

Create Victoria

Final Survey Report

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Prepared for:

The City of Victoria

Developed by:

Nordicity



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1. Introduction

The Project Team (Patricia Huntsman Culture & Communications & Nordicity) was commissioned by the City of Victoria to deploy the Create Victoria Survey as one of the key stakeholder consultation tools in the development of the **Create Victoria Arts and Culture Master Plan**. In order to reach across various elements of the sector, thereby ensuring a statistically reliable profile, the Project Team developed a self-selected (open access) survey targeting cultural organizations/companies and independent stakeholders in Victoria.

The Create Victoria Survey was developed via the online survey software Voxco, ensuring secure Canadian-owned data hosting. As part of the Create Victoria Engagement Plan, the survey was distributed widely through the City's website, ArtsVictoria.ca, various social media platforms (e.g. #CreateVictoria), the Create Victoria Advisory Board, as well as being championed through a series of Cultural Cafes and pop-up kiosks.

Over the period of 60 days (**February 17th to April 17th, 2017**), the survey captured information from **718 respondents** who provided at least basic profile information¹. Not only did the survey encourage a broad canvassing of opinions on key issues related directly to the City of Victoria's cultural planning mandate, it also analyzed the operations, expenditures and tourism related data from core businesses and individuals active in the city's cultural sector (as required for the Economic Impact Analysis).

This report details the profile of the City of Victoria's cultural sector (Section 2), followed by a series of findings related to trends in cultural sector engagement (Section 3). Section 4 comprises an analysis of the economic impact of the cultural sector in terms of both cultural output and cultural tourism, as well as pockets of creative activity and employment evident in other sectors of the economy (i.e. beyond Victoria's cultural sector itself).

Note to the reader, this document complements the [Create Victoria Arts and Culture Master Plan](#), and should thus be considered in tandem.

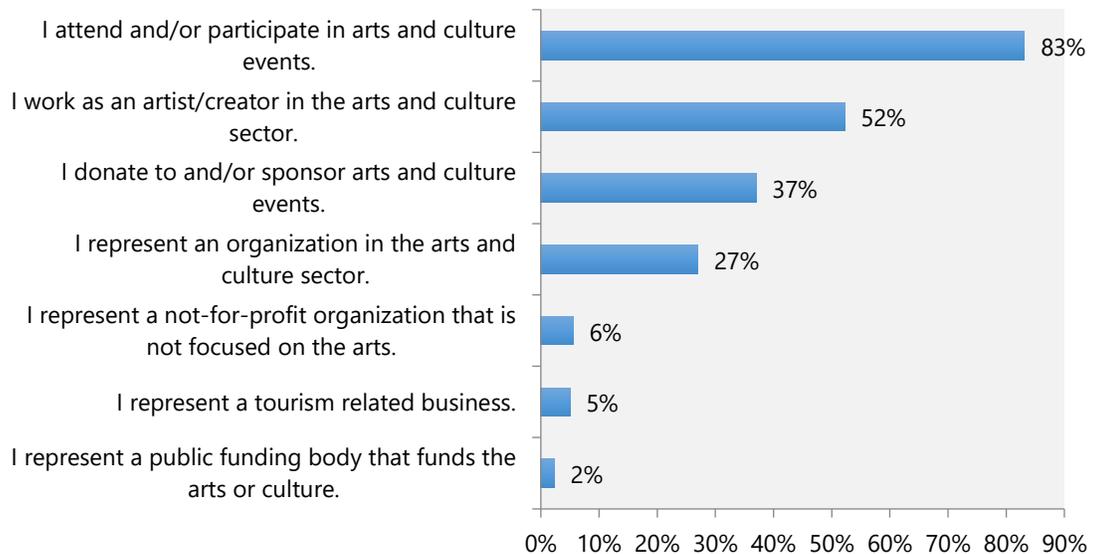
¹ Note, as respondents were not required to answer every question, the total number of responses (or "n value") varies between questions.

2. The City of Victoria Cultural Sector Profile

2.1 Respondent Profile

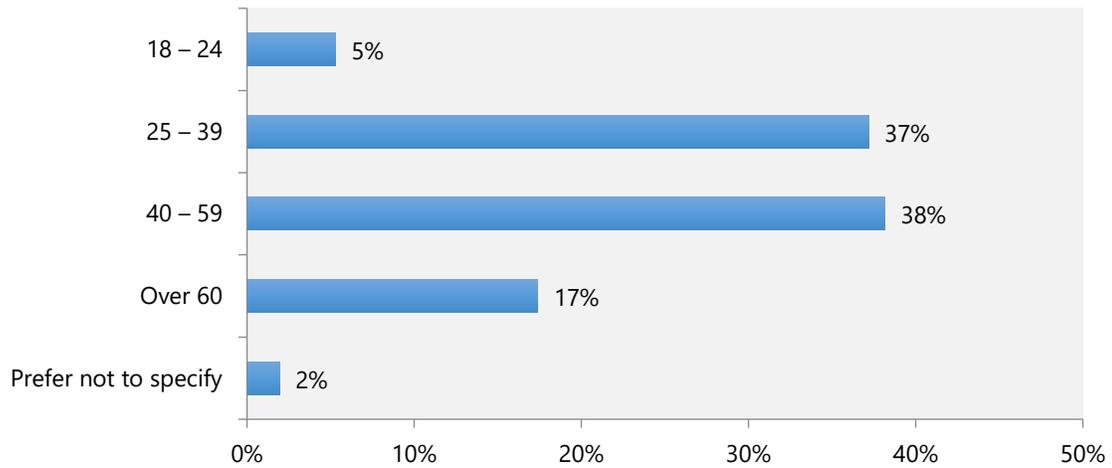
The following section details the demographic profile of Create Victoria survey respondents. As illustrated below, most survey respondents describe their affiliation to Victoria’s cultural sector through their participation in it (e.g. audience members, active involvement in events, users of facilities), followed by those working in the sector – either independently or as part of an organization.

Figure 1: Respondent categories (n=718)



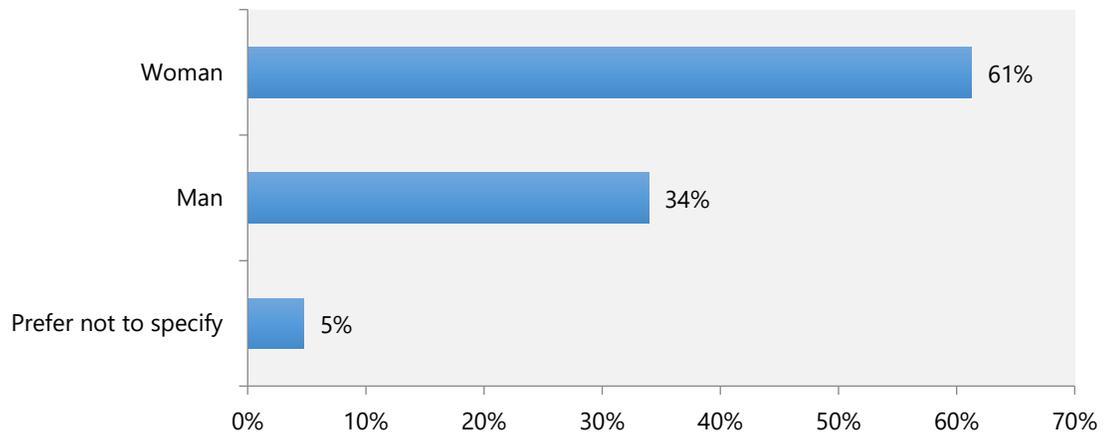
As illustrated below, a strong cohort of younger generations was represented, with 42% of respondents aged 39 or younger. The average respondent was approximately 44 years of age.

Figure 2: Age (n=718)



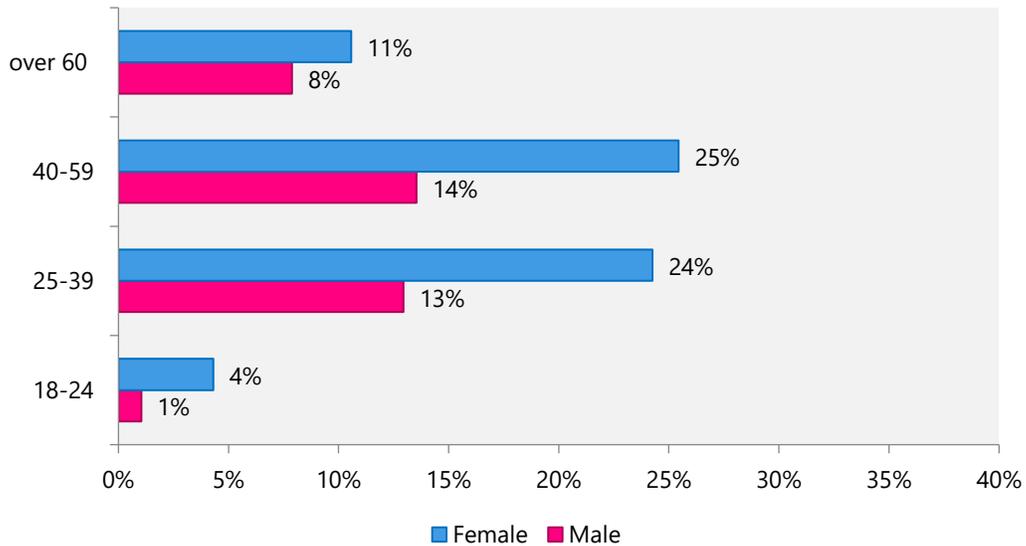
Women comprised the majority of survey respondents (61%), as illustrated below.

Figure 3: Gender (n=718)



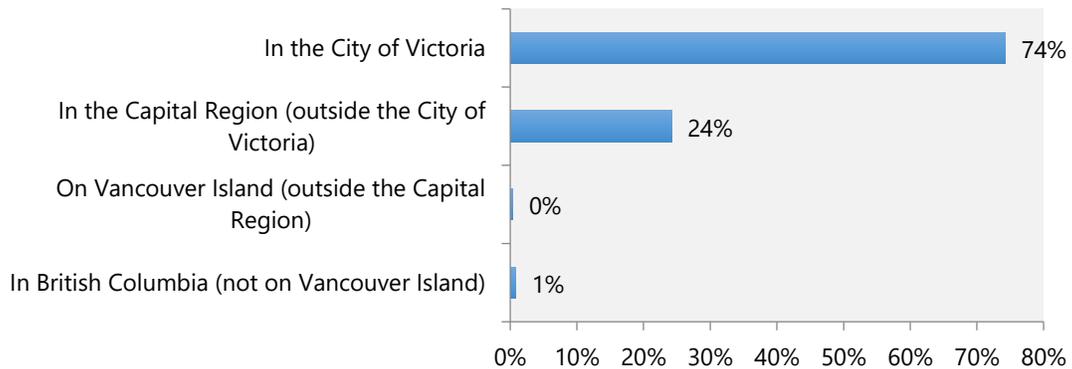
As illustrated below, nearly half of the survey respondents were females between the age of 25 and 59.

Figure 4: Respondents by breakdown of age and gender (n=672)



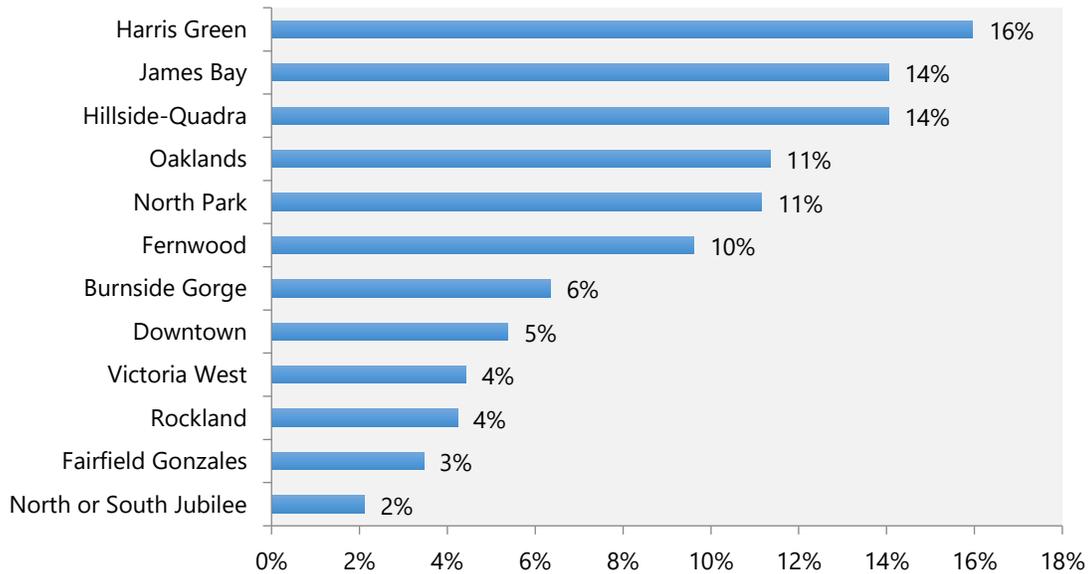
Most survey respondents (74%) indicated that they reside in Victoria itself, with 24% residing within the Capital Regional District, as illustrated below.

Figure 5: Location of respondents (n=713)



Of the 74% (531) of respondents residing in Victoria, the neighbourhoods of Harris Green, Hillside-Quadra and James Bay were most represented.

Figure 6: Respondents by City of Victoria neighbourhood (n=531)



2.2 Independent Cultural Workers

Nordicity used the cultural classifications defined by the Canadian Framework for Cultural Statistics 2011, providing a filter with which to identify cultural context within the Canadian economy. The classification includes 6 domains and 23 sub-domains.² For the sake of clarity for survey respondents, we asked them to identify which of these domains and sub-domains comprise their primary source of income in their work in the cultural sector – i.e. the activity for which they earn their largest portion of revenue. We also asked respondents to select all domains they may earn secondary sources of income from – i.e. they earn a portion of revenue from these activities, though it is not their primary source of revenue.

Table 1: Cultural Domains and Sub-Domains from the Canadian Culture Satellite Account

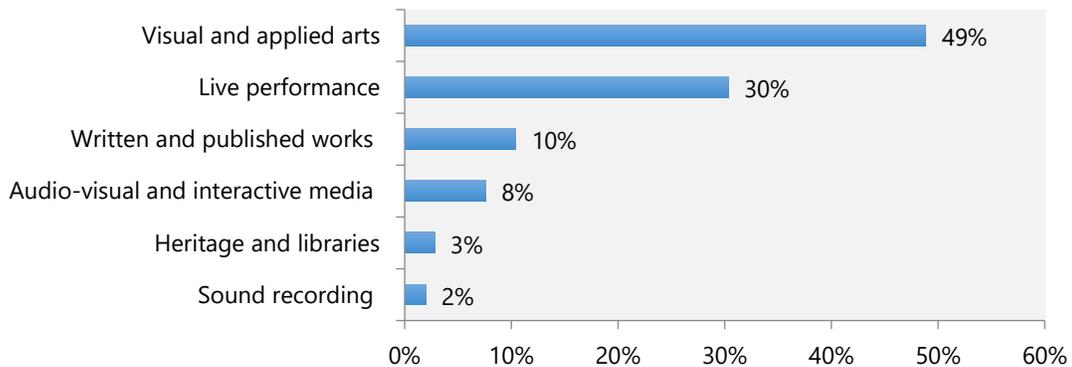
Primary Domain	Core Sub-Domain	Ancillary Sub-Domain
Heritage and Libraries	Archives	
	Libraries	
	Cultural heritage	
	Natural Heritage	
Live Performance	Performing Arts	

² <http://www.statcan.gc.ca/pub/13-604-m/2014075/t/tbl-1-eng.htm#n1>

	Festivals and Celebrations	
Visual and Applied Arts	Original Visual Art	Advertising
	Art Reproductions	Architecture
	Photography	Design
	Crafts	
	Books	Collected Information
Written and Published Works	Periodicals	
	Newspapers	
	Other published works	
	Film and Video	
Audio-visual and interactive media	Broadcasting	
	Interactive media	
	Sound Recording	
Sound Recording	Music publishing	

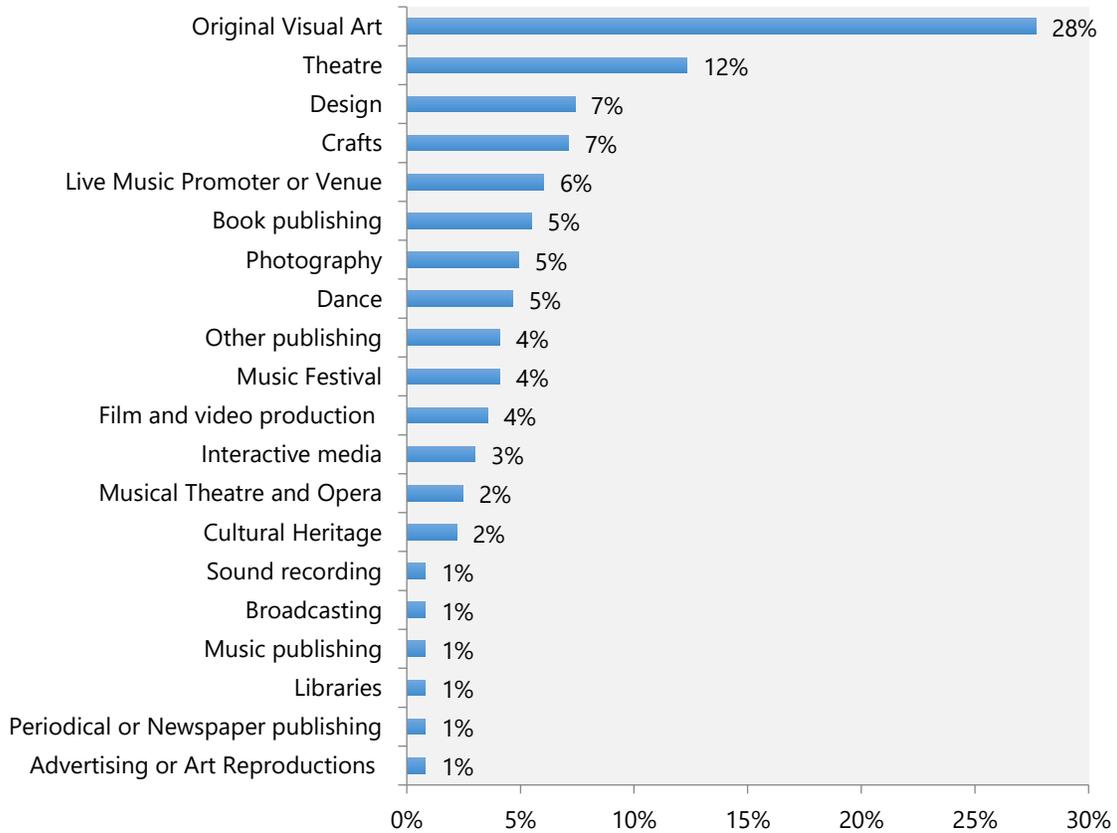
For independent cultural workers and artists (as illustrated in Figure 1), the primary sector most represented was visual and applied arts (49%), followed by those working within live performance (30%).

Figure 7: Primary sector for independent cultural workers and artists (n=363)



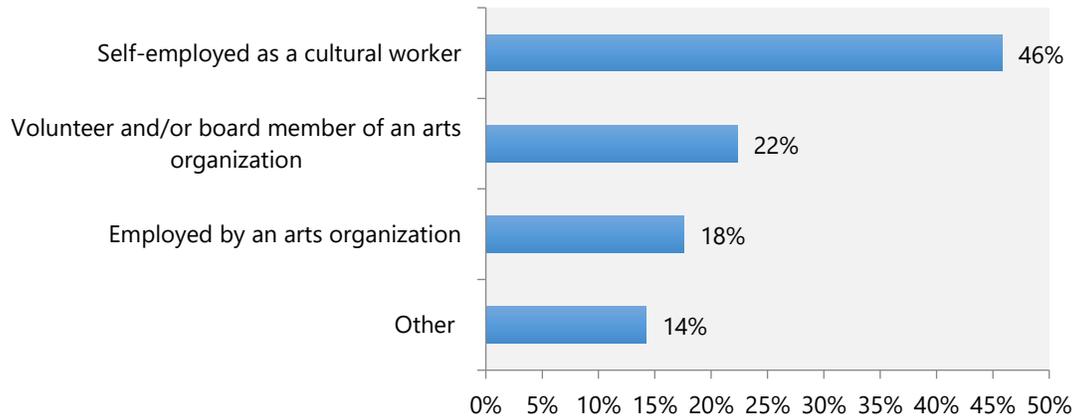
When asked to identify their primary sub-sector, the following figure illustrates the most popular selection for independent cultural workers is visual art, followed by theatre.

Figure 8: Sub- sectors for independent cultural workers and artists (n=363)



Cultural workers in Victoria participate in the sector in a variety of (sometime concurrent) ways. For example, of those respondents who describe themselves as self-employed (46%), 23% are also employed by a cultural organization and 42% participate as a volunteer, board member or have another function.

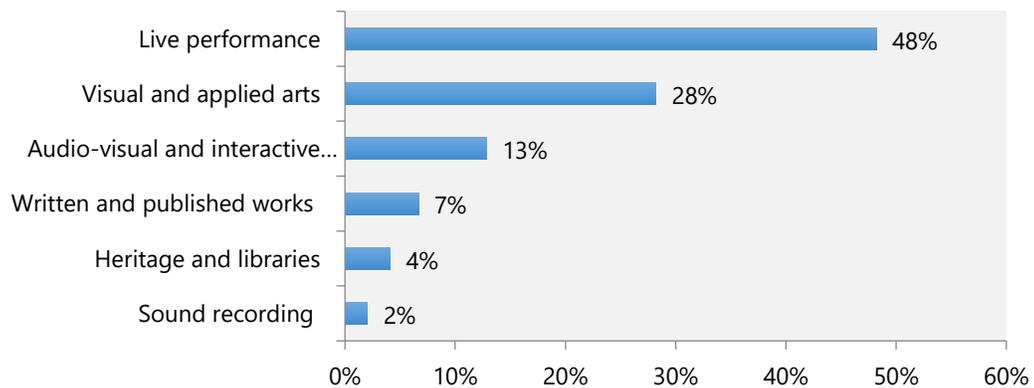
Figure 9: Participation in the sector by independent cultural workers (n=344)



2.3 Cultural Organizations

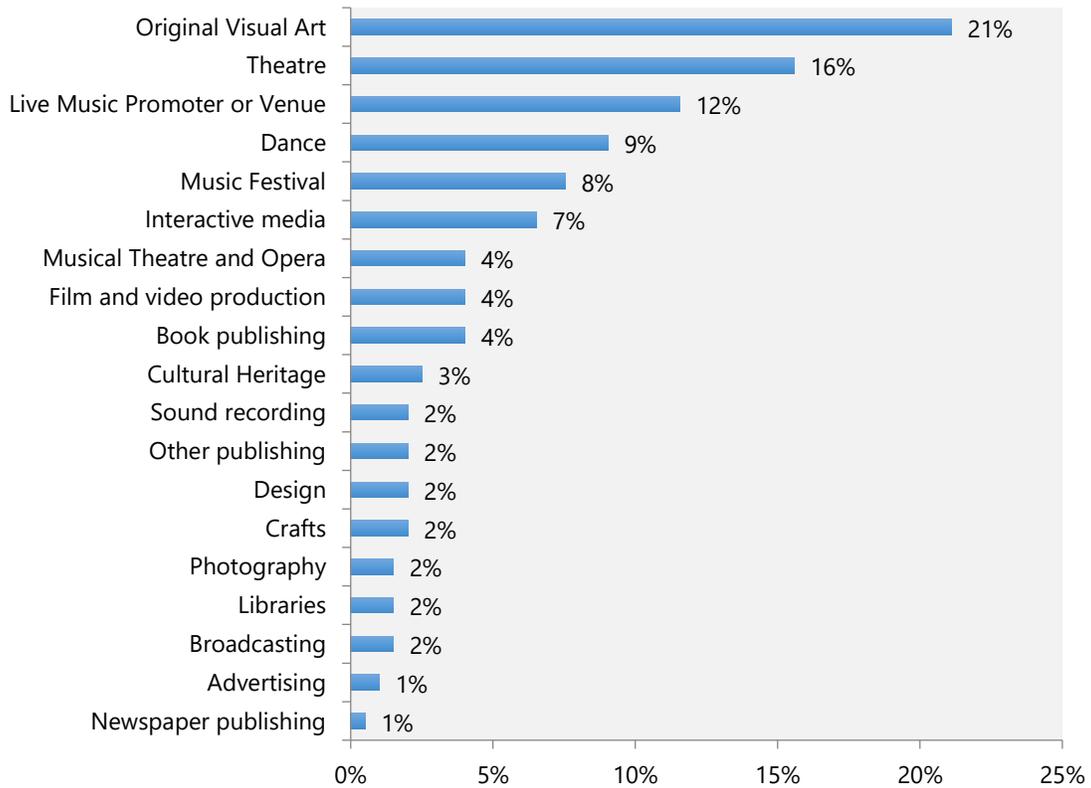
In terms of the cultural organizations, the primary sector most represented by survey respondents is live performance (48%), followed by those working within the visual and applied arts (28%).

Figure 10: Primary sector for cultural organizations (n=199)



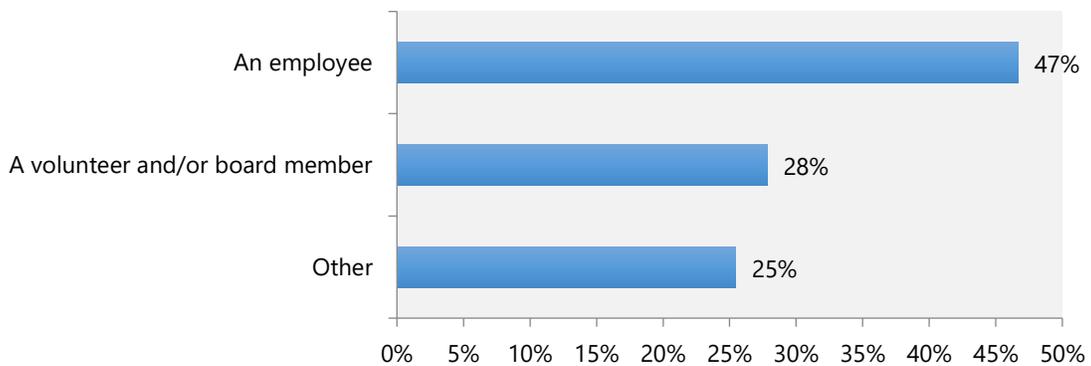
When asked to identify their primary sub-sector, the following figure illustrates the most popular selections for cultural organizations were original visual art, followed by theatre.

Figure 11: Sub-sector for cultural organizations (n=199)



When respondents representing cultural organizations were asked about their role in their organization, most common response was (46%) as employees. For those indicating a role in 'Other', popular responses include: owner, director and creator.

Figure 12: Participation in the sector by respondents on behalf of cultural organizations (n=212)

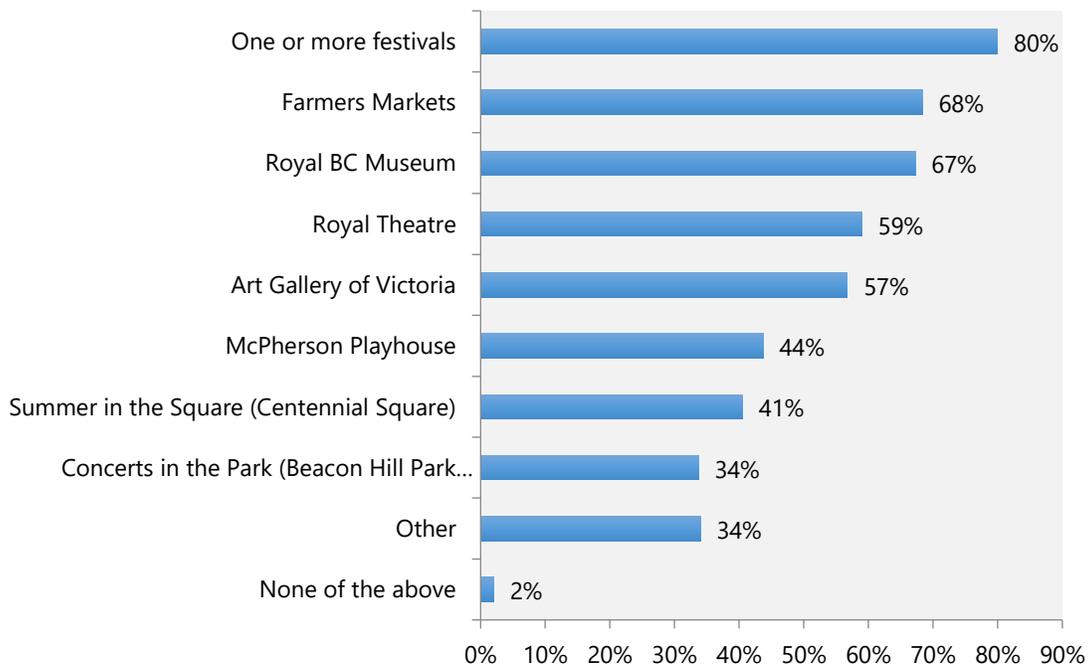


3. Engaging with Culture

One of the key objectives to the Create Victoria Survey was to assess how the community engages with and experiences culture in Victoria. The following section details the findings related to this theme.

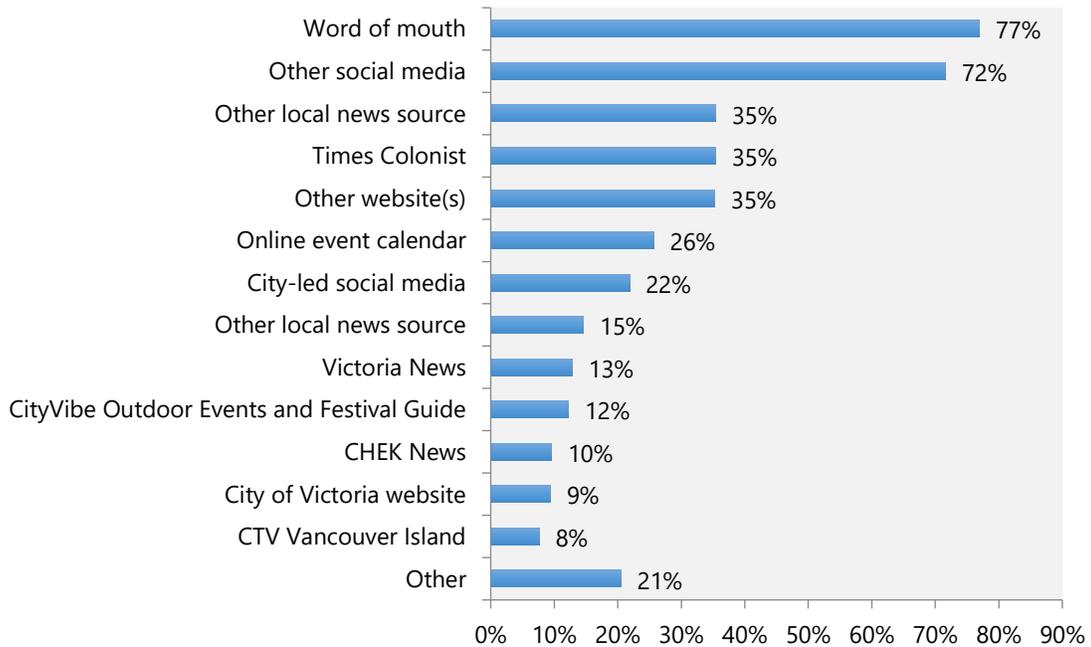
When asked to select cultural events or attractions respondents had visited in the past 12 months, the following figure shows that festivals and farmers markets are widely attended. Some of the common attractions and events listed in the 'Other' response category include: Open Space Art Gallery, Belfry Theatre and the Greater Victoria Public Library.

Figure 13: Cultural events or attractions visited in the past 12 months (n=629)



When asked about how they typically find out about arts and culture activities in Victoria, most respondents indicated word of mouth (77%) and social media accounts not related to the City (72%), as illustrated below. The most common responses for 'Other' were posters and email lists.

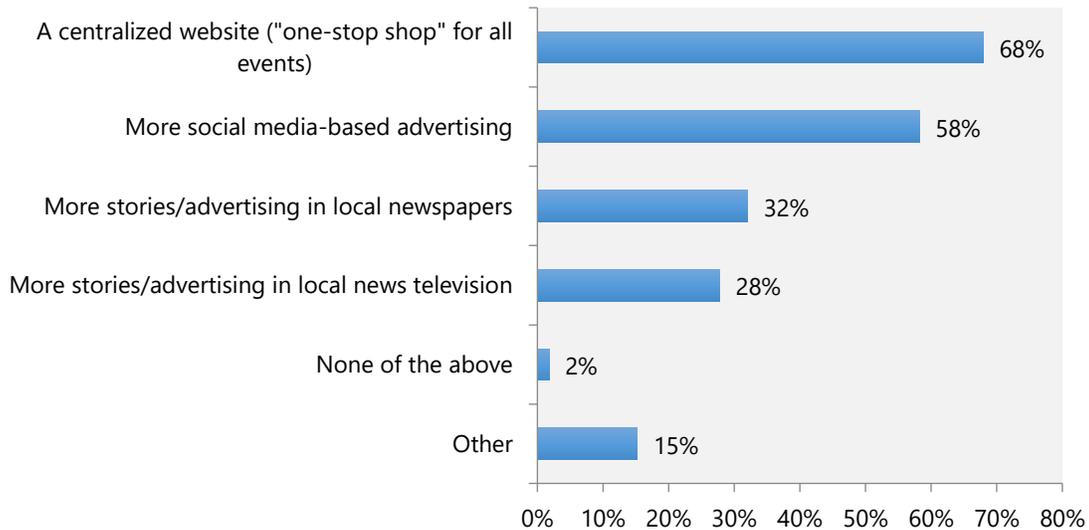
Figure 14: Means for awareness of arts and culture activities in Victoria (n=677)



Beyond understanding how audiences and consumers of culture learn about events and programming, one of the objectives of the Cultural Plan is to consider what role the City can play in terms of improving such awareness. To this end, survey respondents were asked to comment on suggested means of improving awareness for arts and culture activities in the City of Victoria.

As per below, respondents were largely in support of a centralized website (68%) and more social media-based advertising (58%). Most common responses under 'Other' include: centralized email list, arts focused news sources (e.g., segment on TV, Georgia Straight-like newspaper) and radio announcements. Note, additional feedback on this theme can be found in Section 3.1.3.

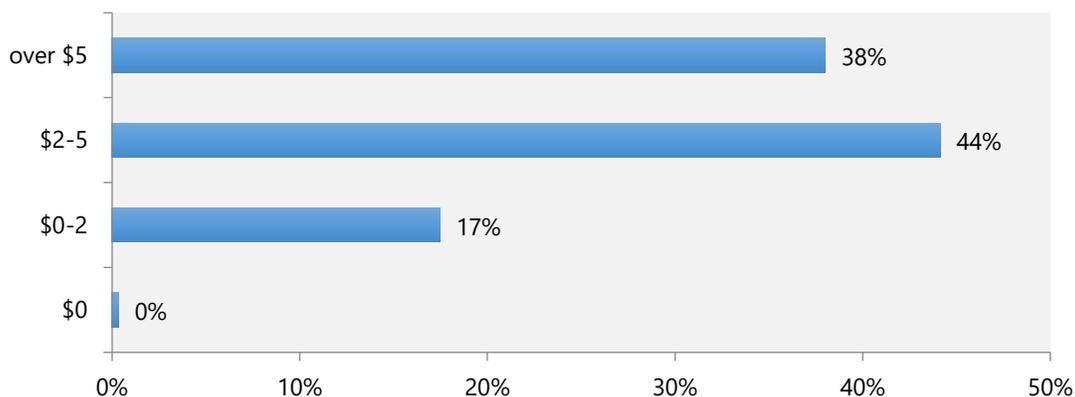
Figure 15: Recommendations for improving awareness for arts and culture activities (n=677)



When probed on the potential development of a taxpayer-funded arts and culture marketing program, a clear majority (83%) of the 671 respondents indicated strong support for such an initiative.

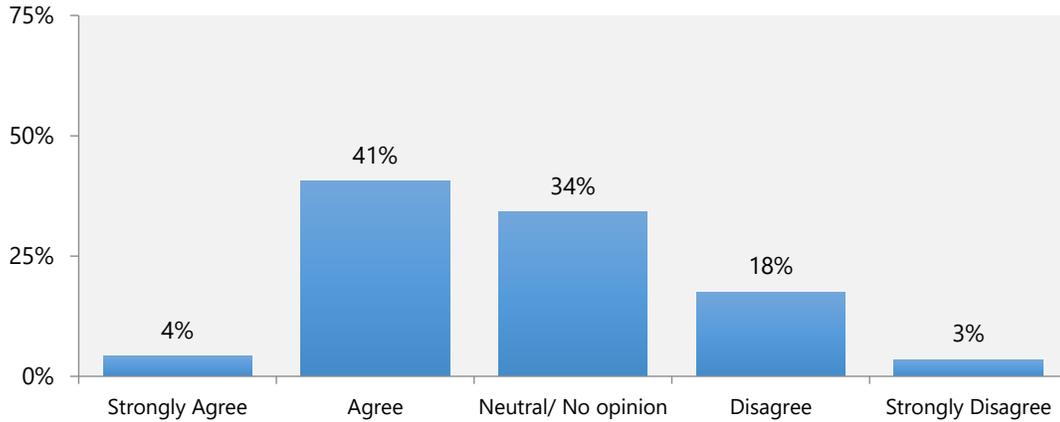
More specifically, respondents showed strong support (82%) for additional individual contributions over \$2 to be used to help market cultural activities in Victoria, as illustrated below.

Figure 16: Price point for an individual yearly contribution to marketing program (n=555)



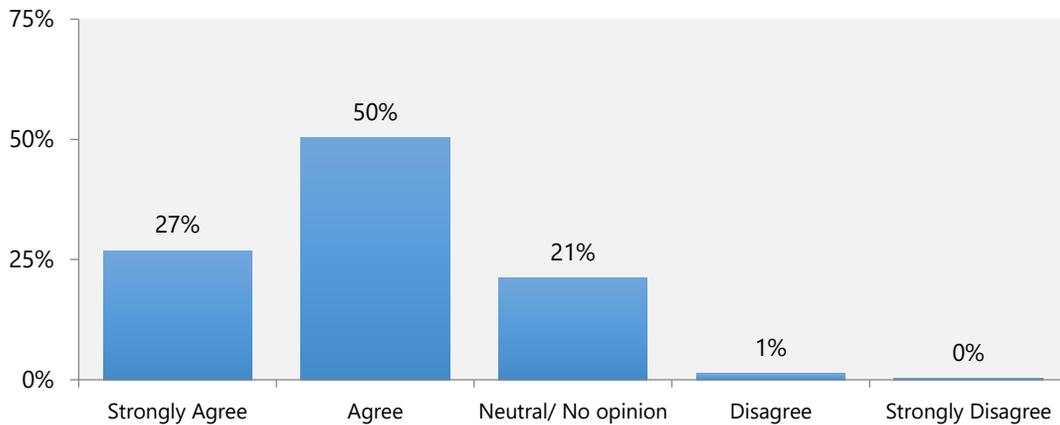
In terms of whether respondents felt that the City of Victoria was a successful owner and operator of venues and infrastructure for the arts, 44% either agreed or strongly agreed with that statement, with only 21% in disagreement. This resulted in a mean Likert score of 0.14 (slight agreement).

Figure 17: The City of Victoria is a successful owner and operator of venues and infrastructure for the art (n=638)



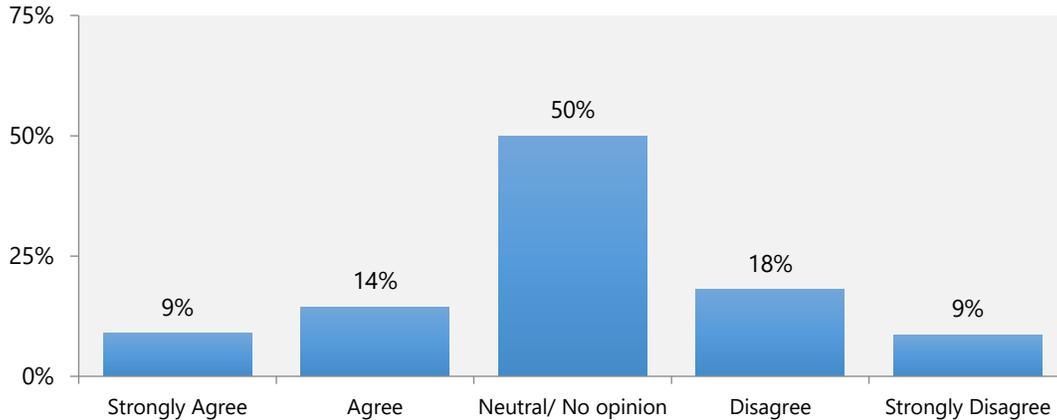
However, respondents did widely agree (77%) that the City of Victoria could improve as an owner and operator of venues and infrastructure for the arts. This resulted in a mean Likert score of 1.11 (agreement).

Figure 18: Victoria could improve as an owner and operator of venues and infrastructure for the arts (n=637)



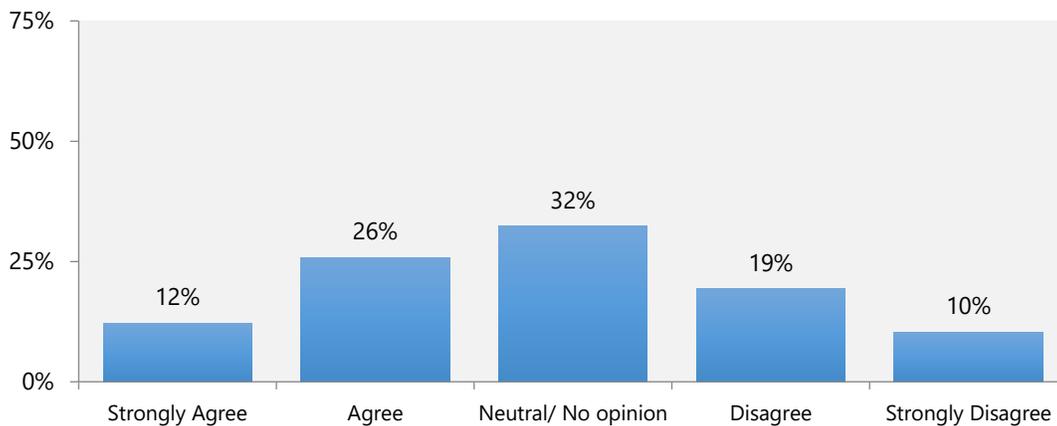
When asked if operating arts venues and infrastructure would be better done at the Capital Regional District (CRD) level than at the City level, there was no clear consensus, as depicted below. While half the respondents (50%) remained neutral on the matter, 27% either disagreed or strongly disagreed. This resulted in a mean Likert score 0.02 (no clear answer).

Figure 19: The operating of arts venues and infrastructure would be better done at the Capital Regional District (CRD) level than at the City level (n=638)



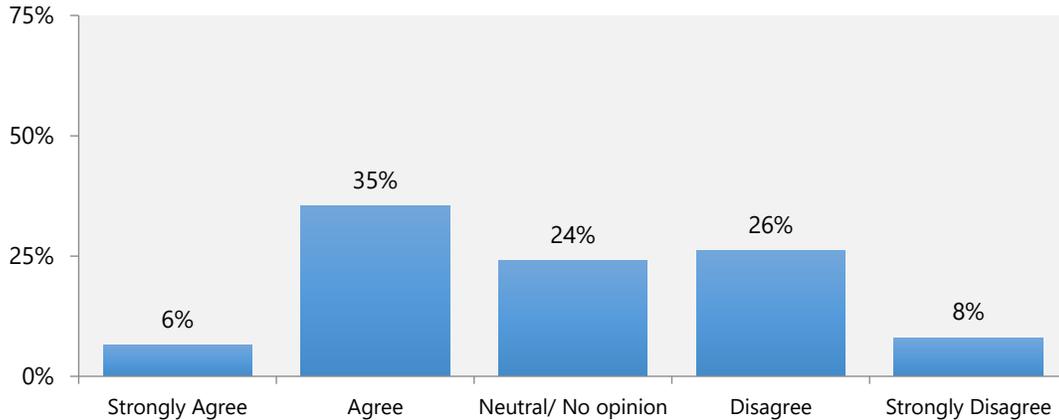
As illustrated below, 38% of survey respondents were in favour of contracting the operations of venues and infrastructure to third parties. This resulted in a mean Likert score of 0.18 (slight agreement).

Figure 20: The City of Victoria should consider contracting the operations of venues and infrastructure for the arts to third-parties (private or non-profit) through partnership and operating agreements (n=638)



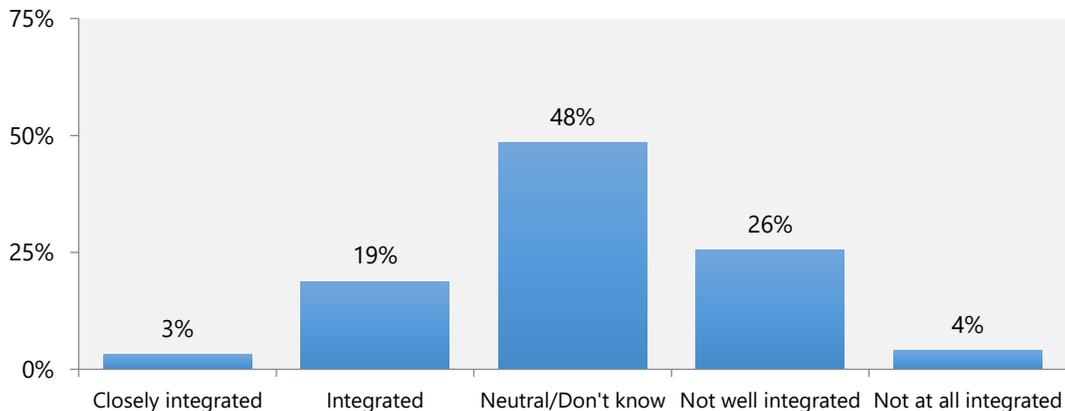
On the subject of accessibility to City-owned facilities, respondents were very marginally in agreement (41%) that arts and cultural facilities are currently accessible for all types of audience members, compared to 34% disagreeing or strongly disagreeing. This resulted in a mean Likert score of -0.02 (no clear answer).

Figure 21: Arts and cultural facilities in Victoria are adequately accessible for all types of audience member (n=649)



As promoted in Objective 4.2 of the Cultural Plan, there is an appetite to develop collaborations between Victoria’s technology sector and cultural sector so as to generate tech-based solutions to some of the challenges faced by the arts, culture and creative community. While many respondents (48%) chose neutral or ‘Don’t know’ when asked about current levels of integration, 30% believe that technology and the arts and culture industries are not well integrated (30%), compared to 22% of respondents who believe these sectors are well integrated. This resulted in a mean Likert score of -0.13 (slightly weighted towards not well integrated).

Figure 22: Rating of integration between the technology and arts and culture sectors in Victoria (n=650)



Such a finding reaffirms the outcomes of the broader Create Victoria engagement strategy in that there are increased opportunities for technology, the arts, and creative industries to collaborate, but these interconnections need more attention in terms of being facilitated and sustained.

3.1 Key Feedback Themes

A significant number of open-ended responses were also compiled on the theme of cultural sector engagement. The most common trends in this feedback are explored in the following sub-sections, related directly to the three strategic priorities of the Create Victoria Arts and Culture Master Plan.

3.1.1 Activating Spaces (Strategic Priority 1: Connecting People and Spaces)

As emphasized in the Create Victoria Arts and Culture Master Plan, there is a need to better understand how people participate in spaces (or wish to) in Victoria, in conjunction with improved cultural infrastructure use. On this theme, many survey respondents commented on the extent of underused places in the city due to inadequate resourcing, funding or plans for how to provide more accessibility (e.g. zoning, parking restrictions).

There are a surprising number of warehouse spaces in Rock Bay that I feel are under utilized or dormant. Also, anything above street level in the old downtown core (lower Yates, Fort, Pandora), along Government could be ideal artist studio space. Many of these 2nd and 3rd floor spaces are empty due to being unsuitable for residential space, but this would be ideal arts studio space for many people.

A diversity of underutilized spaces that hold potential for cultural activity was also outlined by respondents, including: warehouse spaces, industrial units (e.g. Rock Bay), Harbour Air terminal, Fort Commons, Market Square, vacant offices, breweries, schools, churches, libraries, railyards, parkades (e.g. Yates Street), beaches and parks (e.g. Beacon Hill, Carnarvon) as spaces ripe for activation. By far the most prominent point of concern among survey respondents, however, was the visibility of vacant commercial in the downtown core with the potential for cultural activity.

Pointing to the challenges faced by Merlin's Sun Theatre, several respondents suggested that the City of Victoria support registered non-profit arts societies in the production of exhibitions and live music events using vacant industrial space. To this end, it was posited that the City could support a permitting process involving all necessary authorities in the assessment and regulation of events. As one respondent explained, "If there was a clear path for the development of unused space in Victoria for temporary installations and one-off events, all manner of unusual spaces would be found and brought to the table by arts organizations." A related example in this vein was brought up regarding the fact that current municipal zoning does not permit music rehearsal space in industrial zoning.

Bringing on board realtors and property management companies as a means of activating new cultural spaces was also cited by survey respondents. A campaign targeting companies to consider donating office space in evenings and on weekends for rehearsals and small-scale performances was another potential tack. A role for the City in developing house concert circuits (e.g. promoting, subsidizing artists/hosts) was also posited by a few respondents.

There's plenty of spaces; it's the red tape and costs people must go through to host public events that disables vibrant pop up art happenings.

All ages events are in short supply. Municipal youth / recreation staff could support this by including all ages concerts in their programming mandate and providing the space and staffing. Saanich, and even Victoria (Burnside Rec) used to take this approach with good results, but I haven't seen it in recent years. I would love to see this resumed. Even if staff aren't involved in supporting venues it would be a huge help to have a clear message from the City that hosting all-ages concerts and

Some suggested the need for the City to support major civic halls (e.g. Royal Theatre, McPherson Playhouse) and spaces in opening their doors (or lobby areas) as venues for pop-up performances and smaller ensembles. Bridging the old and established facilities with new, emerging, fringe organizations dedicated to using unusual spaces (e.g. Ministry of Casual Living, Odeon Alley, Pretty Good Not Bad, the Fifty Fifty Arts Collective) was a common theme. Similarly, a role for the City in facilitating partnerships between businesses that boast unique space and arts and cultural organizations for the latter's regular use (not just festivals) was also raised.

More public art opportunities that allow the public to participate in co-creating public art was another recommendation falling under this theme. "Creating more collaborative art opportunities would be a feasible, and affordable way for the city to harness the creative power and participation of its citizens, as well as promoting public ownership for public spaces."

One respondent drew the connection to sustainability in supporting independent spaces: "Support indie spaces that already exist and are hosting alternative, immersive work - not just big arts venues. That's where new voices are developed, audiences are created and art is made that changes the future and face of art and performance."

3.1.2 Building Capacities (Strategic Priority 2: Building Cultural Leadership)

A significant number of survey respondents reported a need to place higher value on emerging artists in Victoria – from facilitating more grants to this cohort, to support more all ages shows, to ensuring more local acts get stage time at major summer festivals, to allowing graduating

visual arts exhibitions at major galleries. Indeed, the dearth of performance and exhibition spaces and opportunities for young artists was a common feedback theme.

Initiatives to support new arts companies and emerging artists are particularly important in a town with an increasing cohort of young artists. “As a university town with many young artists, many feel they have to leave the city to make a living creating art. If we support emerging artists planning to be based in Victoria, our cultural and arts scene will only become richer.” Subsidizing theatre and concert tickets for young patrons was a popular recommendation in terms of promoting arts to young, emerging talent.

Even with the grant processes for emerging artists as they are, some respondents pointed to a challenge unique to the CRD – that is, working across city boundaries. For those cultural organizations that operate in different parts of the regional district (e.g. retaining office space in Victoria, performances in Saanich, outreach in Esquimalt), gaining support from the City of Victoria can be challenging, even though perhaps a majority of a company’s audience may reside in Victoria.

Another sub-theme highlighted by survey respondents is the need to encourage the development of digital capacities within and amongst artists and cultural organizations. Similarly, respondents suggested the opportunity to embrace Victoria’s creative technology sector and have the City brand itself as the place for emerging tech talent would elevate the potential for cross-sectoral creative and digital production and consumption.

One respondent suggested taking a cue from the #discovervictoriafair and host a festival celebrating interdisciplinary. Here, maker labs, app developers, designers, film and video producers could come together to respond to a city-wide problem (e.g. water management, farming, affordable housing, etc.). Other respondents pointed to the need to attract more film and television production to the city as a means of spurring more investment in the wider creative tech industries.

City-led facilitation of shared services and resources amongst the cultural community was raised as a particular means of building capacities, particularly in view of physical/sensory accessibility needs and gender-inclusivity of cultural facilities. Many respondents suggested a co-working space or ‘hub’ with shared access to studios, performance spaces and training programs (e.g. shared technology) could be founded by the City, dedicated to artists, cultural organizations and youth groups.

I feel it would benefit the COV in having more engaging conversations with the community, especially millennials, through the digital space on young artists, new programming and emerging cultural topics. By partnering with new and diverse media organizations to help craft and share these stories would benefit the cultural face of the City in the eyes of young people and the region.

3.1.3 Building Audiences (Strategic Priority 3: Telling Our Story)

A third feedback theme points to the need to improve outreach and cultural event awareness in the City of Victoria (as illustrated in Figure 15). A centralized 'one stop shop' platform that has a contemporary look and feel, is a living and breathing resource for the arts community, includes indie events, and appeals to young audiences (e.g. linked with social media) were common suggestions.

Creating partnerships with news/media organizations, the tourism sector (e.g. Harbour Living, Tourism Victoria), and educational institutions were other means of ensuring such a platform is as current and widely distributed as possible. Such partnerships would also ensure efforts are towards improving promotion rather than duplicating efforts. Optimizing "smart marketing" and employing young, fresh talent who understand technology was suggested as a means to drive a new/refurbished online cultural events listings platform for Victoria.

Another example cited under the theme of building audiences through more comprehensive promotional initiatives was to create a 'City Arts Pass' for locals and tourists alike. Examples of this kind of offer in other jurisdictions shows that it is well positioned to encourage audiences to experience a variety of events they would otherwise not be incentivized to try.

Similarly, the idea of an 'Artists Studio Brochure' could be distributed to cruise ship passengers exiting the harbor. As one respondent put it, "There should be more concentration through the tourism industry to promote arts and culture events. They can promote what to do AFTER you see the whales and go to all the gardens.... get visible before the buses scoop the clients and cash!"

Respondents to the Create Victoria Survey shed important light on the three strategic priorities of the Create Victoria Arts and Culture Master Plan. In summary, these remain related to activating underused space (e.g. connecting people and spaces), building capacity within the cultural sector (e.g. nurturing emerging talent, supporting cultural leadership within organizations), and finally, developing new audiences by improving the ways in which the cultural sector promotes itself and 'tells its story'.

Finding a way to share the content of existing tools (e.g. D250 app, Tourism Victoria events listings, Vic Life blog, private enterprise listings, arts orgs, academia etc.) via one aggregated digital hub/single window that profiles the timeliest events and highlights a *range* of arts and culture happenings is critical. Think not only music or big festivals, but say, literary events at Munro's or Bolen books, films at Cinecenta or openings at small art galleries such as Trounce Alley Gallery, performances at the Vic Event Centre, or resto openings. Right now, we're required to go to many sources to stitch the picture together. I'm often in the position of hearing about an event I might have attended, only after the fact.

4. Economic Profile of Arts and Culture in Victoria

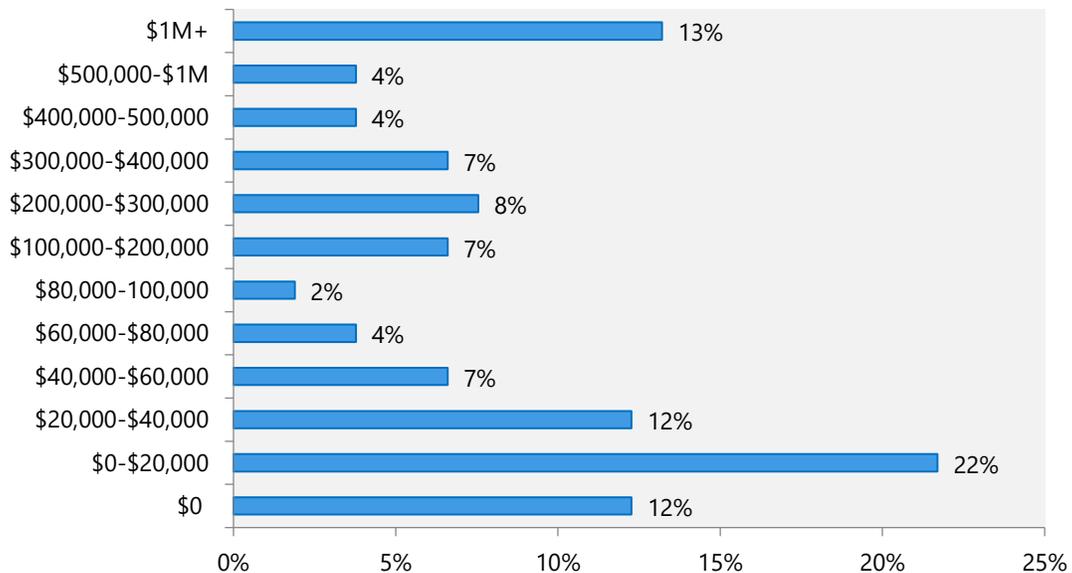
In addition to contributing to social development and community engagement in Victoria, cultural activity has an economic impact on the city. In order to capture the economic footprint of cultural activity in Victoria, we developed quantitative profile of the culture sector (and more broadly, the creative economy). This section uses survey data to provide an economic profile and the analyzes how Victoria’s cultural assets and workforce (e.g. artists and arts, heritage and creative industries organizations) generate income and employment through their **cultural output**. The following section (Section 5), uses the BC Stats Input-Output Model (BCIOM) to calculate the total economic impacts to the Victoria economy. It also includes a description of the value of cultural tourism and its spillovers to the Victoria economy (Section 5.3).

4.1 Operations and Expenditures of Cultural Organizations

This section details the impact of cultural organizations on Victoria’s economy. According to the 2016 Business Register – December 2106 Establishment Counts, there are 475 cultural organizations in Victoria with at least 1 employee. Using that number, we extrapolated data from the companies that reported their financials in the survey to identify the total economic value of these organizations in Victoria.

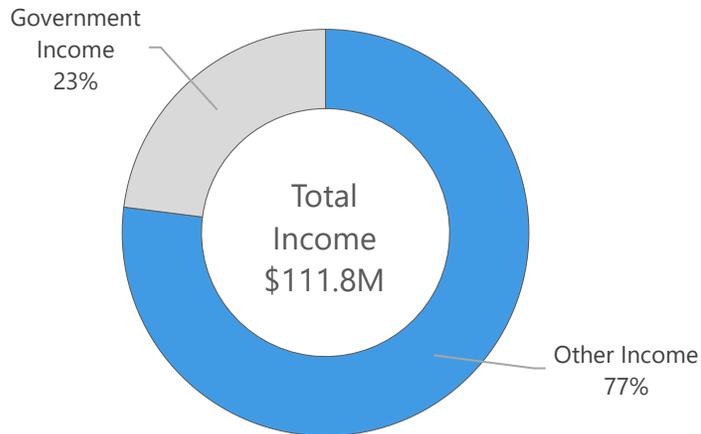
Survey respondents were spread across many different revenue brackets. As displayed below, while the revenue range of cultural organizations in Victoria is broad, an estimated 40% of respondents on behalf of cultural organizations report revenue earnings of \$60,000 or below. The mean average revenue was \$235,476.

Figure 23: Breakdown by revenue brackets for cultural organizations (n=106)



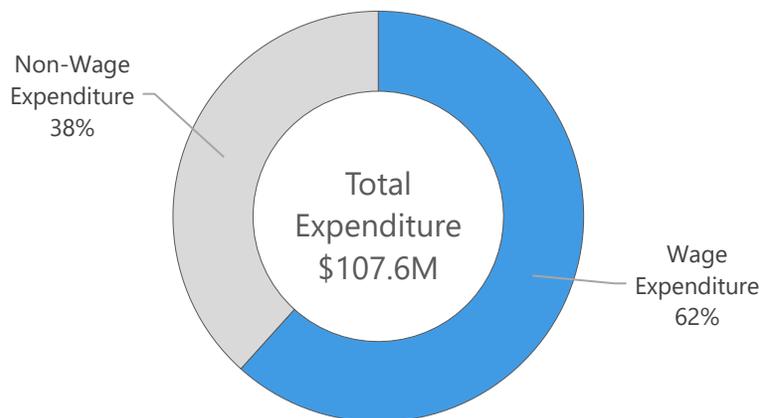
When asked about the breakdown of government versus other sources of income, organizational respondents revealed that approximately 23% of their income came from government sources.

Figure 24: Source of income breakdown for cultural organizations (n=75)



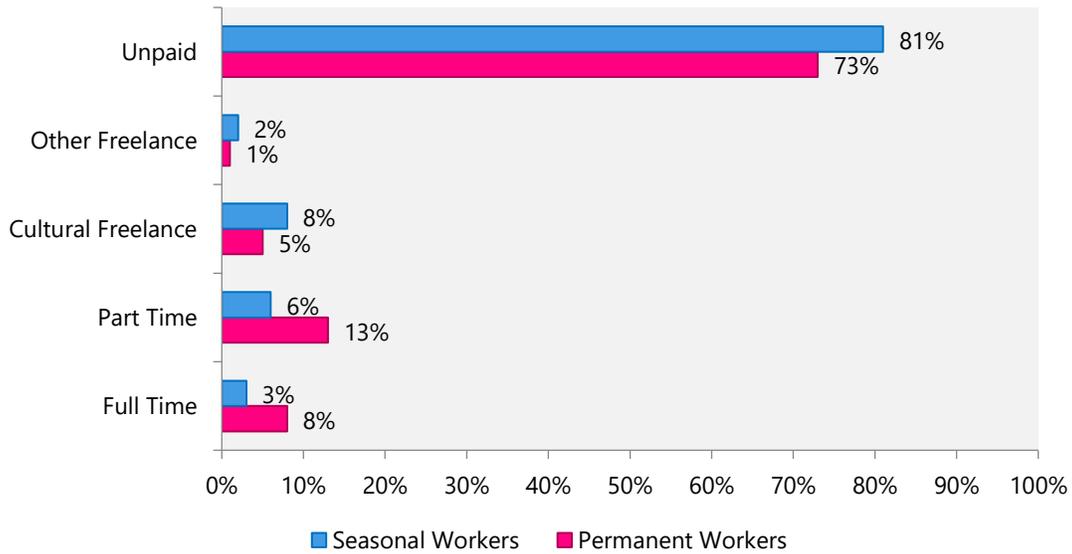
Regarding expenditures, it is estimated that cultural organizations in Victoria spent approximately \$107,613,000 in their last fiscal year. Of that amount, 62% was spent on employee wages, as illustrated below.

Figure 25: Expenditure breakdown for cultural organizations (n=75)



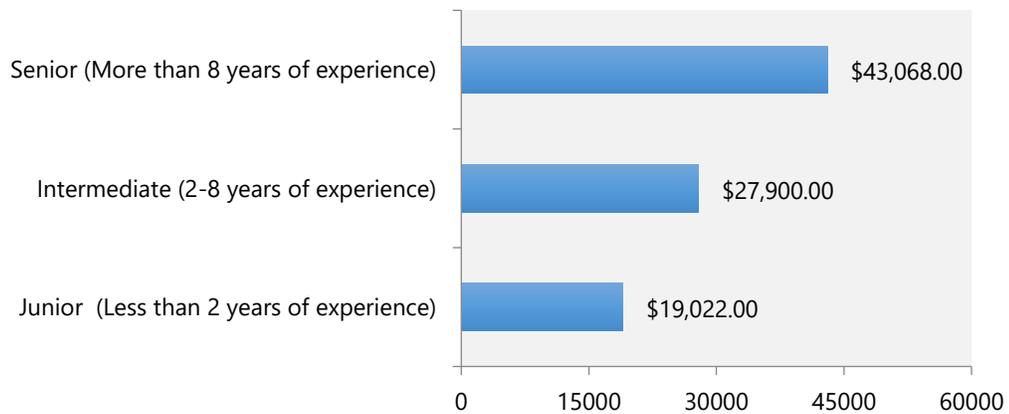
In addition, the survey data revealed that these organizations rely heavily on the input of unpaid labour, both from seasonal workers (81%) and permanent workers (73%).

Figure 26: Breakdown by type of employment of cultural organizations' **seasonal** and **permanent** workers (n=78)



The following table displays the average salaries of full-time employees at different employment levels.

Figure 27: Salary breakdown by worker experience level (n=78)

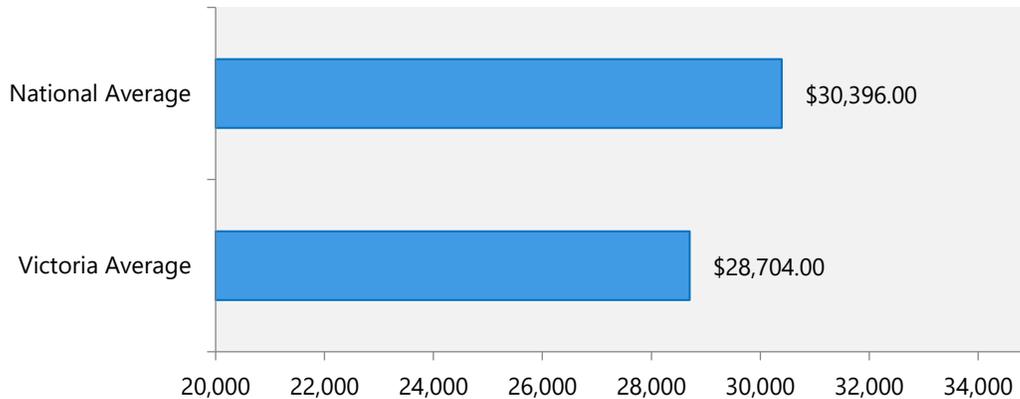


The salary reports in the survey reflect slightly lower than national and provincial trends in the arts industries when compared to other sectors in Canada and BC.³ The average salary for an

³ <http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/labor93a-eng.htm>

employee at a cultural organization in Victoria is \$28,704, compared to the national average of \$30,396⁴.

Figure 28: Salary comparison for workers in cultural organizations between Victoria and the national average



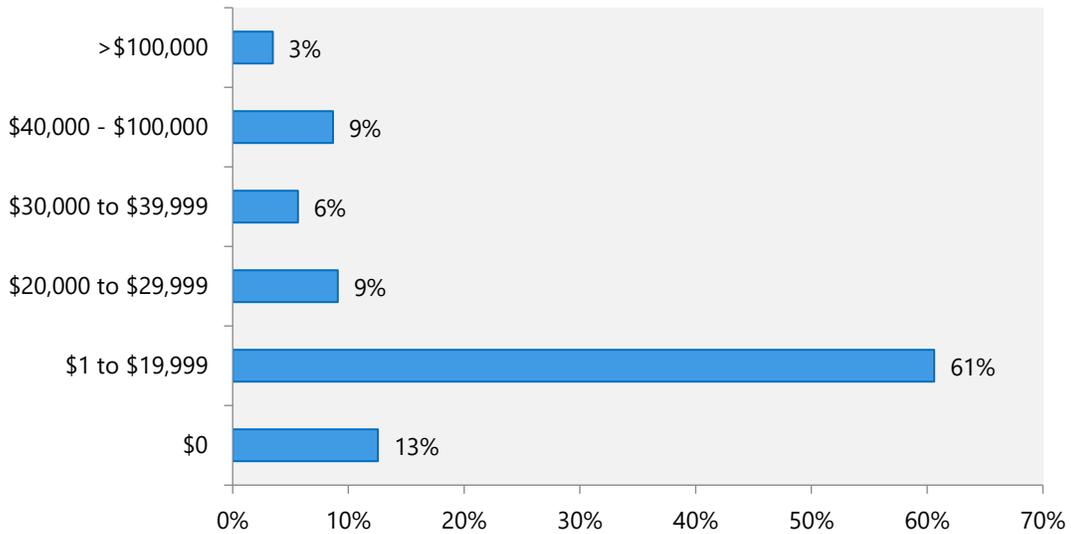
4.2 Operations and Expenditures of Independent Cultural Workers

According to the 2011 NHS data, there are 1100 independent cultural workers in Victoria. This number provides our “universe”. Using that number, we extrapolated data from the 231 individuals that reported their financial data in the survey to identify the total economic value of these workers.

As displayed below, salaries reported in the survey were heavily weighted towards a lower income bracket. In fact, 74% of independent cultural workers in Victoria make less than \$20,000 per annum from cultural activities. The mean average cultural income for independent workers was \$20,259.

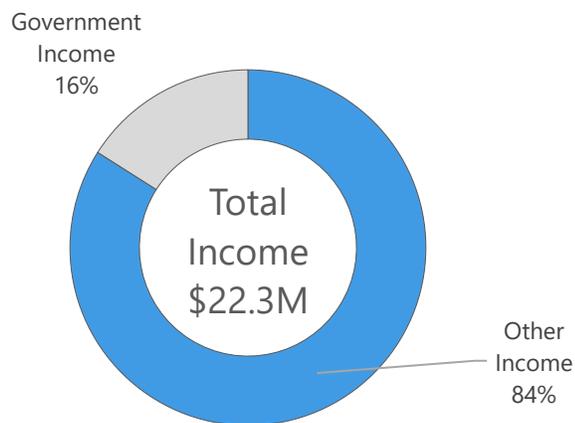
⁴ 2012 North American Industry Classification System (NAICs)

Figure 29: Breakdown of income for independent cultural workers (n=231)



The survey data shows that individuals cultural workers are less reliant on government income than organizations. As indicated below, only 16% of independent cultural workers' total income comes from government subsidies.

Figure 30: Source of income breakdown for independent cultural workers (n=231)



In total, independent cultural workers reported combined expenditures of **\$14,762,000**. The economic impact of these expenditures, as with those from cultural organizations, is analyzed in Section 4.5.

The table below illustrates a compartmentalized view of the direct economic value and profile of both from both independent workers and organizations in Victoria's cultural sector.

Table 2: Breakdown of total cultural industry direct economic value

	Organizations	Independent Workers	Total
Government Income	26,264,000	3,618,000	29,882,000
Other Income	85,587,000	18,667,000	104,254,000
Total Income	111,851,000	22,285,000	134,136,000
Non-Labour expenditures	41,279,000	14,762,000	56,042,000
Labour Expenditures	66,334,000		66,334,000
Total Expenditures	107,613,000	14,762,000	122,376,000
Operating Surplus / mixed income	4,238,000	7,523,000	11,761,000

Source: Nordicity estimates based on data from survey and extrapolated using labour counts from Statistics Canada.
 Note: Some totals may not sum due to rounding.

5. Economic Impact Assessment Summary

To estimate the economic impact of cultural activity in Victoria, we collected data through an online survey of cultural organizations and artists in Victoria. We then used the BC Stats Input-Output Model (BCIOM) to model the direct, indirect and induced impacts that this cultural activity had at the Census Metropolitan Area (CMA)⁵ in 2016 (last fiscal year). These different types of economic impact are described briefly below:

- **Direct Impact** – The direct impact refers to the increase in GDP, FTEs, and labour-driven income directly associated with artists/cultural organizations in the cultural sectors.
- **Indirect Impact** - The impact that occurs when creative workers, companies and other organizations in various creative industries value chains purchase inputs from other industries.
- **Induced Impact** - The induced economic impact arises when households re-spend their income throughout the wider economy
- **Total Economic Impact** - The total economic impact is equal to the sum of the direct, indirect, spill over and induced economic impacts.

While the BCIOM can only provide estimates of the economic impact at the CMA level, Victoria is the commercial center of this area, so we estimate that the vast majority, if not all of the economic impact, falls within the City of Victoria. The analysis of the economic impact of cultural activity was examined in terms of two categories: cultural organizations and artists.

5.1 Total Economic Impact of Cultural Organizations

According to the survey, cultural organizations in Victoria generated \$66.3 million in direct labour (i.e. wages paid to employees and freelance workers (table 3). Cultural organizations also earned an estimated \$7 million in operating surplus (e.g. operating profits or retained revenue) in 2016, resulting in a direct GDP impact of 73 million. Cultural organizations also generated 2,310 full-time equivalents (FTEs) of direct employment in 2016.

Through the purchase of supplies and services from other businesses in Victoria, cultural organizations in Victoria also generated an indirect impact for the economy. In 2016, the activities of Victoria's cultural organizations generated 280 additional FTEs of employment and

⁵ Note, the Census Metropolitan Area (CMA) includes includes 13 municipalities and one electoral area spanning roughly from Sidney to Sooke. While the CRD includes the Gulf Islands, the CMA does not. A detailed map of the CMA can be found at: [https://www.crd.bc.ca/docs/default-source/crd-document-library/maps/census/victoria-census-metropolitan-area-\(cma\).pdf](https://www.crd.bc.ca/docs/default-source/crd-document-library/maps/census/victoria-census-metropolitan-area-(cma).pdf)

over \$14 million in labour income for workers in other industries in Victoria. The indirect GDP impact was nearly \$20 million.

The re-spending of labour income at both the direct and indirect stages also generated an induced economic impact for Victoria. In 2016, the induced impact on labour income was \$8 million; the impact on GDP was \$12 million; over 110 additional FTEs were created on account of the induced economic impact.

In total, cultural organizations generated **2,700 FTEs** of employment for Victoria in 2016, **\$88 million in labour income** and **\$104 million in GDP**.

Table 3: Economic impact of cultural output in Victoria, cultural organizations, 2016

	Direct	Indirect	Induced	Total
Labour income (\$M)	66	14	8	88
GDP (\$M)	73	20	12	104
Employment (FTEs)	2,310	280	110	2,700

Source: Nordicity estimates based on data from survey and BC Stats BCIOM

Note: Some totals may not sum due to rounding.

5.2 Total Economic Impact of Independent Cultural Workers

Artists also made a significant contribution to the economic impact of cultural activity in Victoria. These were an estimated 1,100 artists in Victoria in 2016 (or 940 FTEs of employment). These artists earned an estimated \$7.5 million in labour income in 2016.

Artists procure supplies and services from other industries. As a result, their indirect impact generated \$4.8 million in labour income, a \$7 million GDP contribution and 100 FTEs. Artists also re-spend their labour income which results in an induced impact that generated \$2 million in labour income, \$2.7 million in GDP and 30 FTEs of employment for the Victoria economy.

In total, artists in Victoria 1,070 FTEs of employment, **\$14.3 million in labour income** and **\$18 million in GDP** for the Victoria economy in 2016.

Table 4: Economic impact of cultural output in Victoria, independent cultural workers, 2016

	Direct	Indirect	Induced	Total
Labour income (\$M)	7.5	4.8	2.0	14.3
GDP (\$M)	8.2	7.0	2.7	18.0
Employment (FTEs)	940	100	30	1,070

Source: Nordicity estimates based on data from survey and BC Stats BCIOM

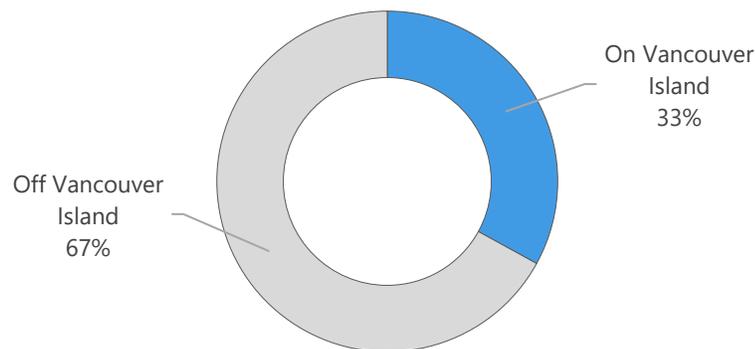
Note: Some totals may not sum due to rounding.

5.3 Total Economic Impact of Cultural Tourism

The economic impact of culture goes beyond cultural activity. Visitors to cultural attractions in Victoria also spend on food, accommodations and retail purchases, which yield an additional economic impact for the Victoria Economy. Tourists can have an even larger impact on the local economy through expenditures in the retail and hospitality sectors, which can be attributed to their attendance at cultural activities.

To estimate the economic impact of cultural tourism, we collected data on the number and profile (i.e. geographic origin) of attendees to some of Victoria’s largest cultural attractions. This attendance data was divided into two groups based on the origin of audience: from on Vancouver Island and off Vancouver Island.⁶ Survey data indicated that most cultural organizations surveyed (63%) confirmed that they attract cultural tourists to Victoria. These organizations also indicated that the bulk (67%) of the tourists attracted come from off Vancouver Island, as indicated below.

Figure 31: Source location of cultural tourists in Victoria (n=18)



Nordicity estimates that yearly cultural tourism is equal to approximately 1,000,000 visitors from off Vancouver Island. Using industry standard tourism spending allocations, Nordicity determined that the direct benefit of the cultural tourism in Victoria results in the creation of 1,560 FTEs, totally \$52 million in direct wages and a direct GDP impact of \$71 million. Again, using the BCIOM, it is estimated that a further \$21 million was generated in labour income and 370 FTEs generated, resulting in an indirect GDP contribution of \$31 million. The induced impact from cultural tourism resulted in \$9 million in labour income, 110 FTEs and GDP impact of \$12 million.

⁶ We assumed that visitors originating from Vancouver Island had no incremental economic impact, since, in the absence of attendance at a cultural event or site, they would have likely spent their tourism expenditures in some other manner on the island.

In total cultural tourism generated **\$82 million in labour income**; a contribution of **\$115 million to GDP**; and, the generation of **2,040 FTEs**.

Table 5: Economic impact of cultural tourism in Victoria, 2016

	Direct	Indirect	Induced	Total
Labour income (\$M)	52	21	9	82
GDP (\$M)	71	31	12	115
Employment (FTEs)	1,560	370	110	2,040

Source: Nordicity estimates based on data from survey and BC Stats BCIOM

Note: Some totals may not sum due to rounding.

The indirect and induced impact of cultural tourism is aggregated from contributions of multiple different supplier industries. The table below illustrates a compartmentalized view of the total regional output impacts of the top 5 supplier industries to the cultural tourism industry in Victoria.

Table 6: Total output impacts of top 5 supplier industries

Supplier Industry	Total (\$M)
Accommodation and food services	78
Transportation and warehousing	25
Arts, entertainment and recreation	14
Retail trade	10
Finance, Insurance, Real Estate, Renting and Leasing	4
Total, indirect & induced impact	141

Source: Nordicity estimates based on data from survey and BC Stats BCIOM

Note: Some totals may not sum due to rounding.

5.4 Summary of Total Economic Impact

The economic impact of cultural activity and cultural tourism can be summed to arrive at an estimate of the total economic impact of the cultural sector in Victoria. In total, the cultural sector in Victoria generated **5,810 FTEs** of employment in Victoria and **\$184.3 million in labour income** and **\$236.9 million in GDP**.

Table 7: Summary of total economic impact of cultural sector in Victoria, 2016

	Direct		Indirect	Induced	Total
	Cultural sector	Tourism			
Labour income (\$M)	73.5	52.0	39.8	19.0	184.3
GDP (\$M)	81.2	71.0	58.0	26.7	236.9
Employment (FTEs)	3,250	1,560	750	250	5,810

Source: Nordicity estimates based on data from survey and BC Stats BCIOM

Note: Some totals may not sum due to rounding.

We note that this estimate of the impact of the cultural sector on the Victoria economy should be viewed as a lower boundary. While the estimate of the economic impact quantifies the impacts generated in the cultural sector, the spillover effects generated in the tourism sector, as well as the upstream supplier impacts, it does not capture the wider spillover effects in other sectors of the economy. The cultural sector attracts skilled workers, entrepreneurs and businesses to a region. As a result, a thriving cultural sector can have even wider economic impacts on a regional economy which cannot necessarily be captured through a conventional economic impact analysis (a brief introduction to some these intersections can be found in Section 6 of this report).

In 2016, the Victoria cultural sector generated 716 FTEs employment in the rest of BC as well as \$37.9 million in labour income and \$56 million in GDP. Overall, therefore, Victoria's cultural sector generated **6,530 FTEs** of employment across the BC economy along with **\$222.2 million in labour income** and **\$292.9 million in GDP for the BC economy**.

Table 8: Summary of total economic impact of Victoria's cultural sector on the BC economy, 2016

	Victoria	Rest of BC	Total
Labour income (\$M)	184.3	37.9	222.2
GDP (\$M)	236.9	56.0	292.9
Employment (FTEs)	5,810	720	6,530

Source: Nordicity estimates based on data from survey and BC Stats BCIOM

Note: Some totals may not sum due to rounding.

6. Creative Economy Analysis

To present a more accurate reflection of the creative activity happening in the City of Victoria, the Project Team examined creative employment across Victoria’s economy. This approach enables further understanding of the size of the City’s **creative economy**, expanding on the employment impact within the sector (reported in the sections above) to also consider creative occupations that are embedded outside the sector, including in industries that may not traditionally be perceived as “creative”.

The first step to measuring creative employment more broadly in Victoria was to define what constitutes a “creative occupation”. The Project Team used the following definition as a starting point – creative occupations:

“involve the creation, production and dissemination of culture goods and services. Examples of creative occupations include librarians and curators, producers, actors and musicians, artists, photographers, architects, designers, artisans, writers, editors, translators, film editors and game developers.”⁷

This definition comes from the Canadian Framework for Culture Statistics (CFCS), which was developed in 2011 and is the basis of the Canadian Culture Satellite Account (CSA) – the main source of national and provincial statistics related to the culture sector. The CFCS provides a list of occupations that can be considered creative. The table below presents the list of creative occupations included in this analysis, which were based on the guidelines provided in the CFCS.

Table 9: Creative Occupations

NOC 2011	Creative Occupation Category and Description
511	Librarians, archivists, conservators and curators
513	Creative and performing artists , including: <ul style="list-style-type: none"> ▪ Producers, directors, choreographers and related occupations; ▪ Conductors, composers and arrangers; ▪ Musicians and singers; ▪ Dancers; actors and comedians; and, ▪ Painters, sculptors and other visual artists.
524	Creative designers and craftspersons , including <ul style="list-style-type: none"> ▪ Graphic designers, interior designers and interior decorators; ▪ Theatre, fashion exhibit and other creative designers; ▪ Artisans and craftspersons; and,

⁷ Statistics Canada, Conceptual Framework for Culture Statistics (2011). The list of creative occupations used in the analysis was derived from *Table 3.1: National Occupational Classification for Statistics (NOC-S 2006) detailed occupations (unit group) by Canadian Framework for Culture Statistics (CFCS) domain and sub-domain*.

NOC 2011 Creative Occupation Category and Description

- Patternmakers – textile, leather and fur products.

2224 **Conservation and fishery officers** (generally involved in the protection of natural resources)

5121 **Authors and writers**

Source: The CFCS guidelines and the NHS use different versions of the same occupational classification system – the CFCS is based on National Occupational Classification for Statistics (NOC-S) developed in 2006, while the NHS uses are based on NOC-S classifications, while the NHS data uses National Occupational Classification (NOC) 2011. While the differences are minor, the analysis did include conversion as necessary between these two systems.

It should be noted that due to limitations related to the classifications systems used by Statistics Canada, some occupations that were defined as creative by the CFCS were not included in the analysis. Namely, web designers and developers; interactive media developers; and, translators, were excluded due to the fact that cultural and non-cultural portions of the industries and occupations could not be disaggregated.

Using the list of creative occupations (Table 3), the Project Team set out to determine what proportion of these occupations fell within and outside of the culture sector. The definition of industries that comprise the culture sector was also based on the CFCS guidelines, and aligned with the approach used to estimate the economic impact of the sector described in earlier sections – in other words, the industries *not* included in our economic impact analysis were considered non-cultural.

The analysis was based on data from the *2011 National Household Survey (NHS)*, which is self-reported by individual respondents, and allows for an examination of both the occupations of people in Victoria and the industries in which they work. However, data available from the NHS is sometimes suppressed at certain levels of specificity. When looking at data for Victoria (as a Census Metropolitan Area), and for very specific occupations and industries, there are cases where the data is not made available to ensure the confidentiality of respondents. In such cases, the Project Team used higher-level or aggregated data, but maintained a highly conservative approach. As a result, the estimated employment of creative workers outside of the culture sector presents a *minimum* value.

This analysis revealed that **among workers in Victoria occupied in creative occupations, over 40% work outside of the culture sector**. The breakdown of the proportion of creative workers outside the culture sector is shown in the table below, by creative occupation category.

Table 10: Embedded creative workers (based on 2011 data from NHS)

Creative Occupation	Proportion occupied in other sectors (i.e. outside the culture sector)
Conservation and fishery officer	100%
Editors	53%
Creative designers and craftspersons	52%

Creative Occupation	Proportion occupied in other sectors (i.e. outside the culture sector)
Creative and performing artists	40%
Authors and writers	36%
Librarians, archivists, conservators and curators	34%
Creative occupations overall	41%

It should be noted here that the study adopted a definition of the culture sector that only looked at core culture domains. As a result, other areas of activity that are tangentially related to culture – which are referred to as “transversal domains” in the CFCS – were not included in the definition. These areas include education and training; and governance, funding and professional support.

It is no surprise, then, that the analysis showed many of the creative occupations working outside the sector, but in somewhat related fields – for example, a high proportion were found to be occupied in the educational services sector and public administration. In fact, conservation and fishery officers, which are classified as a creative occupation under the natural heritage sub-domain in the CFCS, are all occupied within the public sector. At the same time, other sectors, such as retail trade and manufacturing, also revealed large numbers of creative occupations, primarily creative designers and craftspersons.

Overall, the high proportion of creative workers that are employed outside of the traditional culture domains demonstrates the diversity and vibrancy of its creative talent pool, as well as wide-reaching impacts of creativity across Victoria’s economy.