultural and heritage bodies can contribute to reducing poverty” (October 2013), available at <http://www.museumsassociation.org/policy/statements-and-responses>.

Culture is important to the vitality of all communities.²⁰ Research in the US has shown direct connections between culture and community revitalization in Chicago neighbourhoods. Social networks created through arts initiatives based in the community resulted in direct economic benefits for the neighbourhood, such as new uses of existing facilities, and new jobs for local artists.²¹

Our diverse cultural heritage resources tell the story of our shared past, fostering social cohesion.²² They are intrinsic to our sense of place. Investments in heritage streetscapes have been shown to have a positive impact on sense of place.²³ Benefits include improved quality of life for local residents, a feeling of pride, identification with the past, and a sense of belonging to a wider community.

Culture helps cities to develop compelling city narratives and distinctive brands, with unique selling points for tourists and business investors. Culturally rich districts also enhance competitiveness by attracting talent and businesses. Cultural heritage is also a factor in rural development, supporting tourism, community renewal, and farmstead conservation.

2.2 Economic Benefits of Culture

The culture sector helps support the economy through direct and indirect job creation. It also helps spur innovation in other sectors²⁴ in the form of productivity advancements, regional development, community branding, and increased local tourism.²⁵

2.2.1 Contribution to Job Creation

Economic opportunities created by culture have taken on greater importance as economies transition from the industrial model, and work based on physical labour, to a new model in which knowledge and creativity drive productivity and growth. Knowledge-based economies favour ideas to stimulate innovation, and they develop specialized services and highly

²⁰ The Conference Board of Canada, “Valuing Culture,” 2; National Governors Association, “New Engines of Growth.”

²¹ Mark J. Stern and Susan C. Seifert, “From Creative Economy to Creative Society: A neighbourhood-based strategy to increase urban vitality and promote social inclusion,” *GIA Reader* 19, no. 3, (Fall 2008),

<http://daytoncreate.org/?p=471>. See also Mark J. Stern and Susan C. Seifert, “Cultural Ecology, Neighbourhood Vitality and Social Well-being – A Philadelphia Project” (Philadelphia: CultureBlocks, December 2013), <https://www.arts.gov/exploring-our-town/sites/arts.gov/exploring-our-town/files/SIAP%20CULTUREBLOCKS%20REPORT%20DEC2013%20V1.pdf>.

²² Kevin F. McCarthy et al., “Gifts of the Muse: Reframing the Debate about the Benefits of the Arts” (Rand Corporation, 2004): 69, http://www.rand.org/content/dam/rand/pubs/monographs/2005/RAND_MG218.pdf.

²³ Alan Reeve and Robert Shipley, “The Impact of Heritage Investment on Public Attitudes to Place: Evidence from the Townscape Heritage Initiative (THI)” *Urban, Planning and Transport Research: An Open Access Journal* 2 no. 1 (2014), 289-311,

<http://www.tandfonline.com/doi/abs/10.1080/21650020.2014.893199#aHR0cDovL3d3dy50YW5kZm9ubGluZSS5jb20vZG9pL3BkZi8xMC4xMDgwLzlxNjUwMDIwLjIwMTQuODkzMTk5QEBA==>.

²⁴ The Conference Board of Canada, “Valuing Culture,” 2.

²⁵ Working Group of EU Member States Experts on Cultural and Creative Industries, “Policy Handbook” (European Union, April 2012),

[http://s3platform.jrc.ec.europa.eu/documents/10157/0/120420%20CCI%20Policy%20Handbook%20\(FINAL\).pdf](http://s3platform.jrc.ec.europa.eu/documents/10157/0/120420%20CCI%20Policy%20Handbook%20(FINAL).pdf).

customized products to create value.²⁶ Information, technology, and learning are central to their performance.

The culture sector is the foundation for Ontario's growing creative economy sector.²⁷ In 2010, culture contributed nearly \$22 billion to Ontario's GDP, representing 3.7% of the province's economy.²⁸ There were about 280,000 culture jobs in Ontario in 2010, or 4.1% of all jobs in the province.²⁹ Almost half of all culture jobs in Canada were located in Ontario as of 2010.³⁰

Interactive Digital Media (IDM) is poised to be a key driver of growth and employment in Ontario's cultural industries and the overall economy as cultural media products such as games and interactive experiences become more prevalent. According to the most recent Canadian Interactive Industry Profile, nearly one-third of the "core" IDM industry, specifically companies engaged mainly in content creation, were located in Ontario. They contributed estimated revenues of \$1.1 billion in 2011 and accounted for over 17,000 jobs.³¹

Ontario is the number one film and television production jurisdiction in Canada in terms of production volume, revenue and employment;³² and the third-largest film production location in North America after California and New York.³³ Film and television production contributed \$2.3 billion in expenditures in Ontario (accounting for 40% of the national total) and supported 44,410 direct and indirect jobs in 2013-2014.³⁴ Film and television productions supported by the province contributed \$1.3 billion in expenditures, supporting over 28,000 full-time direct and spin-off jobs in 2014.³⁵

²⁶ Charles Levy, Andrew Sissons, and Charlotte Holloway, "A Plan for Growth in the Knowledge Economy" (London: The Work Foundation Alliance Limited, June 2011), http://www.theworkfoundation.com/assets/docs/publications/290_plan%20for%20growth%20in%20the%20knowledge%20economy.pdf.

²⁷ The Conference Board of Canada, "Valuing Culture," 2.

²⁸ Statistics Canada, "Provincial and Territorial Culture Satellite Account, 2010" (Ottawa: Statistics Canada, June 9, 2015), <http://www.statcan.gc.ca/pub/13-604-m/13-604-m2015079-eng.htm>. Figures represent product perspective, which includes the contribution of culture products (goods and services) produced in both culture industries *and* non-culture industries.

²⁹ Statistics Canada, "Provincial and Territorial Culture Satellite Account, 2010."

³⁰ Statistics Canada, "Provincial and Territorial Culture Satellite Account, 2010."

³¹ Nordicity Group Ltd., "2012 Canadian Interactive Industry Profile" (Canadian Interactive Alliance, October 2013), http://www.omdc.on.ca/Assets/Research/Research+Reports/CIIP+2011/Canadian+Interactive+Industry+Profile+2011_en.pdf. These figures are from the Supplementary Ontario Regional Data Revision requested by the Ontario Media Development Corporation and Interactive Ontario.

³² The Canadian Media Production Association et al., "Profile 2014," 11.

³³ Nordicity Group Ltd., "The Economic Contribution of the Film and Television Sector in Canada" (Toronto: The Motion Picture Association – Canada, July 2013): 13, <http://www.nordicity.com/media/2013724dgifbubfnd.pdf>.

³⁴ Canadian Media Production Association et al., "Profile 2014," 11-12.

³⁵ Ontario Media Development Corporation, "Ontario Film and Television Production Levels, 2014" (March 2015), http://www.omdc.on.ca/collaboration/research_and_industry_information/production_statistics/Ontario_Film_and_Television_Production_Levels.htm.

With leading computer animation, visual effects, and post-production facilities engaged in cutting edge innovation, and a strong network of training and research centres such as the Canadian Film Centre and the Screen Industries Training Centre located at Pinewood Studios, Ontario is positioned to remain one of the leading centres of film and television production and post-production in North America.³⁶

2.2.2 Contribution to Tourism

Culture makes a significant contribution to the tourism industry in Ontario, further supporting job creation and encouraging infrastructure development. In 2010, cultural tourism generated \$3.7 billion in GDP and resulted in 67,700 jobs for Ontarians.³⁷

The many festivals and events hosted each year in every corner of Ontario, coupled with the province's museums, art galleries, and historic sites, are magnets for cultural tourists. Almost 90% of the 21 million North Americans who visited Ontario among other destinations over a two-year period sought out a cultural activity on their visit.³⁸ Of visitors from outside the province who stayed at least one night (1.3 million visitors), 25% attended festivals and sporting events.

There are significant opportunities to grow cultural tourism through marketing cultural heritage assets. Historic sites in Ontario had over 3.7 million visits in 2011, placing built heritage in the top five most popular tourist attractions in the province.³⁹

Music tourism offers Canadian artists a means of showcasing their talents and promoting their work. Local music scenes can help brand communities to attract tourists from Ontario and around the world. Three-quarters of those who attended the Jazz on the Mountain at Blue in 2013, hosted by the town of Blue Mountain Village, travelled from over 100 kilometres away. In Ottawa, almost 12,000 travelled over 40 kilometres to attend the Ottawa Folk Festival in 2014. In that year, the Folk Festival drew an audience of over 54,000, up from only 2,500 in 2010.⁴⁰

2.2.3 Cultural Planning

Increasingly, municipalities are recognizing the contribution of culture to sense of place, quality of life, and community and economic prosperity through a process called "cultural planning." Cultural planning is led by local governments and involves broad community engagement to identify and leverage a community's cultural resources, strengthen the management of those

³⁶ Nordicity Group Ltd., "The Economic Contribution of the Film and Television Sector Canada," 72.

³⁷ Research Resolutions & Consulting Ltd., "Ontario Art and Culture Tourism Profile" (Toronto: Ontario Arts Council, November 2012), <http://www.arts.on.ca/AssetFactory.aspx?did=8778>.

³⁸ Research Resolutions & Consulting Ltd., "Ontario Art and Culture Tourism Profile."

³⁹ Stephanie Mah, "Economic Benefits of Heritage Conservation for the Tourism and Film and Television Industries in Ontario" (Toronto: Architectural Conservancy of Ontario, February 18, 2015), available at <http://www.toronto.ca/legdocs/mmis/2015/pg/comm/communicationfile-51565.pdf>.

⁴⁰ Ontario, Ministry of Tourism, Culture and Sport, "Backgrounder: Celebrate Ontario Success Stories" (Ontario, April 9, 2015), <http://news.ontario.ca/mtc/en/2015/04/post-1.html>.

resources, and integrate them in all facets of local planning and decision-making.⁴¹ The process is part of a global trend toward more place-based approaches to planning and development that take into account four interdependent pillars of community sustainability: economic prosperity, social equity, environmental responsibility, and cultural vitality. Cultural planning helps create the environment for culture to flourish.

To date, 69 municipalities, representing nearly three-quarters of Ontario's population, have developed cultural plans and engaged in cultural mapping exercises to identify their unique and valued cultural resources. Maps can include cultural resources both tangible (e.g., cultural workers, spaces and facilities, cultural heritage and natural heritage resources) and intangible (e.g., stories and activities) that reflect the distinct cultural identity of the community.⁴²

Cultural plans have contributed to downtown, waterfront, and neighbourhood revitalization. They complement economic development and community growth plans, as well as tourism and population retention strategies, and expand opportunities for youth. For example, St. Catharines's 2015 cultural plan strongly positions culture as a key economic driver, crucial to combatting the loss of manufacturing jobs. It also positions culture as a source of new business, youth retention, and a means of revitalizing downtown St. Catharines.⁴³

The City of Ottawa's 2013 cultural plan has already resulted in outcomes such as development of an archaeology-related public awareness initiative, a pilot program providing training for youth, support for First Nation, Métis, and Inuit cultural initiatives, investment in local culture (e.g., Arts Court and Ottawa Art Gallery), and music industry development.⁴⁴

For First Nations and Métis communities, the focus of cultural mapping is typically on conserving cultural heritage, traditions, and language. Cultural planning processes have resulted in language plans and policies, place-name maps, videos of Elders' stories, and the recording of traditional knowledge, as well as cultural tourism and economic development opportunities.⁴⁵

3. Forces Shaping the Future of Ontario's Culture Sector

Ontario's culture sector will continue to be shaped by four major forces:

⁴¹ Ontario, Ministry of Tourism, Culture and Sport, http://www.mtc.gov.on.ca/en/culture/cul_planning.shtml. See also Municipal Cultural Planning Inc., <http://www.ontariomcp.ca/about/>, and Creative Cities Network, <http://www.creativecity.ca/about-the-network.php>.

⁴² Municipal Cultural Planning Inc., "Cultural Resource Mapping: A Guide for Municipalities" (Ontario, 2010), http://www.ontariomcp.ca/toolkits/CulturalResourceMapping_digital.pdf.

⁴³ City of St. Catharines, "Inspire St. Catharines: Culture Plan 2020" (City of St. Catharines, February 2015): 6, <http://www.stcatharines.ca/en/governin/resources/CulturePlan2020-Final.pdf>.

⁴⁴ City of Ottawa, "A Renewed Action Plan for Arts, Heritage and Culture in Ottawa (2013 – 2018)" (City of Ottawa, 2013), <http://ottawa.ca/en/liveculture/cultural-planning>.

⁴⁵ From 2009 to 2013, the Creative Communities Prosperity Fund of the Ministry of Tourism, Culture and Sport supported the development of cultural maps and/or cultural plans in over 60 First Nations communities, urban Indigenous communities, and Indigenous organizations.

- Globalization;
- The economy and fiscal restraint;
- The digital transformation; and
- Changing demographics.

3.1 Globalization

The world is seeing unprecedented acceleration and intensification in the flow of capital, labour, and information. Economic interconnectivity and interdependencies are rapidly increasing. Ties between people, companies, and countries are expanding, bringing increased trade, greater foreign investment, and more international movement of people.

Ontario's culture sector generally, and the cultural industries in particular, are subject to these global influences.⁴⁶ Globalization gives artists and producers of cultural products opportunities for co-creation and production, and opportunities to promote and export internationally and attract foreign investment. At the same time, foreign cultural products have greater access to the Ontario market. Balancing the economic rewards of globalized trade while maintaining opportunities for Ontarians to create, discover, and participate in local culture will continue to be a challenge.

For museums and other cultural institutions, globalization provides both opportunities and risks. UNESCO recognized this in one of its Draft Recommendations, adopted in May 2015: "Globalization has permitted greater mobility of collections, professionals, visitors and ideas which has impacted museums with both positive and negative effects that are reflected in increased accessibility and homogenization. Member States should promote the safeguarding of the diversity and identity that characterize museums and collections without diminishing the museums' role in the globalized world."⁴⁷

3.2 The Economy and Fiscal Restraint

Globally, economic growth is expected to be moderate in the coming years,⁴⁸ giving rise to a general climate of fiscal restraint. In response, many jurisdictions have reassessed their direct business supports, including support for cultural production. Some jurisdictions have cut support programs. Saskatchewan, for example, eliminated the film tax credit. Others have redesigned their supports, as in Nova Scotia where cultural media tax credits were replaced with grants.

⁴⁶ Ontario, Ministry of Finance, "2014 Ontario Budget" (Ontario, 2014), <http://www.fin.gov.on.ca/en/budget/ontariobudgets/2014/>.

⁴⁷ UNESCO, "Report of the Intergovernmental Meeting of Experts (Category II) Related to a Draft Recommendation on the Protection and Promotion of Museums, Their Diversity and their Role in Society" (Paris: UNESCO, May 2015): 5, http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CLT/images/Final_Text_of_Draft_recommendation_EN_02.pdf.

⁴⁸ International Monetary Fund, "World Economic Outlook" (International Monetary Fund, April 2015), <http://www.imf.org/external/pubs/ft/weo/2015/01/>; United Nations, "World Economic Situation and Prospects 2015" (United Nations, 2015), http://www.un.org/en/development/desa/policy/wesp/wesp_archive/2015wesp_full_en.pdf.

In Ontario, economic growth will be weak for the foreseeable future.⁴⁹ This forecast is being met with prudent program management, limited growth in spending, and the goal of eliminating the budget deficit by 2017-2018.⁵⁰ In 2015, Ontario introduced a new Program Review, Renewal and Transformation (PRRT) process as part of its yearly budget planning cycle. All government programs are being reviewed to identify opportunities to transform and modernize public services to ensure that they deliver the best value for every dollar spent. This prudent use of resources also responds to Ontarians' increased expectations for accountable and transparent use of public funds.

In recent years, some reports, including the Commission on the Reform of Ontario's Public Services, recommended that the Ontario government should restrict or redesign its direct business supports, including Ontario's cultural media tax credits.⁵¹ As a result of the PRRT review, in its 2015 budget the Ontario government introduced changes to its tax credits and program supports to the film and television, computer animation, music, and interactive digital media industries. These changes were designed to improve sustainability and effectiveness by modernizing and targeting support.

These provincial and national economic trends have implications for the culture sector, which traditionally depends in part on public funds. Municipalities, especially smaller, rural, and northern ones, also face fiscal challenges,⁵² and the impacts are felt throughout the culture sector. Municipalities play a key role in supporting arts and culture in communities across the province. For example, in most cases, municipal governments are the key funders for local public libraries and community museums.

In general, wages in the culture sector are lower than the national average.⁵³ About half of those working in the culture sector are self-employed, and many hold multiple jobs.⁵⁴ The cultural workforce is further challenged by issues such as gender equality. Women represent just over half of Ontario's population, yet 80% of employees in libraries, museums, and art galleries are

⁴⁹ Ontario, Ministry of Finance, "Chapter 4: Long-Term Fiscal Prospects," in "Ontario's Long-Term Report on the Economy" (Ontario, 2014), <http://www.fin.gov.on.ca/en/economy/ltr/>.

⁵⁰ Ontario, Minister of Finance, "2014 Ontario Economic Outlook and Fiscal Review Statement" (Minister's statement to the Legislature, November 17, 2014), <http://www.fin.gov.on.ca/en/budget/fallstatement/2014/statement.html>; Ontario, Ministry of Finance, "Building Ontario Up: 2015 Budget" (Ontario, 2015), <http://www.fin.gov.on.ca/en/budget/ontariobudgets/2015/>.

⁵¹ Commission on the Reform of Ontario's Public Services, "Public Services for Ontarians: A Path to Sustainability and Excellence" (Ontario, Ministry of Finance, 2012), <http://www.fin.gov.on.ca/en/reformcommission/>.

⁵² André Côté and Michael Fenn, "Approaching an Inflection Point in Ontario's Provincial-Municipal Relations," *IMFG Perspectives* 6/2014 (Toronto: Institute on Municipal Finance & Governance, Munk School of Global Affairs, University of Toronto), http://munkschool.utoronto.ca/imfg/uploads/274/imfg_perspectives_6_cote_fenn.pdf.

⁵³ Hill Strategies Research Inc., "A Statistical Profile of Artists and Cultural Workers in Canada" (Hill Strategies, October 2014): 5, <http://www.hillstrategies.com/content/statistical-profile-artists-and-cultural-workers-canada>.

⁵⁴ Hill Strategies Research Inc., "A Statistical Profile of Artists and Cultural Workers in Canada," 5; Statistics Canada, "2011 National Household Survey: Data Tables," <https://www12.statcan.gc.ca/nhs-enm/2011/dp-pd/dt-td/Index-eng.cfm>.

women.⁵⁵ Women working in the culture earn approximately 20% less than men and account for 75% of all unpaid labour.

At the consumer level, precarious employment may have implications for Ontarians' spending on cultural activities.⁵⁶ At least one study in Ontario points to insecure work as a significant feature of the labour market in the City of Toronto and surrounding regions, affecting up to 44% of adults.⁵⁷ The capacity of the culture sector to earn revenue will continue to depend on access to strong markets at home and abroad.

In this fiscal climate, public funders of the culture sector are targeting their funds strategically to achieve their goals within existing resources. The Ontario Trillium Foundation recently undertook a strategic review to align investment with improving outcomes for well-being, to ensure appropriate balance in the types of initiatives it invests in, to measure impacts of investment, and to streamline the application process to better meet the needs of applicants.⁵⁸ The Ontario Arts Council continually adjusts its programs to maintain a strategic course.⁵⁹ At the federal level, the Canada Council for the Arts is undertaking a major redesign of its programs, aimed at increasing flexibility and simplicity for applicants and better positioning the organization to respond strategically to the changing environment for the arts.⁶⁰

Private sector support for culture is increasingly concerned with ensuring the greatest possible impact for investment. To attract philanthropic support, the culture sector must measure and demonstrate its impact.⁶¹ In the US, where impact is being measured more systematically,

⁵⁵ Statistics Canada, "2011 National Household Survey: Data Tables – Place of Work Status," derived from <https://www12.statcan.gc.ca/nhs-enm/2011/dp-pd/dt-td/Rp-eng.cfm?LANG=E&APATH=3&DETAIL=0&DIM=0&FL=A&FREE=0&GC=0&GID=0&GK=0&GRP=0&PID=105617&PRID=0&PTYPE=105277&S=0&SHOWALL=1&SUB=0&Temporal=2013&THEME=96&VID=0&VNAMEE=&VNAMEF=>.

⁵⁶ Wayne Lewchuk et al., "The Precarity Penalty: The Impact of Employment Precarity on Individuals, Households and Communities – and What to Do About It" (Poverty and Employment Precarity in Southern Ontario (PEPSO), May 2015), <http://www.unitedwaytyr.com/document.doc?id=307>.

⁵⁷ Lewchuk et al., "The Precarity Penalty," 25. The 44% is derived by adding 20.3% in the "Temporary and Contract" category and 23.3% in the "Other" category as shown in Figure 1 on page 25 of the report. The "Other" category refers to full-time employees who fall into one of four categories: 1) are not receiving any benefits, 2) could not confirm they would still be with their current employer in 12 months; 3) have work hours that change weekly and could fall below 30 hours per week; and 4) are self-employed.

⁵⁸ Ontario Trillium Foundation, "Business Plan 2014-15," http://www.otf.ca/sites/default/files/otf_business_plan.pdf.

⁵⁹ Ontario Trillium Foundation, media release (Ontario Trillium Foundation, November 4, 2014), <http://www.otf.ca/news/welcome>; Ontario Arts Council (OAC), "Vital Arts and Public Value: A Blueprint for 2014-2020" (Toronto: OAC, 2014), <http://www.arts.on.ca/AssetFactory.aspx?did=10276>.

⁶⁰ Canada Council for the Arts, media release, "Canada Council for the Arts Introduces New Funding Model" (June 3, 2015), <http://canadacouncil.ca/council/news-room/news/2015/new-funding-model>.

⁶¹ Alex Parkinson, blog entry, "Creativity and Impact: Can the Arts and Corporate Philanthropy Coexist?" (Americans for the Arts, April 30, 2015), <http://blog.americansforthearts.org/2015/04/30/creativity-and-impact-can-the-arts-and-corporate-philanthropy-coexist>; Americans for the Arts, "Corporate and Social Responsibility and the Arts: Partnering with Business to Enact Social Change," http://www.partnershipmovement.org/upload/web-files/other/CSR_Tool-Kit_FINAL.pdf.

charitable giving to the arts/culture/humanities in 2014 increased by more than 9% over the previous year.⁶²

In Canada, philanthropic giving to the culture sector is relatively low but stable, hovering at 1% of all charitable giving in 2007 and 2010. The total was close to \$108 million in charitable gifts to arts and culture in 2010.⁶³ This augurs well for the culture sector if it can successfully leverage this interest.

Business for the Arts, an organization committed to enhancing private sector support for the arts and culture sector, recently commissioned a survey of small, medium and large businesses and the public in order to determine the extent to which Canadian businesses support and value the arts. The results showed that 71% of large businesses and 38% of small and medium sized businesses invest in the arts.⁶⁴ The prime motivation was the impact that the donation might have on the community (93% of small and medium sized businesses supported the arts because arts and cultural activities make for a vibrant community). Quality of life, education, and employee engagement were also important motivators for investment.⁶⁵

3.3 The Digital Transformation

The digital revolution has transformed the culture sector. Participation in cultural activities has increased, new networks and forms of interaction have emerged, and the production and distribution of cultural products has changed profoundly.

Lower barriers to entry are transforming our notion of cultural production. Digital technologies allow individuals to self-publish, produce, market, distribute, and sell their creations, diminishing reliance on traditional means of production, distribution, and marketing. Large numbers of professional and amateur creators are engaging with audiences directly over digital networks, and content creators can tailor their products to suit consumers across borders.

Through the Internet and social media, consumers are more engaged, participatory, and in control of their cultural experiences. The majority of Canadians accesses a social media network at least once a month, with young people more than twice as likely to be “social networkers”

⁶² Giving USA, press release, “Americans Donated an Estimated \$358.38 Billion to Charity in 2014: Highest Total in Report’s 60-year History” (June 29, 2015), <http://givingusa.org/giving-usa-2015-press-release-giving-usa-americans-donated-an-estimated-358-38-billion-to-charity-in-2014-highest-total-in-reports-60-year-history/>.

⁶³ Martin Turcotte, “Charitable giving by Canadians,” in Statistics Canada, Catalogue no. 11-008-X, “Canadian Social Trends” (Statistics Canada, July 30, 2012): 29, <http://www.statcan.gc.ca/pub/11-008-x/2012001/article/11637-eng.htm>. The category includes organizations and activities in general and specialized fields of arts and culture, including media and communications; visual arts, architecture; ceramic art; performing arts; historical, literary and humanistic societies; museums; and zoos and aquariums.

⁶⁴ The Strategic Counsel, “Building the Case for Business Support of the Arts” (Toronto: Business for the Arts, February 2015): 30, <http://www.businessforthearts.org/wp-content/uploads/2015/04/Business-Support-for-the-Arts-%E2%80%93-Making-the-Case.pdf>.

⁶⁵ The Strategic Counsel, “Building the Case for Business Support of the Arts,” 34.

than people over 55.⁶⁶ They seek tailored, inspiring experiences that can be shared. Increasingly, they will expect to access and experience arts, media productions, and library and museum collections on line.

Connectivity will continue to spread, bringing work, home, and the surrounding environment into one seamless experience as “connected living.”⁶⁷ Globally, by 2020, there will be over 5 billion Internet users and 80 billion connected devices worldwide.⁶⁸

With 84% of Ontarians connected, the province has one of the highest rates of Internet access in Canada.⁶⁹ However, two million Ontarians do not have Internet access. Those who are not connected are more likely to be older people with lower incomes, whose relationship to culture may not be affected by digital trends.⁷⁰ Rural households are said to face challenges in accessing internet service equivalent to the speeds that are available in cities due to factors such as remote location and challenging terrain.⁷¹

For the majority who are connected, the digital transformation has reconfigured the ways to access, share, learn about, and participate in culture. The availability of multiple devices and platforms encourages the production of new cultural products, feeding the growing demand of Canadian consumers. Phones and wearable devices are part of an expanded computing environment, and the last five years has seen a veritable flood of connected devices into the consumer electronics marketplace. Connected televisions, automobiles, and home appliances have joined laptops, tablets, gaming consoles, e-readers, and smartphones in everyday use, shaping engagement patterns. In Canada, ownership of mobile devices is consistently higher among younger people. As these devices continue to proliferate, there will be increased emphasis on serving the needs of the mobile user in diverse contexts and environments.

These trends afford significant opportunities for culture, but also present challenges. Understanding how to harness digital technologies to offer innovative products and services, operate on new business and revenue models, and respond to new forms of engagement will require a mix of creative, technical, and business skills.⁷² As connectivity, data consumption, and production continue to grow at an exponential rate, the ability to connect with and engage the

⁶⁶ Quorus Consulting, “Canadian Books, Films, Periodicals and Music Opinion Survey” (Ottawa: Canada, Department of Canadian Heritage, September 4, 2012), <http://www.nordicity.com/media/2013724dggfjbufnd.pdf>.

⁶⁷ Sarwant Singh, “The 10 Social and Tech Trends that Could Shape the Next Decade,” (*Forbes*, May 12, 2014), <http://www.forbes.com/sites/sarwantsingh/2014/05/12/the-top-10-mega-trends-of-the-decade/>.

⁶⁸ Singh, “The 10 Social and Tech Trends that Could Shape the Next Decade.”

⁶⁹ Statistics Canada, “Canadian Internet Use Survey, 2012,” <http://www.statcan.gc.ca/daily-quotidien/131126/dq131126d-eng.htm>.

⁷⁰ Statistics Canada, “Canadian Internet Use Survey, 2012.”

⁷¹ Canada, “Access to Broadband” in “Economic Action Plan 2014,” <http://actionplan.gc.ca/en/initiative/access-broadband>; Rural Ontario Municipal Association (ROMA), “A Voice for Rural and Northern Ontario” (ROMA, October 2011), <http://www.roma.on.ca/ROMA-Docs/Reports/2011AVoiceforRuralNorthernOntario2011Oct.aspx>.

⁷² Maria De Rosa and Marilyn Burgess, “Where Creativity Meets Technology in the Digital Economy: A Context Paper for Canada’s Interactive Digital Media Industry” (Cultural Human Resources Council, 2012).

public on line, and to gather and interpret data on how people interact with culture on line, will be both challenging and necessary to remain competitive. Cultural organizations and companies will need to maintain their ability to adapt their products and strategies to digital opportunities and challenges as they evolve.

3.4 Changing Demographics

Cultural diversity is a recognized, important driver of the creative economy.⁷³ With a population of 13 million, Ontario is Canada's most populous province and the most culturally diverse. Ontario's diversity fuels innovation and attracts creative individuals and companies to live and work here. Diversity is a critical strength contributing to Ontario's competitiveness in the culture sector.

Over 300,000 First Nation, Métis and Inuit people live in Ontario, more than in any other province or territory. Ontario is also home to the largest Francophone population in North America outside Quebec. The Francophone population is increasingly diverse,⁷⁴ having for many years welcomed newcomers from Africa, Asia, the Middle East, and Europe. One quarter of Ontario's population, 3.3 million people, identify themselves as visible minorities.⁷⁵ Between 2006 and 2011, Ontario's visible minority population grew five times faster than the population as a whole.⁷⁶ More than 40% of immigrants to Canada from all over the world settle in Ontario.

Ontario's First Nation, Métis, and Inuit populations increased by almost 58% between 2001 and 2011.⁷⁷ Over the next 15 years, Indigenous people could make up over 10% of the total populations of Thunder Bay and Greater Sudbury.⁷⁸

About two and a half million Ontarians are between the ages of 12 and 25. This represents about 18 per cent of the province's overall population.⁷⁹ Ontario's youth are very technologically connected and typically well educated. Trends point to more culturally and geographically

⁷³ The Conference Board of Canada, "Valuing Culture"; The Warwick Commission, "Enriching Britain - Culture, Creativity and Growth" (University of Warwick, 2015); Vivian Hunt, Dennis Layton, and Sara Prince, "Why Diversity Matters" (McKinsey & Company, January 2015),

http://www.mckinsey.com/insights/organization/why_diversity_matters.

⁷⁴ Bakhtiar Moazzami, "Strengthening Rural Canada: Fewer and Older – The Coming Demographic Crisis in Rural Ontario" (Ottawa: Strengthening Rural Canada Initiative, 2014),

<http://www.essentialskillsontario.ca/sites/www.essentialskillsontario.ca/files/Strengthening%20Rural%20Canada%20-%20Fewer%20and%20Older%20-%20The%20Coming%20Demographic%20Crisis%20in%20Rural%20Ontario.pdf>.

⁷⁵ Note: "Visible minority" is the term used by Statistics Canada.

⁷⁶ Statistics Canada, "2011 National Household Survey," used in Ministry of Finance, "2011 National Household Survey Highlights: Factsheet 2," <http://www.fin.gov.on.ca/en/economy/demographics/census/nhshi11-2.html>. Ontario's 301,430 people who self-identified as Indigenous are not counted as part of the visible minority population.

⁷⁷ Moazzami, "Strengthening Rural Canada."

⁷⁸ Éric Caron Malenfant and Jean-Dominique Morency, "Population Projections by Aboriginal Identity in Canada, 2006 to 2031" (Statistics Canada, 2011), cited in Robyn Jeffrey and Elizabeth MacKinnon, "Ontario Arts Council 2013: Environmental Scan" (20 April, 2013): 11, <http://www.arts.on.ca/AssetFactory.aspx?did=9689>.

⁷⁹ Ontario, Ministry of Finance, "Ontario Population Estimates" (Ontario, modified June 15, 2012), <http://www.fin.gov.on.ca/en/economy/demographics/projections/>.

diverse younger generations. Nearly 26 per cent of youth belong to a visible minority group.⁸⁰ First Nation, Métis, and Inuit people are the youngest population in the province, with almost half under the age of 30.⁸¹

Seniors (65 years of age or older) make up the fastest-growing age group in Canada.⁸² There were an estimated 5 million seniors in 2011, and this number is expected to increase to 10.4 million by 2036.⁸³ As is the case throughout Canada, Ontarians are living longer and with less chronic illness or disability than generations before them.⁸⁴ The number of healthy older adults with leisure time will have an impact on the culture sector through increased cultural participation and consumption, cultural tourism, and volunteering.

In 2012, 26.3% of Canadians aged 65 to 74 and 42.5% of those aged 75 and over were people with disabilities.⁸⁵ Only 4.4% of Canadians aged 15 to 24 were people with disabilities.⁸⁶ Thus, although more adults will remain healthy longer, the projected dramatic increase in the number of older adults is expected to raise the percentage of people with disabilities. It seems likely that this trend will spur innovation in assistive technologies suited to the culture sector, in turn leading to increased diversity of expression.

The cultural workforce is aging along with the general population, and succession planning will become more important to assure a smooth transition to the next generation of leaders.⁸⁷ The culture sector will need to ensure that they have the talent, skills, and experience they will need. The transition to a new generation of leadership may provide additional opportunities to leverage Ontario's diversity to competitive advantage.

Over all, Ontario's population growth will be mostly in cities. Immigrants primarily settle in cities⁸⁸ and the number of First Nations, Métis, and Inuit Ontarians living in cities is rising

⁸⁰ Ontario Trillium Foundation, "Diversity in Ontario: A Community Profile" (Ontario Trillium Foundation, 2011), http://www.otf.ca/en/knowledgeSharingCentre/div_ontario.asp.

⁸¹ Statistics Canada, "2011 National Household Survey" used in Ontario, Ministry of Finance, "2011 National Household Highlights: Factsheet 3," <http://www.fin.gov.on.ca/en/economy/demographics/census/nhshi11-3.html>.

⁸² Employment and Social Development Canada (ESDC), "Canadians in Context - Aging Population," <http://well-being.esdc.gc.ca/misme-iowb/.3ndic.1t.4r@-eng.jsp?iid=33>.

⁸³ ESDC, "Canadians in Context - Aging Population."

⁸⁴ Samir K. Sinha, "Living Longer, Living Well: Highlights and Key Recommendations" (Ontario, Ministry of Health and Long-Term Care, January 2013), http://www.health.gov.on.ca/en/common/ministry/publications/reports/seniors_strategy/docs/seniors_strategy.pdf

⁸⁵ Employment and Social Development Canada, *Canadians in Context - People with Disabilities*. Retrieved from <http://well-being.esdc.gc.ca/misme-iowb/.3ndic.1t.4r@-eng.jsp?iid=40>.

⁸⁶ Employment and Social Development Canada (ESDC), "Canadians in Context - People with Disabilities"

⁸⁷ Nordicity Group Ltd., "Labour Market Insights in Ontario's Cultural Industries" (Work in Culture, April 29, 2014), <http://www.omdc.on.ca/Assets/Research/Research+Reports/Labour+Market+Insights+ONS+Cultural+Media+Industries/Labour+Market+Insights+in+Ontarios+Cultural+Media+Industries.pdf>.

⁸⁸ Moazzami, "Strengthening Rural Canada."

sharply. As the urban population is growing, rural and small town populations are shrinking.⁸⁹ Some point to cultural development as having the potential to stem the flow of workers away from rural areas.⁹⁰ The role of culture in revitalizing communities may be important for remote or rural communities facing population decline.

Ontario's changing demographics could translate into opportunities to create more and different cultural products and services, activities, and ways to engage and participate geared to the changing market.⁹¹ It may also create new domestic and international opportunities to market Ontario's cultural products.

4. Sector Profile: The Arts

4.1 Overview

The arts sector includes artists and organizations working in disciplines such as dance, music, theatre, visual arts, media arts, and literary arts, as well as interdisciplinary, multidisciplinary, and emerging art forms.

Artists and arts organizations are supported by professional producers, agents, technicians, administrators, fundraisers, marketers, publicists, curators, critics and educators. They are further supported by educational and training institutions and other bodies such as arts service organizations, guilds, unions, and trade associations. The sector includes artistic research and experimentation, creation, production and dissemination, and marketing and promotion, as well as participation and engagement by the wider public.

Forty-three percent of Canada's artists live in Ontario. In 2011, one in every 115 workers in the province was an artist, approximately 58,100 in all, of which 52% were women. In 2011, 16% of Ontario artists belonged to a visible minority group,⁹² 24% were first generation immigrants, and almost 2% were First Nations, Métis and Inuit. The number of artists in Ontario grew rapidly between 1989 and 2013, increasing by 48% compared with 34% for the overall Ontario workforce.⁹³

Arts organizations include theatre companies, dance companies, orchestras, music groups, performing arts presenters, art galleries, auction houses, festivals, artist-run centres, studios,

⁸⁹ Moazzami, "Strengthening Rural Canada." Population projections for 2011-2025 indicate that Ontario's rural population will continue to decline as more working-age adults leave rural areas to study and work in cities.

⁹⁰ Duxbury, Campbell & Keurvorst, "Developing and Revitalizing Rural Communities through Arts and Culture: Summary Overview" (Creative City Network of Canada, 2009),

http://www.creativecity.ca/database/files/library/rural_arts_summ_overview.pdf.

⁹¹ Jeffrey and MacKinnon, "Ontario Arts Council: 2013 Environmental Scan," 10.

⁹² Note: "Visible minority" is the term used by Statistics Canada.

⁹³ Hill Strategies Research Inc., "Artists and Cultural Workers in Canada's Provinces and Territories," (October 22, 2014), <http://www.hillstrategies.com/content/artists-and-cultural-workers-canada%E2%80%99s-provinces-and-territories>.

and community venues. In 2013-2014, the Ontario Arts Council provided support to 1,095 not-for-profit arts organizations across the province.⁹⁴

For a more comprehensive environmental scan of the arts sector, please consult, Robyn Jeffrey & Elizabeth MacKinnon, *Ontario Arts Council: 2013 Environmental Scan*.⁹⁵

4.1.1 Artists

Artists are at the core of the arts sector. The *Status of Ontario's Artists Act*, enacted in 2007, formally recognizes their social and economic contributions to the province.⁹⁶

A key characteristic of the working life of Ontario's artists is the high level of self-employment. About half of all Ontario artists (47%) are self-employed (compared with 10% of the overall Ontario labour force).⁹⁷

Creators and other self-employed workers in the arts face challenges with precarious status, career self-management, inadequate or fluctuating income and benefits, and instability of work.⁹⁸ Nevertheless, jobs in the arts are generally associated with higher levels of well-being and offer greater personal autonomy.⁹⁹

Though typically highly educated, artists earn about 30% less than the average Ontario worker. On average, Ontario artists earned \$34,900 from all sources in 2011. Half of all Ontario artists earned \$23,200 or less.¹⁰⁰ Among the lowest-earning artists across Canada are dancers, artisans, and visual artists. These are disciplines in which women make up the majority.¹⁰¹

There are also gender-related earnings gaps in arts management. For example, in art museums across North America, women hold fewer than 50% of directorships, and the average female museum director's salary lags behind that of the average male director. In the United States, disparity is greatest at the largest art museums, where women hold only 24% of directorships and female directors earn an average of 71% of male directors' earnings.¹⁰²

⁹⁴ Ontario Arts Council (OAC), "OAC 2013-2014 Annual Report" (Toronto: OAC, 2014), <http://www.arts.on.ca/Asset10353.aspx?method=1>.

⁹⁵ Jeffrey and MacKinnon, "Ontario Arts Council: 2013 Environmental Scan."

⁹⁶ Ontario, *The Status of Ontario's Artists Act, 2007*, <http://www.ontario.ca/laws/statute/07s07>.

⁹⁷ Hill Strategies Research Inc., "Artists and Cultural Workers in Canada's Provinces and Territories."

⁹⁸ The Cultural Human Resources Council (CHRC), "Cultural HR Study 2010: HR Trends and Issues Report" (Ottawa: CHRC, December 2010).

⁹⁹ Daniel Fujiwara, Paul Dolan, and Ricky Lawton, "Creative Occupations and Subjective Well-being" (Nesta, April 2015), https://www.nesta.org.uk/sites/default/files/creative_employment_and_subjective_well-being_1509_1.pdf.

¹⁰⁰ Hill Strategies Research Inc., "Artists and Cultural Workers in Canada's Provinces and Territories."

¹⁰¹ Hill Strategies Research Inc., "Artists and Cultural Workers in Canada's Provinces and Territories."

¹⁰² Anne Marie Gan et al., "The Gender Gap in Art Museum Directorships" (New York/Washington: Association of Art Museum Directors, March 2014) https://aamd.org/sites/default/files/document/The%20Gender%20Gap%20in%20Art%20Museum%20Directorships_0.pdf.

Some artists and other freelance arts workers pursue “portfolio careers,” drawing on many skills and interests to create multiple revenue streams through multiple lines of work.¹⁰³ This is a choice for some and a necessity for others.¹⁰⁴

Unlike most other professions, the overwhelming majority of artists do not retire.¹⁰⁵ As the growing artist population extends working life well into senior years, demand will grow for programs that provide income security adapted to the needs of artists, such as flexible models of retirement benefits and affordable housing.¹⁰⁶

4.1.2 Engagement in the Arts

Exposure to the arts and participation in artistic activities inspires Ontarians of all ages and backgrounds. The vast majority of Ontarians believe that the arts help enrich the quality of their lives, and that arts activities are valuable to their communities.¹⁰⁷

Virtually all Ontarians take part in arts activities of some sort. For example, 99% of Ontarians engage at least once a year in music activities, 98% in visual arts, crafts, or film activities, and 64% in theatre activities.¹⁰⁸ In 2010, 73% of Ontarians attended a performing arts or cultural event. In the same year, 36% of Ontarians visited an art gallery.¹⁰⁹ Studies show, however, that nationwide attendance rates are lower among people with disabilities, seniors, and visible minorities.¹¹⁰

¹⁰³ Benjamin Reid, Alexandra Albert, and Laurence Hopkins, “A Creative Block? The Future of the UK Creative Industries” (The Work Foundation Alliance Limited, December 2010): 26, http://www.theworkfoundation.com/assets/docs/publications/277_a%20creative%20block.pdf; Kate Oakley, “Absentee workers: Representation and participation in the cultural industries,” in Mark Banks, Rosalind Gill, and Stephanie Taylor, eds., *Theorizing Cultural Work: Labour, Continuity and Change in the Cultural and Creative Industries* (London: Routledge, 2014), as cited in Abigail Gilmore, “Raising our quality of life: The importance of investment in arts and culture” (London: The Centre for Labour and Social Studies, 2014): 16, http://classonline.org.uk/docs/2014_Policy_Paper_-_investment_in_the_arts_-_Abi_Gilmore.pdf.

¹⁰⁴ *The Guardian*, Charlie Ball, deputy director of research, Prospects, quoted in Charlotte Seager, “Building freelance portfolio careers in the creative industries – live chat” (*The Guardian*, June 7, 2015), <http://www.theguardian.com/careers/2015/jun/07/building-freelance-portfolio-careers-creative-industries-advice-live-chat>.

¹⁰⁵ Kelly Hill, “Senior Artists in Canada” (Hill Strategies Research Inc., November 2010), http://hillstrategies.com/sites/default/files/Senior_Artists_full_report.pdf.

¹⁰⁶ Hill, “Senior Artists in Canada”; Joan Jeffri et al., “Above Ground: Information on Artists III: Special Focus New York City Aging Artists” (Columbia University Academic Commons, 2007), <http://hdl.handle.net/10022/AC:P:14517>.

¹⁰⁷ The Environics Research Group, “The Arts and Quality of Life: The Attitudes of Ontarians” (Toronto: Ontario Arts Council, March 2010), <http://www.arts.on.ca/assetfactory.aspx?did=6235>.

¹⁰⁸ WolfBrown, “Ontario Arts Engagement Study”; Jeffrey and MacKinnon, “Ontario Arts Council: 2013 Environmental Scan.”

¹⁰⁹ Hill Strategies Research Inc., “Provincial Profiles of Arts, Culture and Heritage Activities in 2010: Statistical Insights on the Arts 10, no. 3” (Canada, Department of Canadian Heritage, March 2012): 69, <http://www.arts.on.ca/AssetFactory.aspx?did=10019>.

¹¹⁰ Hill Strategies Research Inc., “Diversity in Arts Attendance by Canadians in 2010,” <http://www.hillstrategies.com/content/diversity-and-arts-attendance-canadians-2010>.

Volunteering is another significant form of participation in the arts. Arts organizations funded by the Ontario Arts Council logged 1.7 million volunteer hours in 2011-2012.¹¹¹

First Nation, Métis and Inuit peoples report significantly higher levels of engagement in creative activities compared with the rest of the Ontario population. Activities include writing fiction, arts learning (for example, music classes), and community-based arts including social dancing.¹¹²

4.1.3 Social and Economic Benefits of the Arts

The arts have inherent value and make valuable contributions to the quality of life in Ontario's communities. They widen individual perspectives, give voice to points of view and aspirations, stimulate curiosity, and bind people together in shared experiences. The arts are increasingly recognized as an important factor in wellness.¹¹³

For youth, there is a demonstrated link between the arts and improved education outcomes.¹¹⁴ For example, music education contributes to the development of hard skills such as math, logic, and cognitive processing.¹¹⁵ Arts education programs have been shown to build skills in critical inquiry and lateral thinking.¹¹⁶

Artists and arts organizations offer arts education programs for learners of all ages and engage in outreach activities in their communities.¹¹⁷ Arts in learning environments is associated with a wide range of social benefits, such as increased self-esteem, resiliency, and enhanced discovery skills. Youth engagement in the arts has been demonstrated to promote social relationship skills.¹¹⁸

The arts are also important to Ontario's economic health, contributing \$936 million to GDP and creating 24,786 jobs in 2010.¹¹⁹

¹¹¹ Ontario Arts Council (OAC), "OAC 2013-2014 Annual Report."

¹¹² WolfBrown, "Ontario Arts Engagement Study."

¹¹³ All-Party Parliamentary Group on Well-being Economics, "Well-being in Four Policy Areas" (London: New Economics Foundation, September 2014), http://b3cdn.net/nefoundation/ccdf9782b6d8700f7c_lcm6i2ed7.pdf.

¹¹⁴ Peter Taylor et al., "A Review of the Social Impacts of Culture and Sport" (London: Department for Culture, Media and Sport, The Culture and Sport Evidence Programme, March 2015): 88, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/416279/A_review_of_the_Social_Impacts_of_Culture_and_Sport.pdf.

¹¹⁵ Virginia Jones et al., "The Next Big Bang: A New Direction for Music in Canada" (Toronto: Music Canada, rev. September 27, 2013), <http://musiccanada.com/wp-content/uploads/2014/06/TheNextBigBang.pdf>.

¹¹⁶ Peter Taylor et al., "A Review of the Social Impacts of Culture and Sport."

¹¹⁷ Ontario Arts Council, "Ontario Arts Quick Stats" (OAC, October 2014), <http://www.arts.on.ca/AssetFactory.aspx?did=10316>.

¹¹⁸ Peter Taylor et al., "A Review of the Social Impacts of Culture and Sport."

¹¹⁹ Statistics Canada, "Provincial and Territorial Culture Satellite Account, 2010" (Statistics Canada, modified June 9, 2015), <http://www.statcan.gc.ca/pub/13-604-m/13-604-m2015079-eng.htm>. Figures represent industry perspective and include performing arts, festivals and celebrations, original visual art, and crafts. Note: In order to meet the confidentiality requirements of the Statistics Act, the employment figure for original visual art does not include non-culture jobs.

4.2. Key Trends

4.2.1 Evolving Demographics and Arts Practices

Ontario's demographic trends are mirrored in a blossoming of diverse art forms, activities, and services.¹²⁰ Studies have linked cultural diversity amongst artists to the development of hybrid artistic practices that combine traditional and contemporary art forms, particularly by artists trained in both traditional and contemporary practices.¹²¹ This evolving arts scene brings opportunities for greater engagement by diverse Ontario audiences, along with the challenge of accommodating new artists and art forms within the existing physical and fiscal environments.

In the past two decades, "Deaf and disability arts" has gained recognition in Canada as an emerging field of practice. Key concerns for these artists are access to funding, access to training, and access to physical resources such as training institutions, performing arts venues, and art galleries.¹²² The Ontario Art Council's latest strategic plan designates Deaf artists and artists with disabilities as a priority group and has established distinct programs and services addressing their needs.¹²³

Responding to an aging population, collaborations are forming to place the arts in settings concerned with healthy aging.¹²⁴ The Ontario Trillium Foundation supports a number of community-based projects that engage seniors in arts and cultural activities. Projects are built on the themes of Active People, Connected People, and Inspired People. Some other jurisdictions have added arts programs for seniors to their program offerings (e.g., Vancouver's Healthy Aging Through the Arts project).¹²⁵ The challenge is to ensure that the artists have appropriate supports through collaboration with health and elder-care professionals. The Vancouver program, now expanded to other parts of British Columbia, matches professional artists with people working in the seniors' services field.¹²⁶

¹²⁰ Jeffrey and MacKinnon, "Ontario Arts Council: 2013 Environmental Scan," 10. *See also* Canada Council for the Arts, "The Current Environment for the Arts and the Canada Council" (Canada Council for the Arts, n.d.), <http://canadacouncil.ca/council/about-the-council/current-environment#6>.

¹²¹ For example, Maria De Rosa and Marilyn Burgess, "The Shape of Things to Come: Mapping CPAF Members' Support for Multi-Disciplinary Arts" (Ottawa: Canada Council for the Arts, 2009).

¹²² Rose Jacobson and Geoff McMurchy, "Focus on Deaf and Disability Arts in Canada" (Canada Council for the Arts, December 2010), <http://canadacouncil.ca/~media/files/research%20-%20en/focus%20on%20disability%20and%20deaf%20arts%20in%20canada/focusondisabilityanddeafartsincanada.pdf>.

¹²³ Ontario Arts Council, "Vital Arts and Public Value."

¹²⁴ Jeffrey and MacKinnon, "Ontario Arts Council: 2013 Environmental Scan."

¹²⁵ City of Vancouver, "Arts and Health Project: Healthy Aging through the Arts" (n.d.), <http://vancouver.ca/parks-recreation-culture/arts-and-health-project.aspx>; Arts and Health Project (n.d.), <http://www.artsandhealthproject.com/>.

¹²⁶ City of Vancouver, "Arts and Health Project."

Artists, especially young artists, are increasingly interested in working with other sectors such as environment, justice, or human rights.¹²⁷ Collaborations between artists, the scientific community, and cultural industries can drive innovation in artistic expression, creative tools, and products. In Ontario, the Adjacent Possibilities in art+energy project of the Studio Y fellowship program of MaRS (a registered charity) is bringing artists and energy entrepreneurs together to reframe how climate change is considered.¹²⁸

Some First Nations, Métis or Inuit artists are experimenting with and developing hybrid Indigenous art forms that bring together traditional worldviews with contemporary art practices.¹²⁹ Many jurisdictions have developed policies and funding structures to encourage Indigenous arts. The Ontario Arts Council has an Aboriginal Arts Office with dedicated staff and programs.¹³⁰

4.2.2 Digital Technologies

New digital technologies are having a sustained and dramatic impact on artistic creation, production, and dissemination.¹³¹ Artists are making creative and innovative use of new digital technologies in all disciplines, including live performing arts, visual arts, crafts, and the media arts. As digital media has become increasingly integrated into the work of artists and arts organizations in the past decade, digital distribution is increasingly taking their work to new, global audiences.

The arts sector faces two significant challenges arising from the rapid evolution of digital technology. One is the need for skills development to build and sustain capacity to fully embrace opportunities for creation, marketing, and promotion.¹³² The other challenge is revenue generation and fair compensation from digital distribution. Consumers now have unprecedented access to a wide range of creative works via the Internet, and they are able to make perfect digital copies. This threatens the economic returns and protections that copyright

¹²⁷ Canada Council for the Arts, news release, “Canada Council for the Arts Introduces New Funding Model” (June 3, 2015), <http://canadacouncil.ca/council/news-room/news/2015/new-funding-model>.

¹²⁸ Ross Curtner, “Encounters between two cultures: Adjacent possibilities in art+energy” (MaRS, August 14, 2014), <http://www.marsdd.com/systems-change/studio-y/news/encounters-two-cultures-adjacent-possibilities-artenergy/>.

¹²⁹ France Trépanier and Chris Creighton-Kelly, “Understanding Aboriginal Arts in Canada Today: A Knowledge and Literature Review” (Ottawa: Canada Council for the Arts, December 2011), <http://canadacouncil.ca/~media/files/research%20-%20en/understanding%20aboriginal%20arts%20in%20canada%20today%20a%20knowledge%20and%20literature%20review/understanding%20aboriginal%20arts%20in%20canada%20today.pdf>.

¹³⁰ Annamari Laaksonen, “Indigenous Arts Policy: Initiatives and Challenges” (Sydney: International Federation of Arts Councils and Culture Agencies, May 2012), <http://www.ndpculture.org/media/W1siZiIsIjIwMTQvMDcvMzAvN2IwZjc0YTIsOV9EX0FydDlySW5kaWdlbm91c0FydHlNQb2xpY3kucGRmll1d?sha=227271d236a27c9e>.

¹³¹ Canada Council for the Arts, “Canada Council for the Arts Introduces New Funding Model.”

¹³² WorkInCulture, “Skills for Success: Business Skills for the Creative Community” (WorkInCulture, June 2013): 13, <http://www.workinculture.ca/Resources/Research>; see also Jeffrey and MacKinnon, “Ontario Arts Council: 2013 Environmental Scan.”

laws are meant to provide to writers, composers, performers, visual artists, filmmakers, and others.¹³³

4.2.3 The Fiscal Environment

Demand for financial support for the arts is expected to grow throughout Canada.¹³⁴ Increasing arts activity by emerging artists and arts organizations is challenging traditional arts funders to do more within their existing resources.¹³⁵

Ontario's not-for-profit arts organizations have three main revenue sources: earned revenue, private sector giving, and government (all levels) support. On average, private sector giving represents 27% of an arts organization's total revenues.¹³⁶

Private giving is changing around the world and across all charitable sectors, including the arts. Recent research shows that many trusts, foundations, and major donors are shifting to a more strategic approach. This generally involves narrowing the scope of their giving, seeking closer engagement with funding recipients, and an increased interest in measuring and evaluating impact.¹³⁷ The challenge for Ontario's arts sector will be to develop the capacity to meet these new demands and to continue to access this vital support. They will also need to continue to explore new sources of revenues and new operating strategies.

Greater collaboration with the business sector is one way in which arts organizations are accessing new funding. The business sector can open doors to philanthropists and corporate sponsors.¹³⁸ Americans for the Arts in the US¹³⁹ and Business for the Arts in Canada¹⁴⁰ promote partnerships between business and the arts for mutual benefit. Strategic partnerships with

¹³³ Susan Ward, "Copyright in Canada, Part 1: A Copyright Protection Primer" (About.com, n.d.), <http://sbinfocanada.about.com/od/insurancelegalissues/a/copyright1.htm>.

¹³⁴ Canada Council for the Arts, "Strengthening Connections: Canada Council for the Arts Strategic Plan 2011-16" (Canada Council for the Arts, 2011), http://canadacouncil.ca/~media/files/corporate-planning%20-%20en/canadacouncil_strategicplan2011_16_en.pdf; Jeffrey and MacKinnon, "Ontario Arts Council: 2013 Environmental Scan."

¹³⁵ Standing Senate Committee on Official Languages, "Francophone Arts and Culture: Living Life to its Fullest in Minority Settings" (Canada, June 2009), <http://www.parl.gc.ca/content/sen/committee/402/offi/rep/rep03jun09-e.pdf>; Canada, Office of the Commissioner of Official Languages, "Federal Government Support for the Arts and Culture in Official Language Minority Communities" (Canada, March 2008), <http://www.ocol-clo.gc.ca/en/pages/federal-government-support-arts-and-culture-official-language-minority-communities>.

¹³⁶ Ontario Arts Council, Research Office. Internal data. Analysis based on data submitted through CADAC (reflects 2013-2014 actuals).

¹³⁷ BOP Consulting, "Catalyst Evaluation Year One" (Manchester: Arts Council England, March 2015), <http://www.artscouncil.org.uk/media/uploads/CatalystEvaluationYear1FinalReport.pdf>.

¹³⁸ The Strategic Counsel, "Building the Case for Business Support of the Arts," 34.

¹³⁹ Americans for the Arts Partnership Movement, <http://www.partnershipmovement.org/the-movement/>.

¹⁴⁰ Business for the Arts, <http://www.businessforthearts.org/>.

other organizations, whether in business, the arts, or other not-for-profit sectors, can enhance audience development as well as attracting additional revenues.¹⁴¹

The traditional model of the not-for-profit organization is not well adapted to all artistic work. To meet the needs of artists and their projects, new organizational models are emerging. Examples include social enterprise models and not-for-profit service providers that offer a range of professional services to eliminate the need for in-house expertise.

In the US, Fractured Atlas facilitates fiscal sponsorship and offers a number of tools for artists and arts organizations, including insurance coverage, a computer program designed to manage tickets, events, and donations, and a matchmaking tool for renters and providers of creative spaces.¹⁴² This last tool, Spacefinder, operates in 11 US cities and recently expanded into Canada with the launch of Spacefinder Toronto.¹⁴³ Creative Partnerships Australia (CPA), a not-for-profit organization supported by the Australian government through the Ministry for the Arts, is another model. CPA has status as a Deductible Gift Recipient, giving it the ability to provide receipts for tax-deductible philanthropic gifts directed by donors to individual artists, organizations, or projects.

Several jurisdictions are considering charitable platforms that can host artists' projects, eliminating the need for multiple incorporations.¹⁴⁴ In Canada, the challenge in pursuing this is current tax law prohibiting charitable corporations from flowing funds anywhere but to other incorporated, registered charities.

Powered by social media networks, crowdfunding allows organizations and individual artists to access seed funding to launch new initiatives. Crowdfunding also allows supporters to engage with creators and the creative process. Some (e.g., Kickstarter, Indiegogo) lend support to help projects reach their fundraising targets, but to be successful, crowdfunding requires expertise as well as sufficient human and financial resources.¹⁴⁵

¹⁴¹ Brett Sokol, blog entry, "O, Miami: How a Festival Infused a City with Poetry" (The Knight Foundation, March 2013), <http://www.knightfoundation.org/blogs/knightblog/2013/3/19/o-miami-how-a-festival-infused-a-city-with-poetry/>. See also Bill Flood and Beth Vogel, "The Arts in Cross-Sector Collaborations: Reflections on Recent Practice in the U.S." in Patrick S. Föhl and Iken Neisener, eds., *Regionale Kooperationen im Kulturbereich : theoretische Grundlagen und Praxisbeispiele* (Bielefeld: Transcript-Verlag, 2009): 347-361.

¹⁴² Fractured Atlas, <https://www.fracturedatlas.org/site/about/>.

¹⁴³ Fractured Atlas, Space Finder, <http://toronto.spacefinder.org/>.

¹⁴⁴ Jeffrey and MacKinnon, "Ontario Arts Council: 2013 Environmental Scan"; Jane Marsland, "Shared Platforms and Charitable Venture Organizations: A Powerful Possibility for a More Resilient Sector" (The Metcalf Foundation, June 2013), <http://metcalffoundation.com/wp-content/uploads/2013/06/Shared-Platforms-and-CVOs.pdf>.

¹⁴⁵ Maria De Rosa and Marilyn Burgess, "Vers de nouveaux modèles de financement pour les arts au Québec [Toward new financing models for the arts in Quebec]" (SODEC, March 2013).

5. Sector Profile: Cultural Industries

5.1. Overview

Cultural industries are the businesses engaged in creating, producing, and distributing cultural goods and services.¹⁴⁶ Ontario's cultural industries include film and television production, interactive digital media, the music industry, and book and magazine publishing. The economic activity generated by the cultural industries reflects the shift from industrial-based to knowledge-based economies in Ontario and in many jurisdictions around the world.

Companies in the cultural industries develop, produce and market products and services whose value resides in their intellectual property. They trade in intellectual property rights, in particular copyright,¹⁴⁷ which secures the economic value of these goods. Statistics Canada's creation of the Canadian Culture Satellite Account (CSA) recognizes the vital purpose that intellectual property serves in the cultural industries' economic value chain.¹⁴⁸

The Ontario government primarily supports the province's cultural industries through the programs and services offered by the Ontario Media Development Corporation and the Ontario Arts Council.

The cultural industries share common opportunities and challenges:

- The digital transformation has profoundly altered production of content, business models, and modes of content consumption;
- Income is lost to piracy;
- Rapid dissemination reaches wider audiences, but does not necessarily translate into more income; and
- Huge volumes of content, produced by both amateurs and professionals, increases the challenge of discoverability (the means by which content is found online by the target audience).

Ontario has the largest cultural industries sector in the country, accounting for almost half of all cultural industries GDP in Canada.¹⁴⁹ The majority of cultural industry businesses are small or micro enterprises, of which many lack access to capital to grow their businesses.¹⁵⁰ Jobs within

¹⁴⁶ United Nations Conference on Trade and Development (UNCTAD), "Creative Economy Report 2008: The challenge of assessing the creative economy towards informed policy-making" (Geneva: United Nations, 2008): 11, http://unctad.org/en/docs/ditc20082cer_en.pdf.

¹⁴⁷ Scott Lash and John Urry, *Economies of Signs and Space* (SAGE Publications Limited, 1994): 117; Working Group of EU Member States' Experts on Cultural and Creative Sectors, "Good Practice Report on the cultural and creative sectors' export and internationalisation support strategies" (Brussels: European Union, January 2014): 17, http://ec.europa.eu/culture/library/reports/eac-omc-report-ccs-strategies_en.pdf.

¹⁴⁸ Statistics Canada, "Provincial and Territorial Culture Satellite Account, 2010." The CSA provides measures of the economic importance of culture (inclusive of the arts, cultural industries, and heritage) and sport in Canada in terms of output, gross domestic product, and employment.

¹⁴⁹ Statistics Canada, "Provincial and Territorial Culture Satellite Account, 2010."

¹⁵⁰ Castledale Inc., in association with Nordicity Group Ltd., "A Strategic Study for the Book Publishing Industry in Ontario" (Book Industry Advisory Committee, Ontario Media Development Corporation, September 11, 2008),

this sector represent a mix of employment types, including permanent employees, self-employed entrepreneurs, and contract workers or freelancers. Because of the sector's potential for job creation, the cultural industries will continue to be critical to Ontario's growth and prosperity.¹⁵¹

5.2 Ontario's Cluster-Based Approach to the Cultural Industries

Since the 1990s, the Ontario government has taken a cluster-based approach to growing the cultural industries in the province, defining the "Creative Cluster" as the individuals and companies whose primary occupation is the creation, production, and/or monetization of intellectual-property based creative products.¹⁵² The creative cluster includes all activities directly involved in the development and production of creative products and services, as well as the supporting industries that enable the production and distribution of creative content.¹⁵³

The cluster approach facilitates co-location, or geographic clustering of complementary industries, and the removal of barriers to collaboration, whether physical, social, or cultural.¹⁵⁴ This approach was outlined publicly in the 2010 report *Ontario's Entertainment and Creative Cluster: A Framework for Growth*.

Although the province's primary supports focus on the cultural industries segment of the creative cluster, the province recognizes the importance of nurturing the entire creative ecosystem. Cluster theory states that interrelated firms and industries benefit from being co-located in regions where they both compete and cooperate. These benefits include greater opportunities for accessing expertise and skilled workers, financing, business and research networks, and enhanced collaboration and transfer of knowledge. Through targeted investments across the creative cluster ecosystem and through programs that support collaboration and partnerships, Ontario's cluster policy has focused on building the province's rich ecology of companies and institutions to create these important cluster benefits.

The cluster approach is consistent with other jurisdictions. In the US, states such as Arkansas, Colorado and Mississippi are supporting the development of innovation hubs, cultural districts

<http://www.omdc.on.ca/Assets/Research/Research+Reports/A+Strategic+Study+for+the+Book+Publishing+Industry+In+Ontario/A+Strategic+Study+for+the+Book+Publishing+Industry+In+Ontario.pdf>; Hogeschool vor de Kunsten Utrecht (HKU), "The Entrepreneurial Dimension of the Cultural and Creative Industries" (Utrecht: HKU, 2010), http://www.creativwirtschaft.at/document/11_StudyontheEntrepreneurialDimensionoftheCulturalandCreativeIndustries.pdf.

¹⁵¹ Reid, Albert, and Hopkins, "A Creative Block?," 8.

¹⁵² Ontario, Ministry of Tourism, Culture and Sport, "Ontario's Entertainment and Creative Cluster: A Framework for Growth" (Ontario, 2010): 3, http://www.mtc.gov.on.ca/en/publications/Creative_Cluster_Report.pdf

¹⁵³ Ontario, Ministry of Tourism, Culture and Sport, "Ontario's Entertainment and Creative Cluster," 3.

¹⁵⁴ National Governors Association, "New Engines of Growth."

and the creation of spaces for artists and creative talents to cluster.¹⁵⁵ Strong clusters are also associated with innovation and entrepreneurship.¹⁵⁶

Ontario's Entertainment and Creative Cluster: a Framework for Growth identified six pillars to support the growth of the creative cluster in Ontario. Ontario's creative cluster policy has been focused on building these pillars: developing private investment and financing; developing a global presence and market expansion; fostering innovation and digital transition; developing a strong ecosystem; developing skills and leadership infrastructure; and fostering industry-government collaboration. These cluster-based policy priorities underpin Ontario's investments in this sector, helping to build connections within the cultural industries of film and television production, interactive digital media, music, and book and magazine publishing, as well as connections between these industries and the cluster's artistic core, the supporting creative industries, and the wider economy.

5.3 Film and Television Production

The film and television production industry includes companies engaged in production and post-production, animation, and visual effects. They produce content for television programs and feature films, which is then sold or licensed to broadcasters and/or distributors. The industry also includes distributors, guilds, film festivals, trade associations, broadcasters, and many ancillary industries.

Ontario continues to be the leading jurisdiction for film and television production in Canada, contributing \$2.3 billion in production expenditures in Ontario (accounting for 40% of the national total) and supporting 44,410 direct and indirect jobs in 2013-2014.¹⁵⁷ The province is the second-largest Canadian destination for foreign production after British Columbia, accounting for 24% of the total national foreign production in 2013-2014.¹⁵⁸

Film and television production contributed \$1.9 billion to Ontario's GDP in 2010.¹⁵⁹ The sector's economic contribution also manifests itself over time through industry development, and through spillover effects captured by the construction and tourism sectors.¹⁶⁰

The average Canadian watches domestic films through Video on Demand (VOD) and Pay-per-View (PPV) services a few times per year, and 12% of Canadians download or stream Canadian

¹⁵⁵ National Governors Association, "New Engines of Growth."

¹⁵⁶ Mercedes Delgado, Michael E. Porter, and Scott Stern, "Clusters and Entrepreneurship," *Journal of Economic Geography* 10, no. 4 (2010): 495-518, <http://joeg.oxfordjournals.org/content/10/4/495>.

¹⁵⁷ Canadian Media Production Association et al., "Profile 2014," 11-12.

¹⁵⁸ Canadian Media Production Association et al., "Profile 2014," 109.

¹⁵⁹ Statistics Canada, "Provincial and Territorial Culture Satellite Account, 2010." Figures are from the industry perspective.

¹⁶⁰ Nordicity Group Ltd., "The Economic Contribution of the Film and Television Sector in Canada."

films from the Internet at least once per week.¹⁶¹ Monthly use of paid streaming to watch films increased from 22% of Canadians in 2012 to 30% in 2014.¹⁶²

More films are viewed worldwide today than ever before, in many formats and on a wide range of devices.¹⁶³ The proportion of Canadians watching films on mobile devices each month is growing, increasing from 9% in 2012 to 17% in 2014.¹⁶⁴ Preferences have shifted from movies to television series,¹⁶⁵ increasingly viewed on mobile devices. Between 2012 and 2013, the number of Canadians who watched television on their mobile devices increased by 34% to almost 2.5 million.¹⁶⁶ In the US, television viewing time on mobile devices surpassed television screen viewing time in 2014.¹⁶⁷

In 2013, Canadians watched, on average, 29 hours of traditional television per week. Those watching over the Internet typically spent just over five hours viewing programs.¹⁶⁸ On average, Canadian programming accounted for 43% of all weekly viewing. Independent of country of production, drama and comedy ranked highest in popularity, capturing 41% of weekly viewing. One-off documentaries captured 4%, and music, dance, and variety captured almost 2%.¹⁶⁹

The move away from traditional screens to new devices has created gaps in audience measurements that affect both the industry and public policy-makers. The CRTC's "Let's Talk TV" decision to establish an industry working group to develop a set-top box audience measurement analytics system is intended to address this gap.

5.3.1 Key Trends

5.3.1.1 The Financing Environment

Internet-based content distributors and aggregators such as Netflix, Hulu, YouTube and Amazon are producing their own original content to differentiate their services, in some cases spending more than they spend on acquiring catalogue content.¹⁷⁰ These services offer producers new

¹⁶¹ Quorus Consulting, "Canadian Books, Films, Periodicals and Music Opinion Survey."

¹⁶² Telefilm Canada, "Film Consumers in Canada: Three-Year Trends and Focus Group Findings" (Telefilm Canada, 2014), <http://www.telefilm.ca/upload/Website/Focus-group-findings-and-3-year-Trends-Presentation.pdf>.

¹⁶³ Michael Gubbins, "Digital Revolution: The Active Audience" (Cine-Regio, October 2012): 1, http://www.cine-regio.org/dyn/files/pdf_download_items/7-file/Digital%20Revolution_active%20audience_executive%20summary_oct2012.pdf.

¹⁶⁴ Telefilm Canada, "Film Consumers in Canada."

¹⁶⁵ Telefilm Canada, "Film Consumers in Canada."

¹⁶⁶ Comscore, Inc., "Digital Future in Focus" (Comscore Inc., 2014), <https://www.comscore.com/Insights/Presentations-and-Whitepapers/2014/2014-Canada-Digital-Future-in-Focus>.

¹⁶⁷ Simon Khalaf, blog entry, "Mobile to Television: We Interrupt this Broadcast (Again)" (Flurry Insights, November 18, 2014, <http://flurrymobile.tumblr.com/post/115194107130/mobile-to-television-we-interrupt-this-broadcast>.

¹⁶⁸ Canadian Radio-Television and Telecommunications Commission (CRTC), "Communications Monitoring Report 2014" (CRTC, 2015), <http://www.crtc.gc.ca/eng/publications/reports/policymonitoring/2014/cmr.htm>.

¹⁶⁹ CRTC, "Communications Monitoring Report 2014."

¹⁷⁰ Duopoly, "Content Everywhere (2): Securing Canada's Place in the Digital Future" (Canadian Media Production Association, February 2015): 9, <http://www.cmpa.ca/sites/default/files/documents/industry->

sources of financing and opportunities to monetize their content on alternative and new platforms. This trend is expected to grow as strong branded content offers a competitive differentiation strategy for promoting and selling distribution services.

A promising trend for lower-budget independent films is the relatively new practice of equity crowdfunding. This is the fastest growing source of equity financing and is expected to raise \$2.6 billion in 2015.¹⁷¹ In Canada, consolidation in the private broadcast sector has narrowed the number of financing windows for producers and alternative financing tools have become popular in this tightening financing environment.¹⁷²

The Documentary Australia Foundation is leading a funding initiative that leverages support from the philanthropic sector. The Foundation supports documentary filmmakers' efforts to raise funds, promotes their projects on line, and provides them with fundraising tools, a crowdfunding platform, and a charitable receipting service. The Foundation also hosted Good Pitch² Australia, a successful event to bring together the philanthropic and documentary sectors for a day of fundraising.¹⁷³

A number of jurisdictions are supporting low-budget filmmaking, such as the Rookie Film program of the Swedish Film Institute. It provided 80% of the financing for films with a maximum budget of \$1.08 million Euros (\$1.56 million Canadian) Run as a pilot program launched in 2009, it supported five films. In France, the Institute for Film Financing and Cultural Industries is charged with facilitating access to bank financing. A partnership between the French state and public and private banks, it provides loan guarantees for audio-visual

[information/studies/Content%20Everywhere%20-%20Securing%20Canada%E2%80%99s%20Place%20in%20the%20Digital%20Future.pdf.](#)

¹⁷¹ Chance Barnett, "Trends Show Crowdfunding to Surpass VC in 2016," citing MASSolutions Inc., "2015CF: The Crowdfunding Industry Report" (*Forbes*, June 9, 2015),

[http://www.forbes.com/sites/chancebarnett/2015/06/09/trends-show-crowdfunding-to-surpass-vc-in-2016/.](http://www.forbes.com/sites/chancebarnett/2015/06/09/trends-show-crowdfunding-to-surpass-vc-in-2016/)

¹⁷² Documentary Organization of Canada, "Growing the Pie: Alternative Financing and Canadian Documentary" (Documentary Organization of Canada, May 2014), <https://docorg.ca/sites/default/files/documents/DOC-GrowingThePie-2014-Web.pdf>.

¹⁷³ Tracey Friesen, "Story, Money, Impact: Good Pitch² Canada 2016 Feasibility Research Report" (Creative BC/Inspirit Foundation, August 2014),

<http://nebula.wsimg.com/a0d5cca01d08bac48fce503503dbeceb?AccessKeyId=4218BCD25018506E7ACE&disposition=0&alloworigin=1>. Good Pitch² is an initiative developed and shared globally by the BRITDOC. See also Tracey Friesen, "Canadian Impact Media: Research Report" (Inspirit Foundation, August, 2014), https://www.inspiritfoundation.org/files/2714/1392/4451/Canadian_Media_Impact-Research_Report_2014.pdf.

productions and film companies.¹⁷⁴ This facilitates timely access to financing adapted to their needs.¹⁷⁵

Many jurisdictions have reassessed their direct business supports for film and television production. Some, such as Saskatchewan, have eliminated their film tax credit. Others, such as Nova Scotia, have replaced tax credits with grants. In recent years, some reports, including the Commission on the Reform of Ontario's Public Services, have recommended that the Ontario government should restrict or redesign direct business supports, including Ontario's cultural media tax credits.¹⁷⁶ In its 2015 budget, the Ontario government reduced the production services and computer animation tax credits.

Changes on the regulatory front arising from the CRTC's decisions in its "Let's Talk TV" proceedings may further alter financing prospects for screen-based content producers. The elimination and reduction of some Canadian content regulatory supports and the move toward unbundling TV channels are just two of the significant recent changes that may affect the production sector in Ontario.¹⁷⁷

5.3.1.2 Discoverability

The types of screens on which film and television is viewed will continue to multiply, and at home or on the move, VOD and Internet-based services will be accessed on a variety of devices. Nevertheless, theatrical releases will continue to provide Canadian feature films with a critical opportunity to build awareness and will drive consumption on all other platforms.¹⁷⁸

These trends have implications for all activities in the sector, but in particular for producers and distributors. Distributors have embraced new business models such as event scheduling, shorter exhibition windows, and multiplatform release strategies. Innovative marketing and promotion to enhance the discoverability of Canadian television programs and feature films will be an increasing priority.

¹⁷⁴ Olsberg SPI, "Building Sustainable Film Businesses: The Challenges for Industry and Government" (Film i Väst, PACT, and the Swedish Film Institute, 2012): 34, 44, <http://www.filminstitutet.se/globalassets/2.-fa-kunskap-om-film/analys-och-statistik/publications/other-publications/building-sustainable-film-businesses---the-challenges-for-industry.pdf>. See also Working Group of EU Member States Experts on Cultural and Creative Industries, "Policy Handbook."

¹⁷⁵ European Commission, Commission staff working paper, "Impact assessment accompanying the document 'Regulation of the European Parliament and of the Council Establishing a Creative Europe Framework Programme'" (Brussels: European Commission, November 23, 2011), <http://register.consilium.europa.eu/doc/srv?l=EN&f=ST%2017186%202011%20ADD%201>.

¹⁷⁶ Commission on the Reform of Ontario's Public Services, "Public Services for Ontarians: A Path to Sustainability and Excellence."

¹⁷⁷ Canadian Radio-Television and Telecommunications Commission (CRTC), "Broadcasting Regulatory Policy 2015-86," <http://www.crtc.gc.ca/eng/archive/2015/2015-86.htm>.

¹⁷⁸ Monique Lafontaine, "Overview of the Canadian Feature Film Industry: 2012-2015" (Telefilm Canada, March 31, 2015), <http://www.telefilm.ca/document/en/01/17/Overview-canadian-feature-film-industry-2012-15FINAL.pdf>.

The CineCoup Film Accelerator is a unique Canadian model that both supports the productions of independent filmmakers and engages with audiences. The model helps filmmakers develop their projects by building fan support through online marketing.¹⁷⁹

Recognizing that Canadian-made programs must be widely available and visible to succeed in the current environment, CRTC intends to host a summit to engage stakeholders in the development of strategies and mechanisms to enhance the discoverability and promotion of Canadian content.¹⁸⁰

Many factors drive discoverability and promotion is chief among them. While seeking innovative strategies to exploit intellectual property, the Institute for Capitalising on Creativity (ICC) at the University of St. Andrews established a Knowledge Transfer Partnership (KTP). The KTP brings together a researcher, an industry partner and the Institute on industry-initiated projects. In this case, the project explored best practices to develop intellectual property strategies in order to bolster return on investment. Critical issues looked at included: Digital Rights Management, licensing, direct sales, alternative revenue streams, Creative Commons, branding, and formal intellectual property rights (patents, trademarks, copyright, trade secrets and design rights). As a result, Creative Scotland-the national funding body for the arts, film and creative industries-increased its funding for marketing and distribution projects ten-fold.¹⁸¹

The British Film Institute provides support to distributors for using new ways of reaching audiences, new marketing techniques, distribution platforms, or innovative exhibition models.¹⁸² The Institute has also supported trials of simultaneous multiplatform film releases.¹⁸³

5.3.1.3 Sustainability through the Global Marketplace

Films are “capital assets with seemingly increasing shelf lives which can grow with the emergence of markets around the world.”¹⁸⁴ International treaty coproduction allows Canadian producers to access larger production budgets and to gain exposure in foreign markets while enabling them to go beyond the Canadian market which, given its small size, makes it difficult to recoup the cost of production. If a producer now has the opportunity of selling in new territories, these opportunities are countered by the fact that many of Ontario’s film production companies are small, and their lack of international contacts hinders their access to the global marketplace.

¹⁷⁹ CineCoup, <http://www.cinecoup.com/cc/canada-2015>.

¹⁸⁰ CRTC, “Broadcasting Regulatory Policy CRTC 2015-86.”

¹⁸¹ Institute for Capitalising on Creativity, Creative Industries Scotland: Capitalising on Creativity – Report on ESRC Grant RES 187-24-0014, University of St. Andrews, 2015.

¹⁸² British Film Institute, <http://www.bfi.org.uk>

¹⁸³ Institute for Capitalising on Creativity (ICC) and University of St. Andrews, “Creative Industries Scotland: Capitalising on Creativity – Report on ESRC Grant RES 187-24-0014” (ICC, 2015), <https://www.st-andrews.ac.uk/media/icc/newwebsite/documents/ICC%20Capitalising%20on%20Creativity%20Report.pdf>.

¹⁸⁴ Olsberg SCI, “Building Sustainable Film Businesses,” 17.

With bases in 13 European Union Member States, the European Creative Business Network (ECBN) encourages greater collaboration by connecting creative entrepreneurs and development agencies across Europe. Through exchanges and trade missions, the ECBN helps creative companies overcome barriers to working internationally, such as difficulties with finding the right information, bureaucracy, and limited contacts and collaborators.¹⁸⁵

Australians in Film is an industry association for Australian filmmakers and performers in the US, operating with support from the Australian government. It provides members with access to writing and producing labs, industry panels and seminars, and networking opportunities with other industry professionals.¹⁸⁶

5.4 Interactive Digital Media

The interactive digital media (IDM) industry encompasses video games, mobile applications, interactive media, and e-learning. Most IDM companies use digital distribution channels, reaching their customers directly or through online stores and third-party applications.¹⁸⁷

Demand for IDM products is growing. One survey report stated that more than half of Canadians had played a video game in the four weeks prior to the survey.¹⁸⁸ Recent developments will continue to fuel demand for video games. These include free-to-play games, new game consoles and other hardware, and user-generated gameplay videos.¹⁸⁹

The IDM industry in Ontario¹⁹⁰ contributed \$917 million to GDP and 8,041 jobs to the economy in 2010.¹⁹¹ The province has the highest number of IDM companies in Canada, about 31% of the Canadian total. As many as one-third of the very large companies are multinationals, which generate the vast majority of revenue for the sector in Canada.¹⁹² A few have annual revenues

¹⁸⁵ Working Group of EU Member States' Experts on Cultural and Creative Sectors, "Good Practice Report," 41.

¹⁸⁶ Australians in Film, <http://www.australiansinfilmm.org/>.

¹⁸⁷ Nordicity Group Ltd., "2012 Canadian Interactive Industry Profile."

¹⁸⁸ Entertainment Software Association of Canada (ESAC), "Essential Facts about the Canadian Video Game Industry 2014" (ESAC, 2014): 16, <http://theesa.ca/wp-content/uploads/2015/08/Essential-Facts-2014-EN.pdf>.

¹⁸⁹ Maria De Rosa and Marilyn Burgess, Communications MDR, "Monetizing Digital Media: Trends, Key Insights, and Strategies that Work" (Canadian Interactive Alliance, November 2014); Newzoo, "The Consumer as Producer: How Games & Video Converge to Drive Growth" (Newzoo, July 21, 2015), available at <http://www.newzoo.com/insights/the-consumer-as-producer-how-games-video-converge-to-drive-growth-whitepaper/>.

¹⁹⁰ "The Interactive Media sub-domain is defined ... as the parts of IDM that consist of electronic, video, or on-line games, including console games, on-line games, wireless games, and PC games as well as other related interactive digital edutainment products. At a conceptual level, many of these products meet the criteria for culture because they are protected by copyright and are based upon creative artistic activity." Statistics Canada, "Conceptual Framework for Culture Statistics 2011" (Ottawa: Statistics Canada, November 2011): 47, <http://www.statcan.gc.ca/pub/87-542-x/87-542-x2011001-eng.pdf>.

¹⁹¹ Statistics Canada, "Provincial and Territorial Culture Satellite Account, 2010." Information is from the industry perspective.

¹⁹² Nordicity Group Ltd., "2012 Canadian Interactive Industry Profile."

above \$10 million,¹⁹³ but the majority are small- or medium-sized companies earning less than \$1 million in revenues in 2011.

Ontario's internationally recognized "indie" games scene is attracting investment to the province. There were 96 video game companies in Ontario in 2012, directly employing over 1,850 individuals.¹⁹⁴ Of these, 88% were Canadian-controlled, compared with the Canadian average of 76% of firms.¹⁹⁵ The average salary for full-time employees in these companies was \$76,400, slightly higher than the national average of \$72,500 in this industry.¹⁹⁶ According to a survey, 67% of Canadians believe that the video game industry provides good career opportunities for young people.¹⁹⁷

An important social benefit of video games is their application to learning and business environments. "Gamification" applies game play elements to activities such as training, education, and marketing. In education, e-learning is perceived to benefit both students and teachers.¹⁹⁸

5.4.1 Key Trends

5.4.1.1 Developing for Global Markets

IDM companies are increasingly developing their products for global markets, localizing them through language, names, and other culture-specific features.

Revenues for the Ontario mobile app industry are projected to reach \$1.9 billion in 2016 and \$3.3 billion by 2018.¹⁹⁹ Much of this growth is expected to come from international sources. The US is a key export market that generates approximately 27% of the industry's revenues.²⁰⁰

Globally, sales of mobile games are expected to overtake console game sales in 2015,²⁰¹ generating \$30.3 billion compared with \$26.4 billion for console games. Much of this revenue growth is coming from emerging markets in Southeast Asia and China.²⁰² This rapid growth in

¹⁹³ Nordicity Group Ltd., "2012 Canadian Interactive Industry Profile."

¹⁹⁴ Nordicity Group Ltd., "The Economic Contribution of the Film and Television Sector in Canada."

¹⁹⁵ Nordicity Group Ltd., "The Economic Contribution of the Film and Television Sector in Canada."

¹⁹⁶ Nordicity Group Ltd., "The Economic Contribution of the Film and Television Sector in Canada."

¹⁹⁷ Entertainment Software Association of Canada, "Essential Facts about the Canadian Video Game Industry 2014."

¹⁹⁸ Michael Gaebel et al., "E-learning in European Higher Education Institutions" (Brussels: European University Association, November 2014), http://www.eua.be/Libraries/publication/e-learning_survey; Jacqueline Bichsel, "The State of E-Learning in Higher Education: An Eye toward Growth and Increased Access" (Louisville, CO: EDUCAUSE Center for Analysis and Research, June 2013), <https://net.educause.edu/ir/library/pdf/ers1304/ERS1304.pdf>.

¹⁹⁹ Information and Communications Technology Council (ICTC), "Mobile Apps: Generating Economic Gains for Creative Media Industries in Ontario" (ICTC, January 2014): v, <http://www.omdc.on.ca/Assets/Research/Research+Reports/Mobile+Apps+Generating+Economic+Gains.pdf>.

²⁰⁰ ICTC, "Mobile Apps: Generating Economic Gains for Creative Media Industries in Ontario," v.

²⁰¹ John Gaudiosi, "Mobile Game Revenues Set to Overtake Console FGames in 2015" (*Fortune*, January 15, 2015), <http://fortune.com/2015/01/15/mobile-console-game-revenues-2015/>.

²⁰² Gaudiosi, "Mobile Game Revenues Set to Overtake Console Games in 2015."

mobile game revenue is a positive development for Ontario, which has a large share of mobile developers.²⁰³

In North America, however, console game sales are expected to continue to exceed mobile game sales. In 2015, console game sales are projected at \$11.1 billion, compared with \$7.2 billion for mobile games.²⁰⁴ This trend will shield console game developers from the worst impacts of a shrinking market.

5.4.1.2 Early-Stage Financing

Loan and venture capital financing are difficult to obtain in Canada,²⁰⁵ and many IDM companies face challenges with accessing early-stage financing. Survey findings indicate that self-financing and internal company financing may be the predominant sources for start-up capital.²⁰⁶ Some IDM companies look to the US for early-stage financing.²⁰⁷

The Canada Media Fund has introduced a number of innovative funding initiatives to facilitate access to investors. The Accelerator Partnership Pilot Program (A3P) is designed to provide access to digital media accelerators, which assist digital media companies with mentorship and to access markets and capital.²⁰⁸

The Seed Enterprise Investment Scheme (SEIS) in the UK is designed to help small, early-stage companies raise equity financing by providing tax breaks to individual investors. The SEIS also provides tax relief at a higher rate for early-stage companies.²⁰⁹ In addition, the UK government has launched a new tax relief program for certified British video games. Productions must pass a cultural test, based on a points system awarded to cultural content, cultural contribution, the location of the game's development, and the nationalities of key personnel working on the project.²¹⁰

²⁰³ Mobile Experience Innovation Centre (MEIC), "Mobile Innovation: Ontario's Growing Mobile Content, Services and Applications Industry 2012" (Toronto: OCAD University, 2012),

[http://www.omdc.on.ca/Assets/Research/Research+Reports/Mobile+Innovation/Mobile+Innovation+Ontario\\$!e2\\$!80\\$!99s+Growing+Mobile+Content\\$!2c+Services\\$!2c+and+Applications+Industry_en.pdf](http://www.omdc.on.ca/Assets/Research/Research+Reports/Mobile+Innovation/Mobile+Innovation+Ontario$!e2$!80$!99s+Growing+Mobile+Content$!2c+Services$!2c+and+Applications+Industry_en.pdf); Nordicity Group Ltd., "2012 Canadian Interactive Industry Profile."

²⁰⁴ Gaudiosi, "Mobile Game Revenues Set to Overtake Console Games in 2015".

²⁰⁵ Maria De Rosa and Marilyn Burgess, "New Directions for the Financing of Interactive Digital Media in Canada" (Canadian Interactive Alliance, 2012).

²⁰⁶ MEIC, "Mobile Innovation: Ontario's Growing Mobile Content, Services and Applications Industry 2012," 53-54.

²⁰⁷ De Rosa and Burgess, "New Directions for the Financing of Interactive Digital Media in Canada."

²⁰⁸ Canada Media Fund, <http://www.cmf-fmc.ca/funding-programs/experimental-stream/accelerator-partnership-pilot-program/>.

²⁰⁹ United Kingdom, "Business Tax Guidance: Seed Enterprise Investment Scheme" (UK, HM Revenue and Customs, October 22, 2013), <https://www.gov.uk/seed-enterprise-investment-scheme-background>.

²¹⁰ United Kingdom, press release, "Video games companies to begin claiming tax relief" (UK, HM Treasury and David Gauke, MP, August 19, 2014), <https://www.gov.uk/government/news/video-games-companies-to-begin-claiming-tax-relief>.

5.4.1.3 Skilled Labour

To compete globally, IDM companies need workers in multiple areas. There are gaps in access to some highly skilled workers. Technical skills are the biggest gap and will be increasingly in demand in the coming years. In addition to technical and creative skills, business and data analytics skills are also in demand, and monetization expertise is critical to be able to take advantage of opportunities in the app sphere. There are also gaps in leadership and production management skills.²¹¹ Canada's skills gaps are being filled internationally. For example, almost 40% of video game companies outsourced one or more of their functions in 2012.²¹²

The UK's creative industries strategy recognizes the importance of STEAM (Science, Technology, Engineering, Arts, Math) skills to foster innovation capacity. The strategy supports creative subjects, intellectual property awareness, computing, and enterprise/business skills in the British school curriculum.²¹³

5.5 The Music Industry

Canadians believe that listening to music contributes to their quality of life and that it is important to have access to music by Canadian artists.²¹⁴

Canadians, especially teenagers, are spending more time listening to music.²¹⁵ Most Canadians, 90%, listen to an average of 24 hours of music per week, but 95% of Canadian teens listen for an average of 31 hours. Most Canadians listen to music in the background. Teens spend one-third of their music-listening time doing other things, like playing video games, reading, and surfing the Internet.²¹⁶

Music consumption on tablets and smartphones is at an all-time high, and music streaming is growing.²¹⁷ Among music listeners, at least half of all smartphone and computer owners use a digital music service.²¹⁸

Most Canadians rely on radio and word of mouth to discover new music. Web-based sources such as online radio stations, social networks, and online music stores are also important in finding new music.²¹⁹

²¹¹ De Rosa and Burgess, "Where Creativity Meets Technology in the Digital Economy: A Context Paper for Canada's Interactive Digital Media Industry."

²¹² Nordicity Group Ltd., "The Economic Contribution of the Film and Television Sector in Canada."

²¹³ UK Trade & Investment (UKTI), "UK Creative Industries – International Strategy" (London: UKTI, 2014): 10-11, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/329061/UKTI_Creative_Industries_Action_Plan_AW_Rev_3.0_spreads.pdf.

²¹⁴ Quorus Consulting, "Canadian Books, Films, Periodicals and Music Opinion Survey," 9.

²¹⁵ Nielsen, "Music 360 Canada" (Nielsen Canada, February 6, 2015),

<http://www.nielsen.com/us/en/insights/reports/2015/music-360-2015-highlights.html>

²¹⁶ Nielsen, "Music 360 Canada."

²¹⁷ Nielsen, "Music 360 Canada."

²¹⁸ Nielsen, "Music 360 Canada."

²¹⁹ Quorus Consulting, "Canadian Books, Films, Periodicals and Music Opinion Survey."

Ontario's music industry is the largest in Canada. It is responsible for 78% of the country's recorded music sector revenues,²²⁰ and 39% of music industry establishments are located in Ontario.²²¹ The industry includes artist entrepreneurs, Canadian-owned record labels and publishers ("indies"), foreign-controlled record labels ("majors"), live music businesses (agents, music managers, music festivals, promoters, and presenters), and music distributors (e.g., radio, streaming services). Supporting the music industry are industry associations, training institutions, and service and technical organizations (e.g., recording studios, music technology companies).

In 2013, the multinational foreign-owned record companies (e.g., Universal Music Group, Warner Music and Sony Music) accounted for nearly four-fifths of the industry's total sales.²²² The independent sector consists mainly of small- and medium-sized companies involved in music production, artist development, publishing, managing, and touring. These companies accounted for 69% of all music sales by Canadian artists in the same year.²²³

Revenues from live touring are important to musicians, and music tourism has the potential to increase these revenues.²²⁴ The economic potential of music tourism is evident in Austin, Texas, which hosts two major live music festivals each year—South by Southwest Film, Interactive and Music Conference and Austin City Limits Music Festival. Music tourism accounted for nearly half of Austin's \$1.4 billion in tourism revenues in 2010. The Austin Convention & Visitors Bureau helped achieve this success by promoting local musicians and music entrepreneurs domestically and internationally.²²⁵

²²⁰ Based on Statistics Canada Table 361-0034, "Sound recording and music publishing, summary statistics" (accessed September 1, 2015). Revenue figures include the record production and integrated record production and distribution category, composed of record production [512210] and integrated record production/distribution [512220]. <http://www5.statcan.gc.ca/cansim/a26?lang=eng&retrLang=eng&id=3610034&pattern=&stByVal=1&p1=1&p2=-1&tabMode=dataTable&csid=>

²²¹ Based on Statistics Canada Table 551-0005, "Canadian business patterns, location counts, employment size and North American Industry Classification System (NAICS), national industries, by Canada and provinces December 2013" (accessed September 1, 2015). Includes only companies that maintain payroll. Aggregation includes: Record production [512210]; Integrated record production/distribution [512220]; and Music publishers [512230].

²²² Based on Statistics Canada Table 361-0061, "Sound recording and music publishing, total sales of recordings by country of control" (accessed September 2, 2015).

²²³ Based on Statistics Canada Table 361-0061, "Sound recording and music publishing, total sales of recordings by country of control" (accessed September 2, 2015).

²²⁴ Jones et al., "The Next Big Bang: A New Direction for Music in Canada," 3.

²²⁵ Titan Music Corp, "Accelerating Toronto Music Industry Growth: Leveraging Best Practices From Austin, Texas" (Music Canada, March 2012), <http://musiccanada.com/wp-content/uploads/2014/07/Accelerating-Toronto%E2%80%99s-Music-Industry-Growth-%E2%80%93-Leveraging-Best-Practices-from-Austin-Texas.pdf>.

Similar initiatives in Australia have been shown to provide solid economic returns. A study by the Australian Live Music Office shows that every dollar invested in Australia's live music industry returns three dollars to the wider economy.²²⁶

The music sound recording and music publishing industry in Ontario contributed \$275 million to GDP and 5,296 jobs in 2010.²²⁷ Ontario accounted for 43% of all jobs in the sound recording industry in Canada in 2010.²²⁸

The Ontario government is committed to a Live Music Strategy. First announced in 2013, it promotes Ontario's live music sector and positions the province as a premier global destination for live music and music tourism.²²⁹ In 2014, the Ontario government launched OntarioLiveMusic.ca, a portal dedicated to promoting live music in Ontario as part of the Live Music Strategy.²³⁰

5.5.1 Key Trends

5.5.1.1. Music Streaming Services

Music industry revenues are drawn music subscription services, CDs, vinyl LPs, downloads, and performance rights licensing. A key driver of change has been streaming music services. Ad-supported and subscription streaming services accounted for 32% of global digital music revenues in 2014, up from 25% in 2013.²³¹ Research on 13 of the world's leading music markets in 2015 showed that 38% of Internet users had accessed music on streaming sites such as Spotify in the previous six months.²³²

The music subscription model is the fastest growing area, driven by foreign services such as Spotify, Google Play Music, Rdio, Slacker, and Songza. Canada has lagged in offering streaming services, but they are proving popular with audiences. There was an increase of 127% in audio streams in the first half of 2015 compared to figures for the last six months of 2014 when

²²⁶ University of Tasmania et al., "The Economic and Cultural Value of Live Music in Australia 2014" (APRA AMCOS, August 12, 2015), <http://apraamcos.com.au/broadcast/LiveMusic-report-FINAL.pdf>.

²²⁷ Statistics Canada, "Provincial and Territorial Culture Satellite Account, 2010." Figures are from industry perspective.

²²⁸ Statistics Canada, "Provincial and Territorial Culture Satellite Account, 2010." Figures are from industry perspective.

²²⁹ Ontario, media release, "Ontario a Leader in Live Music: McGuinty Government Developing a Live Music Strategy to Showcase Industry Globally" (Ontario Newsroom, January 23, 2013), <http://news.ontario.ca/mtc/en/2013/01/ontario-a-leader-in-live-music.html>.

²³⁰ Quentin Burgess, "Ontario Government launches Live Music Portal and announces recipients of the first year of the Ontario Music Fund" (Music Canada, September 19, 2014), <http://musiccanada.com/news/ontario-government-launches-live-music-portal-and-announces-recipients-of-the-first-year-of-the-ontario-music-fund/>.

²³¹ International Federation of the Phonographic Industry (IFPI), "Digital Music Report 2015: Charting the Path to Sustainable Growth" (IFPI, 2015): 7, <http://www.ifpi.org/downloads/Digital-Music-Report-2015.pdf>.

²³² IFPI, "Digital Music Report 2015," 7.

numbers started to be tracked. That significant increase coincided with the arrival of Spotify in the latter half of 2014.²³³

This trend has also had an impact on the revenue streams of artists, providing them with an additional source of income. In the five-year period to 2014, revenues from streaming increased as a share of overall revenues for artists. However, income from streaming remains a relatively small portion of overall revenues.²³⁴

5.5.1.2 Export Expansion

Canada has a strong international reputation as an incubator of great musical talent. Independent music companies are primarily oriented to the domestic market, but there are opportunities for Canadian companies to develop international relationships to market, promote, and support touring for Canadian talent.²³⁵

In the UK, the Music Export Growth program provides grants to independent music companies to market UK music overseas.²³⁶

The Nordic Music Export Program (Nomex) is a joint platform of the music export offices of five Nordic countries: Sweden, Finland, Denmark, Iceland and Norway. The program aims to strengthen the market in the Nordic region, and to promote Nomex projects in other jurisdictions. The initiative includes a booking platform for touring artists, a Nordic playlist online, and live music showcases in the UK and Japan.²³⁷

5.6 Book and Magazine Publishing

Canadians believe in the value of reading and associate it with strong social benefits, including literacy, creativity, quality of life, social cohesion, and strength of the economy.²³⁸

Studies have shown that there is a relationship between reading and social engagement. Book readers volunteer their time at non-profit organizations and donate money or goods to non-

²³³ Tim Ingham, "Audio Streaming Volume Grows 127% in Canada – But YouTube is King" (*Music Business Worldwide*, July 21, 2015), <http://www.musicbusinessworldwide.com/audio-streaming-volume-grows-127-in-canada-but-youtube-is-king/>.

²³⁴ IFPI, "Digital Music Report 2015," 20.

²³⁵ Titan Music Corp, "Accelerating Toronto Music Industry Growth," 52.

²³⁶ Department of Culture Media and Sport, media release, "Another record year for the UK's creative industries" (Gov.UK, December 30, 2014), <https://www.gov.uk/government/news/another-record-year-for-the-uks-creative-industries>.

²³⁷ Working Group of EU Member States' Experts on Cultural and Creative Sectors, "Good Practice Report," 43. See also Nordic Music Export, <http://nordicmusicexport.com>.

²³⁸ Ekos Research Associates Inc., "Public Opinion on the Value of Books in the English Language Book Sector, Summary Report" (Association of Canadian Publishers, January 2015): 4, <http://publishers.ca/images/downloads/Book%20Value%20Summary%20Final%2031%20Mar%202015.pdf>.

profit organizations at much higher levels than non-readers do. Generally, they have a stronger sense of belonging to Canada.²³⁹

Reading occupies about a quarter of all leisure time among Canadians. Most Canadians (8 in 10) read books and spend an average of over five hours per week reading. About one-third of Canadians spend 75% or more of their reading time on fiction.²⁴⁰

Ontario's book publishing industry includes foreign-owned and Canadian firms. Foreign-owned publishers tend to be large, multi-national companies. Canadian-owned publishers tend to be small and specialize by genre. Most of Ontario's book publishers are English-language imprints and are based in Toronto. Ontario also has a number of French-language publishers, located in Ottawa, Sudbury, and Toronto.

Sales from physical books represented the vast majority (89%) of the revenues of Ontario's Canadian book publishers in 2011.²⁴¹ Bricks-and-mortar retailers accounted for 50% of these revenues, and digital sales channels accounted for just under 4%.²⁴²

In the last few years, book publishers have witnessed the growing popularity of e-books. About half of all readers in Canada read e-books. Younger readers read them most often, but as many as four in ten older readers read some books digitally, whether on mobile devices or computers. They particularly value e-books for being convenient for travel.²⁴³

Ontario's book publishing industry is the largest in Canada,²⁴⁴ generating almost \$1.23 billion in revenues in 2012, or nearly two-thirds of the industry's national revenues.²⁴⁵ In 2010, the book publishing industry in Ontario contributed \$499 million to GDP and created 5,435 jobs.²⁴⁶

Ontario also has the largest magazine industry in the country, generating \$1.13 billion in revenues in 2013.²⁴⁷ Magazine publishing contributed \$739 million to GDP and 8,516 jobs in

²³⁹ Hill Strategies Research Inc., "Social Effects of Culture: Exploratory Statistical Evidence" (Hill Strategies Research Inc., March 31, 2008), <http://www.hillstrategies.com/content/social-effects-culture-exploratory-statistical-evidence>.

²⁴⁰ Ekos Research Associates, "Public Opinion on the Value of Books in the English Language Book Sector."

²⁴¹ Nordicity Group Ltd. and Castledale Inc., "An Economic Impact Study of the Ontario Book Publishing Industry" (Ontario Media Development Corporation, September 12, 2013), http://www.omdc.on.ca/Assets/Research/Research+Reports/Book+Study+2013/Economic+Impact+Book+Publishing+Final+Report_en.pdf. Excludes multinational firms.

²⁴² Nordicity Group Ltd. and Castledale Inc., "An Economic Impact Study of the Ontario Book Publishing Industry," 8. This figure excludes Harlequin Enterprises. Harlequin's isolated digital sales were closer to 15% of its total sales.

²⁴³ Ekos Research Associates, "Public Opinion on the Value of Books in the English Language Book Sector."

²⁴⁴ Statistics Canada, "Book Publishers 2012" (Statistics Canada, Catalogue no. 87F0004X, Table 1, March 2014), <http://www5.statcan.gc.ca/olc-cel/olc.action?objId=87F0004X&objType=2&lang=en&limit=0>.

²⁴⁵ Statistics Canada Table 361-0007, "Book publishers, summary statistics, by North American Industry Classification System (NAICS)" (accessed August 9, 2015), <http://www5.statcan.gc.ca/cansim/a26?lang=eng&id=3610007>. Book publishing establishments are defined as those who maintained an employee payroll. Does not include publishers who have a workforce consisting of contracted workers, family members, or business owners.

²⁴⁶ Statistics Canada, "Provincial and Territorial Culture Satellite Account, 2010." Figures represent industry perspective.

Ontario in 2010.²⁴⁸ In 2013, Ontario magazine media reported \$511 million (about half of the national total) in advertising revenues and \$306 million (about two-thirds of the national total) in circulation revenues.²⁴⁹

Most major national magazines are published in Ontario. The sector includes consumer, business-to-business, and cultural magazines, published in English and French as well as Indigenous and other languages.²⁵⁰ Magazine publishers are highly diverse in their scale and output. The largest release more than 20 titles in a variety of categories; smaller publishers may produce only one or two niche titles.²⁵¹ Magazine publishers deliver content in print, online and for mobile devices.²⁵²

Magazine readership among Canadians is strong across all demographics and in virtually every life phase. Despite the adoption of digital platforms, readers aged 12 to 24 read almost as much as the average magazine reader who devotes 44 minutes to read a print magazine.²⁵³ The readership of Canada's 47 top-selling English-language magazines ranges from 166,000 to 3.9 million readers per issue.²⁵⁴ Magazines with a focus on Canadian content account for 41% of magazine spending with Canadian titles accounting for 80% of magazine subscription delivery.²⁵⁵

²⁴⁷ Statistics Canada Table 361-0032, "Periodical publishers, summary statistics" (accessed August 9, 2015), <http://www5.statcan.gc.ca/cansim/a26?lang=eng&id=3610010>.

²⁴⁸ Statistics Canada, "Provincial and Territorial Culture Satellite Account, 2010." Figures represent industry perspective.

²⁴⁹ Statistics Canada Table 361-0052, "Periodical publishers, advertising and circulation revenue" (accessed August 9, 2015), <http://www5.statcan.gc.ca/cansim/a26?lang=eng&retrLang=eng&id=3610052&&pattern=&stByVal=1&p1=1&p2=31&tabMode=dataTable&csid=>.

²⁵⁰ Magazines Canada, "Building on Canadian Strengths: Canadian Magazines in the Digital Economy" (Toronto: Magazines Canada, 2010), https://www.magazinescanada.ca/uploads/File/Public%20Affairs/MC_digital_consultation_paper.pdf.

²⁵¹ TCI Management Consultants, "A Strategic Study of the Magazine Industry in Ontario" (Ontario Media Development Corporation Magazine Industry Advisory Committee, September 30, 2008): 3, <http://www.omdc.on.ca/Assets/Research/Research+Reports/A+Strategic+Study+of+the+Magazine+Industry+in+Ontario/A+Strategic+Study+of+the+Magazine+Industry+in+Ontario.pdf>.

²⁵² Magazines Ontario, "Ontario Pre-Budget Submission" (Magazines Canada, n.d.), https://www.magazinescanada.ca/uploads/File/Public%20Affairs/Magazines_Ontario_2011-12_ON_Pre-Budget_Submission.pdf.

²⁵³ Magazines Canada, "Canadians Love Canadian Magazines: PMB Spring 2015 Study" (Magazines Canada, April 24, 2015), <http://www.magazinescanada.ca/diffusion/pub:3246/Canadians-Love-Canadian-Magazines-PMB-Spring-2015->

²⁵⁴ NADbank + PMB (now Vividata) "NADbank + PMB Topline Report 2015 Spring Release" (Vividata, April 2015), http://198.46.83.53/~pmb1101/public/e/pmb2015_spring_public/release/Topline-Spring-2015.pdf.

²⁵⁵ Magazines Canada, "Building on Canadian Strengths."

5.6.1 Key Trends

5.6.1.1 Digital Publishing

Digital publishing is expected to have a permanent and growing impact on book and magazine publishing. Globally, growth is expected to be driven by sales of e-books and digital magazines.²⁵⁶

The majority of publishers in Ontario are publishing e-books, but digital sales are only beginning to replace revenues lost from the decline in traditional print sales. The demand for digital books and magazines has grown, but the opportunity promised by new digital distribution channels has not yet been realized. Most publishers report that digital sales account for less than 15% of their revenue.²⁵⁷

Traditional print book sales globally are expected to fall at a Compound Annual Growth Rate (CAGR) rate of -3.1%. Demand for e-books will drive growth in sales globally, with year on year increases of 1.3% expected towards 2019.²⁵⁸

The growing number of digital magazines and the launch of subscription services will likely maintain and slightly increase total magazine revenue globally over the next four years. However, declining print circulation and falling advertising revenues will continue to affect the magazine sector.²⁵⁹

The Australian government is implementing a number of national initiatives to support its book industry, particularly to support digital expansion. It has established the Book Industry Collaboration Council, a public-private advisory body representing the entire book supply chain, to give advice on priority issues for the industry.²⁶⁰

Quebec launched a 12-component Book Action Plan in April 2015. One of the components aims to support innovative projects seeking to increase the digital products offered by accredited bookstores.²⁶¹ A portion of the Book Action Plan is funded by the province's Digital Culture Strategy, launched in 2014, which seeks to address three main goals: enhancing digitally

²⁵⁶ PricewaterhouseCoopers, "Global Entertainment and Media Outlook 2015-2019, Book Publishing: Key Insights at a Glance," <http://www.pwc.com/gx/en/global-entertainment-media-outlook/segment-insights/book-publishing.ihtml>; PricewaterhouseCoopers, "Global Entertainment and Media Outlook 2015-2019, Magazine Publishing: Key Insights at a Glance," <http://www.pwc.com/gx/en/global-entertainment-media-outlook/segment-insights/magazine-publishing.ihtml>.

²⁵⁷ Digital Book World, "Most Canadian Publishers Now Selling Ebooks Direct" (Digital Book World, May 12, 2015), <http://www.digitalbookworld.com/2015/most-canadian-publishers-now-selling-ebooks-direct/>.

²⁵⁸ PricewaterhouseCoopers, "Book Publishing: Key Insights at a Glance."

²⁵⁹ PricewaterhouseCoopers, "Magazine Publishing: Key Insights at a Glance."

²⁶⁰ Book Industry Collaborative Council, "Final Report 2013" (Australia, 2013), <https://www.publishers.asn.au/documents/item/157>.

²⁶¹ Quebec, ministère de la culture et des communications, media release, "Le livre: au coeur de la culture – plan d'action sur le livre" (April 2015), https://www.mcc.gouv.qc.ca/index.php?id=2328&no_cache=1&tx_ttnews%5Btt_news%5D=7162&cHash=9efe683e1352ae36c30f2b67b8159115.

available cultural content, ensuring that digital content is accessible and disseminated, and creating an environment where digital culture thrives.²⁶²

The Association of Canadian Publishers and the Organization of Book Publishers of Ontario have received government support to advance the industry, from both levels of government, such as the creation of BookNet Canada. Through this industry-led initiative, the book industry is developing technologies to promote and sell books, streamline workflows, and analyze and adapt to a rapidly changing market.²⁶³ This initiative supports publishing companies, retailers, distributors, sales agents and libraries.

5.6.1.2 Online Marketing and Discoverability

Magazines have responded to the opportunities and challenges of the digital transformation with innovative ways to utilize the Internet and mobile applications to extend and deepen their relationship with readers.

As a result of the evolving Canadian retail market and the decline of bricks-and-mortar book stores, discoverability is a significant challenge, especially for smaller book publishing companies. Internet-related approaches have yet to supplant traditional outlets as a way to discover new books.²⁶⁴ Traditional outlets are still an important factor, albeit a diminishing one.

Internationally, some jurisdictions have launched initiatives to support online marketing and discoverability of books. The UK's Digital R&D Fund for the Arts was an innovative three-year program to support collaboration between organizations with arts projects, technology providers, and researchers.²⁶⁵ The fund supported the development of the Bookspotting app, based on a curated selection of Scottish-interest books.²⁶⁶

In Canada, collaborative projects support the digital discoverability of books. A project of the Association of Canadian Publishers and Canadian Publishers' Council, 49thShelf.com seeks to make it easier for readers to discover Canadian books of all genres from a wide pool of authors and publishers from anywhere in the country. The project is supported by the federal and provincial governments.²⁶⁷

Digital technology has introduced new efficiencies and models on the distribution side. Technology-driven improvements such as better inventory management, communication networks, and sales data tracking have produced significant efficiencies in the distribution system. Online marketing can similarly provide opportunities to reach audiences.

²⁶² Quebec, ministère de la culture et des communications website, <http://culturenumerique.mcc.gouv.qc.ca/about/>.

²⁶³ Booknet Canada, <http://www.booknetcanada.ca/about-us/>.

²⁶⁴ Quorus Consulting, "Canadian Books, Films, Periodicals and Music Opinion Survey."

²⁶⁵ Digital R&D Fund for the Arts, <http://artsdigitalrnd.org.uk/about/>.

²⁶⁶ Digital R&D Fund for the Arts, <http://artsdigitalrnd.org.uk/projects/publishing-scotland/>.

²⁶⁷ 49th Shelf website, <http://49thshelf.com/About-49thShelf.com>.

Digital Skill Sharing in the UK brought together librarians and publishers to collaborate on reading campaigns through the use of digital communications platforms and social media. Publishers shared their skills and expertise through talks and showcases on the benefits of digital platforms and social media, including website and social networking master classes with digital innovators.²⁶⁸ The case studies have been made available online to disseminate key findings.

5.6.1.3 Access to Capital

The small size of the domestic market continues to challenge the ability of smaller book publishers to grow. A lack of access to capital makes it difficult for some publishers to invest in the systems and technologies they need to achieve a stronger competitive footing.²⁶⁹

Magazine publishers face similar challenges. The development of digital products has been hindered by lack of access to capital. In addition, the sector is facing declining advertising revenues.²⁷⁰

CultuurInvest is a public-private investment fund in Belgium to support publishers. The fund provides project financing, growth capital, and loans. CultuurInvest also provides management support and training to entrepreneurs to facilitate industry development.

6. Sector Profile: Public Libraries

6.1 Overview

Public libraries have become more than just places to borrow books. They also provide inviting places for people to gather or pursue their interests and goals and they offer programs and spaces for recreation and cultural activities as well as learning and personal development.²⁷¹ Ontarians recognize the role public libraries play in their quality of life, and most feel that losing their local library would have a major impact on their communities.²⁷²

²⁶⁸ Arts Council England, www.artscouncil.org.uk/.

²⁶⁹ Nordicity Group Ltd. and Castledale Inc., “An Economic Impact Study of the Ontario Book Publishing Industry.”

²⁷⁰ Nordicity Group Ltd., in association with PricewaterhouseCoopers “Study of Digital Magazine and Newspaper Publishing in Canada: Final Report” (Canada, Department of Canadian Heritage, August 2009): 42, <http://www.nordicity.com/media/20121112ghttxgyq.pdf>.

²⁷¹ Guylaine Beaudry et al., “The Future Now: Canada’s Libraries, Archives, and Public Memory” (Royal Society of Canada, November 2014): 108, https://www.rsc-src.ca/sites/default/files/pdf/L%26A_Report_EN_FINAL_Web.pdf. See also Wendy Newman, “Third Generation Libraries: Visionary Thinking and Service Development in Public Libraries (to 2020) and Potential Application in Ontario” (Ontario, Ministry of Culture, 2008): 10, http://www.mtc.gov.on.ca/en/publications/third_gen_libraries.pdf.

²⁷² Market Probe, “Federation of Ontario Public Libraries Research” (Federation of Ontario Public Libraries Research Task Force, May 2015), http://dysartjones.com/wp-content/uploads/2015/05/fopl_presentation_2015-05-09_-_v7_-_animated.pdf.

The *Public Libraries Act* is the key legislation governing Ontario's public libraries. Its purpose is to ensure free and equal access to public library services and information.²⁷³ Under the *Act*, public library boards, established by municipalities, are responsible for the operation of their library systems. In First Nation communities, public libraries may be established by Band Councils.²⁷⁴

There are 265 public library boards across Ontario and 45 First Nations public libraries. They provide 1,157 public library service points across the province, including library branches, book deposit stations, and bookmobile stops.²⁷⁵ In 2013, about 5 million Ontarians were active library cardholders, making 72 million in-person visits, and 110 million electronic visits.²⁷⁶

Ontario Library Service-North and Southern Ontario Library Service provide support programs and services to public libraries on behalf of the Ministry of Tourism, Culture and Sport. They aim to increase the capacity of libraries to provide services to the public.²⁷⁷

6.1.1 Social and Economic Benefits of Public Libraries

Public libraries are key contributors to literacy and lifelong learning. Studies have shown that the public library's role in early learning is particularly important for children in rural communities and for children from low-income families.²⁷⁸ Programs offered through public libraries help build the self-confidence and self-esteem that children and youth living in difficult environments need to succeed in school, graduate from high school, go on to higher education, and find employment.²⁷⁹ Literacy and reading at all ages is strongly linked to physical and mental health and well-being. Reading has mental health benefits, and the increased health knowledge available through reading influences self-improvement and disease prevention.²⁸⁰

Public libraries support job training and skills development and offer many resources for career planning and employment success. They connect job seekers to the technology resources they need to find and compete for job opportunities, help them keep up with a more mobile job

²⁷³ Ontario, Ministry of Tourism, Culture and Sport, brochure, "Understanding Ontario's Public Libraries Act: Some Key Aspects" (Ontario, n.d.),

[http://www.mtc.gov.on.ca/en/libraries/PLA%20Brochure%20\(English%20version\)%20final.pdf](http://www.mtc.gov.on.ca/en/libraries/PLA%20Brochure%20(English%20version)%20final.pdf).

²⁷⁴ Municipalities, First Nations bands and Local Services Boards may also provide public library services by entering into a contract with one or more public library boards.

²⁷⁵ Ministry of Tourism, Culture and Sport, "2013 Ontario Public Library Statistics,"

http://www.mtc.gov.on.ca/en/libraries/statistics_2013.shtml.

²⁷⁶ Ministry of Tourism, Culture and Sport, "2013 Ontario Public Library Statistics."

²⁷⁷ Ministry of Tourism, Culture and Sport, <http://www.mtc.gov.on.ca/en/libraries/resources.shtml>. See also Newman, "Third Generation Libraries," 4.

²⁷⁸ Institute of Museum and Library Services, "Nine to Nineteen: Youth in Museums and Libraries – A Practitioner's Guide" (Washington: Institute of Museum and Library Services, April 2008),

https://www.ims.gov/assets/1/workflow_staging/News/750.pdf.

²⁷⁹ Beaudry et al., "The Future Now," 121; Carlos B. Crockett, "Urban Youth and Public Libraries" (Public Libraries Online, January 5, 2015), <http://publiclibrariesonline.org/2015/01/urban-youth-and-public-libraries/>.

²⁸⁰ Arts Council England, "Evidence review of the economic contribution of libraries" (Arts Council England, June 2014): 33-35,

http://www.artscouncil.org.uk/media/uploads/pdf/Evidence_review_economic_contribution_libraries_2014.pdf

market, and provide access to and help with navigating vast amounts of information.²⁸¹ Public libraries also support new businesses by offering training and resources for entrepreneurs, and in some cases, even serve as small business incubators. In 2013, Ontario's public libraries offered 936 business development programs and 1,551 career help or job skills programs.²⁸²

Libraries also play a key role in helping to integrate newcomers to Canada, delivering over 10,000 programs in more than 60 Ontario communities. Programs include English and French language instruction, settlement support, and help with professional accreditation.²⁸³

Public libraries contribute to the economy. In 2013, Ontario public libraries employed 10,156 people and spent \$463 million on wages. Libraries also spent \$188 million on physical and electronic materials and \$42 million on library infrastructure.²⁸⁴ A 2013 study of the economic impact of the Toronto Public Library revealed that every dollar spent by the City of Toronto on the Toronto Public Library yielded an average return of \$4.63 in economic activity.²⁸⁵ Libraries also have indirect economic benefits. For example, the presence of public libraries has been shown to revitalize neighbourhoods, particularly when the library is new or newly refurbished.²⁸⁶

6.2 Key Trends

6.2.1 Community Hubs

The role of public libraries as community hubs continues to grow as libraries tailor services to meet a wide range of community needs.²⁸⁷ As a result, there is a growing trend towards flexible, multifunctional spaces that house more than books.²⁸⁸

Libraries are trusted sources of community and government information and provide vital services such as health clinics and emergency response centres.²⁸⁹ Increasingly, libraries coordinate and partner with government, community organizations, schools, and the private sector to provide services that meet local community needs. For example, in 2014 the Toronto

²⁸¹ Garmer, "Rising to the Challenge," 27.

²⁸² Ontario, Ministry of Tourism, Culture and Sport, "2013 Ontario Public Library Statistics."

²⁸³ Ontario, Ministry of Tourism, Culture and Sport, "2013 Ontario Public Library Statistics."

²⁸⁴ Ontario, Ministry of Tourism, Culture and Sport, "2013 Ontario Public Library Statistics."

²⁸⁵ Martin Prosperity Institute, "So Much More: The Economic Impact of the Toronto Public Library on the City of Toronto" (Toronto: Martin Prosperity Institute, December 2013): 13-14, http://martinprosperity.org/media/TPL%20Economic%20Impact_Dec2013_LR_FINAL.pdf.

²⁸⁶ Arts Council England, "Evidence review of the economic contribution of libraries," 12.

²⁸⁷ Ontario, "Community Hubs in Ontario: A Strategic Framework and Action Plan, 2015," (Ontario, 2015), <http://www.ontario.ca/page/community-hubs>.

²⁸⁸ Lumos Research Inc., "An Analysis of Public Library Trends" (Canadian Urban Libraries Council, April 2011), <http://www.culc.ca/cms/lib/CULC%20Public%20Library%20Trends.pdf>.

²⁸⁹ Garmer, "Rising to the Challenge," 13.

Public Library offered flu shots at branches across the city.²⁹⁰ With their community reach and non-clinical atmosphere, libraries have been shown to be effective in delivering health services such as programs for new parents and breastfeeding information.²⁹¹

Libraries enrich Ontario's cultural life with free access to books, music, and movies, as well as digital media such as educational apps, videos, and audio and e-books. In 2013, Ontario public libraries offered 3,388 cultural programs, including community theatre, drumming or art workshops, poetry and story readings, and art exhibitions.²⁹² Libraries also act as memory institutions, providing access to information about local history and culture.

6.2.2 Digital Services

Increasingly, Ontarians are accessing their public libraries electronically. Over the past five years, in-person visits remained constant while online visits increased. In 2013, Ontario's libraries reported e-book circulation of up to 10 per cent of total circulation.²⁹³ Digital services are changing the role of the library and the librarian, and both are increasingly seen as authoritative sources for navigating information in the age of information overload.²⁹⁴

Libraries are creating apps, Facebook pages, and Twitter accounts to reach their patrons and posting images and videos for user comment. In 2013, Ontario libraries received 11 million social media visits.²⁹⁵ Libraries are reviewing their resources and adapting and reshaping their spaces and services to engage users in conversation.²⁹⁶

Public libraries are stimulating creativity with innovative digital services. Some offer maker spaces (spaces for creating, collaborating, and presenting, along with tools like 3D printers and training on how to use them), learning labs, and other interactive technologies. Innisfil Public Library's IdeaLAB offers a 3D printer, vinyl cutter, and laser cutter. The library also offers training in using email and online security and runs a technology social club for seniors ("Appy Hour"). Its Check Out a Skill program pairs library users with a library staff member for one-on-one training sessions.²⁹⁷

Offering digital information and promoting digital literacy are among the most important public library services, particularly where the library is the only source of this information. Ontario

²⁹⁰ Toronto Public Library, <http://torontopubliclibrary.typepad.com/health-and-wellness/2014/10/ready-for-the-flu-shot-but-dont-know-where-to-go.html>.

²⁹¹ Arts Council England, "Evidence Review of the Economic Benefits of Libraries," 4, 31-34.

²⁹² Ontario, Ministry of Tourism, Culture and Sport, "2013 Ontario Public Library Statistics."

²⁹³ Ontario, Ministry of Tourism, Culture and Sport, "2013 Ontario Public Library Statistics."

²⁹⁴ Garmer, "Rising to the Challenge," 4.

²⁹⁵ Ontario, Ministry of Tourism, Culture and Sport, "2013 Ontario Public Library Statistics."

²⁹⁶ Frances Stocker, "Environmental Scan for Ontario Public Libraries" (Southern Ontario Library Service, November 2011): 8, http://www.sols.org/files/docs/develop/publications/miscellaneous/environmental_scan_2011.pdf.

²⁹⁷ Debra Mann, "Cultivating a Hacker Ethic: Digital Citizenship at Innisfil Public Library" (OCLC WebJunction, October 9, 2014), <https://www.webjunction.org/news/webjunction/cultivating-a-hacker-ethic.html>.

public libraries offer 11,500 computer workstations, 9,598 with Internet access. In 2013, they delivered 18,393 technology, social media, and computer literacy programs.²⁹⁸

Technology infrastructure and programs have become central to the success of libraries in meeting community needs.²⁹⁹ Together with the new emphasis on digital resources, this has put pressure on library budgets throughout the province, especially smaller and rural public libraries.³⁰⁰ Many rural libraries lack the bandwidth to provide adequate digital services.³⁰¹ In addition, the cost of maintaining an e-book collection can be prohibitive, as licenses for these materials are significantly more expensive for libraries than for individual consumers.³⁰² At the same time, librarians are faced with the challenge of achieving and maintaining technical skills in record-keeping, information management, and emerging digital technologies.³⁰³ Part of the solution may lie in greater collaboration among libraries to build technology capacity.

6.2.3 Collaboration and Consortia

There has been significant growth in interlibrary partnerships over the past two decades. Collaboration helps libraries address the costs of moving to digital, and positions them to seize opportunities to take advantage of digital technologies to increase public access and build capacity.³⁰⁴

Consortium purchasing allows libraries to increase their buying power, reduce the cost of e-resources, negotiate favourable terms and conditions, and expand services and access to resources. Ontario Library Services helps public libraries access e-resources through shared collections like Overdrive. Currently, 200 libraries participate in the program, most of which represent communities of under 100,000 people.³⁰⁵ There are 30 libraries participating in the French Archambault e-book collection, which provides access to Francophone resources to participating libraries. Other examples include shared cataloguing systems or Integrated Library Services (ILS). Similarly, the Ontario Library Service – North manages a shared cataloguing system, JASI, on behalf of 85 northern libraries.³⁰⁶

Technology needs are also driving greater collaboration between libraries, archives, and museums.³⁰⁷ They are sharing digital resources as a cost-effective way of providing wider public

²⁹⁸ Ontario, Ministry of Tourism, Culture and Sport, “2013 Ontario Public Library Statistics.”

²⁹⁹ Stocker, “Environmental Scan for Ontario Public Libraries.”

³⁰⁰ Beaudry et al., “The Future Now,” 121.

³⁰¹ Beaudry et al., “The Future Now,” 126.

³⁰² Beaudry et al., “The Future Now,” 124.

³⁰³ Beaudry et al., “The Future Now,” 124.

³⁰⁴ Newman, “Third Generation Public Library.”

³⁰⁵ Southern Ontario Library Service, <http://www.sols.org/index.php/share-collaborate/e-resources-and-e-collections/e-collections/e-collections-overdrive>.

³⁰⁶ Ontario Library Service-North Joint Automated Server Initiative (JASI), <http://www.jasinorth.ca/>.

³⁰⁷ Jennifer Novia, “Library, Archival, and Museum (LAM) Collaboration,” *Endnotes: The Journal of the New Members Round Table* 3, no. 1 (October 2012),

access, exchanging holdings and sharing storage, and mounting joint exhibitions where libraries exhibit museum objects. For example, the Belleville Public Library recently partnered with Hastings County, the City of Belleville, and the Hastings County Historical Society to commit more than \$1 million to renovate the Belleville Public Library building to house the county archives, share expertise, and find program efficiencies.³⁰⁸

Collaboration also provides opportunities to develop software and standards for broader content-sharing.³⁰⁹ Europeana is an international collaboration among Europe’s leading galleries, libraries, archives, and museums. Millions of objects, including books and other texts, have been digitized and made available to the public at europeana.com. The United States is exploring a similar model for a national platform to bring together libraries, archives, and museums and make their materials freely available through the Digital Public Library of America.³¹⁰

6.2.4 Serving Diverse Communities

Ontario’s changing demographics call for public libraries to provide a wide array of services to an increasingly diverse population, including children and youth, seniors, new Canadians, First Nations peoples, and people with disabilities. Public libraries play an important role in building social capital and fostering social cohesion. For many, they are gateways to participation in society. For example, new Canadians may be able to find information in languages other than English at their public library. At Markham Public Library, 10% of the non-electronic circulating items are in a language other than English or French.³¹¹

Some studies point to opportunities to engage youth at risk through mentoring programs in public libraries.³¹² Mentoring helps build resiliency in children and youth raised in difficult environments and can support their successful life outcomes. Some public libraries are building connections with communities by involving families and communities when delivering programs to young people.³¹³

As our population ages, more library users are likely to need accessibility measures. Ontario public libraries provide services and assistive technologies to people with disabilities and aim to minimize barriers through building design. This ranges from common measures (minimizing the numbers of doors and steps and creating wider aisles and adaptable lighting and wiring) to

<http://www.ala.org/nmrt/sites/ala.org.nmrt/files/content/oversightgroups/comm/schres/endnotesvol3no1/2lamcollaboration.pdf>.

³⁰⁸ Hastings County Historical Society, <http://hastingshistory.ca/community-archives.php>.

³⁰⁹ Institute of Museum and Library Services (IMLS), “Growing Young Minds: How Museums and Libraries Create Lifelong Learners” (Washington: IMLS, June 2013), <https://www.ims.gov/assets/1/AssetManager/GrowingYoungMinds.pdf>.

³¹⁰ Garmer, “Rising to the Challenge,” 21.

³¹¹ Ontario, Ministry of Tourism, Culture and Sport, “2013 Ontario Public Library Statistics.”

³¹² Crockett, “Urban Youth and Public Libraries.”

³¹³ Institute of Museum and Library Services, “Nine to Nineteen.”

innovative ways to accommodate a broad range of cognitive, sensory, and mobility capacities.³¹⁴ Staff and volunteers are trained to communicate with people with disabilities in a way that addresses their needs.³¹⁵ The capital funding available for these types of infrastructure changes varies from library to library, and can be a challenge for public libraries with smaller budgets.

A key pan-Canadian accessibility initiative is to remove barriers for people with print disabilities. The Centre for Equitable Library Access (CELA) is a collaboration between the Canadian Urban Library Council and the Canadian National Institute for the Blind. CELA supports public libraries in providing accessible collections, for example in alternative formats such as audio, braille, e-text and described video.³¹⁶ The National Network for Equitable Library Services is an online public library for people who require information in a format other than traditional print. It provides library access for 3.5 million Canadians with a perceptual disability.³¹⁷

First Nations public libraries, particularly in remote communities, are an important resource for free access to information, Internet, and community spaces. Through their collections, exhibitions, and programs, they preserve and promote cultural traditions. In 2013, First Nations public libraries provided almost 200 culturally specific programs, including 116 First Nations Public Library Week programs and 80 First Nation Communities Read programs.³¹⁸ However, of 133 First Nations communities in Ontario, only 45 had public libraries in 2013.

Through *Our Way Forward: A Strategic Plan for Ontario First Nations Libraries*,³¹⁹ First Nations librarians are promoting awareness of their public libraries as essential contributors to the social and economic well-being of First Nations peoples. At the national level, the *Sound Practices in Library Services to Aboriginal Peoples* provides a framework and outlines next steps in the development of library services to First Nations.³²⁰

³¹⁴ Newman, "Third Generation Libraries."

³¹⁵ Lumos Research Inc., "An Analysis of Public Library Trends," 4.

³¹⁶ Centre for Equitable Library Access, <http://iguana.celalibrary.ca/iguana/www.main.cls?url=CELA-home&lang=eng&theme=reset>.

³¹⁷ National Network for Equitable Library Service, <https://nnels.ca/>.

³¹⁸ Ontario, Ministry of Tourism, Culture and Sport, "2013 Ontario Public Library Statistics."

³¹⁹ Ontario First Nation Public Library Strategic Plan Liaison Committee, "Our Way Forward: A Strategic Plan for Ontario First Nation Public Libraries" (Ontario Library Service-North, April 2014): 6, http://www.ourwayforward.ca/Downloads/First_Nation_Strat_Plan.pdf.

³²⁰ Aboriginal Library Services Working Group, "Sound Practices in Library Services to Aboriginal Peoples: Integrating Relationships, Resources and Realities" (Provincial/Territorial Public Library Council, August 2009), http://www.bclibraries.ca/ptplc/files/FINAL%20AUGUST%202009%20PTPLC_LibServAboriginal_FINAL.pdf.

7. Sector Profile: Cultural Heritage

7.1 Overview

Heritage resources include artifacts or museum collections, buildings or structures (e.g., historic buildings, bridges, infrastructure, or monuments), cultural heritage landscapes (e.g., historic streetscapes, parks, trails, industrial complexes), and archaeological sites.

Ontario recognizes that cultural heritage resources may have attributes that are tangible (such as the features and details that help make a building or landscape significant) and intangible (such as stories and customs connected with the cultural heritage value of a property).

There is a growing recognition internationally that intangible practices or traditions, such as oral traditions, expressions, language, social practices, rituals, ceremonies, traditional knowledge, and skills, can in themselves be of cultural heritage value.³²¹ Language retention and cultural transmission are particularly important to Ontario's Indigenous people, and the Francophone community.

In British Columbia, in addition to tangible cultural assets, the First Peoples' Cultural Council supports communities and individuals in safeguarding intangible cultural heritage through the language and arts programs and the FirstVoices project.³²² As another example, in 2014 the Government of Quebec designated Inuit Throat Singing as part of its cultural heritage, the first such designation under new legislation.³²³

Many partners work to conserve, protect, and promote Ontario's shared heritage, including community heritage organizations, museums, heritage and archaeological consultants, developers, private property owners, volunteers, the academic sector, the Government of Ontario, and the federal and municipal governments. Their efforts enhance community development, promote environmental sustainability, and bring economic benefits.

The Ontario Heritage Trust conserves and protects significant built, cultural, and natural heritage sites in Ontario. In addition to its educational and commemorative programs, the Trust holds 188 heritage properties, including 27 built properties, in trust for the people of Ontario, and has conservation easement agreements on 270 heritage properties.³²⁴ The Trust has

³²¹ UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage, <http://www.unesco.org/culture/ich/index.php?lg=en&pg=00006>.

³²² For example, the First People's Cultural Council in British Columbia, <http://www.fpcc.ca/culture/heritage-toolkit/Intangible-Cultural-Heritage.aspx>.

³²³ Nunatsiq Online, "Inuit Throat Singing Designated Part of Quebec's Cultural Heritage" (January 28, 2014) http://www.nunatsiaqonline.ca/stories/article/65674throat_singing_designated_as_part_of_quebecs_cultural_heritage/.

³²⁴ An easement is a voluntary legal agreement between the heritage property owner and the Trust. It establishes mutually accepted conditions that will ensure the preservation of heritage property in perpetuity. See <http://www.heritagetrust.on.ca/Conservation/Conservation-easements/What-is-an-easement.aspx>.

erected over 1,200 commemorative plaques across the province to mark significant people, events, and places.³²⁵

7.1.1 Legislative Framework

The *Ontario Heritage Act* provides the legislative framework for the identification, designation, protection, and conservation of Ontario's heritage.³²⁶ It also defines the roles of municipalities and the provincial government in cultural heritage conservation. The Act gives municipal councils the power to designate individual heritage properties and heritage conservation districts. The Act prohibits alteration, removal or demolition of building or structure on a designated property without municipal approval.

The Act ensures the conservation of cultural heritage property owned or controlled by the provincial Crown or prescribed public bodies. This is achieved through the *Standards and Guidelines for Conservation of Provincial Heritage Properties*.³²⁷

Under the Act, anyone who carries out archaeological fieldwork in Ontario must hold a valid archaeological license issued by the Minister of Tourism, Culture and Sport.³²⁸ The publication *Standards and Guidelines for Consultant Archaeologists* sets out rules for fieldwork and reporting, including requirements for engaging Indigenous communities.

Heritage protection is integrated into many other pieces of legislation. For example it is an important aspect of land use planning and development decision-making processes through the *Environmental Assessment Act*, the *Planning Act*, and the Provincial Policy Statement (2014).³²⁹ Land use planning processes provide for the identification, protection and conservation of significant built and cultural heritage resources and the protection of archaeological resources.

7.1.2 Social and Economic Benefits of Cultural Heritage

Conserving cultural heritage is closely linked to quality of life, sense of place and identification with the past, and contact and cooperation across cultures and age groups.³³⁰ Engagement in cultural heritage can foster a sense of belonging to a wider community, increasing social

³²⁵ Ontario Heritage Trust, "Ontario Heritage Trust Corporate Business Plan 2015-16" (Ontario Heritage Trust, n.d.), <http://www.heritagetrust.on.ca/CorporateSite/media/oht/PDFs/2015-16-OHT-Business-plan-WEB.pdf>.

³²⁶ *Ontario Heritage Act* R.S.O. 1990, Chapter O.18. Available at <http://www.ontario.ca/laws/statute/90o18>.

³²⁷ Ontario, Ministry of Tourism, Culture and Sport, http://www.mtc.gov.on.ca/en/heritage/heritage_s_g.shtml.

³²⁸ Ontario, Ministry of Tourism and Culture, "Standards and Guidelines for Consultant Archaeologists" (Ontario, 2011): 113, http://www.mtc.gov.on.ca/en/publications/SG_2010.pdf.

³²⁹ Ontario, Ministry of Municipal Affairs and Housing, "Land Use Planning: Provincial Policy Statement" (Ontario, 2014), <http://www.mah.gov.on.ca/Page215.aspx>.

³³⁰ Lynda Kelly, "Measuring the impact of museums on communities: The role of the 21st century museum" (INTERCOM 2006 Conference Paper, 2006), <http://www.intercom.museum/documents/1-2Kelly.pdf>.

cohesion and a sense of inclusion.³³¹ Access to cultural heritage also broadens opportunities for education and lifelong learning.

Heritage conservation can be part of the solution to the challenges of climate change. Repurposing historic buildings conserves the energy embedded in them. Conserving cultural heritage landscapes also promotes sustainable land development, balancing protection of cultural heritage resources, management, and planning for new development.

Investment in heritage streetscapes has been shown to have a positive impact on communities. For example, the conservation of historic neighbourhoods in the Rope Walks in Liverpool and the Merchant City in Glasgow resulted in a significant improvement in residents' perception of their neighbourhoods compared with other places.³³² Conserving heritage buildings can also help create jobs and other economic benefits. In the US, a \$1 million investment in the rehabilitation of a heritage building in Delaware created 14.6 jobs, compared with 11.2 jobs from a similar investment in a new building and 9.2 jobs from a manufacturing investment.³³³

Ontario's museums, archives and historic sites employ 5,275 people and generated over \$432M in revenues in 2011.³³⁴ Ontario represents just over 30% of the total GDP attributed to cultural heritage in Canada.³³⁵

7.2 Museums and Heritage Organizations

Ontario has hundreds of museums, historic sites, heritage organizations, historical societies, archives, cultural centres, and related institutions.³³⁶

Museums and heritage organizations contribute to community identity and pride, attract tourists, foster creativity and innovation, assist in youth development, and provide educational programs for both children and adults.³³⁷ Museums support the development of skills important for success in the knowledge economy, such as critical thinking, creativity, and collaboration. Heritage organizations promote community heritage through walking tours, lectures, Doors Open events, and research. Many of these organizations are almost exclusively volunteer-run.

³³¹ CHCfE Consortium, "Cultural Heritage Counts for Europe"; Dümcke and Gnedovsky, "The Social and Economic Value of Cultural Heritage"; Department of Arts, Heritage and the Gaeltacht, "National Landscape Strategy for Ireland 2015-2025."

³³² Reeve and Shipley, "The Impact of Heritage Investment on Public Attitudes to Place."

³³³ Donovan D. Rypkema and Caroline Cheong, "Measuring the Economics of Preservation: Recent Findings" (Washington: Advisory Council on Historic Preservation, June 2011), <http://www.preserveamerica.gov/docs/final-popular-report6-7-11.pdf>.

³³⁴ Canada, Department of Canadian Heritage, "Government of Canada Survey of Heritage Institutions: 2011" (Canada, 2014), http://www.pch.gc.ca/DAMAssetPub/DAM-comn-comn/STAGING/texte-text/heritage-institutions-2011_1432823474350_eng.pdf?WT.contentAuthority=6.0.

³³⁵ Statistics Canada, "Provincial and Territorial Culture Satellite Account, 2010." This information is from the industry perspective.

³³⁶ Ontario Museum Association, <http://www.museumsontario.ca>.

³³⁷ Ontario Museum Association, <http://www.museumsontario.ca>.

Ontario's museums and historic sites had 12 million visits in 2011,³³⁸ including over 14,000 school groups.³³⁹ Virtual visitors are also accessing museum collections and heritage experiences. Digital services allow people to explore collections, customizing their experiences through opportunities to research, sort, and access material of interest to them.³⁴⁰ In 2011, there were over 15 million online visits to Ontario's museums, historic sites, and archives.³⁴¹

7.2.1 Key Trends

7.2.1.1 Digital Transformation

Museums and heritage sites are digitizing their collections to help long-term conservation as well as to increase public engagement and access. The Red Lake Regional Heritage Centre, in partnership with the local First Nation, created an online exhibit of an Elder telling the legend of Red Lake as he heard it from his ancestors, recorded in both Ojibwe and English.³⁴²

Digitization of collections supports the development of an increasing array of museum apps and social media conversations where users can share, tag, or comment on heritage collections. The Ontario Museum Association offers a location-based app called ON museums that promotes special offers, current exhibits, and nearby museums. The Museum of Health Care in Kingston created an app that tells the history of Nursing in Kingston through photos, audio-visual recreation, and games.

To engage youth, museums are recognizing that they need to provide opportunities for authentic exchanges and two-way discussions. Youth councils, such as the one at Bytown Museum in Ottawa, allow young people to participate in creating digital experiences for their peers and organizing events and exhibitions.³⁴³

Digital engagement strategies will continue to grow in importance. They allow museums to link to the community and deliver what people value. They can target underserved populations, culturally diverse communities, and seniors, and in particular, engage younger generations. Digital engagement also contributes to sustainability by introducing new ways of reaching out to supporters to generate revenue.

Continued investment in digitization is vital, as there will be uses for digitized holdings that have not yet been designed or imagined.³⁴⁴ Digital holdings could form the basis of new ventures to reach new markets and generate revenues. Many larger institutions are already taking

³³⁸ Canada, Department of Canadian Heritage, "Government of Canada Survey of Heritage Institutions: 2011."

Includes historic sites, museums, archives, zoos and botanical gardens, and art galleries.

³³⁹ Canada, Department of Canadian Heritage, "Government of Canada Survey of Heritage Institutions: 2011."

³⁴⁰ G. Wayne Clough, e-book, *Best of Both Worlds: Museums, Libraries and Archives in a Digital Age* (Washington: Smithsonian Institution, January 2015), available at <http://www.si.edu/bestofbothworlds>.

³⁴¹ Canada, Department of Canadian Heritage, "Government of Canada Survey of Heritage Institutions: 2011."

³⁴² Red Lake Regional Heritage Centre, <http://www.redlakemuseum.com/current-exhibits.html>.

³⁴³ Bytown Youth Council, <https://bytownyouthcouncil.wordpress.com/>.

³⁴⁴ Rina Elster Pantalony, "Managing Intellectual Property for Museums" (World Intellectual Property Organization, 2013), http://www.wipo.int/edocs/pubdocs/en/copyright/1001/wipo_pub_1001.pdf.

advantage of opportunities to license images held in their collections and create digital products, for example to support education, that could be licensed or syndicated. Entering into co-branding relationships may be possible for museums with recognizable brands or trademarks as a means of monetizing their reputation. The challenge for smaller museums is to build capacity to exploit these opportunities in a way that is both financially feasible and rewarding. Many such opportunities require large up-front investment, crowdfunding, or social enterprise.

Museums will need to find a balance between their public mission and commercial opportunities, and they will need staff with keen business acumen and understanding of market principles. Within this context, demonstrating the public value of museums and heritage organizations and their relevance to communities will continue to be a high priority.³⁴⁵

7.2.1.2 Sustainable Organizations

As non-profit and volunteer organizations, museums and heritage organizations regularly face financial challenges and are struggling to “do more with less.”³⁴⁶ Pressing financial needs include funds for capital improvements, digital conservation and curation, and dissemination and engagement.

In addition to fiscal challenges, workforce renewal, and the ability to provide attractive job openings for new entrants into the profession, is a key concern in the museum sector.³⁴⁷ Current museum and heritage organization leadership is aging, along with all of Ontario’s population, and organizations need strategies to attract a new generation of dedicated leaders and volunteers.³⁴⁸ The need for updated skills and training (e.g., digital technology skills), job stability, and equitable pay and benefits are key concerns of library, archive, and museum professionals internationally.³⁴⁹

Small and rural communities experience all of these challenges more acutely. Regional networks and partnerships with local libraries, archives, and art galleries can help address organizational capacity needs. For example, the Ottawa Museum Network, representing 11 community museums, partnered with the City of Ottawa to obtain a license and training for new collections management software.³⁵⁰

³⁴⁵ Institute of Museum and Library Services, “The Future of Museums and Libraries: A Discussion Guide” (Washington: Institute of Museum and Library Services, June 2009), <https://www.ims.gov/assets/1/AssetManager/DiscussionGuide.pdf>.

³⁴⁶ Ontario Museum Association (OMA), “Reinforcing Relevance: The Strategic Plan of the OMA, 2010-2015, Summary Version (Ontario Museum Association, n.d.), <https://members.museumsontario.ca/about-us/strategic-plan>.

³⁴⁷ Ontario Museum Association, “Reinforcing Relevance,” 5 -6.

³⁴⁸ Ontario Museum Association, “Reinforcing Relevance.”

³⁴⁹ Claudia Engelhardt, Stefan Strathmann, and Katie McCadden, “Report and analysis of the survey of training needs” Digital Curator Vocational Education Europe (DigCurV), 2011): 54-55, available at <http://www.digcur-education.org/eng/Resources/Report-and-analysis-on-the-training-needs-survey>.

³⁵⁰ City of Ottawa, “Ottawa 2020: Arts and Heritage Plan: 5-Year Progress Report” (April 2010), http://www.creativecity.ca/database/files/library/ottawa_five_year_report.pdf.

7.2.2.3 Relationship with First Nations, Métis and Inuit Peoples

Questions of voice and representation, who speaks for whom, have characterized critiques of the museum system in recent decades. For example, the *Report of the Royal Commission on Aboriginal Peoples* recognized the authority of Indigenous Canadians to speak for themselves in the way they are represented in museums, particularly in recognizing their role in the development of Canadian history and contemporary life. The commission recommended that museums and First Nations work together to correct inequities.³⁵¹ These recommendations were reiterated in the Truth and Reconciliation Commission Report in 2015.³⁵²

Museums and heritage organizations are developing new relationships with Indigenous communities. Some have jointly agreed to new protocols for describing, researching, handling, and sharing culturally sensitive material.³⁵³ A good example is the Musée des Abénakis in Quebec, which consulted and involved the Indigenous community in establishing the museum and has included members of the Abenaki community ever since. The museum serves as a platform for discussing the issues and struggles of this Indigenous community.³⁵⁴

In Ontario, Sustainable Archaeology has established an advisory committee composed of equal numbers of archaeologists and First Nations individuals to explore all issues of archaeological practice and heritage. The principal aim of the committee is to advise and direct Sustainable Archaeology's operational goals, accommodating both archaeological and First Nation cultural values in a co-management fashion. For example, if a researcher wants to see sensitive artifacts, both archaeologists and First Nations have to give consent.

These are significant accomplishments, but the recent report of the Truth and Reconciliation Commission underscored the need to do more to deepen the relationship between museums and First Nation, Métis, and Inuit peoples.³⁵⁵ The report recommends a national review of museum policies and best practices to determine the level of compliance with the *United Nations Declaration on the Rights of Indigenous Peoples* and to make recommendations.³⁵⁶

³⁵¹ Royal Commission on Aboriginal Peoples, "Report of the Royal Commission on Aboriginal Peoples, Volume 3: Gathering Strength" (Canada, 1996): Ch. 6 Arts and Heritage, Appendix 6A: Excerpts from Turning the Page: Forging New Partnerships Between Museums and First Peoples, http://www.collectionscanada.gc.ca/webarchives/20071124130346/http://www.ainc-inac.gc.ca/ch/rcap/sg/sim6_e.html.

³⁵² Truth and Reconciliation Commission of Canada, "Honouring the Truth, Reconciling for the Future: Summary of the Final Report of the Truth and Reconciliation Commission of Canada" (Truth and Reconciliation Commission of Canada, 2015): 247, http://www.trc.ca/websites/trcinstitution/File/2015/Honouring_the_Truth_Reconciling_for_the_Future_July_23_2015.pdf.

³⁵³ Truth and Reconciliation Commission of Canada, "Honouring the Truth, Reconciling for the Future," 248.

³⁵⁴ Lilla Vonk, "Indigenous peoples and ethnographic museums: A changing relationship" (The Nordic Centre of Heritage Learning and Creativity, January 28, 2015), <http://nckultur.org/wp-content/uploads/2013/05/Report-Indigenous-communities-and-museums-L-Vonk.pdf>.

³⁵⁵ Truth and Reconciliation Commission of Canada, "Honouring the Truth, Reconciling for the Future," 251.

³⁵⁶ Truth and Reconciliation Commission of Canada, "Honouring the Truth, Reconciling for the Future," 252.

7.2.2.4 Collections Management Pressures

Heritage organizations with collections, such as museums and archives, increasingly must find ways to make their collections more accessible to the general public and Indigenous communities while ensuring their continued preservation. Many are finding it difficult to afford adequate storage for their collections, conduct research on them, and share them with the public.

Many museums are dealing with the legacy of years of unplanned collecting and need realistic strategies for documenting and managing collections within available resources. Some are considering other options, including de-accessioning.³⁵⁷ Some are partnering with other cultural institutions, such as libraries, to provide greater access to their collections through joint digital conservation projects.

Digital technology has opened the door to increasing access to collections and potentially increasing revenues, but resources are needed to implement it. Many Ontario museums participate in the Canadian Heritage Information Network (CHIN) started by the Department of Canadian Heritage in the 1970s. It includes cross-Canada artifact databases and the Virtual Museum of Canada, which supports and brings on line exhibits developed by local museums.³⁵⁸

The RE-ORG Canada workshop offered by the Canadian Conservation Institute offers one solution to collections management challenges faced by community museums.³⁵⁹ The training initiative aims to help museums address their storage issues using the RE-ORG methodology, which is internationally recognized.³⁶⁰ Participants identify key issues affecting access to and conservation of their collections, develop options for reorganization, and implement solutions.

7.3 Built Heritage

Built heritage connects us to previous modes of daily life, culture and work. It includes properties with residential, commercial, institutional or industrial buildings, monuments, places of worship, and structures such as bridges or dams.

Many municipal governments recognize the role heritage buildings, districts, and other heritage resources can play in revitalizing their communities. As of 2015, there were 7,836 heritage properties individually designated by municipalities under the *Ontario Heritage Trust Act*. Additionally, Ontario municipalities have designated 121 Heritage Conservation Districts,

³⁵⁷ De-accessioning is the process of disposing of artifacts or collections.

³⁵⁸ Canadian Heritage Information Network, <http://www.rcip-chin.gc.ca/index-eng.jsp>.

³⁵⁹ Canadian Conservation Institute, Training and Workshops, RE-ORG Canada, <http://www.cci-icc.gc.ca/training-formation/list-liste/reorg-eng.aspx>.

³⁶⁰ RE-ORG: Canada, <http://canada.pch.gc.ca/eng/1445446202824>. The international framework was developed by ICCROM and UNESCO. The Canadian Conservation Institute is working in partnership with the RE-ORG International Program, which has coordinated similar training activities in several countries.

representing 20,800 properties.³⁶¹ Municipalities also use other conservation tools to protect heritage properties, including conservation plans, cultural heritage impact assessments, tax rebates, and heritage loan and grant programs.

The conservation of built heritage plays a role in attracting investment, businesses, and skilled professionals to the area. Significant economic activity and job creation are associated with the conservation and repurposing of heritage buildings.³⁶² In some cases, heritage development (the renovation that supports continued use or adaptive reuse of historic buildings) has been shown to be economically competitive with new construction. Even when the cost is greater, developers of heritage properties are generally rewarded with a high rate of return on investment.³⁶³

7.3.1 Key Trends

7.3.1.1 Adaptive Reuse of Heritage Sites

In both urban and rural communities, the adaptive reuse of historic buildings creates unique living and working spaces. Historic buildings, streetscapes, and entire downtowns are being redeveloped as exciting places to live and work. A wide range of heritage development projects have been completed in Ontario, most of which are private sector projects.³⁶⁴ Examples include the Alton Mill, a former knitting mill and rubber company which was restored and revitalized as an arts-based marketplace and gallery; the #1 Fire Station in Kenora, revitalized and restored to house a craft brewer; and the Merritton Cotton Mill in St. Catharines, restored by a local entrepreneur and rented to a popular and profitable restaurant. An important factor in the success of heritage development is dynamic, risk-taking, creative developers.³⁶⁵

Social enterprises for heritage redevelopment have multiple impacts, both economic and social. In Toronto, Artscape has redeveloped a number of heritage buildings into creative centres, housing, galleries, theatres, and spaces for not-for-profit groups, as well as live/work spaces for

³⁶¹ Ontario Heritage Trust, "Ontario Heritage Act Register," <http://www.heritagetrust.on.ca/Resources-and-Learning/Ontario-Heritage-Act-Register/FAQ.aspx#;FAQLink289>.

³⁶² Rypkema and Cheong, "Measuring the Economics of Preservation: Recent Findings."

³⁶³ Robert Shipley, Michael Parsons, and Stephen Utz, University of Waterloo, "The Lazarus Effect: An Exploration of the Economics of Heritage Development in Ontario" (Architectural Conservancy of Ontario, January 2006), https://uwaterloo.ca/heritage-resources-centre/sites/ca.heritage-resources-centre/files/uploads/files/lazarus-jan20-verA_0.pdf; Heritage Canada The National Trust, "Financial Measures to Encourage Heritage Development: Final Report" (Federal-Provincial-Territorial Ministers' Table on Culture and Heritage, 2014): <https://www.nationaltrustcanada.ca/sites/www.heritagecanada.org/files/Final%20Report%20-Financial%20Measures-2014.pdf>.

³⁶⁴ Shipley, Parsons, and Utz, "The Lazarus Effect."

³⁶⁵ Michael Brightman, "Is the Conservation of the United Kingdom's Built Heritage Sustainable?" *Reinvention: a Journal of Undergraduate Research*, British Conference of Undergraduate Research 2012 Special Issue (2012), http://www2.warwick.ac.uk/fac/cross_fac/iatl/reinvention/issues/bcur2012specialissue/brightman/.

artists. Artscape Queen Street West, formerly a warehouse, was the first legal live/work space in Toronto geared to artists' incomes. Today it is located in the heart of a thriving gallery district.³⁶⁶

Local governments are using a range of approaches to finance brownfield redevelopment, including tax abatements (rate freezes or deductions for a set period of time), revolving loan funds, or general obligation bonds.³⁶⁷ For example, in 2002 the City of Toronto designated the industrial buildings of the Don Valley Brick Works. The following year the City issued a proposal looking for a developer to raise the capital needed to restore and reuse all 16 heritage structures on the site, and to create a centre for environmental learning and urban ecology.³⁶⁸ The project, led by social enterprise Evergreen, was funded through loans from the provincial, federal and municipal government, as well as private funding. The heritage redevelopment and establishment of Canada's first large-scale community environment centre was completed in 2010.³⁶⁹

7.3.2.2 Environmental Sustainability

There is evidence that the environmental footprint of historic buildings is smaller than that of new construction, even compared with modern buildings designed to be energy efficient. Buildings from the early 20th century have been shown to perform as well as if not better than newer buildings.³⁷⁰ This is because historical construction methods and materials often maximized natural sources of heat, light, and ventilation. By leveraging original design intelligence in existing buildings, modernization of older buildings can achieve levels of energy consumption comparable to new builds at a LEED Silver level.³⁷¹

Additionally, it takes decades before a new building recovers, through energy savings, the embodied energy of an old building, taking into account the energy used in demolition and new construction. Studies have estimated that it can take between 10 and 80 years for a new building to overcome the negative environmental impacts from construction.³⁷²

³⁶⁶ Carolyn Quinn, "The Perfect Mix: Old Buildings and the New Economy" *Heritage* 18, no. 2 (2015), https://www.nationaltrustcanada.ca/sites/www.nationaltrustcanada.ca/files/FE_02%2015-%20FINAL.pdf. See also Artscape, <http://www.torontoartscape.org/artscape-west-queen-west>.

³⁶⁷ Francesca Romana, Medda Simone Caschili, and Marta Modelewska, "Financial Mechanisms for Urban Heritage Brownfields," in Guido Licciardi and Rana Amirtahmasebi, eds., *The Economics of Uniqueness: Cultural Heritage Assets and Historic Cities as Public Goods* (Washington: World Bank, 2012): ch. 8, http://siteresources.worldbank.org/EXTSDNET/Resources/Economics_of_Uniqueness.pdf.

³⁶⁸ Ontario Public Works Association, <https://opwa.ca/wp-content/uploads/2014/01/Toronto-2014-Article-2.pdf>

³⁶⁹ Ontario Public Works Association.

³⁷⁰ Preservation Green Lab, "The Greenest Building: Quantifying the Environmental Value of Building Reuse" (Seattle: National Trust for Historic Preservation, 2011): 18, http://www.preservationnation.org/information-center/sustainable-communities/green-lab/lca/The_Greenest_Building_lowres.pdf.

³⁷¹ Environmental Security Technology Certification Program (ESTCP), "Demonstrating the Environmental & Economic Cost-Benefits of Reusing DoD's Pre-World War II Buildings" (ESTCP, April 2013), VII, <http://www.achp.gov/docs/DoD%20Cost%20Benefit%20Report.pdf>.

³⁷² Preservation Green Lab, "The Greenest Building," 75.

A study of building reuse in Portland, Oregon reported that reusing the existing building stock would meaningfully reduce the negative environmental impacts associated with building development. The study found that 15% of the county's total CO₂ reduction targets would be met simply by reusing 1% of Portland's total building stock over 10 years instead of replacing them with new, efficient buildings.³⁷³

Building reuse almost always yields fewer environmental impacts compared with new construction. It also offers immediate climate change impact reductions.³⁷⁴ Waste from demolition and construction is estimated to account for almost 30% of all waste going to landfills in Canada.³⁷⁵ Reusing an old building cuts down on landfill waste, protects greenfield land, and can reduce greenhouse gas emissions.

Conservation of built heritage resources presents economic opportunities associated with green industries, for example through the development and use of sustainable conservation technologies. These new opportunities will have implications for the construction sector, creating a need for new skills.³⁷⁶ Construction professionals will need to acquire skills in the conservation, repair, and maintenance of heritage properties, including skills related to sustainability, regeneration, energy efficiency, and climate change. This effort will require widespread dissemination of information, advice and guidance, and best practices related to methods and materials.³⁷⁷

7.3.2.3 Development and Heritage Resources

Despite evidence that property values in heritage conservation districts tend to be higher than market value, there is still a stigma around the financial viability of heritage buildings and heritage development projects.³⁷⁸ Difficulties with respect to accessing financing from banks have been noted.³⁷⁹ Developers will increasingly need to ensure that they have viable business models to attract adequate financing for conservation and ongoing resource protection.

³⁷³ Preservation Green Lab, "The Greenest Building," 85.

³⁷⁴ Preservation Green Lab, "The Greenest Building," 61.

³⁷⁵ Muluken Yeheyis et al., "An overview of construction and demolition waste management in Canada: a lifecycle analysis approach to sustainability" *Clean Technologies and Environmental Policy* 15(1) (published on line March 25, 2012): 81-91, <http://link.springer.com/article/10.1007/s10098-012-0481-6#page-1>.

³⁷⁶ Cultural Human Resources Council (CHRC), "Human Resources in Canada's Built Heritage Sector" (CHRC, 2004), http://www.culturalhrc.ca/research/CHRC_Built_Heritage-en.pdf; National Heritage Training Group, "Built Heritage Sector Professionals: Current skills, future training" (London: The National Heritage Training Group, 2008), https://www.citb.co.uk/documents/research/nhtg_skillsresearch_professionals_2008_fullreport_tcm17-6859.pdf.

³⁷⁷ Cultural Human Resources Council, "Human Resources in Canada's Built Heritage Sector"; National Heritage Training Group, "Built Heritage Sector Professionals."

³⁷⁸ For example, University of Waterloo, study on Heritage Conservation Districts, https://uwaterloo.ca/heritage-resources-centre/sites/ca.heritage-resources-centre/files/uploads/files/Upper_Doon_Summary_Report.pdf.

³⁷⁹ Shipley, Parsons, and Utz, "The Lazarus Effect."

Low returns on investment are said to act as a deterrent to conservation efforts, whereas fiscal incentives and grants are key to encouraging it.³⁸⁰ The US has had a federal tax credits for rehabilitation of historic buildings since 1977. Since the program began, over 38,000 projects have generated 2.4 million jobs and leveraged \$66 billion in private investment. The tax credit has been shown to be a tool to revitalize vacant and underutilized buildings and older urban neighbourhoods and downtowns, create affordable housing, stimulate the community, and enhance property values.³⁸¹

Under the *Ontario Heritage Act*, municipalities can create heritage grant or loan programs to assist owners of heritage properties to cover the costs of repair and restoration or to adaptively reuse heritage buildings in community improvement areas. Some municipalities provide grants, loans, and tax rebates, including Ottawa, Toronto, Peterborough, Stratford, Cobourg, and many others.³⁸² Ontario Heritage Property Tax Relief is a provincial program that provides a tax rebate to heritage property owners in participating municipalities. The province and the municipality share the cost of the program. Currently, 41 municipalities participate in the program.³⁸³

7.4 Cultural Heritage Landscapes

A cultural heritage landscape is “a defined geographical area that may have been modified by human activity and is identified as having cultural heritage value or interest by a community, including an Aboriginal community. The area may involve features such as structures, spaces, archaeological sites, or natural elements that are valued together for their interrelationship, meaning or association.”³⁸⁴

Examples of cultural heritage landscapes range from heritage conservation districts designated under the *Ontario Heritage Act*, villages, parks, gardens, battlefields, main streets and neighbourhoods, cemeteries, trails, views, natural areas, and industrial complexes. They may also include areas recognized by federal or international designation authorities.

Cultural heritage landscapes may be associated with a traditional practice, such as harvesting fish or animals, establishing seasonal camps, or gathering for ritual and ceremonial events. These practices represent an ongoing relationship with a place, but do not necessarily modify

³⁸⁰ Heritage Canada The National Trust, “Financial Measures to Encourage Heritage Development.”

³⁸¹ Heritage Canada The National Trust, “Financial Measures to Encourage Heritage Development,” 11.

³⁸² Jenna Langdale, “Inventory of Ontario Heritage Incentive Programs: An Excerpt from “Heritage Incentive Programs: The Key to Achieving the Potential of Heritage Conservation in Ontario” (Toronto: Ryerson University, June 1, 2011). https://www.burlington.ca/en/services-for-you/resources/Planning_and_Development/Heritage_Conservation/Inventory_of_Ontario_Heritage_Incentive_Programs.pdf.

³⁸³ Ontario, Ministry of Tourism, Culture and Sport, “Getting Starting: Heritage Property Tax Relief, a Guide for Municipalities” (Ontario, 2005), <http://www.mtc.gov.on.ca/en/publications/taxguide-e.pdf>.

³⁸⁴ Ontario, Ministry of Municipal Affairs and Housing, “Land Use Planning: Provincial Policy Statement.”

the landscape. For example, the long distance routes used by Inuit to travel across the High Arctic disappear with each new snowfall.³⁸⁵

In Ontario, heritage conservation districts are identified as a type of cultural heritage landscape that can include residential, commercial, or industrial areas, rural landscapes, or hamlets, with features or land patterns that contribute to a cohesive sense of time or place. For example, the Oil Springs Heritage Conservation District in Lambton County defines the practice of small-scale oil extraction as part of local community identity and protects the area's industrial heritage and rural landscapes.³⁸⁶ Heritage conservation districts, in addition to significant physical elements, may also include important views or vistas, for example toward spaces within the district.³⁸⁷

A cultural heritage landscape may also be a single property. For example, the McMichael Gallery in Ontario includes a sculpture garden, a wilderness garden intended to reflect the northern landscapes of the Group of Seven, and a small cemetery where six Group of Seven members and gallery founders Robert and Signe McMichael have been buried. The McMichael is currently engaged in the creation of a master plan to guide its development and long term care. Enhancing and maintaining the grounds as a cultural heritage landscape is a key component of the plan.³⁸⁸

7.4.1 Key Trends

7.4.1.1 Strategic Use of Cultural Heritage Landscapes in Community and Economic Development

Increasingly, the potential community and economic value of conserving cultural heritage landscapes is being recognized, and jurisdictions are implementing cultural heritage landscape conservation strategies.³⁸⁹ Cultural heritage landscape conservation plans, inventories, or guidelines exist in a number of Ontario municipalities, including Hamilton, Mississauga, Caledon, Waterloo, Oakville, Kitchener, and Vaughan. Communities may pursue conservation of cultural heritage landscapes for practical or economic reasons.³⁹⁰ For example, the heritage designation of Markham Village and Unionville, both within the town of Markham, contributed to the

³⁸⁵ Lisa Prosper, presentation, "Aboriginal Perspectives on Renewing and Revitalizing Cultural Meaning in Place" (15th US ICOMOS International Scientific Symposium, "World Heritage in the Americas: Confluence of Cultures," May 30 – June 1, 2012, San Antonio, Texas).

³⁸⁶ Wendy Shearer Landscape Architect (WSLA) et al., "Draft Heritage Conservation District Feasibility Study for the Town of Petrolia, Lambton County" (July 2009), <https://www.lambtononline.ca/home/residents/planninganddevelopment/Oil%20Heritage%20Conservation%20District%20Plan%20Documents/Heritage%20Conservation%20District%20Feasibility%20Study%20for%20the%20Town%20of%20Petrolia.pdf>.

³⁸⁷ Ontario, Ministry of Culture, "Ontario Heritage Tool Kit, Heritage Conservation Districts: A Guide to District Designation Under the Ontario Heritage Act" (Ontario, 2006), http://www.mtc.gov.on.ca/en/publications/Heritage_Tool_Kit_HCD_English.pdf.

³⁸⁸ McMichael Canadian Art Collection, <http://mcmichael.com/about/>.

³⁸⁹ Nora Mitchell, Mechtild Rössler, and Pierre-Marie Tricaud, "World Heritage Cultural Landscapes: A Handbook for Conservation and Management" (UNESCO, 2009), http://whc.unesco.org/documents/publi_wh_papers_26_en.pdf.

³⁹⁰ Reeve and Shipley, "The Impact of Heritage Investment on Public Attitudes to Place."

evolution of these neighbourhoods and has been shown to have had a positive impact on business.³⁹¹

Cultural heritage has been the catalyst for sustainable heritage-led regeneration in several European cities, such as the award-winning regeneration of the Grainger Town in Newcastle upon Tyne in England and initiatives in Krakow, Lille, and Liverpool. In Manchester, an integrated policy approach to cultural heritage landscapes led to the regeneration of the wider area.³⁹² The conservation of cultural heritage played a key role in regenerating the Cathedral Quarter in Belfast, where the investment in heritage conservation was the driver for regeneration.³⁹³

7.4.1.2 Evolving Approaches to Conservation

The goals of ecological sustainability and conserving cultural heritage landscapes are converging. Increasingly, the conservation of cultural heritage landscapes is defined by sustainability, leading to “rethinking how we use technology, live life in urban milieus, and how we understand nature.”³⁹⁴ As a result, some cultural heritage landscape conservation projects are contributing to conserving biodiversity.³⁹⁵

The protection of cultural heritage landscapes will continue to play a role in sustainable land development, but socioeconomic change will put pressure on cultural heritage landscapes. Some cultural heritage landscapes near urban areas will be threatened by urbanization and encroachment. There will be a growing challenge to develop appropriate conservation strategies, recognizing the needs of an evolving society while protecting the cultural heritage value of the landscape.³⁹⁶

The European Landscape Convention commits signatory countries to develop strategies and plans to conserve culturally significant landscapes and promote awareness of them, to strengthen public participation in landscape conservation and to integrate cultural landscape considerations into larger cultural and economic plans.³⁹⁷ Ireland’s National Landscape Strategy,

³⁹¹ Robert Shipley, Marcie Snyder, “The Role of Heritage Conservation Districts in Achieving Community Economic Development Goals,” *International Journal of Heritage Studies* 19, no. 3 (2013): 304-321.

³⁹² CHCfE Consortium, *Cultural Heritage Counts for Europe*, p.145.

³⁹³ CHCfE Consortium, *Cultural Heritage Counts for Europe*, p. 162.

³⁹⁴ American Society of Landscape Architects, “Interview with Francesco Bandarin, Director, UNESCO World Heritage,” <http://www.asla.org/ContentDetail.aspx?id=25842>.

³⁹⁵ Council of Europe, “Landscape and Sustainable Development: Challenges of the European Landscape Convention” (Strasbourg: Council of Europe Publishing, July 2006),

<https://rm.coe.int/CoERMPublicCommonSearchServices/DisplayDCTMContent?documentId=09000016802f24d2>;

Council of Europe, presentation, “European Landscape Convention: General Activity Report” (7th Council of Europe Conference on the European Landscape Convention, Strasbourg, April 2015),

<https://rm.coe.int/CoERMPublicCommonSearchServices/DisplayDCTMContent?documentId=09000016802f1409>.

³⁹⁶ American Society of Landscape Architects, “Interview with Francesco Bandarin.”

³⁹⁷ France, “Communication relative à la reconquête des paysages et à la place de la nature en ville,” press release by Ségolène Royal, Ministère de l’Écologie, du Développement durable et de l’Énergie (France, September 25, 2014), http://www.developpement-durable.gouv.fr/IMG/pdf/2014-09-25_-_DP_annonces_et_expo_paysage_final.pdf. The

for example, aims to integrate landscape into its approach to sustainable development, recognizing the interconnections between heritage landscapes, biodiversity and climate change.³⁹⁸

An innovative use of technology to both conserve and promote awareness of a cultural landscape is the Memorial Landscape Berlin Wall, a web-based Geographic Information System (GIS) developed by the Department of Architectural Conservation of the Brandenburg University of Technology. In addition to conserving the authentic physical remains and traces, the memory of the Wall has been conserved digitally, allowing users to explore the remains virtually.³⁹⁹

7.5. Archaeology

An archaeological site is any site that contains an artifact or other physical evidence of past human use or activity. Sites may include the remains of camps, villages, battlefields, pioneer homes, burial grounds, and shipwrecks. These sites tell the story of the history and the development of the local area. Archaeological sites can be found anywhere that may have attracted humans in the past, including urban centres as was the case with the remains of Ontario's 1797 First Parliament.

Archaeology in Ontario is predominantly practised as a commercial enterprise driven by the needs of the land use and development sector.⁴⁰⁰ The archaeology industry is estimated to be worth more than \$20 million annually and is growing.⁴⁰¹ The industry currently employs about 475 licensed archaeologists and hundreds of other specialized workers such as field crews, research staff, and collections managers. However, changing professional practices have led some in the profession to express concern that graduating archaeologists may not be adequately prepared for the responsibilities of private sector careers as consultants.⁴⁰²

Ontario's archaeological fieldwork activity is increasing, uncovering an unprecedented volume of artifacts and data. This has created a challenge for archaeologists, museums, universities, and

European Landscape Convention defines landscape to mean an area, as perceived by people, whose character is the result of the action and interaction of natural and/or human factors.

³⁹⁸ Department of Arts, Heritage and the Gaeltacht, "National Landscape Strategy for Ireland 2015-2025."

³⁹⁹ Guntram Geser, Veronika Hornung-Prähauser and Andreas Strasser, eds., "Handbook for Creative Cultural Heritage Cooperation Projects" (Salzburg: Salzburg Research Forschungsgesellschaft m.b.H., 2014). Memorial Landscape Berlin Wall was developed by the Department of Architectural Conservation of the Brandenburg University of Technology, with the Institute for Contemporary History Munich – Berlin and the German Armed Forces Research Office (Potsdam).

⁴⁰⁰ Ronald F. Williamson, "Planning for Ontario's Archaeological Past: Accomplishments and Continuing Challenges," *Revista de Arqueologia Americana (Journal of American Archaeology)* 28 (2010): 1-45, available at <http://utoronto.academia.edu/RonWilliamson>.

⁴⁰¹ Williamson, "Planning for Ontario's Archaeological Past," 10.

⁴⁰² Neal Ferris, "Where the Air Thins: The Rapid Rise of the Archaeological Consulting Industry in Ontario" *Revista de Arqueología Americana (Journal of American Archaeology)* 21 (2002): 53-88; Neal Ferris, "From Crap to Archaeology: The CRM Shaping of Nineteenth-Century Domestic Archaeology," *Ontario Archaeology* no. 83/84 (2007): 3-29; Society for American Archaeology Bulletin 15, no. 5 (November 1997), <http://www.saa.org/Portals/0/SAA/publications/SAAbulletin/15-5/>.

other institutions that do not have the space to house growing collections. There are currently more than 20,000 archaeological sites registered with the Ministry of Tourism, Culture and Sport.⁴⁰³

In 2011 the Ministry implemented new *Standards and Guidelines for Consultant Archaeologists*. This document sets out, for the first time, best practices and requirements for engaging with Indigenous communities in archaeological fieldwork and decision-making. The draft technical bulletin, *Engaging Aboriginal Communities in Archaeology*, provides further guidance for archaeologists.⁴⁰⁴ Best practices include protection in situ, having community liaisons on site during fieldwork, and the proper disposition of Aboriginal artifacts and ancestral remains.⁴⁰⁵

Similarly, under the 2014 Provincial Policy Statement (PPS 2014), planning authorities are required to conserve significant archaeological resources before development can occur, and to consider the interests of Indigenous communities when doing so. The PPS 2014 also suggests that planning authorities take a proactive approach to conserving archaeological resources by considering and promoting archaeological management plans.⁴⁰⁶

7.5.1 Key Trends

7.5.1.1 Increased Involvement of Indigenous Communities in Archaeology

In Ontario, 80% of all archaeological sites are Indigenous in origin. This includes First Nations and Métis villages, hunting camps and portage areas. Artifacts include pottery sherds, arrow and spear points, and other everyday materials. Some sites and their contents, such as burial sites and ossuaries containing ancestors' remains and funerary artifacts, are sensitive and must be treated with respect and dignity.⁴⁰⁷

Indigenous peoples are increasingly voicing their deep interest in the conservation of the sites and artifacts left by their ancestors. There is a continued need for increased dialogue between archaeologists and Indigenous individuals, organizations, and communities. The Ministry of Tourism, Culture and Sport has supported the Association of Professional Archaeologists to provide training to members of Indigenous communities and archaeological site liaison staff with the goal of promoting good communications between Indigenous communities and archaeologists.

In 2013, the Ontario Heritage Trust and the University of Toronto partnered with the Huron-Wendat Nation to rebury the remains of 1760 Huron-Wendat ancestors. The reburial occurred at the location of the largest original burial sites, within a conservation area owned by the

⁴⁰³ Ontario, Ministry of Tourism, Culture and Sport, <http://www.mtc.gov.on.ca/en/archaeology/archaeology.shtml>.

⁴⁰⁴ Ontario, Ministry of Tourism, Culture and Sport, "Standards and Guidelines for Consultant Archaeologists."

⁴⁰⁵ Ontario, Ministry of Municipal Affairs and Housing, "Land Use Planning: Provincial Policy Statement."

⁴⁰⁶ Ontario, Ministry of Municipal Affairs and Housing, "Land Use Planning: Provincial Policy Statement."

⁴⁰⁷ Ontario, Ministry of Tourism, Culture and Sport, "Aboriginal heritage: museums and archaeology" (Ontario, 2015), http://www.mtc.gov.on.ca/en/aboriginal/aboriginal_museums_arch.shtml.

Ontario Heritage Trust. This is the largest reburial of Aboriginal ancestral remains ever undertaken in North America.⁴⁰⁸

7.5.1.2 Lack of Public Access to the Archaeological Record

The rapid growth in archaeological fieldwork driven by development, particularly in southern Ontario, has yielded tens of millions of artifacts and large amounts of associated records and data (collectively “archaeological collections”).

Some archaeological collections have been transferred to public institutions, but the majority are in the private care of consultant archaeologists and consulting firms, museums, and government, held in trust for Ontarians. Archaeologists are required to file fieldwork reports in the Ministry’s Register of Reports, which is publicly accessible. However, access to artifacts and detailed data for research, educational, and public information purposes remains limited under the present circumstances.

Most Canadian provinces have a provincial repository, sometimes part of the provincial museum. Many American states have government-sanctioned repositories for archaeological collections, most of which are co-managed with the relevant Native American tribes.⁴⁰⁹

The Internet plays a key role in facilitating the sharing of information about Ontario archaeology, with an increasing focus on public interpretation on line (for example, on archaeologists’ websites). Some major projects are under way to consolidate and digitize archaeological collections to make them more accessible, but the sheer number of objects will make this a challenge for the foreseeable future.⁴¹⁰

One innovative solution being developed in Ontario is the consolidation, storage, and digitization of artifact collections through Sustainable Archaeology, a joint project between McMaster University and the University of Western Ontario. Sustainable Archaeology accepts artifact collections from archaeological researchers and consultants for a fee. It will facilitate future use by researchers and ultimately allow the public to connect with Ontario’s archaeological heritage.⁴¹¹

8. Strategic Directions for Culture

As the culture sector gains recognition as a significant contributor to knowledge-based economies and as a driver of social benefits, many jurisdictions in Canada, Europe, the United Kingdom, the United States, Australia, and New Zealand are developing or refreshing their culture policies. As in Ontario, the culture sector in these jurisdictions is adapting to change

⁴⁰⁸ Ontario Heritage Trust, media release, “1760 Huron-Wendat Nation ancestors reburied” (September 14, 2013), <http://www.heritagetrust.on.ca/News-And-Events/2013/Sep/1,760-Huron-Wendat-Nation-ancestors-reburied.aspx>.

⁴⁰⁹ Williamson, “Planning for Ontario’s Archaeological Past,” 39.

⁴¹⁰ Sustainable Archaeology, <http://sustainablearchaeology.org/>.

⁴¹¹ Sustainable Archaeology, <http://sustainablearchaeology.org/>.

driven by digital technologies, globalization, the fiscal environment, and demographic shifts.

As part of this environmental scan, the authors reviewed arts and culture strategies and related documents from other Canadian⁴¹² and international jurisdictions. Implementation approaches varied, but several common strategic directions emerged:

- 1) **Fostering inclusion** by promoting cultural diversity as an asset to creative expression and social cohesion, and respecting Indigenous cultures;
- 2) **Strengthening communities** by fostering sense of place, enhancing tourism, and building capacity for sustainable development;
- 3) **Enhancing the economic benefits of culture** by accessing global markets and strengthening financial capacity;
- 4) **Leveraging digital technologies** by establishing new organizations and adopting digital strategies;
- 5) **Investing in the culture sector workforce** by promoting skills development and workforce sustainability; and
- 6) **Encouraging collaboration and partnerships** across sectors (e.g., with business, health, technology, environment) and between levels of government or government departments.

These themes may be useful to Ontario as it develops its culture strategy.

8.1 Fostering Inclusion

Many jurisdictions make diversity and inclusion a cornerstone of their culture strategy. For example, “Diversity and Access” is one of the guiding principles of Alberta’s culture policy. The objective is to foster a sense of belonging through participation in cultural activities that reflect and celebrate Alberta’s Aboriginal traditions and contemporary cultures.⁴¹³

Similarly, a guiding principle in the Australia Council for the Arts Cultural Engagement Framework is that respecting and interacting with cultural diversity makes the arts more relevant, dynamic, innovative, and reflective of Australia.⁴¹⁴

Through their strategic plans, arts councils in a number of jurisdictions aim to expand participation in culture and reduce historical and systemic barriers. The Ontario Arts Council’s recent strategic plan *Vital Arts and Public Value* identifies Deaf artists and artists with disabilities, Aboriginal artists, artists of colour, francophone artists, and new generation artists

⁴¹² Canadian jurisdictions examined include Yukon, North West Territories, British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, Quebec, New Brunswick, Nova Scotia, Prince Edward Island and Newfoundland and Labrador.

⁴¹³ Alberta, “The Spirit of Alberta: Alberta’s Cultural Policy” (Alberta, 2008), <http://www.culture.alberta.ca/about/premiers-council/pdf/SpiritofAlberta.pdf>.

⁴¹⁴ Australia Council for the Arts, <http://www.australiacouncil.gov.au/about/cultural-engagement-framework/>.

(aged 18 to 30) as priority groups.⁴¹⁵ With a focus on these priority groups, the plan commits to ensuring fair and equitable access to funding programs and processes and to learning opportunities.⁴¹⁶ The plan includes collecting and sharing stories reflecting the diversity of Ontario artists and their work.

8.1.1 Indigenous communities

Access to and participation in culture by Indigenous communities is a priority in several Canadian culture policies.⁴¹⁷ For example, New Brunswick seeks to preserve Indigenous artists' and First Nations' heritage and promote it to the rest of the population.⁴¹⁸ It emphasizes creating partnerships with First Nations to share and disseminate cultural goods and experiences.

Newfoundland and Labrador's policy enshrines the principle of cultural and linguistic diversity, including that of Indigenous peoples.⁴¹⁹ Its strategic direction "Aboriginal peoples and communities" recognizes the distinctive contributions of Indigenous peoples to the province's cultural diversity and asserts the goal of ensuring that Indigenous communities direct and control their cultural development and preservation. The policy aims to ensure financial support to Indigenous artists and communities so that they have the means to preserve and foster their distinct cultures.⁴²⁰

One of the key goals in the Northwest Territory's culture and heritage strategic framework, *Strong Cultures, Strong Territory* 2015, is respect for diversity. Their priorities and principles highlight the importance of respecting the foundational role of Aboriginal cultures, clearly recognizing the legacy of colonialism and residential schools on Aboriginal cultures. This priority specifically recognizes the importance of language. The Northwest Territories has 11 official languages, English, French and 9 different Aboriginal languages.⁴²¹ This priority commits to supporting Aboriginal communities in the revitalization and protection of these languages. The

⁴¹⁵ Ontario Arts Council, "Vital Arts and Public Value," 6. Note: The term "artists of colour" is based on the Statistics Canada definition of "visible minority".

⁴¹⁶ Ontario Arts Council, "Vital Arts and Public Value."

⁴¹⁷ For example, Yukon, Alberta, Quebec, Saskatchewan, Newfoundland and Labrador, New Brunswick, and British Columbia.

⁴¹⁸ New Brunswick, "Creative Futures: A Renewed Cultural Policy for New Brunswick, 2014-2019" (New Brunswick, June 2014), <http://www2.gnb.ca/content/dam/gnb/Departments/thc-tpc/pdf/Culture/2014CulturalPolicy.pdf>.

⁴¹⁹ Newfoundland and Labrador, "Creative Newfoundland and Labrador: The Blueprint for Development and Investment in Culture" (Newfoundland and Labrador, 2006), <http://www.btcrcd.gov.nl.ca/artsculture/pdf/culturalplan2006.pdf>.

⁴²⁰ Newfoundland and Labrador, "Creative Newfoundland and Labrador."

⁴²¹ Northwest Territories, "Strong Cultures, Strong Territory: GNWT Culture and Heritage Strategic Framework, 2015-2025" (Northwest Territories, 2015): 11, http://www.assembly.gov.nt.ca/sites/default/files/td_341-175.pdf.

framework also includes the recognition of traditional place names, and other aspects of intangible heritage such as skills, knowledge and traditional practices.⁴²²

In Australia, the New South Wales *Aboriginal Arts and Cultural Strategy* aims to increase the participation and recognition of Aboriginal people in cultural activities. The strategy also seeks to strengthen the culture sector and support the development of Aboriginal jobs and enterprises within the cultural industries through residencies, workshops, and mentorships.⁴²³ The strategy also includes partnering with arts and cultural organizations to create a network of Aboriginal educational and curatorial workers who can undertake cross-agency initiatives that encourage Indigenous people to participate as audience-members or contributors.

8.1.2. Francophone Communities

Although Francophone cultural producers share many of the same challenges as their English-speaking counterparts, these challenges are exacerbated by the small and dispersed population and the smaller communities in which some cultural producers work. A study conducted by the Office of the Commissioner of Official Languages found that demographic decline, and lack of dedicated facilities for the arts and development opportunities has a major impact on artists working in Francophone communities.⁴²⁴

Touring, audience development, promotion and export to the Québec and French markets, access to professional development opportunities in French and media exposure, are significant challenges for Francophone artists and cultural producers.⁴²⁵ For example, television still dominates the media-consumption habits of Franco-Ontarians. However, while 91% of Francophone youth in Ontario watch television on average 14 hours per week, a significant proportion of youth (41%) only watch English stations.⁴²⁶ Therefore, a large number of Francophone youth are not consuming Francophone cultural products.

To address these specific and inherent challenges, New-Brunswick emphasizes Francophone linguistic and cultural development in their cultural policy. For example, the policy promotes the goal of enhancing identity and community pride by developing opportunities for cultural

⁴²² Northwest Territories, "Strong Cultures, Strong Territory," 13.

⁴²³ Arts New South Wales, Communities New South Wales, "NSW Aboriginal Arts and Cultural Strategy 2010," <http://www.arts.nsw.gov.au/wp-content/uploads/2010/11/Aboriginal-Strategy-web-version-final.pdf>.

⁴²⁴ Canada, Office of the Commissioner of Official Languages, "Federal Government Support for the Arts and Culture in Official Language Minority Communities" (Canada, 2008): 12, : http://www.officiallanguages.gc.ca/html/stu_etu_032008_e.php.

⁴²⁵ Fédération culturelle canadienne-française and Canada Council for the Arts, "A Current Look at the situation of artists in the Canadian francophonie, Canadian Institute for Research on Linguistic Minorities" (2013), : <http://www.icrml.ca/fr/recherches-et-publications/publications-de-l-icrml/item/8496-la-situation-des-artistes-dans-la-francophonie-canadienne>

⁴²⁶ Ontario, Office of Francophone Affairs and Groupe Média TFO, "The Media Habits of Francophones in Ontario" (Ontario, 2013), <http://ofa.gov.on.ca/en/franco-studies-media-2013.html?p=summary>

exchange to ensure that members of both official language groups share their cultural experiences with each other.⁴²⁷

New Brunswick's strategy also recognizes the importance of supporting French-language schools as a place for linguistic and cultural development.⁴²⁸ The strategy links to New Brunswick's *Linguistic and Cultural Development Policy* (2014), which reinforces the connection between the French-language and the vitality of French-speaking culture.⁴²⁹ In French-speaking Ontario, French-language schools have a similar mandate to protect, enhance and transmit the French language and culture.⁴³⁰ This objective is achieved by curriculum that is adapted to the Francophone community as well as the integration of cultural activities into the school.⁴³¹

By virtue of Section 41 of the Official Languages Act, the federal government supports the development of official-language minority communities by supporting cultural organizations. To support this, the federal government has struck agreements with federal agencies such as the Canada Council for the Arts, Telefilm and National Film Board to foster greater participation of Franco-Canadian artists in their programs.

8.1.3 Youth, seniors and people with disabilities

Some jurisdictions have developed specific strategies or initiatives to ensure greater access to cultural activities for seniors, youth, and people with disabilities.

Creative Scotland, Time to Shine, the country's first national youth arts strategy, aims to support youth to flourish and achieve.⁴³² Key initiatives include funding to establish youth arts hubs across Scotland, develop new ways for young people to participate in the arts, nurture young talent, and develop young peoples' digital creativity.⁴³³

In Northern Ireland, the *Arts and Older People Strategy* of the Arts Council of Northern Ireland⁴³⁴ assists seniors in increasing their access to and participation in the arts. The strategy aims to promote tolerance, inclusion, and health and well-being. It addresses the social and creative needs of seniors through participation in the arts, encouraging active living and life-long

⁴²⁷ New Brunswick, "Creative Futures," 12.

⁴²⁸ New Brunswick, "Creative Futures," 13.

⁴²⁹ New Brunswick, "Creative Futures," 33.

⁴³⁰ Ontario, "The Aménagement Linguistique: A Policy for Ontario's French-Language Schools and Francophone Community" (Ontario, 2004), <http://www.edu.gov.on.ca/eng/amenagement/>.

⁴³¹ Ontario, "The Aménagement Linguistique."

⁴³² Creative Scotland, "Time to Shine: Scotland's Youth Strategy for Ages 0-25" (Creative Scotland, 2014), http://www.creativescotland.com/_data/assets/pdf_file/0016/21328/Time-To-Shine-Scotlands-Youth-Arts-Strategy.pdf.

⁴³³ Creative Scotland, "Time to Shine."

⁴³⁴ Arts Council of Northern Ireland, "The Arts and Older People Strategy" (Arts Council of Northern Ireland, 2010), <http://www.artscouncil-ni.org/images/uploads/artform-documents/Arts%20and%20Older%20People%20Strategy.pdf>.

learning, supporting opportunities for volunteering, and raising awareness of issues affecting seniors.⁴³⁵

Northern Ireland has also developed an *Arts and Disability Policy*. The country has the highest rate of disability in the UK and Ireland. More than 20% of the population are people with disabilities. For this reason, improving access to and participation in the arts is a priority.⁴³⁶ The Policy puts forward a number of strategies for addressing the need, including a national central information point for artists with disabilities, easy-to-understand information on funding opportunities and assistance with applications, inclusive professional development programs, and local peer support and networking programs. The policy also aims to create a more inclusive infrastructure through actions aimed at attitudinal change, encouraging proactive support for artists with disabilities by cultural organizations, and monitoring of access by the Arts Council.⁴³⁷

8.2 Strengthening Communities

Recognizing the role of culture in enhancing sense of place, promoting tourism, and supporting sustainable development, government strategies in many jurisdictions are seeking to leverage investment in culture to strengthen communities. Many such strategies emphasize the importance of partnerships.

8.2.1 Sense of place

The Nova Scotia Leadership Council recommends engaging the culture sector to help create employment, respond to population aging, curtail outward migration, and diversify local economies.⁴³⁸ Their recommended strategy is to seek relationships to strengthen local economies, and to help communities develop strong, place-based experiences that attract creative people and industries.

Pride of Saskatchewan similarly recognizes the role of culture in creating vital communities with a high quality of life and distinctive character that make them attractive places to live, attract business, and promote tourism.⁴³⁹

New Brunswick's culture policy recognizes the role that the conservation of built heritage plays in the revitalization of city cores and main streets, and the benefits to the environment and the local economy. The policy takes this one step further and includes actions related to creating a unique contemporary built environment through a public art policy, improved design and

⁴³⁵ Arts Council of Northern Ireland, "The Arts and Older People Strategy."

⁴³⁶ Arts Council of Northern Ireland, "Arts and Disability Policy, 2013-2018" (Arts Council of Northern Ireland, 2014): 9-10, http://www.artscouncil-ni.org/images/uploads/artform-documents/Arts_Disability_May14.pdf.

⁴³⁷ Arts Council of Northern Ireland, "Arts and Disability Policy, 2013-2018," 10.

⁴³⁸ Creative Nova Scotia Leadership Council (CNSLC), "Culture: Nova Scotia's Future" (CNSLC, 2014): 10, <https://creative.novascotia.ca/sites/default/files/files/CultureNovaScotiaFuture2014.pdf>.

⁴³⁹ Saskatchewan, "Pride of Saskatchewan: A Policy Where Culture, Community and Commerce Meet" (Saskatchewan, 2010): 5, <http://www.pcs.gov.sk.ca/Pride-of-Saskatchewan>.

planning approaches, and support for educational programs related to urban design.⁴⁴⁰

8.2.2 Cultural tourism

Culture is integral to tourism. The Statistics Canada Travel Survey of Residents of Canada and International Travel Survey (2012) reports that 11% of overnight trips by US residents and 31% of overnight trips by overseas residents included visiting museums or art galleries. These numbers are even higher for historic sites. The same report found that 19% of overnight trips by US residents and 41% of overnight trips by overseas residents included visiting a historic site.⁴⁴¹ Culture is an important trip motivator and trip enhancer for the North American market, but it is an even more important for attracting overseas travellers, who stay longer and contribute significantly to economic prosperity and growth.

The Ontario Tourism Marketing Partnership Corporation (OTMPC) 2012 Consumer Insight Study found that events and festivals, as well as museums, history, and galleries are major attractions for tourists.⁴⁴² Canadian, American, and overseas visitors expect to include culture in their itineraries. The 2009 Ontario Tourism Competitiveness Strategy recognized that investing in major festivals and events would help raise the profile of Ontario and capitalize on the province's strong culture sector, as well as its sport infrastructure and natural assets.⁴⁴³

A key priority of the Queensland Arts Strategy in Australia is to grow cultural tourism and to encourage place-based participation in culture. The strategy aims to support unique cultural experiences by partnering with regional tourism organizations and local governments. It is expected that working with tourism bodies to promote local assets will generate cultural and economic impact and strengthen community identity and pride.⁴⁴⁴

In New Zealand, arts, culture, heritage, and tourism are even more strongly linked through the *New Zealand Arts, Cultural and Heritage Tourism Strategy to 2015* (2008). The strategy focuses on raising awareness of New Zealand arts, culture, and heritage among international and domestic travelers.⁴⁴⁵ The plan is to promote New Zealand culture in the domestic market,

⁴⁴⁰ New Brunswick, "Creative New Brunswick," 21.

⁴⁴¹ Statistics Canada, "Travel Survey of Residents of Canada, 2012," <http://www5.statcan.gc.ca/COR-COR/COR-COR/objList?lang=eng&srcObjType=SDDS&srcObjId=3810&tgtObjType=CST>; Statistics Canada, "International Travel Survey," <http://www5.statcan.gc.ca/COR-COR/objList?lang=eng&srcObjType=SDDS&tgtObjType=CST&srcObjId=3152>.

⁴⁴² Ontario Tourism Marketing Partnership Corporation, "Traveller Segment Profiles" (2015), <https://www.tourismpartners.com/en/research/traveller-segment-profiles>.

⁴⁴³ Ontario Tourism Competitiveness Study, "Discovering Ontario: A Report on the Future of Tourism" (Ontario, 2009), http://www.mtc.gov.on.ca/en/publications/Discover_Ontario_en.pdf.

⁴⁴⁴ Department of Science, Information Technology, Innovation and the Arts, "Arts for all Queenslanders Strategy 2014–2018" (Queensland, n.d.), <http://www.sdrc.qld.gov.au/ArticleDocuments/257/Arts%20for%20all%20Queenslanders%20strategy%202014-2018.pdf.aspx?Embed=Y>

⁴⁴⁵ New Zealand, "New Zealand Arts, Cultural and Heritage Tourism Strategy to 2015" (New Zealand, Ministry for Culture and Heritage, September 2008), <http://www.mch.govt.nz/sites/default/files/New%20Zealand%20Cultural%20Creative%20Industries%20Tourism%20Strategy.pdf>.

encourage deeper engagement between the culture and tourism sectors, and build tourism capability in cultural organizations.

8.2.3 Sustainable development

Culture is increasingly being linked to environmental sustainability. In Ontario, culture is recognized as a fundamental aspect of the environment. Protection of cultural heritage resources is built into environmental assessment processes, legislation, and policy. The Ontario Heritage Trust, through its land acquisition, public awareness, and awards programs is also building connections between environmental sustainability and heritage protection.

Quebec's *Agenda 21 for Culture* positions culture within the government's strategy for sustainable development.⁴⁴⁶ The policy connects biodiversity and cultural diversity through the stories, uses, and preservation of cultural landscapes. The policy's three priorities include the protection, promotion, and preservation of cultural diversity as essential to sustainable development, the responsible and sustainable use of cultural heritage resources, and support for creativity and social and technological innovation as essential to the long-term viability of development. An action plan supports implementation of the strategy.⁴⁴⁷

Scotland and Ireland have introduced cultural landscape conservation strategies that integrate principles of sustainable development. "Our Place in Time: The Historic Environment Strategy for Scotland" is a high-level framework setting out a 10-year vision for the historic environment.⁴⁴⁸ The key outcome of the strategy is to ensure that the cultural, social, environmental, and economic value of Scotland's heritage makes a strong contribution to the well-being of the nation and its people. The strategy positions Scotland's historic environment as a sustainable resource, for example through the sustainable reuse of historic buildings and sustainable management of heritage landscapes.

Similarly, Ireland's *National Landscape Strategy* promotes the sustainable protection, management, and planning of cultural landscapes.⁴⁴⁹ The strategy recognizes the contribution of cultural landscapes to the well-being of society, the environment, and the economy and aims to balance environmental and economic considerations with social and cultural needs.

⁴⁴⁶ Quebec, ministère de la culture, des communications et de la condition féminine, "Agenda 21C de la culture au Québec" (Quebec, November 2012), <http://www.agenda21c.gouv.qc.ca/wp-content/themes/agenda21c/pdf/A21C-Brochure.pdf>.

⁴⁴⁷ Quebec, ministère de la culture et des communications, "Notre culture, au Coeur du développement durable – Plan d'action de développement durable 2013-2015" (Quebec, 2013), https://www.mcc.gouv.qc.ca/fileadmin/documents/publications/plan_developpement_durable_2013-2015_-_VF.pdf.

⁴⁴⁸ Scotland, "Our Place in Time: The Historic Environment Strategy for Scotland" (The Scottish Government, 2014), <http://www.gov.scot/Resource/0044/00445046.pdf>.

⁴⁴⁹ Department of Arts, Heritage and the Gaeltacht, "National Landscape Strategy for Ireland."

8.3 Enhancing the Economic Benefits of Culture

In many jurisdictions, the cultural industries are perceived to be drivers of economic growth, generating significant GDP directly or indirectly.⁴⁵⁰ Many jurisdictions are developing sector-specific strategies to help promote their cultural industries globally and strengthen the financial capacity of companies and individuals involved in the production of cultural products and services.

The UK has implemented numerous strategies to support the creative industries, including infrastructure development, skills building, exports, and innovation. Because of its long-standing recognition of the sector's importance, the UK has developed sophisticated tracking of the economic performance of the culture sector.⁴⁵¹

8.3.1 Business innovation

To foster the growth of the cultural industries, many jurisdictions are supporting innovation, encouraging exports, and strengthening financial capacity to gain competitive advantage globally. Across the US, states such as Arkansas, Colorado, and Mississippi are supporting the development of innovation hubs, cultural districts, and spaces for artists and other creative talent to cluster.⁴⁵² These strategies facilitate co-location or geographic clustering of complementary industries and the removal of physical, social, or cultural barriers to collaboration.⁴⁵³

Creative incubators are emerging to help young companies grow. The DMZ (formerly Digital Media Zone) at Ryerson University in Toronto is Canada's first-ranked university incubator and fifth in the world.⁴⁵⁴ At the DMZ, students, alumni, and young entrepreneurs collaborate and innovate to develop new technology-driven products. Since its launch in 2009, the DMZ has helped young digital industry companies, including those working in entertainment, to raise over \$70 million in seed funding and create over 1,500 jobs.⁴⁵⁵

The University of Abertay in Dundee, Scotland, created White Space, a business incubator mixing the talents of computer arts students, staff, business people, broadcasters, and artists,

⁴⁵⁰ Creative Nova Scotia Leadership Council, "Culture: Nova Scotia's Future": 25.

⁴⁵¹ For example, see UK Trade & Investment, *UK Creative Industries - International Strategy* (UK, 2015), https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/329061/UKTI_Creative_Industries_Action_Plan_AW_Rev_3.0_spreads.pdf. Earlier strategies include Department for Business Innovation & Skills, *Digital Britain* (UK, 2009), https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/228844/7650.pdf; and Department for Culture, Media and Sport, *Creative Britain: New Talents for a New Economy*, (UK, 2008), <http://webarchive.nationalarchives.gov.uk/+http://www.culture.gov.uk/images/publications/CEPFeb2008.pdf>.

⁴⁵² National Governors Association, "New Engines of Growth."

⁴⁵³ National Governors Association, "New Engines of Growth."

⁴⁵⁴ Kristen Heredia, "DMZ Ranked Fifth Globally and First in Canada in University Business Incubator's Global Ranking," posted on DMZ News (dmz.ryerson.ca/dmznews), June 25, 2014, <https://dmz.ryerson.ca/dmznews/digital-media-zone-ryerson-university-ranked-fifth-globally-first-canada-university-business-incubators-global-ranking/>

⁴⁵⁵ Ryerson University DMZ website: <https://dmz.ryerson.ca/about/>

encouraging them to work across disciplines. The Grand Theft Auto franchise was originally developed in Dundee, now a major seat of games development and other creative businesses, driven by innovations emerging from the University of Abertay.⁴⁵⁶

8.3.2 Accessing international markets

International markets provide opportunities for exports, creative collaboration, and increased global visibility for Ontario's culture sector. The Ontario Media Development Corporation's Export Fund provides funding to book publishing, film and television, and interactive digital media companies for business-building trips to international markets and trade fairs.⁴⁵⁷ The Ontario government also promotes music exports through the Ontario Music Fund.

Saskatchewan's culture policy promotes new partnerships between culture, business, technology, and educational institutions to develop brand recognition and market opportunities for cultural products at the provincial, national, and international level. It also aims to make First Nations and Métis cultural products available and accessible to a growing audience.⁴⁵⁸

At the national level, the Canada Council for the Arts supports artists and arts organizations to access international markets, strengthen international collaboration, and engage a broader public.⁴⁵⁹ Quebec's provincial arts council, *le Conseil des arts et lettres du Québec*, developed an international action plan, recognizing that the international marketplace for the arts provides significant opportunities to increase and diversify revenues, to collaborate and innovate on creative projects, and to promote Quebec on the global stage.⁴⁶⁰

The strategy of providing opportunities to increase access to international markets is an international trend. In the UK, the Trade and Investment department's International Strategy for the Creative Industries focuses on helping companies develop global partnerships.⁴⁶¹ The strategy brings together domestic companies with overseas businesses and organizations in informal consortia. Another UK example is the British Museum, which has an extensive

⁴⁵⁶ University of Abertay and White Space website: <http://www.abertay.ac.uk/about/facilities/whitespace/>. See also Scotland, Skills Development Scotland, *Skills Investment Plan for the Creative Industries Sector* (The Scottish Government, June 2015), <https://www.researchonline.org.uk/sds/search/download.do;jsessionid=13F44D38614017F18CC5C8DCFE199F2D?ref=B42747>.

⁴⁵⁷ Ontario Media Development Corporation, *Annual Report 2013-14*: 10.

⁴⁵⁸ Saskatchewan, *Pride of Saskatchewan*.

⁴⁵⁹ Canada Council for the Arts, "Canada Council Increases Support for International Market Access," press release, June 27, 2012, <http://canadacouncil.ca/council/news-room/news/2012/canada-council-increases-support-for-international-market-access>.

⁴⁶⁰ Conseil des arts et lettres du Québec, *Plan d'action internationale* (Quebec, Direction du développement, de l'action régionale et internationale, 2006), http://www.calq.gouv.qc.ca/international/plan_action.pdf.

⁴⁶¹ UK Trade & Investment, "UK Creative Industries – International Strategy."

international touring exhibition program. Each year, the program allows more than two million people outside the UK to see parts of the collection.⁴⁶²

Denmark is seeking to strengthen its brand as a creative country with unique strengths in design, fashion, and architecture. It plans to leverage cultural industries such as film and television to encourage international collaborations and help attract talent and cultural tourists.⁴⁶³

8.3.3 Capital investment

Companies in the cultural industries sector require access to capital in order to grow. Financial instruments that support access to capital are particularly important for small and medium-sized enterprises (SMEs).⁴⁶⁴ Government responses to the financing gap for culture-related SMEs include tax incentives, public sector loans and equity investments, and grants.

An innovative approach in Europe is to offer loan guarantees to private lending institutions to encourage lending to the culture sector. Under the European Union's framework of support for the cultural and creative industry sectors, Creative Europe includes a new loan guarantee facility for small cultural enterprises in architecture, archives and libraries, artistic crafts, audio-visual (including film, television, video games, and multimedia), cultural heritage, design, festivals, music, performing arts, publishing, radio, and visual arts.⁴⁶⁵ In addition, the program aims to increase understanding of the culture sector within European financial institutions by providing training and sharing expertise.⁴⁶⁶

8.4 Leveraging Digital Technologies

Digital technologies and the Internet afford unprecedented opportunities for access to culture. Quebec, Australia, New Zealand, the UK, and other jurisdictions are developing policies to encourage the development and distribution of cultural products using digital technologies.⁴⁶⁷

⁴⁶² The British Museum, "Towards 2020: The British Museum's Strategy" (The British Museum, n.d.): 4, https://www.britishmuseum.org/pdf/Towards_2020-The_British_Museum_Strategy.pdf.

⁴⁶³ Denmark, "Denmark at Work: Plan for the Growth in the Creative Industries – Design" (The Danish Government, February 2013), https://www.google.com/search?q=Denmark+at+Work%3A+Plan+for+the+Growth+in+the+Creative+Industries+%E2%80%93+Design&oq=Denmark+at+Work%3A+Plan+for+the+Growth+in+the+Creative+Industries+%E2%80%93+Design&aqs=chrome..69i57.1875682j0j4&sourceid=chrome&es_sm=122&ie=UTF-8.

⁴⁶⁴ European Commission, "Creative Europe: The Cultural and Creative Sectors Loan Guarantee Facility, Frequently Asked Questions" (European Commission, July 2012), available at <http://www.creativeeuropeireland.eu/content/resources/18.%20faq-financial-instrument.pdf>. See also John Rigby and Ronnie Ramlogan, "Access to Finance: Impacts of Publicly Supported Venture Capital and Loan Guaranties" (NESTA Working Paper No. 13/2, January 2013), https://www.nesta.org.uk/sites/default/files/access_to_finance_impacts_of_publicly_supported_venture_capital_and_loan_guarantees.pdf.

⁴⁶⁵ European Commission, "Creative Europe."

⁴⁶⁶ European Commission, "Creative Europe."

⁴⁶⁷ Quebec, ministère de la culture et des communications, "Pour occuper l'espace numérique: stratégie culturelle

These policies are far-reaching, addressing infrastructure needs such as bandwidth and Internet access, digital skills development, and digital cultural content creation, production, distribution, and use.

Creative Australia's National Cultural Policy will encourage production of innovative Australian content for emerging platforms. The policy recognizes that digital technologies drive the creation of new cultural products and their distribution, and that digital technologies can expand the capacity of audiences to engage with content. The policy provides for significant new government investment in digital content. It will also ensure that Australia's regulatory environment is conducive to digital content creation, including a review of its copyright legislation.⁴⁶⁸

In Quebec, the Ministry of Culture and Communications has developed a comprehensive digital strategy for the culture sector built around three priority directions: 1) to increase the supply of digital cultural content; 2) to ensure that this content is distributed and available to the public; and 3) to ensure a conducive business environment; for example, by strengthening protection of intellectual property.⁴⁶⁹

Other jurisdictions are building digital priorities into sector-specific strategies. For example, Yukon's Department of Tourism and Culture recognizes the importance of the digital preservation of its cultural heritage and is developing a digital preservation management policy. The policy aims to strengthen historic and heritage resources management and ensure that Yukon's art, material culture, and archival and natural history collections are properly managed.⁴⁷⁰

Like Ontario, many jurisdictions are recognizing the role of libraries in providing access to digital technology. One of the key priorities of the Scottish National Library Strategy is to ensure universal digital inclusion by promoting virtual libraries and digital library services, creating a national solution to increasing the lending of e-books, promoting digital and information literacy, and providing access to digital technologies not generally available in other public places.⁴⁷¹ The Irish National Library Strategy seeks to ensure that libraries support building

numérique du Québec" (Quebec, March 2014), https://www.mcc.gouv.qc.ca/fileadmin/documents/Strategie_culturelle_numerique/MCC-StrategieNumerique-HR.pdf; Australia, "Creative Australia: National Cultural Policy" (Australian Government, 2013), <http://creativeaustralia.arts.gov.au/assets/Creative-Australia-PDF-20130417.pdf>; Department for Culture, Media and Sport and Business Innovation & Skills, 2009; New Zealand, "Creating A Digital New Zealand: New Zealand's Digital Content Strategy" (New Zealand, August 2007), <https://www.itu.int/net/wsis/stocktaking/docs/activities/1211236218/DigitalContentStrategy.pdf>.

⁴⁶⁸ Australia, "Creative Australia."

⁴⁶⁹ Quebec, "Pour occuper l'espace numérique."

⁴⁷⁰ Yukon Tourism and Culture, "Strategic Plan 2013-2018" (Yukon, 2013), http://www.tc.gov.yk.ca/pdf/TC_strat_plan_booklet_FNL.pdf.

⁴⁷¹ Scotland, Skills Development Scotland, "Skills Investment Plan for Scotland's Creative Industries Sector."

digital literacy skills in the community for everyone by creating a single national digital online library, accessible to all citizens.⁴⁷²

8.5 Investing in the Culture Sector Workforce

Investing in the culture sector workforce, whether business, technical, or creative professionals, ensures that they have access to skills they need to innovate, seize business opportunities, and design and deliver digital products and services to the public.

The Ontario Arts Council’s strategic plan prioritizes strengthening skills, capacity building, and sharing knowledge among Ontario’s artists and arts organizations. Objectives include ensuring that artists and other arts professionals have access to learning opportunities and convening, connecting, and promoting collaboration within the arts community.⁴⁷³

8.5.1 Education and training

Several Canadian jurisdictions have culture policies to encourage careers in the culture sector, strengthen the sector’s competitiveness, and build future demand for cultural goods.

New Brunswick cites increased recognition and support for artists as one of the key goals of its policy, to be achieved by identifying, supporting, and promoting professional development through education and training opportunities for professional artists.⁴⁷⁴

BC Creative Futures is an education, arts engagement, and professional skills training strategy aimed at strengthening the province’s creative economy. The strategy supports the province-wide BC Jobs Plan and aims to develop the next generation of creative leaders. It focuses on programing for young people, post-secondary programs, scholarship programs, and co-op placements to promote young professionals working in BC’s creative businesses.⁴⁷⁵

8.5.2 Digital skills

Developing digital skills allows creative individuals and companies to seize new business and creative opportunities. Australia’s creative industry strategy recognizes the importance of creative and digital skills in creating a more innovative workforce and provides three national initiatives designed to improve digital skills in the sector. The Workforce Innovation Program supports digital skills development through creative industry associations.⁴⁷⁶

⁴⁷² Department of the Environment, Community and Local Government, “Opportunities for All: The Public Library as a Catalyst for Economic, Social and Cultural Development” (Dublin: Department of the Environment, Community and Local Government, 2013), http://www.lgma.ie/sites/default/files/public_libraries_strategy_2013_2017.pdf.

⁴⁷³ Ontario Arts Council, “Vital Arts and Public Value.”

⁴⁷⁴ New Brunswick, “Creative Futures,” 16, 18.

⁴⁷⁵ British Columbia, “BC Creative Futures: Building British Columbia’s Creative Economy” (British Columbia, 2013), http://www.cscd.gov.bc.ca/arts_culture/docs/jan2013_bccreativefutures.pdf.

⁴⁷⁶ Australia, “Creative Industries: A Strategy for 21st Century Australia” (The Australian Government, 2011), <http://arts.gov.au/sites/default/files/creative-industries/sdip/strategic-digital-industry-plan.pdf>.

Scotland has recently released its skills investment plan for the creative industries.⁴⁷⁷ The plan recognizes the importance of developing skills in entrepreneurship, communication, and leadership. The plan also acknowledges the growing demand for “digital skills in relation to design capability, use of technology to support creative storytelling, and in business practice.”⁴⁷⁸ In describing the role of digital and computing skills in driving the creative sector, the plan notes that digital skills are relevant for new entrants to the creative workforce. Senior managers also need a solid understanding of the commercial opportunities afforded by digital exploitation, including how to plan for and execute digital strategies.

8.5.3 Leadership

Leadership and succession planning continue to be an important issue in the culture sector. For example, in Arts Council England’s strategic framework for the arts, a key priority is to increase arts leadership skills to enhance leaders’ understanding of their communities, ability to work creatively with a wide range of people, and understanding of the potential of digital technologies. The framework specifies skills development, collaborative working, and knowledge-sharing as priority areas for action.⁴⁷⁹

Saskatchewan’s strategic plan focuses on ensuring that the culture sector has the business skills to succeed commercially. The plan emphasizes building organizational capacity in leadership, human and financial resources, infrastructure, and strategic plans.⁴⁸⁰

In 2013, the Ontario Museum Association (OMA) launched the museumsuccession project to enable organizational capacity-building, enhance governance models, encourage career and professional development, and support planning for sustainability and leadership. A key component of the program provides training and resources to help museum professionals develop skills to meet the challenges facing the sector and ensure smooth leadership transition.

Within the arts community, some arts funding organizations and private foundations are creating tools and online resources to help arts groups plan for new leadership. For example, in the US, the National Arts Strategies Foundation provides training and online resources to support leadership development in the arts,⁴⁸¹ and the National Alliance of Media Arts and Culture, which developed the long-standing Leadership Institute, relaunched it in 2015 as the Creative Leadership Lab in a partnership with the Sundance Film Institute.⁴⁸²

⁴⁷⁷ Scotland, Skills Development Scotland, “Skills Investment Plan for Scotland’s Creative Industries Sector.”

⁴⁷⁸ Scotland, Skills Development Scotland, “Skills Investment Plan for Scotland’s Creative Industries Sector,” 10.

⁴⁷⁹ Arts Council England, “Achieving Great Art For Everyone: A Strategic Framework for the Arts” (Arts Council England, November 2010), http://www.artscouncil.org.uk/sites/default/files/download-file/Great_art_and_culture_for_everyone.pdf

⁴⁸⁰ Saskatchewan, “Pride of Saskatchewan,” 22.

⁴⁸¹ National Arts Strategies, <http://www.artstrategies.org>. See also Illinois Arts Council Agency, <http://www.arts.illinois.gov/toolkit/search?browse=true&topic=30>.

⁴⁸² National Alliance for Media Arts and Culture, <http://www.namac.org/programs/leadership/>

8.6 Encouraging Collaboration and Partnerships

A trend in culture policy is to encourage collaboration across government departments and levels of government. Another is to strengthen partnerships across sectors, including business, health, education, and technology.

Newfoundland and Labrador's culture policy promotes partnerships between artists and the private sector. The policy commits to the establishment of a working group with the Newfoundland and Labrador Arts Council, and key stakeholders to investigate and develop cultural partnership initiatives with the private sector.⁴⁸³ The plan encourages companies that are involved in culture to establish work placements, internships, and training opportunities to help assist the culture sector. It also addresses businesses that are not directly involved in the culture sector to use the services of the sector (e.g. donate, adapt and use arts and heritage structures, use arts and heritage design and techniques in manufacturing, and develop products that target the needs of the culture sector). The policy also commits the Newfoundland and Labrador government to promoting awareness of the culture sector to the province's chambers of commerce, business and industry groups.⁴⁸⁴

Some jurisdictions are encouraging greater synergy between culture and other sectors to leverage new resources, and address fiscal realities, broaden social benefits, and fuel innovation.⁴⁸⁵ For example, the 2015 Report by the Warwick Commission on the Future of Cultural Value makes an economic argument that the cultural and creative industries and traditions are important to the British economy and that future sustainability and growth need to become a priority for public sector investment. The report sets out a "Blueprint for Growth," a set of goals to enhance the interconnected sectors that make up the cultural industries (e.g. publishing, film, TV, video, design, crafts, architecture, music, museums, galleries and libraries, etc.).⁴⁸⁶ The report emphasizes the economic benefits of the culture "ecosystem" as the fastest-growing industry in the UK. Recommendations include taking a joint approach to culture policy making by making the connection between culture, heritage, and creativity across various government departments, including Business, Innovation and Skills, Education, Department for Environment, Food and Rural Affairs in order to increase and emphasize investment potential for the culture sector.⁴⁸⁷

⁴⁸³ Newfoundland, "Creative Newfoundland and Labrador," 21.

⁴⁸⁴ Newfoundland, "Creative Newfoundland and Labrador."

⁴⁸⁵ Matthew Taylor, blog entry, "Arts and Culture: Time to Get (Even More) Serious" (Royal Society for the Encouragement of Arts, Manufactures and Commerce, February 20, 2015), <https://www.thersa.org/discover/publications-and-articles/matthew-taylor-blog/2015/02/arts-and-culture--time-to-get-even-more-serious/>.

⁴⁸⁶ The Warwick Commission on the Future of Cultural Value, "Enriching Britain: Culture, Creativity and Growth" (The University of Warwick, 2015): 13, http://www2.warwick.ac.uk/research/warwickcommission/futureculture/finalreport/warwick_commission_report_2015.pdf.

⁴⁸⁷ The Warwick Commission on the Future of Cultural Value, "Enriching Britain," 26.

The Arts Advocate and its partners recently brought together a number of sector leaders to explore challenges and opportunities for the culture sector. The keynote speaker, Matthew Taylor of the Royal Society for the Arts, challenged the culture sector to think differently and embrace opportunities to collaborate more with other sectors. He articulated the theme of the symposium, that culture sector needs to move away from the “ask” to making an “offer”.⁴⁸⁸ Culture organizations should invite local governments to explain their challenges and think about how the culture sector could make a unique contribution to solving social issues. The arts, heritage, and cultural industries have much to offer other sectors, including creativity, innovation, collaboration, and a captive audience.

9. Conclusion

This environmental scan found strong evidence of the individual, social, and economic benefits of culture. It also found that in Ontario, as elsewhere, the culture sector is faced with challenges and is responding by seizing new opportunities.

Globalization, economic constraints, the digital transformation, and demographic shifts are the major forces changing the way people produce, experience, and access culture around the world. These forces apply to each of the four sectors examined in this scan: the arts, cultural industries, public libraries, and cultural heritage.

The increasingly borderless world presents significant opportunities, particularly for the arts and cultural industries, related to export expansion, discoverability by new audiences, and access to global financing. Globalization also increases competition, and drives a need for new skills and innovative approaches.

The economic climate, global and domestic, has created a shift toward public and private sector fiscal restraint. All culture sectors are considering how to do more with less to meet demand, establish new programs, and build or repair infrastructure. Infrastructure needs are particularly acute for place-based cultural resources, such as museums, galleries, built heritage, and public libraries. Co-location of two or more resources is a significant trend in responding to these needs.

Digital transformation has increased access to culture with a flood of cultural products and a growing array of devices and platforms for experiencing them. The ability to meet digital infrastructure needs and acquire the skills to keep pace with change is a central preoccupation in all culture sectors.

Ontario’s population is becoming more diverse, older, and more urban, further changing the way culture is produced and consumed. The culture sector is responding to appeal to and meet

⁴⁸⁸ The Arts Advocate, report on symposium proceedings, “Reframing the Cultural Policy Dialogue: Shifting from the Ask to the Offer,” *The Arts Advocate* 21, no.3 (June 29, 2015), https://s3.amazonaws.com/taa-report-materials/The_Arts_Advocate_Vol_XXI_Issue_3.pdf.

the needs of more diverse audiences and reflect their perspectives. In the global market for cultural products, Ontario's rich diversity is a competitive advantage.

Ontario is not alone in developing a culture strategy to respond to global forces and trends. This scan provides examples of programs, policies, and strategies other jurisdictions have implemented. Recognizing the social and economic benefits of culture, many jurisdictions have formulated strategies to maximize its positive impact. Common threads in these strategies are fostering innovation through culture, improving access to international markets, leveraging digital technologies, investing in culture sector workers, strengthening local communities, and reflecting diverse voices while improving access to culture for everyone.

The authors hope that this scan will prove useful in the development of Ontario's first culture strategy.

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