



CreativeCITY:
Prosperity through the
Creative Economy

ECOSYSTEM REPORT

Photo Credit: Emil Agopian
Val Duncan in *Klimt's Playthings*,
courtesy of Theatre Encounter

AT A GLANCE

THE PROBLEM

Despite its significant economic, social, human, and environmental contributions to our region, Calgary's creative economy is underleveraged and overlooked due to a creative ecosystem that is fragmented and inefficient.

THE POTENTIAL

ECONOMIC

Current Status:

- » 12,000 enterprises
- » 32,000 employees
- » Annual direct impact of \$2.1 billion

Underleveraged areas:

- » A city identity built around creativity
- » Diverse forms of arts and culture
- » Talent acquisition
- » Talent retention
- » Talent development

HUMAN

- » Higher educational achievement
- » Improved mental health and overall well-being
- » Creativity in the workplace increases workers' sense of value and accomplishment

SOCIAL

- » Over 49,000 volunteers in arts and culture, totalling nearly 7.3 million hours or 3,670 full-time job equivalents
- » Improves social cohesion and sense of community
- » Increases civic participation
- » Supports urban revitalization and community building

ENVIRONMENT

- » Acts as an important mechanism for education and awareness-raising about environmental issues, including climate change
- » Improves energy efficiency and emissions reduction through sustainable design
- » Developing creative solutions to environmental problems

THE VISION

Calgary is Canada's most livable city

THE MISSION

Calgary's creative economy is recognized as a global leader through a sustained, collaborative commitment to the city's prosperity.

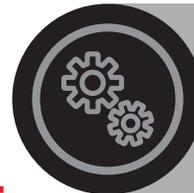
EMBED AUDACIOUS CREATIVITY INTO OUR CITY'S DNA:

To fully leverage the robust, growing creative economy in Calgary, creativity needs to be at the heart of everything we do as a city.



MOBILIZE CALGARY'S CREATIVE CAPACITY:

To develop and retain Calgary's exceptional creative talent, we must work to ensure creative professionals, new or seasoned, have the knowledge, skills and resources required to succeed.



INCUBATE CREATIVE COLLISIONS:

Unifying our creative economy under one identity requires creating conditions for collaboration, cross-sector partnerships, knowledge transfer, and resource sharing.



VALUE THE DIVERSITY OF CALGARY'S CREATIVITY:

As Canada's third most diverse city, Calgary has an opportunity to tap into the unique perspectives and experiences of our diverse creative class to build something new, authentic, and meaningful for everyone in the city.



THE PLAN

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EXECUTIVE SUMMARY





Photo Credit: Hero Images
Makerspace Workshop, courtesy of Fuse33



Photo Credit: Kiah Lucero
VR Showcase, courtesy of CSIF

What is the Creative Economy?

The creative economy looks at creativity as an output that intersects job fields, rather than isolated to particular industries. Adopting an ecosystems lens, the creative economy recognizes the connections between fields such as education, arts, culture and innovation, rather than viewing them in isolation. It maps the interdependence of these as unique drivers of direct and indirect economic outputs. Adopting this lens leads to a fundamental reassessment of the role creativity plays in areas ranging from education to industrial design, to organizational theory.

We use the UK's National Endowment for Science, Technology and the Arts (Nesta) view of the creative economy, which looks at creativity at the occupational level rather than the industry level. This allows us to gain a more accurate understanding of the economic role creativity plays and allows us to better understand how creativity permeates every industry, whether it is in medicine, oil and gas, or technology.



Photo Credit: Trudie Lee
The cast of *The Loud House*, courtesy of Theatre Calgary



The Value of a Creative Economy

The value of the creative economy relates to how it contributes to the prosperity of the community and everyone who lives in it, which can be viewed across four interdependent dimensions: economic prosperity, social prosperity, human prosperity, and environmental prosperity.

ECONOMIC PROSPERITY

Considering creative industries' supply chain impact and wages that are reinvested into the economy, their economic footprint reached \$3.85 billion in Calgary. This impact also resulted in \$48.8 million in municipal tax contributions and \$238.1 million in provincial tax contributions in 2016.¹ These outputs, however, do not consider the economic impact of creativity across other industries. Sectors from oil and gas, to agriculture, to finance all depend on creatives for innovation and enhancing productivity: they are the designers, problem solvers, and communicators that support industries viewed as integral to Calgary's economy. A city's creativity and creative class are also essential for building a resilient economy, attracting and retaining young professional talent, and drawing greater business investment.

SOCIAL PROSPERITY

Creativity and the creative economy help create social value, contributing to overall community prosperity. They are tied to greater levels of civic participation, urban revitalization, community building, and social cohesion, which in turn can improve safety and security and further strengthen the economy.

HUMAN PROSPERITY

At the individual level, creativity is essential to developing personal identities and self expression. It has been tied to greater educational achievement, improved mental health and general health outcomes, and better personal well-being. Within communities, creativity influences how we engage and relate to others through shared experiences, values, and cultural connections. On the job, integrating creative work approaches in the workplace is linked to an increased sense of value and accomplishment.

ENVIRONMENTAL PROSPERITY

There is creativity in how we interact with our environment, and it will be a crucial component in achieving environmental sustainability. Mitigating the effects of climate change and sustaining our natural environment will require investment in research and innovation to find creative solutions. The creative economy and creative occupations contribute the designers, communicators, and problem solvers needed to push development in a direction that balances our impact on the environment.



Photo Credit: Benjamin Laird
The Lion, the Witch and the Wardrobe (2019), courtesy of Alberta Theatre Projects

Calgary's Creative Economy

Calgary is home to nearly 12,000 creative economy enterprises employing over 32,000 people. This high ratio of enterprises to employees reflects a growing trend towards a gig-oriented economy, where individual creative professionals rely on gigs, freelance work, and temporary contracts to make a living.

CITY PLANS AND POLICIES

We reviewed 43 guiding documents at the municipal level that surfaced shared themes and outcomes to better understand city priorities. All of these documents weave a common thread of building a more resilient, vibrant, diverse, connected, and prosperous city, and all of them have touchpoints to Calgary's creative economy. Seven key areas of alignment were found across these guiding documents:

- Economic Development
- Placemaking (physical experiences and perception of the City)
- Civic Enrichment (incorporation of the arts in daily Calgarian life)
- Infrastructure
- Transportation
- Arts and Culture (public and private organizations and businesses)
- Education (schools and training)

Most of these guiding documents have strategies which are being implemented in a siloed approach. A strategy that bridges these silos to create a unified approach to community prosperity would unlock the power of the creative economy as a contributor to community prosperity.

RESOURCES AT OUR DISPOSAL

Calgary is well-equipped to fuel the creative economy with resources covering economic development, capacity building, social connection, human development, and natural beauty. If leveraged, these resources can catalyze change and inspire a new creative direction for the city.

Economic Resources:

- At 71.6 percent, Calgary has the highest labour force participation and highest labour force productivity of any major Canadian city.
- Calgary has the highest concentration of high-tech workers, and the second highest number per capita of small businesses and self-employed individuals.
- There are significant public investments being made into culture and cultural industries, with \$18 million allocated to arts and culture spending in the 2020 municipal budget.

Capacity Building Resources:

- Calgary is home to eight public and private post-secondary institutions, offering 82 programs related to the creative economy.
- Post-secondary programs dedicated to creative industries represent the highest proportion of creative programming, with a large number of programs in broadcast media, performing arts, and music.

Social and Structural Resources:

- Roughly 50,000 Calgarians volunteer in the creative economy, amounting to 7.3 million hours of productivity and creative output.
- Calgary has a network of 150 community associations that provide a conduit for building social and structural capital at the neighbourhood level.

Human Resources:

- With 33.7 percent of the population representing visible minorities, Calgary is the third most ethnically diverse city in Canada.
- Though the median age in the city is trending upward, the current median age of Calgarians is 37.2 years, making Calgary the fourth youngest city in Canada.
- Calgary has one of the highest levels of educational attainment in Canada, and the highest proportion of STEM graduates among major cities.

Natural Resources:

- Calgary is 62 km to the Canadian Rocky Mountains.
- It is at the confluence of the Bow and Elbow Rivers, both running through densely populated areas of the city with many accessibility points.

Opportunities for Calgary's Creative Economy

SEVEN EMERGING TRENDS SHAPING OUR ENVIRONMENT

1

The Competition for Talent:

There is a need to evolve the current labour force to meet emerging needs, and there is an opportunity to leverage the creative economy to attract talent across all industries.

2

Accelerating Technological Disruption:

The internet, social media, mobile devices, and big data analytics have redefined the way society produces and consumes media, and these are likely to change further.

3

From Consumer to Co-Creator:

Over the next decade, the role of the creative economy for consumers will expand dramatically as the system transitions to a model of innovation that leverages knowledge from individuals and enterprises across an ecosystem, rather than being confined within a single company.

4

Changing Media Consumption:

Story forms, promotional or otherwise, will continue to adapt and evolve from single form to transmedia storytelling, where the consumer is able to seamlessly shift from text to other media.



Photo Credit: Cary Schatz
Ouri (2019), courtesy of Sled Island

5

Social Justice and Change:

There is a deep discontent in Canadian society and a demand for change, resulting in enormous movements which aim towards confronting some of the core injustices in society, ranging from systemic inequality to the growing wealth gap.

6

The COVID-19 Longtail:

The long-term fallout from COVID-19 remains unknown and will largely depend on the real and perceived threat of the pandemic to Calgarians and creative economy consumers. However, there will be operational implications such as the increased demand for sanitation and hygiene, and financial impact through reduced access to private or public funding.

7

Sustainability at the Centre:

The creative economy will continue to have a central role in shaping sustainable development by providing the designers, communicators, and innovators to make fundamental changes to how our economy currently operates.

Being Inspired: Creative Successes in Calgary and Around the World

In reviewing best-in-class creative cities across Canada, the US, and the world, five key themes were identified for which Calgary could utilize and align its own creative economy policies:

- Driving digital creativity
- Building entrepreneurial capacity
- Investing in creative spaces and places
- Integrating through collaboration
- Embedding creativity into decision-making



Photo Credit: Sebastian Buzzalino
Jean-Michel Blais (2018), courtesy of Studio Bell

A Creative Economy Strategy for Calgary

VISION

Calgary is Canada's most livable city

MISSION

Calgary's creative economy is recognized as a global leader through a sustained, collaborative commitment to the city's prosperity.

STRATEGIC PILLARS

To deliver our vision and mission, Calgary's creative economy will be guided by four strategic pillars:



Embed audacious creativity into our city's DNA:

To fully leverage the robust, growing creative economy in Calgary, creativity needs to be at the heart of everything we do as a city.

Goals:

- By 2030, Calgary is known as a music city.
- By 2030, the greater Calgary region leads Canada for number of film shoots per capita.
- By 2030, Calgary recognizes itself as a centre for culture and creativity.

Priorities:

- Leverage the existing momentum of Calgary's film and music industries to embed creativity into our city's brand and identity.
- Model the success of Calgary's film industry and extend to music and other creative industries.



Mobilize Calgary's creative capacity:

To develop and retain Calgary's exceptional creative talent, we must work to ensure creative professionals, new or seasoned, have the knowledge, skills and resources required to succeed.

Goals:

- By 2030, the Calgary region leads Canada in the integration of arts and experiential learning into our K-12 classrooms.
- By 2030, Calgary's post-secondary creative programs have the highest graduate employment rates in Canada.
- By 2030, Calgary leads Canada in the number of creative economy workers per capita.

Priorities:

- Adapt educational programs to create a more dynamic workforce.
- Foster creativity by building programs in a way that layers career knowledge, skills building, and access to opportunities in a scaffolded approach.
- Embed experiential learning and arts into formal and informal education programs.



Incubate creative collisions:

Unifying our creative economy under one identity requires creating conditions for collaboration, cross-sector partnerships, knowledge transfer, and resource sharing.

Goals:

- By 2030, Calgary leads Canada in creative economy start-ups per capita.
- By 2030, Calgary is recognized as a global leader for its sustained commitment to collaboration.

Priorities:

- Leverage our digital capacity to connect and strengthen Calgary's creative economy.
- Purposefully facilitate and encourage the collaboration of the creative economy across quadrants.
- Establish an implementing body to oversee the coordination and implementation of a creative economy strategy.
- Encourage play and exploration without fear of failure.



Value the diversity of Calgary's creativity:

Calgary has an opportunity to tap into the unique perspectives and experiences of our diverse creative class to build something new, authentic, and meaningful for everyone in the city.

Goals:

- By 2030, the make up of Calgary's creative economy workforce is representative of the population.
- By 2030, equity, diversity, inclusion and accessibility are prioritized and embedded into creative economy workplaces and programming.
- By 2030, creative economy enterprises and organizations celebrate their board-level diversity with pride and are encouraging other organizations to follow suit.

Priorities:

- Develop and adopt programs and policies to ensure diverse individuals have the knowledge, skills and tools to succeed.
- Embed principles of equity, diversity, inclusion and accessibility into the creative economy strategy.
- Choose new faces and new voices to lead change.

MOVING FORWARD

Over the next six months, we will endeavour to refine our understanding and prepare for the release of the *CreativeCITY Strategic Guidebook* by mid-2022, which will outline specific objectives and activities that will be undertaken to make Calgary a world-leading creative city and Canada's most livable city.

In Phase 2, we will follow the progress of 'small experiments with radical intent'. These four creative projects are already underway in Calgary and align with each of our strategic pillars. The outcomes of these experiments will be used to further inform our creative economy strategy. We will also engage in a series of public CreativeCITY round table discussions led by partners at the Mount Royal University CityXLab, with subject matter experts and allies aimed at surfacing new areas of possibility.

In Phase 3, findings from this ecosystem report and our 'small experiments with radical intent' will inform a detailed community consultation. Consultation results will refine our path forward and guide the development of the *CreativeCITY Strategic Guidebook*. The Guidebook will provide formal recommendations for policy, community, and industry interventions to support community prosperity through the creative economy.

SETTING THE STAGE

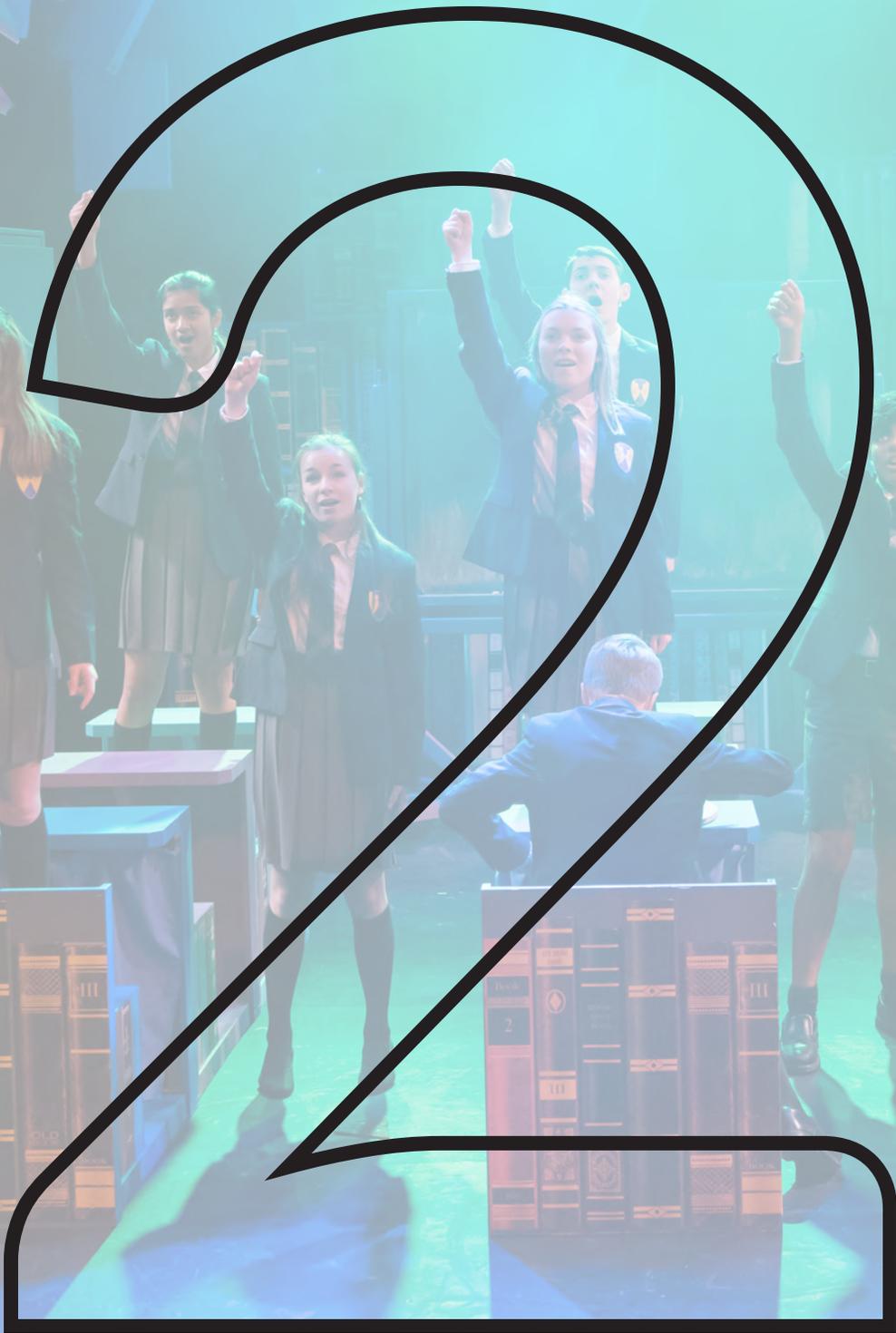


Photo Credit: Benjamin Laird
Matilda cast, courtesy of Storybook Theatre

Background

The structural disruptions facing our economy, combined with COVID-19, are causing community leaders to think differently about the future of our city. Even prior to the current pandemic, Calgary was facing serious economic and social headwinds.² Fundamental structural changes in the oil and gas sector contributed to Calgary having the highest unemployment rate of Canada's six largest cities over the past half decade.³ Moreover, the City forecasts⁴ this unemployment to continue well into the 2020s, and Calgary Economic Development anticipates that half of the jobs performed by Calgarians today could be at risk of automation over the next 20 years.⁵

Further, there are early warning signs suggesting that the socio-economic disruption facing our city is negatively impacting the retention of young talent. For example, over the past decade, when the regional population grew by 250,000, those aged 20-24 declined by 5.5 percent.⁶ Similarly, Calgary has a disproportionate share of migration of people aged 20-40 compared to other cities in Canada.⁷

Calgary has high quality educational institutions, a growing creative economy, and easy access to world-class outdoor and sporting activities.

Calgary has high quality educational institutions, a growing creative economy, and easy access to world-class outdoor and sporting activities. Its potential for attracting tourism, investment and talent will only increase if each of these experiential factors can work cohesively on a broader strategy for community prosperity. CreativeCITY is working with Rethink Calgary to build that cohesive strategy through aligning a CreativeCITY plan with ActiveCITY and LearningCITY plans for a more cohesive, system-level strategy.

See **Figure-1** for an understanding of how these plans and organizations can work together with mutual accountabilities to make Calgary a more vibrant city.

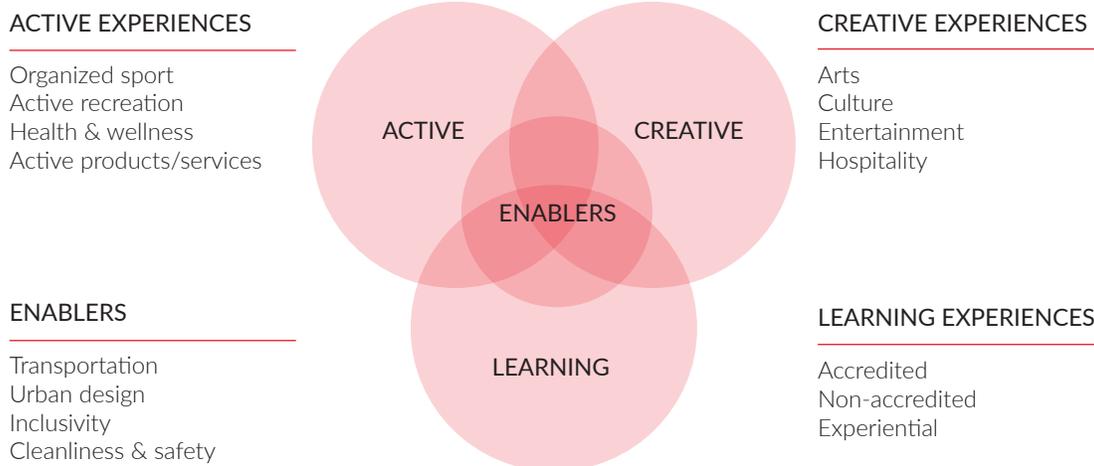


Figure 1 - Rethink Calgary

In this report, we explore what the creative economy is, where it is leading the way and where it is falling behind, and we identify opportunities to create a shared vision for Calgary that leverages a key economic driver in our city for broader community prosperity.

Defining the Creative Economy

For decades, researchers have explored the impact of knowledge, creativity and innovation as drivers of an enterprise's competitive advantage and growth.⁸ In the last 20 years researchers and policymakers identified that creativity should also be considered at a community-level.⁹ Creativity is the output of intentional, sustained, collaborative and social processes beginning in childhood and reinforced through social and cultural norms.¹⁰ When creative communities find support, divergent and creative thinkers are able to collaborate with others who share this mindset. This contributes to reorienting from a traditional industry sector lens (e.g. arts), to an ecosystem lens (e.g. creativity across industries). As a result, a concept called the creative economy was coined, incorporating diverse fields including science and engineering, architecture, design, education, arts, music and entertainment.

The idea of a creative economy has been influential as it does not view fields such as education, arts, culture and innovation as isolated. Rather, by adopting an ecosystem view, the creative economy can be used to map the interdependence of these fields as unique drivers of direct and indirect economic outputs.¹¹ Adopting this lens leads to a fundamental reassessment of the role creativity plays in fields ranging from education to organizational theory.¹² One example of where this is operationalized is in the United Kingdom's (UK) *Department of Culture, Media and Sport* (DCMS) which defines the creative economy as "those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property."¹³

As one can well imagine, defining the exact parameters of each field within the sector can be challenging, and the boundaries of the creative economy have been highly debated.

The idea of a creative economy has been influential as it does not view fields such as education, arts, culture and innovation as isolated. Rather, by adopting an ecosystem view, the creative economy can be used to map the interdependence of these fields as unique drivers of direct and indirect economic outputs.

CULTURAL SATELLITE ACCOUNT VIEW

In the Canadian context, Statistics Canada established the Cultural Satellite Account (CSA). The CSA defines *culture* as a *creative artistic activity and the goods and services produced by this creative activity and the preservation of heritage.*¹⁴ (See **Table-1**)

Table-1. Creative industries (Conference Board of Canada)¹⁵

Core domains	Sub-domains
Heritage and libraries	Archives
	Libraries
	Cultural heritage
	Natural heritage
	Libraries
Live Performance	Performing arts
	Festivals and celebrations
Visual and applied arts	Original visual art
	Art reproductions
	Photography
	Crafts
	Advertising
	Architecture
Written and published works	Books
	Periodicals
	Newspapers
	Other published works
	Collected information
Audio-visual and interactive media	Film and video
	Broadcasting
	Interactive media
Sound recording	Sound recording
	Music publishing

The CSA incorporates six core domains and 27 sub-domains.¹ The CSA framework was adopted by the Conference Board of Canada to define the creative industries. Their analysis identified that the creative industries included in the CSA employ 24,000 people, accounting for over \$1.55 billion in household income for Canadians.¹⁶

¹ The framework uses several criteria to determine what is and is not a culture product. A product is determined to be culture if it satisfies the general definition of culture (noted above) and satisfies one or more of the following criteria:

1. The product must have copyright protection potential.
2. The product must support the creation, production, dissemination or preservation of culture.
3. It adds to the content of a culture product.
4. It preserves exhibits or interprets human or natural heritage.
5. It provides culture training or educational services.

NESTA VIEW

Others, such as the DCMS, the UK's National Endowment for Science, Technology and the Arts (Nesta), and the European Union adopted variations on this sectoral approach, while also capturing sectors that are impacted by creative occupations.¹⁷ See **Figure-2** for a four-cluster creative economy model.

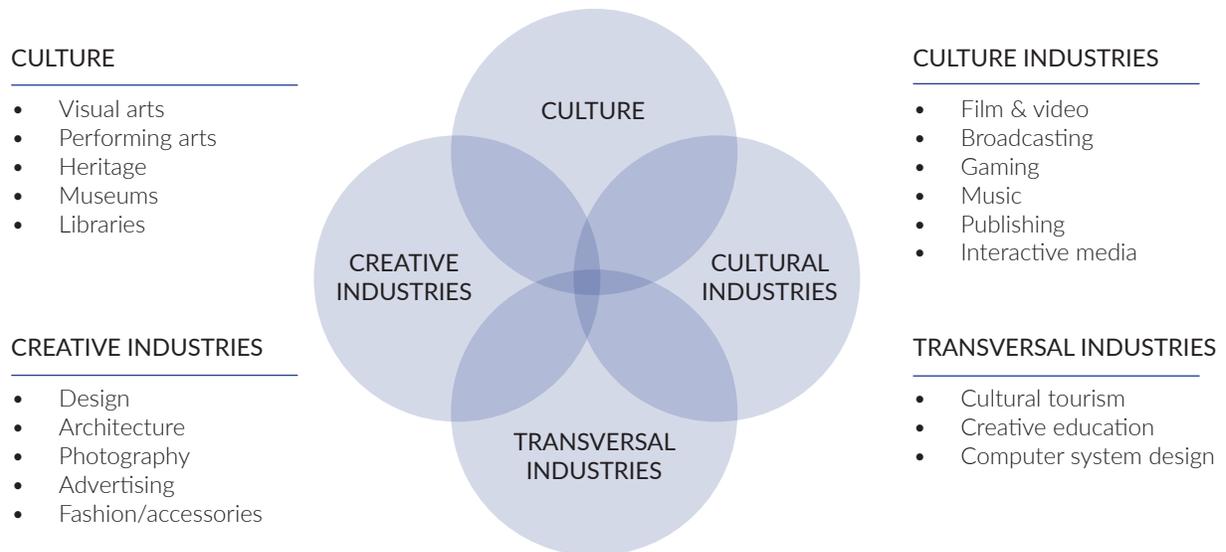


Figure 2 - The Four-Cluster Nesta Model

Nesta further refined the sectoral model by evaluating the creative intensities within the creative sub-sectors. In their research the occupation intensity ranges from 90 percent in artistic creation to 11 percent in computer programming. Overall, Nesta identifies that the creative industries employ 25 times more creative occupations than non-creative industries.¹⁸



To provide scope of the creative economy for the purpose of this report, we adopted the UK's DCMS model and mapped it to the North American Industry Classification system (NAICs). This mapping identified a total of 1280 sector categories, clustered under 59 level-5 NAIC classes. **Table-2** provides a sample of mapping Nesta to NAICs. Refer to **APPENDIX 1** for the full list.

Table-2. Mapping DCMS to NAICs

Nesta Class	Creative Intensity	NAIC Class
Artistic creation	90%	Independent visual artists and artisans
Performing Arts	80%	Dance companies
Radio broadcasting	79%	Radio broadcasting
Manufacture imitation jewelry and related articles	79%	Jewelry and silverware manufacturing
Photographic activities	73%	Photographic services
Specialized design	65%	Industrial design services
TV programming & broadcast activities	55%	Television broadcasting
Publishing of journals and periodicals	50%	Periodical publishers
Sound recording and music publishing activities	40%	Music publishers
Publishing of computer games	38%	Video game publishers
Museum activities	21%	Historic and heritage sites
Cultural education	20%	Fine arts schools
Computer programming activities	11%	Computer systems design and related services

Leveraging the Nesta creative economy model is important to accurately map the current state of Calgary's creative economy and emerging opportunities.

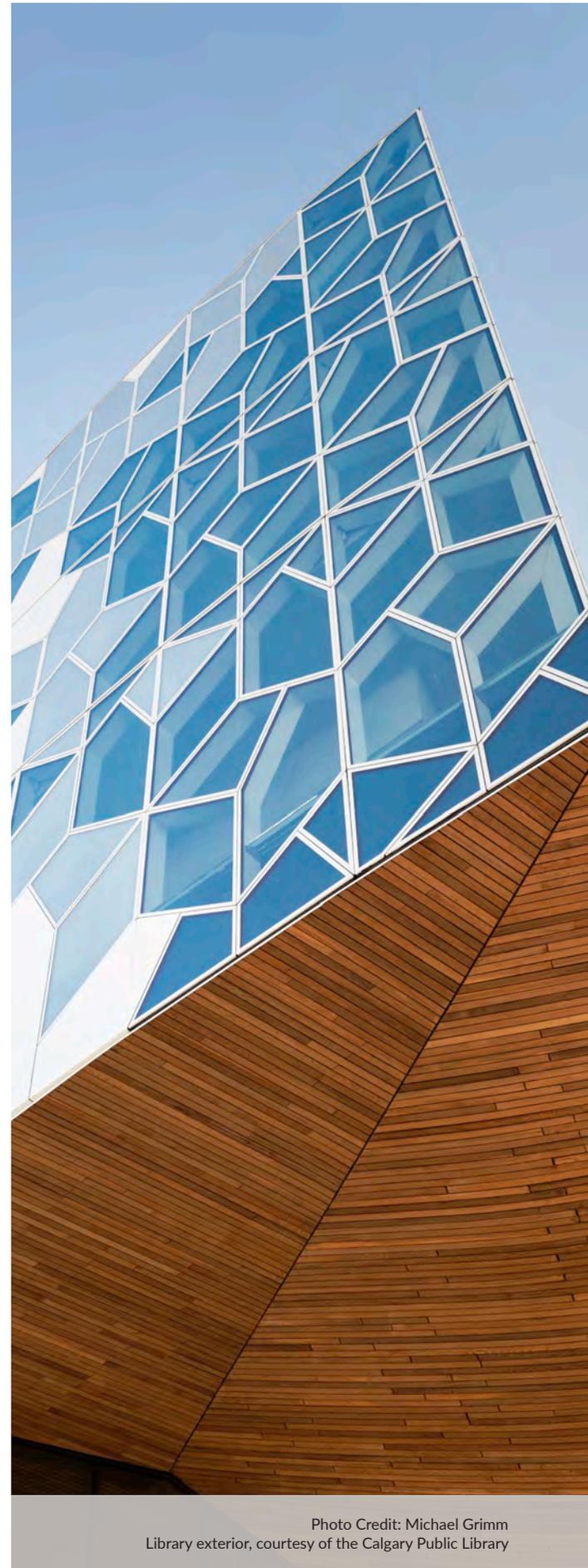


Photo Credit: Michael Grimm
Library exterior, courtesy of the Calgary Public Library



Photo Credit: Will Young
OK Go, courtesy of Arts Commons

Value of the Creative Economy

The creative economy is not a means unto itself. Rather, the value of the creative economy relates to how it contributes to the prosperity of the community and everyone who lives in it. Community prosperity incorporates four interdependent dimensions:

- *Economic prosperity*: This includes measures of economic activity at both an individual and community level.
- *Human prosperity*: This includes an individual's real and perceived skills, knowledge, mental and physical health¹⁹ such as life expectancy, health, and wellness.
- *Social prosperity*: This is a multi-dimensional concept that examines the value of the collective community to an individual. Examples of measures include both behavioral (e.g. voting, volunteering) and perceptual (e.g. perceived trust, safety).²⁰
- *Environmental prosperity*: This includes measures associated with the health and sustainability of a community's natural resources with examples including air quality and waste management.

Economic Prosperity

Economic activity at both an individual and community level

Human Prosperity

An individual's real and perceived skills, knowledge, mental and physical health

Social Prosperity

The value of the collective community to an individual

Environmental Prosperity

The health and sustainability of a community's natural resources

VALUE AS A SYSTEM

One of the shortfalls of adopting a sectoral view of the creative economy is that it simplifies the complex interdependence between the respective sectors and subsectors. For this reason, it is essential to adopt a system's level view of the creative economy as a value chain (Figure-3). This value chain recognizes that value is not generated only by individual enterprises but also by the way in which these enterprises interact. To understand the interdependency of the value chain, it is essential to break it into discrete, but interdependent building blocks. These building blocks form the community value chain incorporating community input resources, activities and outputs. This value chain is anchored to measures of community prosperity.

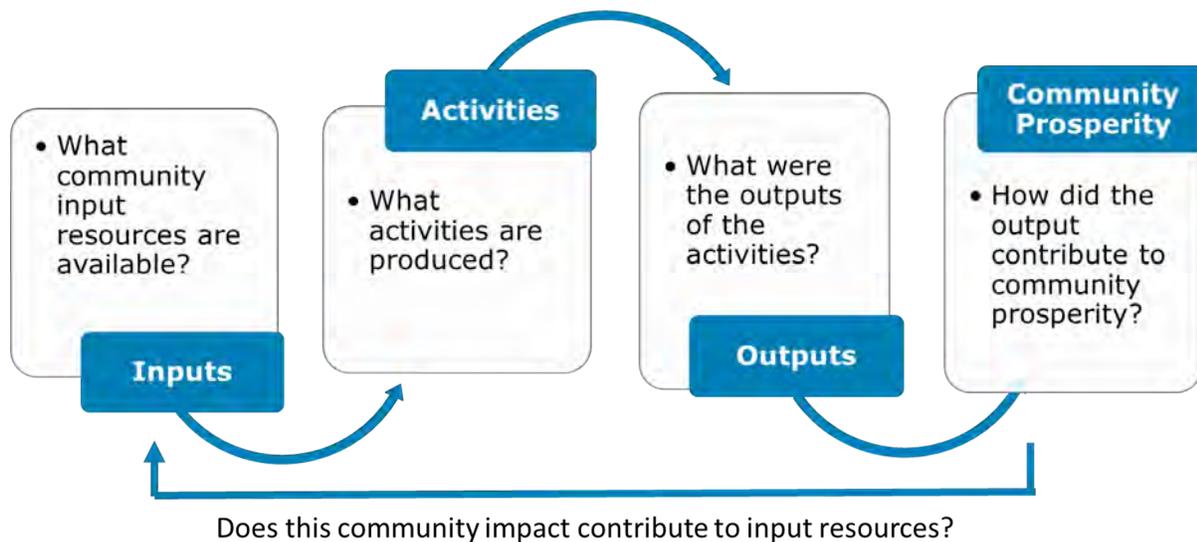


Figure-3. Value as a system

Community input resources: This incorporates the diverse tangible and intangible resources that contribute to developing activities and outputs. These community resources can be categorized into five categories.

- *Built:* Facilities developed to facilitate the delivery of creative economy outcomes.
- *Natural:* Natural resources that can be leveraged to support creative economy outcomes.
- *Economic:* Public and private financial resources available for investment in the production of creative economy outcomes.
- *Human:* Intrinsic or learned knowledge, skills and experiences at both an individual and collective level.
- *Social & Structural:* The intrinsic value of social relationships that contribute to community building, inclusive of the processes that facilitate community and collaboration.

Activities: Activities incorporate the enterprises and production processes that utilize a combination of two or more community input resources. For example, it may take human resources (e.g., skills and experience), economic resources (e.g., funding) and built resources (e.g., a theatre or computer coding camp) to develop and operate a program that offers free improv or coding classes for youth at risk.

Outputs: Outputs are the tangible and intangible products, services or experiences generated by the creative economy activities. For example, outputs generated by the above-mentioned improv program may include supportive relationships and increased self-esteem.

ECONOMIC VALUE

A city's unique culture and "built heritage" can be a differentiating factor, giving a city a competitive advantage in attracting visitors over other cities.²¹ Cultural industries alone contributed \$53.1 billion to Canada's GDP in 2017, accounting for 667,000 jobs.²² The Conference Board of Canada concluded that creative industries directly contributed \$2.1 billion to Calgary's GDP in 2016. That total rises to \$3.85 billion when considering creative industries' supply chain impact and wages that are reinvested into the economy.²³ This impact also resulted in \$48.8 million in municipal tax contributions and \$238.1 million in provincial tax contributions in 2016.

These outputs, however, do not consider the full economic impact of creativity across other industries. Sectors from oil and gas, to agriculture, to finance all depend on creatives for innovation and enhancing productivity: they are the designers, problem solvers, and communicators that support industries viewed as integral to Calgary's economy. These creative occupations, as outlined in the Nesta model above, permeate every business, from designing new products to managing advertising campaigns. Just as the tech sector shifted from being viewed as a siloed industry to one that is a catalyst for development across industries, the creative economy should be treated as an essential enabler to economic growth.

The creative economy can provide significant economic impact for a community, if it is adequately supported through investment and planning. In Calgary, the creative economy could foster greater economic diversification, provide jobs to creative workers, and play a role in attracting and retaining professional talent and business investment.

The creative economy also supports long-term economic sustainability. Automation threatens to eliminate up to half of all jobs in Calgary.²⁴ However, an American study found that although the US is expecting the same level of job loss due to automation, 86 percent of creative jobs have little to no risk of being replaced.²⁵ Creative workers, whether designers, communicators, engineers, or problem solvers, have essential transversal skills that can be applied across industries. Small investments in retraining and job placement programming could be essential for creating new opportunities for the workforce in downward trending, low-growth industries.

Additionally, there is an increasing push to support the digitization of arts and creative sectors to adapt to the changing technological climate. The Government of Canada, for example, has launched Creative Canada, which will work to modernize creative and cultural programming in the digital world.²⁶ Indeed, the alignment between the push for digitization and the general insulation of creative jobs from automation can ensure a stable source of employment into the future.

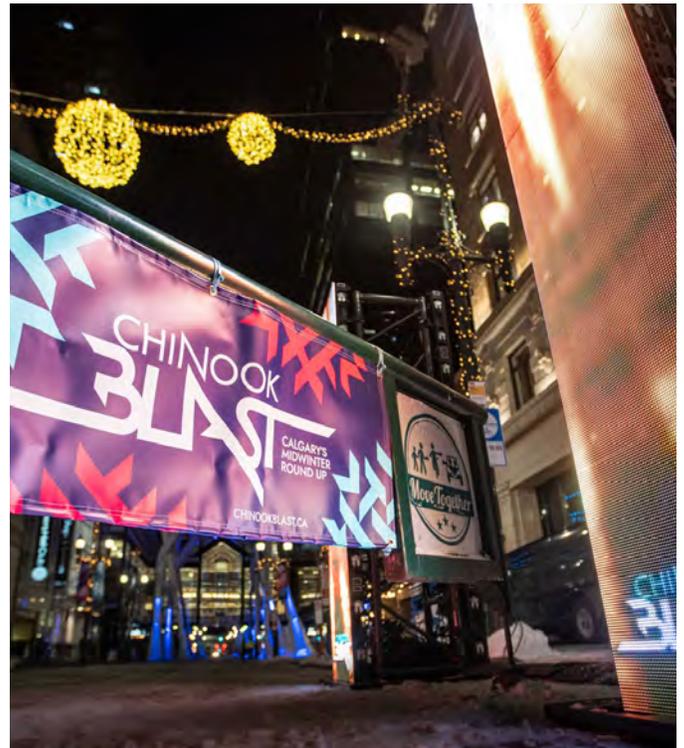


Photo Credit: Neil Zeller
Chinook Blast (2021), courtesy of Tourism Calgary

In addition, the development of highly engaging creative spaces within a city has been found to help attract and retain knowledge workers, furthering the economic growth of the city.²⁷ This is particularly important for retaining young adults. As the City's 2020 Outlook Survey demonstrates: 17 percent of people aged 18-24 in Calgary - the targeted age group for workforce retention - said that arts and culture is the most important initiative that would make Calgary a more vibrant city.²⁸ Development of other enabling factors such as safe streets, parks, libraries, and public buildings also represent an effective form of economic development.²⁹

Creative and cultural cities are also more attractive to high-tech companies who will locate their offices based on where the most in-demand labour is, which, in this case, is those with creative skills. Creatives are in high demand as creative thinking has been found to develop better technological solutions to social and economic problems.³⁰ With a growing presence of tech companies in Calgary, investing in a cohesive approach to a creative economy that includes partners from tech and other major industries could further attract and retain the young professional talent that these companies are looking for.

Creative workers, whether designers, communicators, engineers, or problem solvers, have essential transversal skills that can be applied across industries.

SOCIAL VALUE

Creativity and the creative economy help create social value, contributing to overall community prosperity. It is tied to greater levels of civic participation, urban revitalization, community building, and social cohesion, which in turn can improve safety and security and further strengthen the economy.

A strong creative economy developed by municipalities alongside citizens makes cities more dynamic and meaningful places to live by instilling a strong sense of local identity, cultural significance, celebration, memory making, and pride.³¹ This is particularly important for young people as well: research has shown that high school students who engage in arts in school are more likely to vote, volunteer, and get more involved in their communities.

Creativity is also linked to civic investment in the community, and can lead to more impactful community design.³² This is supported by a study published by Oxford University, which found that when communities are engaged in public art initiatives, they are more likely to have a sense of agency in shaping the community and its outcomes.³³

The creative economy is strongly tied to urban revitalization. Creative industries and products can be gathering places for diverse groups, and can enable the strengthening of cultural identities and meaningful public dialogue. Spaces created with creativity and community in mind foster inclusivity and collaboration, and they can prevent emotional exhaustion and weariness by encouraging critical and meaningful engagement with the space and the individuals in it.³⁴

Creative experiences are also tied to social cohesion, appreciation for diversity, and community-building.³⁵ This can be further accomplished by integrating Indigenous thinking into visual arts, cultural institutions and events in the spirit of reconciliation by basing the creative community-led approaches on Indigenous practices. Calgary is also known as Moh'kinsstis, and it is the ancestral territory of the Siksikaitsitapi—the Blackfoot people—comprising the Siksika, Kainai, and Piikani Nations, as well as Treaty 7 signatories, the Tsuut'ina Nation, and the Îyâxe Nakoda Bearspaw, Chiniki, and Wesley First Nations. This land is also the home of Métis Nation Region 3. Calgary has an opportunity to orient the creative economy with guiding principles of renewal and revitalization in partnership with local Indigenous communities.

By using creativity to rethink design, public spaces, events, and how we engage with our Indigenous neighbours, Calgary has an opportunity to strengthen social cohesion, improve urban vitality, increase safety, and increase civic participation. In turn, improvements in these areas can further attract young, professional talent, as well as strengthen cross-cultural relationships in Canada's third most diverse city.

High school students who engage in arts in school are more likely to vote, volunteer, and get more involved in their communities

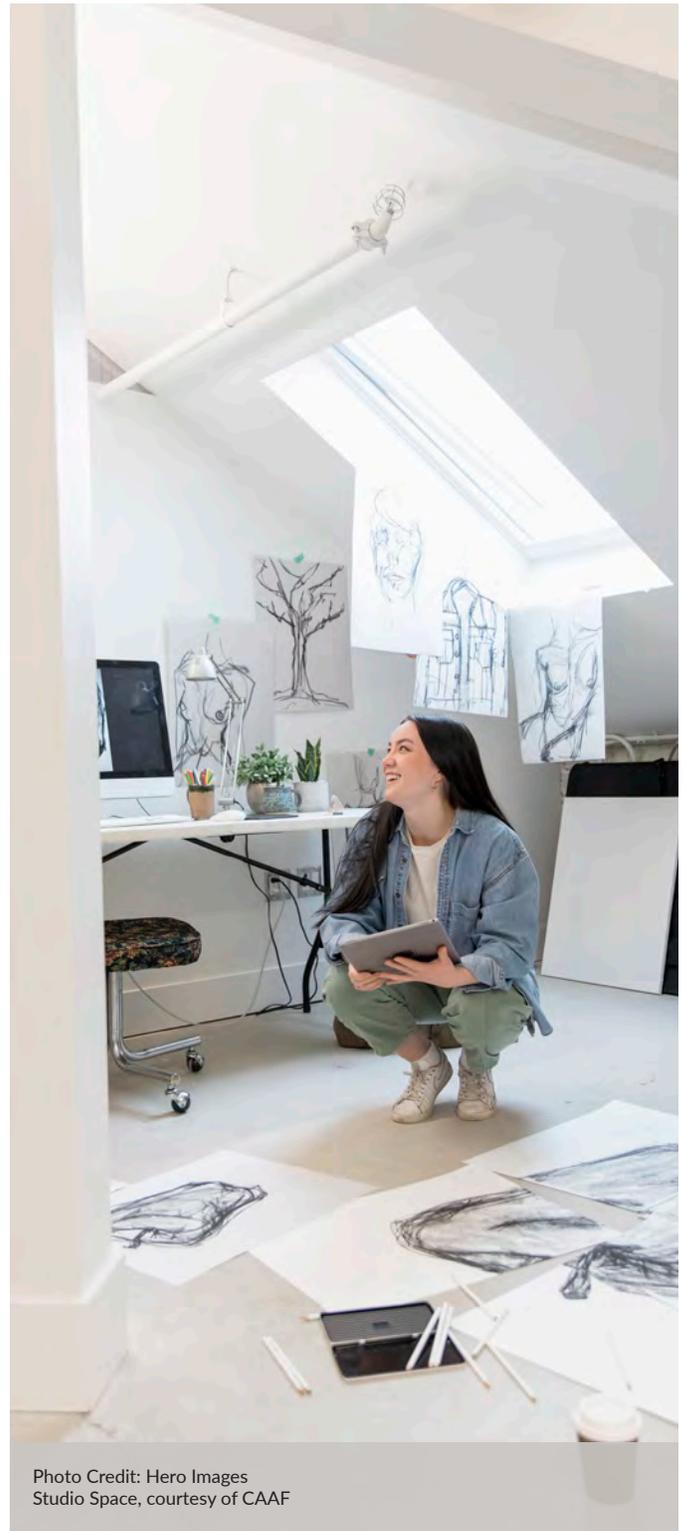


Photo Credit: Hero Images
Studio Space, courtesy of CAAF

HUMAN VALUE

Creativity is essential to developing individuals' personal identities, and it influences how we engage and relate to others through shared experiences, values, and cultural connections.³⁶ We see this every day in how we interact: friends attend live concerts together; colleagues bond over the latest episodes of a new television series; and professionals brainstorm creative solutions to their problems through platforms designed by creative individuals.

Positive benefits of creative approaches can be seen in education. When encouraged to approach their work creatively, students were more likely to take risks, and they showed improvement in personal well-being and educational achievement.³⁷ New approaches to creative education at the post-secondary level are also being used to support students in developing successful careers in the creative economy by giving them the skills, training and networking needed to thrive by connecting them with mentorship and practical experience opportunities. Some colleges and universities in Calgary are taking initial steps in this direction, like in organizing hackathons and case competitions for students to use creative thinking and problem solving to address social challenges in our city.

Integrating creative approaches in the workplace is linked to an increased sense of value and accomplishment in one's work. Conversely, workplaces that do not incorporate opportunities for creativity are linked to an increased potential for mental health deterioration due to monotony of routine, lack of engagement, lack of personal fulfillment, and boredom.³⁸

Creative self-expression outside of work is also linked to better health outcomes.³⁹ Participation in arts and culture-based activities and events by individuals outside the creative economy has been shown to greatly decrease feelings of depression and anxiety.⁴⁰ Examples of creative activities that can reduce depression include museum and exhibition trips, concerts, theatre outings, film viewing, outdoor activity, dance, singing, and playing instruments. This is seen in more formal settings as well: music therapy was credited as a valuable resource for mental health issues as early as the 1800s.

Since COVID-19 began, creativity has been essential to maintaining mental health. Social isolation prompted many individuals to turn to the arts for outlets, dusting off their old guitars or trying out painting for the first time; families were able to stay connected through online platforms and games designed by creative professionals; and streaming services' stock prices skyrocketed as a result of record high viewership.

When encouraged to approach their work creatively, students were more likely to take risks, and they showed improvement in personal well-being and educational achievement.



Photo Credit: Benjamin Laird
The New Canadian Curling Club, courtesy of Alberta Theatre Projects

Since COVID-19 began, creativity has been essential to maintaining mental health.

The creative economy and creative occupations contribute the designers, communicators, and problem-solvers needed to push development in a direction that balances our impact on the environment.

ENVIRONMENTAL VALUE

Since the industrial revolution began, the average global temperature has risen 1.8 °C, and most of that warming occurred just in the last 40 years.⁴¹ If this trend continues, the earth will face catastrophic changes, including more extreme weather events, drought, flooding of coastal and island communities, loss of habitats and biodiversity, and record numbers of displaced people globally. Mitigating these effects and sustaining our natural environment will require investment in research and innovation to find creative solutions. The creative economy and creative occupations contribute the designers, communicators, and problem-solvers needed to push development in a direction that balances our impact on the environment.

Creatives are already responsible for significant developments in environmental sustainability:

- Architects and engineers work together to design more efficient, sustainable buildings, creating globally recognized standards for others to follow, such as the Leadership in Energy and Environmental Design (LEED) certification.⁴²
- Advertising specialists are using their creativity for good through several private communications firms dedicated to supporting environmental organizations in communicating and marketing their programming.
- Filmmakers have produced countless documentaries and fictional stories to raise awareness about our environment and the threats it faces.
- Industrial designers have led the way in changing how the products we use every day are produced, used, and disposed of through the creation of circular design, where products and business models are built to reuse and recycle materials as well as last substantially longer than current products.⁴³

Long-term sustainability will require creative thinking and future-oriented planning to ensure that the economic, social, and human development of the city are viable. Green solutions to these issues will require interdisciplinary and intercultural approaches to find the best possible solutions for sustainable growth, as well as remaining cost effective in the long term.⁴⁶

Governments and businesses engaged with communities, as well as local entrepreneurs, must embrace the concept of generational sustainability for community prosperity, embedding Indigenous mindsets into long-term planning. This concept looks at the future of the community for generations to come, such as the “Seven Generations Principle” which is a decision-making philosophy rooted in Indigenous ways of knowing whereby the decisions we make today should lead to a sustainable world seven generations into the future.⁴⁷

Investment in individuals, businesses, and civic projects with the trajectory of long-term sustainability and creativity in mind can also help provide economic opportunities and facilitate the placemaking goals of the city.⁴⁸ This type of creative and out of the box thinking will not only help Calgary thrive for future generations, but can allow Calgary to be seen as a leader in sustainable urban development.

Right here in Calgary, there are several entrepreneurial creatives moving the dial on environmental sustainability. DIRTT, for example, is a Calgary-based design company that uses technology and construction to build sustainable interiors for offices all over the world.⁴⁴ Sustainable Calgary has also been working to advocate for sustainable design principles to be incorporated into Calgary’s urban design, including reshaping the walkability of the city, accentuating heritage sites in development, and revitalizing lower-income neighbourhoods.⁴⁵

SR

SITUATION ANALYSIS

Calgary's Creative Economy

Like many jurisdictions, Calgary has never fully adopted a holistic creative economy view. Rather, the creative economy remains highly fragmented. This fragmentation includes multiple levels of governments, civic bodies, political jurisdictions, and competing sectors.

THE SCOPE OF CALGARY'S CREATIVE ECONOMY

By utilizing the Nesta four-cluster model and associated intensity methodology, we evaluated the current scope of Calgary's creative economy. This analysis identifies a total of almost 12,000 creative economy enterprises. As per Figure-4, 67 percent of these enterprises do not have employees. As per Figure-5, though these enterprises employ over 32,000 people, this is reduced to 12,000 once the creative intensity is overlaid into the model. The outlier in this current model is the transversal industries, the category of computer systems design and related services. This single category accounts for 6000 enterprises. Prior to the intensity allocation, it represents 52 percent of the 32,000 people in the creative economy. Following the intensity allocation of 11 percent, this reduces to 19 percent.²

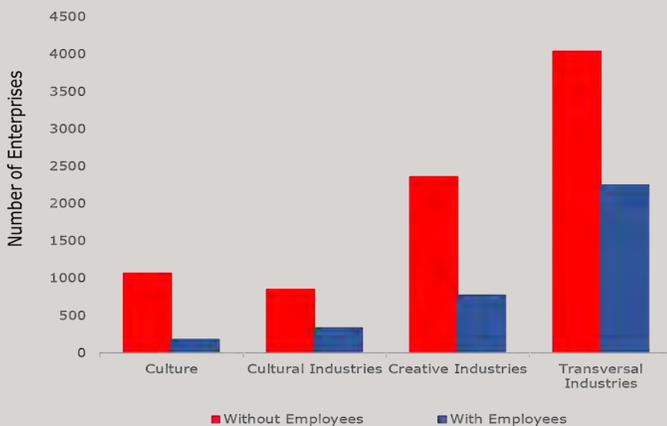


Figure-4. Creative Economy Enterprises

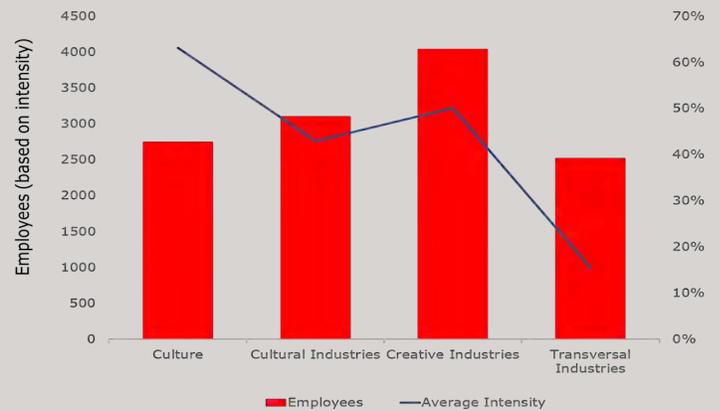


Figure-5. Creative Economy Employees

² The current model excludes economic impact associated with creative/cultural tourism.

Gig-based work in our city's creative industries now represents **41 percent** of all employment.

Creatives are **more than twice as likely** as other Canadians to be self-employed or working in a gig, contract, freelance or piecework model.

Canadian based creative workers in marketing and communications sectors are **leaving traditional employment structures** and stable connections to creative economy enterprises (agencies, studios and firms in the marketing and communications sector) at higher rates than any other participants in the creative economy.

A CHANGING CREATIVE LANDSCAPE

Perhaps the biggest change facing workers in Calgary's creative industries is the increasing shift from traditional forms of employment to gig-based work models.⁴⁹ For writers, photographers, branding consultants, advertising creative directors and others in Calgary's creative industries, the shape of everyday work is changing rapidly. Their traditional employers – marketing, communications, advertising and branding focused enterprises – are hiring more freelance, gig-based and contract creative workers than ever, while shrinking their in-house staff at record rates. Gig-based work in our city's creative industries now represents 41 percent of all employment, and creatives are more than twice as likely as other Canadians to be self-employed or working in a gig, contract, freelance or piecework model.⁵⁰ This freelance economy has become mainstream as companies and talent alike recognize the benefits of employment on-demand.⁵¹ Indeed, gig work has become the expectation for creative professionals, rather than the exception to the rule.

This shift has influenced every quadrant of the creative economy ecosystem – from culture and the culture industries to creative education and creative industries – but the impact is made especially visible in the marketing and communications sector.⁵² This comes as no surprise: according to a recent McKinsey and Company report,⁵³ the heightened rate of transition between traditional employment models and gig based work is happening most at the intersection of knowledge-intensive industries and creative economy sectors. According to the Conference Board of Canada, Canadian based creative workers in marketing and communications sectors are leaving traditional employment structures and stable connections to creative economy enterprises (agencies, studios and firms in the marketing and communications sector) at higher rates than any other participants in the creative economy.

As the creative industry sectors in Canada shift more and more towards a gig-based employment model,⁵⁴ understanding the strategies required for creative workers to thrive becomes increasingly important.

Moreover, the lack of a shared civic vision constrains the capacity building of the sector. Research identifies that the clustering of individuals and enterprises facilitates capacity building through information diffusion and a concentration of labour and efficiencies. This also contributes to focused investment in training and professional development to support the continued growth of a cluster.

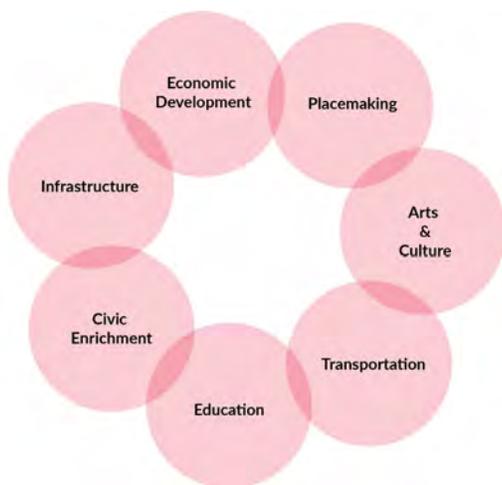
City Plans and Policies

Emerging from an initial audit of City and civic plans, **we have identified 43 guiding documents** that have a common thread of building a more resilient, vibrant, diverse, connected, and prosperous city, and all of those documents have touchpoints to Calgary's creative economy. All 43 were assessed to help identify critical areas of interest and potential areas of growth for the City of Calgary. The assessment focused on the desired outcomes described in each plan and looked for points of alignment and divergence between them. Based on this assessment, we found 7 areas of alignment across these guiding documents:

- Economic Development
- Placemaking (physical experiences and perception of the City)
- Civic Enrichment (incorporation of the arts in daily Calgarian life)
- Infrastructure
- Transportation
- Arts and Culture (public and private organizations and businesses)
- Education (schools and training)

Of these areas of interest, outcomes related to economic development in Calgary far outnumber those of other areas, indicating a strong focus on economic development at the city level. Second to economic development was placemaking, followed by civic enrichment. These general categories were also further broken down into more specific subtopics based on the individual outcomes each plan was created to achieve. A full list of outcomes identified and their relative intensity throughout these City plans can be found in **APPENDIX 2**.

These areas of alignment across civic plans are important considerations in ensuring outcomes in the creative economy are directly tied to economic development, placemaking, and civic enrichment, which could better encourage the creation of a shared vision for the city and reduce fragmentation across strategies for a more cohesive approach.



PATHWAYS TO INTEGRATION

If properly integrated into City planning and policymaking, the creative economy could be a central influencing factor in outcomes related to economic development, placemaking, and civic enrichment by establishing new ways for Calgarians to participate in the creative economy as both consumers, workers and co-creators. Other areas will depend more heavily on city planning and public and private sector investment, particularly in infrastructure development, transportation, and education. However, these areas of interest are key enabling factors that can support the effective development of a creative city.

Job creation is also mentioned several times across various civic plans, such as Calgary Economic Development's *Calgary in the New Economy*. However, talent retention is less significant in the plans focused on economic development, which is problematic for building a robust creative economy. A talent retention strategy to supplement current job creation strategies could better address the broader issues related to the brain drain currently taking place in Calgary. This can also be connected to planning in education, which was also underrepresented in the civic plans that have touchpoints to the creative economy. CityXLab's *Learning City—Learning Our Way Forward* is an integral report that addresses institution-specific needs in Calgary, such as transitioning to open and purpose-based learning systems. These systems can ensure people are empowered and accountable for their development, supported by arts training and experiential learning, and can create post-graduation work opportunities to retain talent in the city after students finish.

Cross-sector collaboration allows for a broad coalition of actors in the city to come together and tackle the various facets of what the *CreativeCITY Strategic Guidebook* could entail. Some of the civic plans with a longer-term focus, such as *Calgary in the New Economy*, City of Calgary's *SMART Cities Approach*, *Learning City—Learning Our Way Forward*, City of Calgary's *Resilient Calgary Strategy*, and City of Calgary's *Climate Resilience Strategy*, provide a cursory indication of the need for cross-sector collaboration within the City. The *Resilient Calgary Strategy* also addresses the need to work collaboratively across governmental levels (municipal, provincial, and federal) to respond to citizens' economic needs. However, these documents do not always provide tangible actions or plans to build these connections. The *CreativeCITY Strategic Guidebook* can help fill some gaps by recognizing the interconnectedness of various sectors and identifying common goals.

NEW POLICY POSSIBILITIES

There are many areas of interest which are less frequently used in Calgary plans and policies, but are valuable for Calgary's creative economy strategy. The *City of Calgary Digital Strategy* and the *Tourism Strategic Plan* are among the few that address the necessary digital shifts that need to be taken for future economic planning. There is an opportunity in the *CreativeCITY Strategic Guidebook* to incorporate digital connections in a variety of areas, including training and professional development, community building, and civic engagement.

Calgary's *CreativeCITY Strategic Guidebook* also presents a unique opportunity to integrate civic plans that already have areas of alignment as well. This alignment covers a range of longer-term and shorter-term outcomes and goals for the city. For example, *Calgary in the New Economy* addresses entrepreneurship to help foster economic diversification and generate jobs, talent retention opportunities, and placemaking by building the Calgary brand. Incidentally, all of these goals are burgeoning areas of Calgary's creative economy and can support creative economy goals. There are also plans with creative economy-specific policies and strategies such as:

- City of Calgary's arts development strategy *Living a Creative Life*
- City of Calgary's *Civic Arts Policy*
- City of Calgary's *Downtown Strategy*
- City of Calgary's *Cultural Landscape Strategic Plan*
- City of Calgary and Calgary Arts Development's *Arts and Culture Infrastructure Strategy*
- City of Calgary's *Cultural Plan*
- City of Calgary's *Festival and Events Policy*
- City of Calgary's *Public Art Policy*

All of these plans and policies could be aligned with the *CreativeCITY Strategic Guidebook* and should, therefore, be incorporated into any new planning measures.

Few civic plans consider the intersection between the creative economy and the wider economy in great detail, leading to a fragmentation of ideas and goals. City of Calgary and Calgary Arts Development's *Arts and Culture Infrastructure Plan* does provide a more tailored approach to this type of integration and could be considered as a model to replicate when drafting policy recommendations for a creative economy strategy. A list of plans that could be most useful in building the Strategic Guidebook can be found in **APPENDIX 2**.



There are even more citywide documents that focus on enabling factors which support the functionality of a creative economy. These include transportation plans such as the City of Calgary's Transportation Plan, *RouteAhead*, and *Step Forward*, which all support easy and affordable access to facilities and venues for audiences. These also include other placemaking initiatives developed by the City of Calgary such as *imaginePARKS*, the *Downtown Strategy*, and the *Municipal Development Plan*. These plans help provide meaning and connectedness, and enhance residents' and visitors' experiences in the city.

Despite the number of plans and policies that are connected to the creative economy, there is a need for development of a strategy that identifies the alignments in order to fully realize the benefits of a strong creative economy. With a cohesive, fully integrated Strategic Guidebook that pulls in all necessary stakeholders, aligns with existing strategies, and ensures consideration for creative industries, we can then take advantage of the possibilities.

Economic Resource Audit

HIGHLIGHTS

Head Offices

There are more corporate head offices in Calgary per capita than any other Canadian city.⁵⁵ Examples of local head offices associated with the creative economy include AspenTech Canada, SMART Technologies, and Corus Entertainment.

Labour Force

The labor force includes those currently employed and people who are unemployed but looking for work. At 71.6 percent (2021), Calgary has the highest labour force participation as well as the highest labour force productivity of major Canadian cities.⁵⁶ Moreover, the five-year labour force growth rate is 7.5 percent, and its 12-month rate is 2.6 percent.

Income

Calgary has the highest per capita income in the country and the lowest percentage of low-income households of any major city in Canada.⁵⁷

High Unemployment

In 2019, Calgary had the highest unemployment rate of Canada's six largest cities. In 2019, Calgary's unemployment rate was 7.2 percent compared with a national rate of 5.6 percent.⁵⁸ Even prior to COVID-19, high unemployment was forecasted to continue for the next half-decade.⁵⁹

Energy Sector Dependent

The primary sector industries and utilities contribute about \$36 billion (28.4 percent) of Calgary's GDP, and Calgary's oil and gas reliance (OGR) index stood at 34.9.³ The value of oil and gas exports in 2020 was \$56.6 billion—61 percent of all merchandise exports.⁶⁰ Of the top five export markets, the US alone represents 84 percent of total export value.⁶¹

Technology Centre

Calgary has the highest concentration of high-tech workers in Canadian cities.⁶² Calgary ranked first in research and development business cost competitiveness relative to peers.⁴

Entrepreneurial

Calgary has the second-highest number per capita of small businesses and self-employed individuals in Canada.⁶³

Income Inequality

Calgary has the highest median income in Canada and the lowest proportion of low-income earners. However, in 2017 the ratio of Alberta's top 20 percent of earners to the bottom 20 percent was 26 to 1. For the past five years, Calgary has also seen a consistent increase in demand for food bank hampers. In 2019, over 200,000 recipients received hampers, compared to 150,000 in 2014.⁶⁴

³ The OGR index is derived by determining the oil and gas industry's contribution to three areas of Calgary's economy: employment (the Conference Board of Canada Metropolitan Outlook Report), GDP (the Conference Board of Canada), and net exports (Government of Alberta, Alberta Finance and Enterprise). These three values are reflected as percentages, which are then added together and divided by 3. An index of 100 would be total reliance. Refer to: Keough, N., Morrison, B., & Lee, C. (2020, May 27). State of our city 2020: An urgent call for a just transition. Sustainable Calgary. https://static1.squarespace.com/static/5ab716b9ee1759b04ca2703e/t/5ecd551002f4af1d18d76785/1590514966826/SustainableCalgary_SOOC2020.pdf

⁴ Y Location Cost Index 2017-18 Peer Cities: Albany, Chicago, Columbus, Edmonton, Grand Rapids, Milwaukee, Minneapolis, Salt Lake City, San Jose, Saskatoon, Seattle, Toronto, Vancouver. Refer to: Ernst & Young. (n.d.). Comparing business investment and operating costs in Calgary and selected cities: EY Location Cost Index overview and results 2017-2018. <https://www.calgaryeconomicdevelopment.com/dmsdocument/198>

ECONOMIC STAGNATION

The changing demands on the crude oil market will have long-term implications on Calgary's energy sector and the economy. As part of their 2020-25 Economic Outlook, the City of Calgary has mapped a series of risk scenarios that consider this dynamic environment. In the 2020-25 Outlook, they state:

"There is extreme uncertainty around Calgary's economic outlook for the next five years. The length of a demand shock on the crude oil market will have a long-term impact on Calgary's energy sector. The longer the demand shock, the greater the damage to Calgary's energy-related firms and jobs."⁶⁵

The energy sector, representing almost a quarter (23.20 percent) of Alberta's gross domestic product, is experiencing significant structural disruption.⁶⁶ However, this does not necessarily or accurately reflect the real impact of an unstable oil and gas sector. As Statistics Canada notes, "for each dollar in lost GDP in the oil and gas industry, \$1.14 is lost in other industries due to indirect (\$0.77) and induced (\$0.37) impacts. For each job lost in the oil and gas industry, six jobs are lost in other industries (4 through indirect effects and two through induced effects)."⁶⁷ Recognizing the need for diversification, in June 2018, Calgary City Council unanimously approved a new economic strategy for the city, facilitated by Calgary Economic Development, titled, *Calgary in the New Economy*. This strategy called for a diversification of the economy.

An anticipated difficulty in achieving this goal is Calgary's historical roots in the energy sector. For example, 25 percent of Calgary's technical expertise is comprised of software engineers and data scientists, compared with 50 to 62 percent in Ottawa, Vancouver, Montreal, and Toronto.⁶⁸ Further, in a recent survey of global oil and gas CEOs by PwC, 68 percent of the leaders are concerned about talent availability to support their company's digital transformation strategies; so there will be increasing competition for these types of individuals.⁶⁹ As a result, Calgary is forecasted to have a significant skill gap over the next decade.

PRIVATE SECTOR

The creative economy is supported by a mix of public and private sector investment, and includes enterprises ranging from non-profit arts organizations to large for-profit technology companies. It is predominantly made up of gig workers and freelancers as well - upwards of 67 percent of the nearly 12,000 creative economy enterprises in Calgary do not have employees.⁷⁰ These sole proprietorships and independent gig workers range from actors, to freelance photographers and designers, to independent communications consultants, to part-time musicians and artists. Though these enterprises are integral to Calgary's economy, workers in the freelance space can face financial instability and less access to additional benefits that come with traditional employment, like retirement contributions or supplementary health insurance.

This gig economy is reflected in Calgary's perception as an entrepreneurial leader. Evidence supports this, with Calgary having the second-highest number per capita of small businesses and self-employed individuals in Canada.⁷¹ Leveraging this entrepreneurial culture and identifying solutions to better support gig workers will be essential for the growth of the creative economy.

Calgary having the second-highest number per capita of small businesses and self-employed individuals in Canada.



Photo Credit: Leslie Cyrynowski, LC Photography
Hotel Balconies, courtesy of Hotels Live

PUBLIC INVESTMENT

Federal, provincial, and municipal government investment in Calgary's regional creative economy occurs through a multitude of ministries and agencies including arts, culture, education, economic development, tourism, and heritage. An audit of municipal, provincial, and federal government budgets was conducted to determine levels of public sector spending in the creative economy. This was done by reviewing publicly available budget information and allocating it, where possible, to specific creative industries or quadrants based on the Nesta model.

The audit shows that while there are significant investments being made in the creative economy between all three levels of government, these investments are disproportionately allocated to culture and cultural industries, and to a lesser extent, transversal industries. It must be noted though, that this audit did not include provincial education spending, which would add additional funding for arts education in school curricula. Industries considered creative industries using the Nesta model receive little public investment. Though some of the more in-demand fields like advertising and architecture may require less government investment, design, fashion and photography may be overlooked.

It is also important to note that while the Government of Canada has allocated almost \$3 billion to the creative economy, it is anticipated that little of that investment is directed toward Calgary relative to other major Canadian cities. By taking a unified approach and building a new city identity around creativity, Calgary may be able to attract further investment from the provincial and federal levels of government.

While the Government of Canada has allocated almost **\$3 billion** to the creative economy, it is anticipated that **little of that investment is directed toward Calgary** relative to other major Canadian cities.



Municipal Investment

The City of Calgary is facing significant financial pressures due to a dependence on non-residential property taxes. The stagnant economy and increasing commercial vacancy rates forced the City to rebalance the property tax burden both geographically and between non-residential and residential sources. As of fall 2019, the City's financial projections were stable with sufficient flexibility on its debt limit. However, the financial implications of COVID-19 act as a significant constraint on municipal investment and programs associated with the creative economy.

For 2020, The City of Calgary allocated \$126.9 million towards the creative economy, or about 2.25 percent of the city's combined operating and capital budget. The spending is divided between arts and culture, economic development and tourism, and library services.

For arts and culture specifically, the City of Calgary's operating budget was \$18 million, with \$16 million being funded through taxes. This included:

- \$7.4 million to festivals and events;
- \$6.4 million to Calgary Arts Development;
- \$2.2 million to visual and performing arts; and
- \$1.2 million to public art.⁷²

Prior to COVID-19, there were 612 City-supported festivals and events, with a 72 percent participant satisfaction rate.

It is important to note that comparison of municipal expenditures is difficult. Scope, definitions, and budgets within City departments can be inconsistent. Additional research is required to determine a more accurate breakdown of City spending in the creative economy.

Provincial Investment

Direct provincial support and investment in Calgary's regional creative economy happen in several ways, including granting. Grants come from the Alberta Foundation for the Arts (AFA), The Community Initiatives Program (CIP), The Other Initiatives Programs (OIP), and The Community Facility Enhancement Program (CFEP). These agencies award grants to various organizations and individuals across the province, including those outside the creative economy, such as sport, recreation, and civic organizations. Most of the AFA's funding (\$26.9 million) goes towards grants for organizations and individuals in culture and cultural industries. In the 2019-2020 fiscal year, the top organizations the AFA funded were professional performing arts, community support, and arts presenting.⁷³ Most individual grants went to music, visual art and new media, and film and video.

Alberta also allocates \$129.6 million in cultural spending to libraries, heritage, museums, and cultural infrastructure.⁷⁴ Another significant provincial investment is in Film and Television, with the Alberta Media Fund's \$30.9 million budget making up most of the Province's \$39.3 million cultural industries allocation.⁷⁵ Most spending in transversal industries is allocated to tourism under the Travel Alberta budget of \$37.7 million.⁷⁶

Federal Investment

The Government of Canada also provides support for the creative economy through a variety of mechanisms, allocating \$2.76 billion in total to the creative economy in its 2020-21 budget.⁷⁷

Cultural Industries

Cultural industries spending makes up over half of the federal government's creative economy allocation for 2020-2021, primarily because of the \$1.2 billion in funding for the CBC. The next largest cultural industry beneficiary is film and video (\$166.77 million), made up of funding for the National Film Board and Telefilm Canada. The remaining spending in this cluster includes a \$134.1 million contribution to support the Canada Media Fund and, more generally, in the areas of publishing (\$127.4 million) and music (\$36.65 million). The Canada Music Fund, however, will receive an additional \$70 million as a supplement to the federal budget to support economic recovery.⁷⁸

Culture

The next most prominent federal spending area is culture, where the federal government allocated \$611.9 million, which went to heritage, libraries, museums, and performing arts. However, it is essential to note that a disproportionate amount of this spending benefits organizations and venues outside of Calgary and Alberta. For instance, almost \$210 million of the \$225 million allocated for museums specifically fund four museums in the Ottawa-Gatineau area, one in Winnipeg, and one in Halifax. The only specific performing arts spending in the federal budget (\$35.3 million) is for the National Arts Centre in Ottawa.

Also under this category are a few grants and contributions to various funds. The largest include \$47.2 million to the Canada Cultural Spaces Fund, \$27 million for the Canada Arts Presentation Fund, and \$20 million to the Canada Cultural Investment Fund.

Other Spending

The federal government also allocates an additional \$428 million to the creative economy for more general programming and granting. This amount includes the Canada Council for the Arts (\$363 million) and grants and contributions to the Indigenous Languages and Cultures Program of \$60.4 million. Transversal Industries spending includes the Canadian Tourism Commission's \$95.67 million and a \$22.78 million contribution to the Canada Arts Training Fund for creative education.

Though not directly tied to the creative economy, the federal government allocates funds to additional activities with various creative touchpoints, which further supports a culture of creativity across the country. This includes funding for digitization and heritage sites. For example, the federal budget broadly discusses 'bridging the digital divide' and 'digital literacy' without specific reference to the creative economy or specifying particular budget amounts for that programming, reflecting an investment in the technological capacities of Canadians. The federal government also allocates heritage funding under Parks Canada, such as the National Historic Sites Cost-sharing Program. Parks Canada's heritage spending would add to the over \$43 million in heritage spending already identified across all three government levels.

The Government of Canada recently announced additions to the 2021-2022 budget, allocating **\$1 billion** to revitalize tourism across Canada.

PHILANTHROPIC INVESTMENT

The relative wealth in Calgary within Canada makes it one of the highest per capita philanthropic donation communities.⁷⁹ However, only a small percentage of charitable donations in Canada are allocated to sectors in the creative economy.⁸⁰ Moreover, arts and culture charities were found to perform worse than their peers on indicators like money spent on overhead and fundraising, and financial transparency.⁸¹

IMPLICATIONS

COVID-19

The COVID-19 pandemic has affected government budgets drastically: as creative professionals lose work, governments have increased funding and support across sectors. The Canadian Council for the Arts received \$55 million from the Department of Canadian Heritage to establish a COVID-19 Emergency Support Fund to distribute emergency assistance to its core and project-funded organizations.⁸² The Government of Alberta also recently launched the Stabilize Program in their 2021 budget meant to provide one-time operational funding to stabilize Alberta's non-profit live experience sector.

In addition, the Government of Canada recently announced additions to the 2021-2022 budget, allocating \$1 billion to revitalize tourism across Canada. This includes \$200 million for festivals and events, \$500 million for a tourism relief fund, and \$300 million to Canadian Heritage to support recovery for arts, culture and heritage, including relief for live music and heritage institutions.⁸³

However, as Calgary and the country begin recovery, government budgets are expected to decrease in the long-term to prevent further deficits. These changes will likely affect the amount of funding allocated to the creative economy over the next ten years, once most businesses are operational again.



Photo Credit: Neil Zeller
Chinook Blast (2021), courtesy of Tourism Calgary

Stagnant Economy

In addition to the impacts from COVID-19, the current stagnant regional economy could have a significant impact on the creative economy over the next decade. This is because a significant proportion of Calgary's regional creative economy is traditionally dependent on municipal and provincial investment, to support either core operating or capital investment. It would be beneficial for Calgary's creative economy to become far more collaborative. For creative economy enterprises to survive and excel, the system as a whole must demonstrate how investment can contribute to achieving funder goals. This will require greater harmonization compared to traditional competitive tendencies.

Fragmented Investment Model

The current regional creative economy investment model is fragmented across multiple domains. Today, competition for scarce private and public investments occurs between enterprises across the creative economy ecosystem. In this sense, individual members of the creative economy and creative industries are competing with each other, often in a zero-sum investment model, regardless of what would provide maximum value to the community.

This lack of a coherent and integrated ecosystem-level investment strategy that could guide priority investment is one of the greatest barriers and opportunities facing the creative economy. A benefit of creating the *CreativeCITY Strategic Guidebook* is providing an integrated framework for private and public sector investors, outlining where priority investments would have maximum system and community level impact.

With **82 creative programs**, there is one program for every 16,983 people in the metro-Calgary region.

Capacity Building Resource Audit

HIGHLIGHTS

Post-Secondary Institutions

Calgary is home to eleven post-secondary institutions, five public and six private, offering 90 programs related to the creative economy.

Creative Programming

In total, Calgary's post-secondary institutions provide 82 creative economy programs, fewer than other major Canadian cities and less programs per capita than other cities.

Creative Priorities

Post-secondary programs dedicated to creative industries represent the highest proportion of creative programming, based on the Nesta model, and a large number of programs in broadcast media, performing arts, and music.

POST-SECONDARY INSTITUTIONS

Calgary has eleven post-secondary institutions, split between six private and five publicly funded schools. Public institutions include the University of Calgary, Mount Royal University, Alberta University of the Arts (AUArts), Southern Alberta Institute of Technology (SAIT), and Bow Valley College. Private institutions include Ambrose University, Visual College of Art and Design (VCAD, a Vancouver-based institution with a Calgary campus), ABM College, Robertson College, St. Mary's University, and MC College. In addition to Calgary's post-secondary institutions that provide accredited degree and diploma programs, the region is home to several other organizations and institutions that support further education and capacity building in the creative economy, such as Banff Centre for Arts and Creativity. Though these organizations provide valuable resources to creative amateurs and professionals, they were not included in this analysis. However, further research is underway to explore the full extent of capacity building resources for creatives in Calgary, which will provide a more thorough understanding of the successes and gaps in the city's current offerings.

CREATIVE PROGRAMMING

Between its eleven post-secondary institutions, Calgary offers 90 programs that are based in the creative economy, with 67 coming from public institutions. Most of these programs are also provided by universities, rather than colleges, requiring most students to attend school for a four-year term to obtain their credentials. This additional time commitment and cost may be a deterrent for some young creatives who can relocate to Vancouver, for example, where there is a proportionally greater number of college and vocational programs dedicated to the creative economy.

With 90 creative programs, there is one program for every 15,563 people in the metro-Calgary region, and one for every 20,785 people when only considering public institutions. By way of comparison, metro-Vancouver offers one program for every 11,844 people, Edmonton offers one for every 14,337 people, and Ottawa offers one for every 11,932 people.

CREATIVE PRIORITIES

Calgary's creative programs can be divided into four major categories based on the Nesta model:

- 38 are in the creative industries which include design, advertising, fashion, photography, and architecture
- 35 are in culture, which includes visual and performing arts, heritage and museums
- 22 are in the cultural industries, which include film and video, music, broadcasting, gaming, and publishing
- 7 are in the transversal industries, which include cultural tourism, creative education, and computer system design

Interestingly, other cities tend to have higher proportions of cultural industries programs compared to creative industries programs. In this, Calgary's creative programming diverges from the norm. However, Calgary also has a wide variety of artistic programs with a large presence in broadcast media, performing arts and music.



IMPLICATIONS

Capacity building resources for creatives is not confined to post-secondary institutions; it includes K-12 schooling, evening hobby arts classes, professional and skills development programming held by civic organizations and workers associations, and online learning available to anyone. Additional research is required to fully understand the breadth of capacity building resources available for creatives in Calgary.

In terms of post-secondary education, Calgary is lagging behind other major Canadian cities in terms of the number of creative programs offered, despite having more post-secondary institutions than other cities. In comparison to Vancouver, for example, Calgary also appears to be lacking in tech-based art programs or art programs with tech implementation, which will be essential in preparing our creative workers for a digital future.

In comparison to Vancouver, Edmonton, and Ottawa, many of Calgary's arts programs (specifically in AUArts) have a "trades" background (sculpture, ceramics, fibres, glass, etc.). For example, AUArts has the largest glass program in Canada. Having more hands-on, applied programs such as these may be helpful in better preparing students for careers in those specific fields. However, more emphasis is needed on building a multi-disciplinary workforce that can go between creative skills. With a greater number of workers expected to be reliant on freelance and gig-based work, knowledge and skills in a variety of fields, including business management and human resources, will be essential for the creative class going forward.

Social and Structural Resource Audit

HIGHLIGHTS

Sense of Community

Calgary trends lower than both Alberta and Canada in many measures related to sense of community.

Volunteering

Calgarians are actively involved in creative experiences, like festivals and libraries, with 49,440 volunteers contributing 7.3 million hours. These hours help generate economic activity in creative sectors by increasing productivity and access to creative experiences for Calgarians.

Municipal Voting

Calgary municipal voting has varied widely from 20 to 58 percent over the past five elections.

Community Associations

Calgary has a network of 150 community associations that provide a conduit to build social and structural capital at a local community level.⁸⁴

Other Associations

There are dozens of civic and community enterprises that facilitate social and structural capital for groups or functional areas. Social and structural resources incorporate the tangible and intangible processes and structures that facilitate the social bonding of individuals and enterprises. This includes the processes and (infra)structures that enable the effective leveraging of other resources, such as human or economic, that generate incremental value. Social resources may include dimensions such as cultural activities or knowledge management systems and processes. Structural resources facilitate the effective collaboration and harmonization of individuals and enterprises within a city.⁸⁵

As a starting point, a strategy must consider three key measures of social and structural resources: sense of belonging, volunteering, and municipal voting.

SENSE OF BELONGING

A sense of belonging is defined as a feeling of reciprocity, fellowship, and being emotionally connected and committed to your community. At 63.3 percent of Calgarians feeling a sense of belonging in 2014, the city tracks lower than both the Canadian and Albertan averages, where 68 percent of all Canadians and 69.3 percent of all Albertans felt a sense of belonging.⁸⁶

VOLUNTEERING

In Calgary, 49 percent of people report volunteering a minimum of once per month, compared with 41 percent nationally.⁸⁷ In 2017 49,440 people volunteered for arts and cultural organizations in Calgary and contributed a total of nearly 7.3 million hours to Calgary's regional creative economy.⁸⁸ This number of hours is equal to 3,670 full-time jobs or 0.5 percent of all full-time employment in Calgary.

MUNICIPAL VOTING

Over the past five Calgary municipal elections, voting turnout has ranged from 20 to 58 percent. The overall level of voting is consistent with other Canadian cities.

SOCIAL AND STRUCTURAL RESOURCE INVENTORY

Calgary has a diverse but fragmented group of enterprises that play a vital role in facilitating social cohesion. These can be clustered into (1) organized cultural and creative associations; (2) community associations; (3) civic organizations; and (4) other.

Organized Cultural and Creative Associations

Calgary and the region have dozens of performers' groups, creative hubs, incubators, and arts and culture associations. These range from enterprises such as Alberta Ballet and Calgary Pro Musica Society, to the Fuse33 Makerspace, to Innovate Calgary. These can be classified as intra-group or inter-group structural capital.

Intra-group includes organizations whose mandate is facilitating collaboration among entities in the same field or creative practice. Local examples include Calgary Society of Independent Filmmakers and Calgary Musicians Association. In contrast, inter-group structural capital is generated from organizations mandated to facilitate collaboration with groups across the creative ecosystem. For example, cSPACE King Edward coordinates among groups ranging from Alexandra Writers Centre Society (AWCS) to Alliance Française (AF) and the Calgary Association of Lifelong Learners (CALL).

Other Civic Organizations

Calgary has a unique structure of 150 local community associations, which are critical to running creative programming at the local level and providing community-level access. The makeup of our community associations is relatively unique to Calgary, and provides an additional mechanism for community cohesion unseen in many other cities. Their activities include providing workshops and hosting cultural events and festivals. In 2016, Sustainable Calgary reported 29 percent of households are members of their local community associations.⁸⁹

In addition, Calgary has numerous civic organizations that transcend Calgary's regional creative economy, including Tourism Calgary, Platform Calgary, and Calgary Economic Development. There are also dozens of additional community organizations that facilitate structural capital for specific community groups, like school, seniors, and religious groups. Each plays a vital role in supporting social cohesion.

IMPLICATIONS

Calgary has long been recognized as a community with significant social and structural resources led by a high level of volunteering. Similar to other areas, the challenge is fragmentation. Each resource plays an essential role in community cohesion and creating more paths to collaboration between the hundreds of separate organizations and associations, of varying sizes, scope, and resources. Collaboration could facilitate harmonization and help manage duplication of programming and infrastructure. Developing strategies that enable the maximum impact of Calgary's regional creative economy demands that the fragmentation challenge be acknowledged and managed.



Photo Credit: Hero Images
Makerspace Workshop, courtesy of Fuse33

Human Resource Audit

HIGHLIGHTS

Growth

Calgary's population of 1.35 million includes an increase of 220,000 in the past decade.⁹⁰

Ethnic Diversity

Calgary is the third most ethnically diverse city in Canada with 33.7 percent of the population from a visible minority. Toronto is the most diverse at 51.4 percent.⁹¹

Ageing

The median age in Calgary is 37.2 years, making it the fourth-youngest city in Canada.⁹² However, like the rest of Canada, the city is ageing as the baby-boomer generation retires. The population of 65+ increased by 12 percent over the past decade. The population between the ages of 20-24 decreased by six percent.

Education

Calgary possesses one of the highest educational attainment levels in Canada. At 27 percent, Calgary possesses the highest proportion of STEM graduates of major Canadian cities, with a high concentration in geosciences and related areas.⁹³

A DIVERSE CITY

Calgary's population is becoming increasingly diverse, and this is forecasted to accelerate over the next decade.

New Canadians: One of the ways in which Calgary is changing is through immigration. In the 1980s, Calgary would average 20,000 new Canadians per five-year period, but between 2011 and 2016, Calgary welcomed over 95,000 new Canadians. Moreover, according to Statistics Canada, there are more than 80,000 immigrants working in professional and technical occupations in arts and culture across the country and make up over a quarter of workers in creative occupations.⁹⁴

Indigenous Peoples: In 2011, there were 28,905 people identifying as Indigenous living in Calgary, representing 2.7 percent of the total population. This has grown significantly in the last nine years and Calgary's Indigenous population is young with a median age of 28.⁹⁵ Art and creative expression have always been an important part of Indigenous cultures and ways of life.



Photo Credit: Gui Ribeiro
Member Screening (2019), courtesy of CSIF

Impacts of Colonization

Indigenous people in Canada have continuously been marginalized in economic participation due to systemic racism and an unequal relationship with many levels of government. Despite this, many communities are engaged in the economy while actively working to overcome barriers to self-determination. To move forward with economic development within Indigenous communities, both government and communities have to work together to increase capacity and foster an environment of entrepreneurial growth and business opportunities.

For over a century, the central goals of Canada's Indigenous policy were to eliminate Aboriginal governments; ignore Indigenous rights; terminate the Treaties; and, through a process of assimilation, cause Indigenous peoples to cease to exist as distinct legal, social, cultural, religious and racial entities in Canada. The establishment and operation of residential schools were a central element of this policy, which can best be described as "cultural genocide." One of the legacies of colonialism and forced relocation to reserve lands is the lack of access and control many Indigenous communities have over resources, limiting opportunities for economic development in those communities. This is further complicated by the failure of governments to fulfil their treaty obligations, creating an environment of uncertainty that may prevent external organizations from engaging in economic development initiatives with Indigenous communities.

Canada's Truth and Reconciliation Commission calls for increasing support and recognition of Indigenous communities, but there is a great deal of work needed, even within creative sectors specifically. A 2016 report found that Indigenous workers are underrepresented among artists and cultural workers and have much lower median incomes than non-Indigenous artists in eight of the nine arts occupations.⁹⁶

Seniors: Another specific population requiring attention is older adults. For the first time in Canadian history, seniors (65+) are a bigger cohort than children (<12 years) and people over the age of 100 are actually the fastest-growing demographic group in Canada.⁹⁷ By 2032 one in four Canadians will be a senior. Calgary's population is predicted to grow over the next decade by an average of 1.71 percent in total, while the forecasted growth rate for seniors is 4.71 percent.⁹⁸

While particular consideration is given to newcomers, Indigenous peoples and seniors, the *CreativeCITY Strategic Guidebook* must work to understand the wants, needs and barriers of every person in the community. Importantly, this includes an emphasis on those groups that have a much lower level of engagement compared to others. This includes BIPOC, young girls and women, LGBTQI2S+, lower-income households and people with disabilities, among others.



A HEALTHY CITY

There are many metrics by which to measure health. The creative economy plays an important role in mental health. Mental health refers to overall prosperity including life satisfaction, happiness, productivity and involvement, and the ability to manage stress. According to the World Health Organization (WHO) there is no health without mental health.⁹⁹ Yet, more than 300 million people have depression worldwide, which is an increase of 18 percent between 2005 and 2015.¹⁰⁰ Though Calgarians rank better than those in other Canadian cities when comparing perceived work stress, physical health, and mental health, physical and mental health issues are still increasing.¹⁰¹

IMPLICATIONS

Calgary has undergone seismic changes in the past two decades related to the themes just discussed. It is one of the most ethnically diverse cities in the country. The region also faces the challenge of an ageing population. These two trends have led to a significant increase in the human capital available to the city.

However, the potential of this human capital is being under-leveraged for many reasons. Calgary's creative economy is largely siloed and struggles with retaining talent. As a result, there are several implications. First is the need to ensure equitable access to creative education and careers. Second, is the need to encourage more diverse creatives and types of creativity that reflect the needs of an increasingly diverse population. A third imperative is the need to intertwine creativity with tech, science, and engineering in order to create programs and jobs that are horizontal, resilient, and future proof.

Natural Resource Audit

HIGHLIGHTS

Mountains

Calgary is only 62 km away from the Canadian Rocky Mountains.

Rivers

Calgary is at the confluence of the Bow and Elbow Rivers.

Parks

Just over 99 percent of Calgary residents are within a five-minute walk of one of the 2,733 parks or greenspaces.¹⁰² This becomes even more significant given 94 percent of Calgarians are satisfied with parks.¹⁰³ Currently, 8.25 percent of Calgary has an urban canopy.¹⁰⁴

Pollution

Calgary reports some of the highest air and water quality in North America.



LAND RESOURCES

Calgary's land mass is 825.56 square kilometres and is at an elevation of 1,045 metres. The western slopes of the Canadian Rockies are approximately 62km from the city which enables a range of four-season recreational amenities. The Rockies are also major focal points for Alberta's tourism, art and film industries.

WATER RESOURCES

The Bow River begins within the Canadian Rocky Mountains and winds through the Alberta foothills, through Calgary and onto the prairies, where it meets the Oldman River, and then the two form the South Saskatchewan River. In addition, the Elbow River is 120 km long and flows from the Canadian Rockies to the city of Calgary, where it merges into the Bow River. The Bow River provides habitat for wildlife and many opportunities for recreation and culture. The Bow is home to Prince's Island Park and St. Patrick's Island Park. Both are used as community gathering places, hosting festivals, concerts, performances, and more. Notable events include Calgary Folk Music Festival, Shakespeare by the Bow, and Expo Latino. The City has also used the Bow and the Elbow as focal points for creativity, such as the Peace Bridge and the East Village community murals.

CLIMATE

The average daily temperatures in Calgary range from 16.5 °C in July to -6.8 °C in December. Calgary has the most sunny days year-round of all of Canada's largest cities, with over 333 days of sun.¹⁰⁵ Winters are cold and the air temperature can drop to or below -20 °C for an average of 22 days of the year, and -30 °C for an average of 3.7 days of the year. The cold is often broken up by warm, dry Chinook winds that blow into Alberta over the mountains. Though Calgary gets little precipitation,¹⁰⁶ Sunshine Village in Banff National Park averages 10 metres of snow per year.¹⁰⁷ In summer, daytime temperatures in Calgary range from 10 to 25 °C.¹⁰⁸ Climate change has also resulted in significant changes and potential impacts from severe weather events, which are forecasted to increase in future years.¹⁰⁹ The increasing weather variability negatively impacts planning and securing major events in the region.

SUSTAINABILITY

At a macro-level, Calgary appears to be improving sustainability with indicators linked to water, air quality and waste diversion. In 2018, Calgary's average water consumption was 362 litres per capita per day, declining 11 percent since 2012. Though Calgary possesses some of the best air quality in North America, it has recorded over 300 poor air quality events in the past two decades.¹¹⁰ Waste diversion programs have seen landfill use reduced by 50 percent over two decades.¹¹¹ Calgary has also increased resource consumption over the past two decades, which is considered unsustainable. The city's carbon and ecological footprints per capita are the highest in Canada¹¹² and over four times what is defined as Calgary's "fair share" of global resources.⁵ In 2017, Calgary had a population density of 2,473 persons/km² based on a population of 1,246,337 and a built-up area of 504 km². This was an increase of 5.3 percent from its 2012 density.¹¹³ A City of Calgary study estimated that increasing densification over the next 30 years could also reduce taxpayer burden by \$10 billion.¹¹⁴

IMPLICATIONS

Harmonize Multiple Jurisdictions

The Calgary regional creative economy has access to world leading natural resources including mountains, rivers, and prairies. The resources can be used as inspiration in creativity, community gathering places, or as incentives for talent attraction and retention. Our creative economy is not confined by Calgary's borders; it crosses multiple jurisdictions, including three cities, six towns, four villages, two municipal districts and two First Nations. It also encompasses multiple school boards, one national park, and dozens of provincial parks and recreation areas. As a region, we must view the current challenges in the creative economy as an opportunity to increase efficiencies across jurisdictions and align on a shared goal and purpose.



Our creative economy is not confined by Calgary's borders; it crosses multiple jurisdictions, including three cities, six towns, four villages, two municipal districts and two First Nations.

⁵ Fair share is a per capita calculation if every person on earth shared resources equally based on the planet's capacity.



OPPORTUNITY ANALYSIS

Emerging Trends and the Creative Economy

Between 2018 and 2022, 50 percent of employees globally will need to be reskilled or upskilled.

Predicting the future with precision is an impossible task; however, for any movement, macro-level trends and the resulting implications must be considered. Being aware of the context, the global environment, and with thoughtful planning, it is necessary to indicate what is reasonably possible. During the creative economy planning process we will further explore best of class benchmarks and how other jurisdictions are adapting to anticipated trends. At this stage, we provide an early overview of seven macro-level trends to be considered for the future creative economy.

TREND 1: The Competition for Talent

Over the next decade, cities will be increasingly defined by their ability to attract and mobilize human capital. Human capital views competencies as capital, similar to other forms of capital (e.g., financial capital, social capital). Human capital can be viewed at the level of an individual, institution (e.g., enterprise or ecosystem) or city.¹¹⁵

How will talent be defined in the future? The exponential pace of change in many sectors of the economy has transitioned the competition for talent from one focused on domain-specific competencies to one focusing on enabling competencies. Domain-specific competencies incorporate the knowledge, skills, attitudes, values, and behaviours required to complete specific tasks associated with a role (e.g., coding, welding, engineering) and/or a sector (e.g., energy, creative). However, today, employers are searching for people who can adapt and pivot in a constantly dynamic environment.⁶ For example, it is estimated that between 2018 and 2022, 50 percent of employees globally will need to be reskilled or upskilled.¹¹⁶ Calgary Economic Development forecasts that half of the jobs performed by Calgarians today could be at risk of automation over the next 20 years.¹¹⁷ Not surprisingly then, 91 percent of human resource decision-makers view an employee's ability to adapt as a critical competency.¹¹⁸

Adaptive capacity is the ability for an individual to anticipate systematic changes and proactively develop new or refine existing competencies that are valued as demand changes. Adaptive capacity is rooted in possessing enabling competencies. Enabling competencies (also referred to as meta-skills, human-skills, soft-skills, and transferable-skills) is the ability to incorporate the knowledge, skills, attitudes, values, and behaviours required to deliver analytical thinking, interpersonal communication, foundational literacies, and professional competencies across a range of contexts. Mapping the links between the creative economy and enabling competency development will be critical to understanding the systemic economic value of the creative economy.



Photo Credit: Michelle Spice Photography
Devin Cooper & Mariya Stokes, courtesy of RISE UP Weekend 2020

This competition for talent has two direct implications on the creative economy. Firstly, the current labour forces needs to evolve to meet emerging needs. The development of high-valued talent incorporates both enabling competencies and domain specific competencies.

The development of these competencies has traditionally been developed through two mediums: (1) through formal education, encompassing accredited and non-accredited training that contribute to the development of an individual's cognitive and personality resources; and (2) through lived experience, including, professional (e.g., paid), volunteer (e.g., not compensated work) and contextual (e.g., personal experiences, such as travel). The development and refinement of these competencies is also an iterative and nonlinear process, incorporating feedback loops through education and experience. This then provides Calgary an opportunity to leverage its creative economy as a strategic asset to develop demanded competencies that contribute to the city's economic growth and prosperity.

Relating to the creative economy, evidence shows that engagement in creative disciplines contributes directly to the development of valued competencies such as divergent thinking skills. However, the relationship between developing high-demand competencies and an individual's participation in the creative economy is largely informal. This then provides Calgary an opportunity to leverage its creative economy as a strategic asset to develop demanded competencies that contribute to the city's economic growth and prosperity.

The second implication is the ability to leverage the creative economy for talent acquisition. Unlike cities such as Vancouver or Austin, the creative economy for Calgary, at best, has been used as an ad hoc asset for talent acquisition. This remains an untapped opportunity to develop and leverage the creative economy as a foundational asset for the acquisition of talent that is essential for economic diversification and growth.

⁶ For more information on the evolving nature of talent and its impact on Calgary, refer to the *Calgary on the Precipice* reports at [LearningCITY.ca](https://www.learningcity.ca)

The global gaming market exceeds two billion participants or 30 percent of the world's total population.

TREND 2: Accelerating Technological Disruption

In the past two decades, technological innovation has disrupted society. The internet, social media, mobile devices, and big data analytics are only the tip of the digital iceberg. In the future, wireless connections will be built specifically to keep up with the “internet of things.”

The internet and other innovations from social media to mobile devices to big data have redefined the way society produces and consumes media. Currently, there are close to 30 million smartphone users in Canada, increasing to 33 million by 2024.¹¹⁹ A study of US children and teenagers aged 8 to 18 years, found tweens spend five hours a day on screens and teenagers 7.5 hours per day.¹²⁰

With the rapid advancement of the “internet of things,” it is estimated that in 2025 more than 50 billion devices—from your car to your refrigerator—will be connected. Ericsson is predicting 90 percent of all devices will have mobile broadband capability by 2022.¹²¹

Advancements related to artificial intelligence, machine learning and cognitive computing are also going to change lives and careers. For example, when the first Nintendo Wii was introduced over a decade ago, the world had a glimpse of the potential of immersive computing. Computing is no longer a passive activity, rather it is evolving with the potential to be active. The next decade may see explosive growth in immersive visual computing, such as augmented and virtual reality (AR/VR), which may be a technological game changer for the creative economy. Today, 70 percent of the top VR apps use video.

Over the next decade, audiences' expectations of content will continue to be redefined. For example, new 360-degree cameras enable the production of three-dimensional virtual reality video with surround sound to allow a viewer to move within a video wearing a headset.¹²² There will also be significant technological advancements in neuro-coaching and machine medicine. This could include non-invasive brain stimulation to accelerate muscle memory and precision, brain scanning technology to manage cognition and emotion, supplements to accelerate reaction time, immersive visual computing training, RFID tags to track performance, implantable sensors to monitor blood, and technology to help people sleep better.

Driven by these technological advancements in addition to increased social networking and video streaming, the global gaming market exceeds two billion participants or 30 percent of the world's total population.¹²³ In competitive e-sports,

there were an estimated 110 million competitors in 2018.¹²⁴ For perspective, a video game released in 2019, Red Dead Redemption 2, generated \$725 million in sales in its first three days. If Red Dead Redemption 2 were a movie, it would rank as the third largest box office opening in history; larger than any Star Wars or Harry Potter movie.¹²⁵ In fact, three of the top five “opening weekends” in history are held by games, not movies. The growth of e-sports is also represented by the size of the prize pools, which now rival prize pools from the largest professional sports in the world from Wimbledon to The Masters.

Another technological disruption is the advancement in battery technology. This contributes to continued advancement in e-transportation, including electric bikes and vehicles. Similarly, most analysts believe autonomous transportation will contribute to the redefining of transportation.¹²⁶ The positive from this is increased efficiency and reduction of traffic accidents; the negative is the loss of millions of jobs for trucking, taxi and public transportation sectors.¹²⁷ Autonomous vehicles, combined with active transportation, could redefine transportation networks and patterns of movement, significantly impacting broader city level planning.

The variety of technological advancements discussed here creates both opportunities and threats to the creative economy. For example, the explosion of smartphones and other devices has led to the exponential increase in “screen time.” Today, studies suggest that over 80 percent of parents believe that screens are negatively impacting their children from engaging in other activities.¹²⁸

Each ‘device’ and how consumers use them, including social media and e-commerce transactions, generates data. This data is used to predict behaviour and reveal preferences. In other words, every credit card transaction, click on Google, Instagram post and GPS ping from your smart phone generates data that is collected and used by enterprises to increase efficiencies, lower costs, accelerate decision-making, and increase customer satisfaction.

The use of this ‘big data’ will continue to grow over the next decade as the volume, velocity and variety of data grows in influencing critical decision-making in the creative economy. However, one implication on society as a whole, and the creative economy specifically, is increased risk to privacy and its implications. In the creative economy, this may range from financial transactions to personal information and health records that are shared and at risk of being used by others. The ability for enterprises in the creative economy to protect and secure this data is therefore of increasing importance.

TREND 3: From Consumer to Co-Creator

Traditional innovation processes focus on controlling innovation which allows a company to retain ownership of, and control over, knowledge and intellectual property. In other words, this is the exploration of new knowledge and exploitation of existing knowledge in a closed loop and limited to employees within an enterprise. Traditional innovation, however, has limited access to knowledge from external sources; therefore, an enterprise is challenged to effectively tackle the most complex problems.

In contrast, open innovation encourages the development of partnerships and the leveraging of complementary knowledge for innovation from individuals and enterprises across ecosystems. This model, adopted by companies such as Apple, Google and LEGO, recognizes that when you empower people, you accelerate innovation. In this model, an enterprise transitions from being a linear controller of knowledge to becoming a dynamic broker across the entire ecosystem, supporting interconnected processes.

Over the next decade, the role of the creative economy for consumers and other stakeholders will expand dramatically as the system transitions to the open innovation model just described.

Other changes that will impact the creative economy include the democratization of participation. Anyone can be an athlete (e-sport) just as anyone can be a 'reporter' using their iPhone and camera. Today you can capture reality with high-speed cameras; there is no blur and increased resolution and granularity. Simulations and reality are now difficult to distinguish. Social media and the changing world of communication, connectivity, and collaboration allows one to connect with anyone on the planet anywhere, at any time.

Enterprises and ecosystems that have successfully developed open innovation systems have done so systematically. This includes the tangible and intangible processes and structures that facilitate effective collaboration and alignment of individuals and institutions. At this stage, with no shared vision or purpose, the creative economy lacks the core structural capital that underpins the capacity to aggregate individuals and enterprises into one system. Instead, most mechanisms remain limited internally to enterprises, with only limited examples of aggregation at the ecosystem level. The result is risk of system-level duplication and inefficiencies.

The foundation of a shared vision for a creative economy is the commitment to develop the required structural capital for Calgary's creative economy to work as a system. The anchor should include establishing mechanisms for system-wide knowledge mobilization, coordinated experiments and shared open resources.



Photo Credit: Megan Hein Photography
Robotic Suit, courtesy of Beakerhead

TREND 4: Changing Media Consumption

Between 2009 and 2019, media advertising revenues almost doubled in size globally from \$1.2 to \$2.1 trillion. Ironically, the fragmentation of media has led to a concentration of advertising revenues, as both Google and Facebook control one-fifth of all advertising revenue globally.¹²⁹

Concurrent with this financial disruption, technology has transformed how society consumes media, forms opinions, and makes decisions. For example, consumers are no longer at the mercy of broadcast schedules. They can increasingly watch and listen to the programming they want, when they want. The result is that people digest bite-sized stories on Tik Tok or YouTube, often using multiple screens simultaneously.¹³⁰ Today, the average Canadian is online for 40 hours each week.¹³¹

Studies suggest that how society processes information is changing as society adapts from text to video or other forms of content. Some consumers dig deeper, watching embedded videos and follow multiple links to related stories. Others are satisfied with skimming headlines. Today, more so than ever, the medium really is the message.

Moreover, user-generated content, such as social media posts or online reviews, becomes increasingly valuable as trust in brands and large institutions (including governments) is displaced by trust in people. This dynamic has massive implications on how people are influenced and behave. Our reliance on recommendations from trusted friends and family is growing, with a study by the Pew Research Centre showing that 40 percent of American adults define Facebook as a primary news source. In Canada, 60 percent of the population uses Facebook daily and 21 percent defines it as their first source of information. Interestingly, this transcends age groups with 49 percent of those 60 years and older reporting using Facebook daily.¹³²

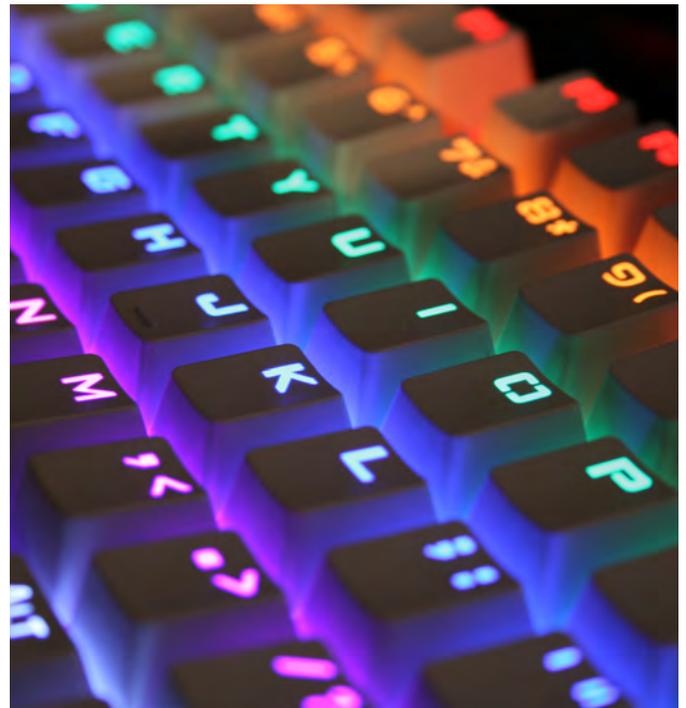
Twitch has also emerged as a potentially game changing media platform that may provide a guide to the future of media. Twitch, owned by Amazon, is a platform that allows you to watch others play video games.¹³³ Twitch averages 2.2 million daily broadcasters or streamers and 15 million daily viewers; 41,000 concurrent broadcasters /streamers and 1.1 million concurrent viewers (CCV).¹³⁴ At peak hours its CCV numbers outpace some of the top-rated US cable channels, such as CNN and MSNBC.¹³⁵ In Alexa's ranking of global websites, Twitch is just behind Netflix and LinkedIn at number 26.

As a platform, Twitch streamers have launched their own channels, and with a webcam and headset microphone, livestream themselves playing games and offering commentary for audiences. Twitch uses algorithms to make content suggestions to users, facilitating navigation. Twitch is also interactive, allowing viewers to comment or ask questions in a chat sidebar, and streamers in turn can react to the posts. Furthermore, Twitch has built features into the program to

The fragmentation of media has led to a concentration of advertising revenues, as both Google and Facebook control one-fifth of all advertising revenue globally.

monetize viewer interests. This includes traditional advertising and sponsorship, but also opportunities for viewers to make donations to the streamers they follow. As part of the interaction that occurs, streamers offer to complete certain tasks or play certain games in exchange for contributions. Streamers can also draw revenue through a base subscription to their channel for a fee that then allows subscribers to comment in the channel's chat.

The changing media landscape is having a similarly significant impact on the creative economy to television's impact in the 1950s. Short-form and user-generated media, such as Twitch or Tik Tok, does not spell the end of long-form storytelling, but it will continue to redefine it over the next decade. Advancements in technology have also triggered a hyper-social generation with unique values and demands. Therefore, story forms, promotional or otherwise, will continue to adapt and evolve from single form to transmedia storytelling, where the consumer is able to seamlessly shift from text to other media.



Story forms, promotional or otherwise, will continue to adapt and evolve from single form to transmedia storytelling, where the consumer is able to seamlessly shift from text to other media.

TREND 5: Social Justice and Change

Many of the other trends resulting from COVID-19, such as technology, demographics, and media consumption, are redefining the relationships between people, and between people and institutions. Over the past decade, there has been a significant decline in trust of institutions such as government, media, corporations, and social enterprises. Amplified through mediums like social media, people's values are framed by the echo-chamber of others who share similar values and views. This creates an increased animosity or fear of those who may not look or think like you. Brexit, the discord around the 2016 and 2020 American presidential elections, and Black Lives Matter are partial reflections of this fundamental breakdown in institutional trust. Edelman, a global public relations firm, conducts an annual world-wide study on trust. In Canada, the following 2020 data reflects the social discontent society is facing:⁷

- 15 percent believe the current social system in Canada is working for them
- 53 percent believe the current social system in Canada is failing them
- 74 percent believe there is a broad societal injustice in Canada
- 69 percent have a desire to see social change in Canada
- 65 percent want to be involved in shaping the future of Canadian society

This data demonstrates the deep discontent in Canadian society and the demand for change. As a result, there are enormous movements occurring which aim to confront core injustices in society, ranging from systemic inequality to the growing wealth gap. As a city and region, Calgary is not immune from this increasing demand for social justice:¹³⁶

- 89 percent of Calgarians are concerned about poverty
- 96 percent believe reducing poverty is important to the wellbeing of the city

In the past 20 years Calgary has emerged as the third-most ethnically diverse city in the country, yet much of the city's leadership does not yet reflect this. For example, of 218 leadership positions surveyed in a study of Calgary boards, councils, elected bodies, and media, 34 percent are held by women, 12.4 percent by visible minorities, and 1.4 percent by Indigenous people. All are significantly below their proportion of the population.¹³⁷

Over the next decade, there will be increasing focus on redressing the country's relationships with our Indigenous partners through the calls to action outlined in the Truth and Reconciliation Report. This redress is not only at a legal and institutional level, but also in the form of education, fulfilling careers, cultural vitality, entrepreneurship and strong family and community ties.



There are enormous movements occurring which aim to confront core injustices in society, ranging from systemic inequality to the growing wealth gap.

⁷ Survey was taken prior to the COVID-19 pandemic. Canadian trust barometer study is located at: Edelman. (2020). Edelman trust barometer 2020. <https://www.edelman.ca/sites/g/files/aatuss376/files/2020-02/2020%20Edelman%20Trust%20Barometer%20Canada%20-%20FINAL%20%281%29.pdf>.

TREND 6: The COVID-19 Longtail

COVID-19 triggered one of the worst economic crashes in recent history, with Alberta's unemployment rate reaching 15.5 percent in May of 2020.¹³⁸ Moreover, 46 percent of Albertans have seen a reduction in their incomes, whether due to reduced hours, pay cuts, cancelled gigs, or layoffs.¹³⁹ The general climate is also less optimistic: even those that have not seen an income reduction are avoiding spending. This is likely to go unchanged even as the economy continues to re-open, as the economic realities of the crisis will still be setting in and consumers will be forced to prioritize their spending.

The live experience economy (inclusive of the creative economy) was one of the worst affected by COVID-19, as most of their revenues stem from large gatherings and in-person interaction. They are, therefore, expected to be one of the last to recover. Although live experience producers account for 15,000 businesses in Calgary, two thirds have five or fewer employees.¹⁴⁰ These small enterprises typically do not have the resources to weather this crisis in the long term.

The arts and culture sector is particularly vulnerable, as it will take even longer to recover than other live experience options. According to *The Future of the Live Experience Economy*, a study completed by Calgary Arts Development, Mount Royal University, the ActiveCITY Collective, and consulting firm Stone-Olafson, arts and culture customers are less comfortable and more hesitant to re-engage compared to other customers such as sports and recreation.¹⁴¹

Some in the live experience sector were able to adapt, offering virtual live experiences such as online exhibition tours or concerts. However, hopes that these virtual offerings will become 'the new normal' are not likely to be met. In *The Future of the Live Experience Economy*, 72 percent of survey respondents agreed with the statement: "I'm getting tired of the substitutes for all the things I used to do," and once the pandemic is over, only 12 percent of Albertans will consider continuing to watch live events or performances digitally, and only 4 percent will consider continuing with virtual exhibits or tours.¹⁴²

50 percent of total consumer spending on music each year goes towards admission for live music events.

Albertans are now placing a higher value on social connections, engaging in virtual experiences that allow them to stay connected with their social groups.¹⁴³ Respondents also show less concern about transmission when they are interacting within their known social groups. With a high demand for safe live experiences that allow for social interaction, there is an opportunity to offer Calgarians a different kind of live experience that can give them a feeling of connection without fear of virus transmission.

Some creative economy enterprises were able to pivot their business models fully or partially, while most suspended operations, hoping to reopen when there was a return to 'normalcy'. Those who adapted their programming varied from altering their distribution to reassessing the sustainability of their entire business model.

The long-term fallout from COVID-19 remains unknown and will largely depend on the real and perceived threat of the pandemic to Calgarians and creative economy consumers. We have identified two near-term implications for the creative economy: operational and facility design.

Operational implications include the increased demand for sanitation and hygiene, and financial impact through reduced access to private or public funding. This also considers the organizational implications tied to risk management systems and insurance. In some cases, the market dynamics may lead some of these enterprises to fully exit a business model that requires physical interactions. In other cases, enterprises may see a path forward that blends both touch and no touch offerings into a unique and compelling value proposition. Finally, the path forward for some creative economy sectors may be identical to the path that got them here. What is needed is patience, strategic investment, planning, and a focus on short and long-term sustainability.

The second near-term implication will be on the design of facility infrastructure. This will include smaller spaces for smaller group activities and designing egress to provide greater physical distancing. An outstanding question remains regarding the large arts venues and the impact of COVID-19 on longer-term demand.

Adaptability of the Live Event Sector

- Virtual live experiences include online exhibition tours or concerts.
- Virtual offerings will probably not be the 'the new normal'.
- Only 12% percent of Albertans will consider continuing to watch live events or performances digitally.
- Of survey respondents, 72% agreed with the statement, "I'm getting tired of the substitutes for all the things I used to do".
- Only 4% will consider continuing with virtual exhibits or tours.

Sustainability is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs.

TREND 7: Sustainability at the Centre

Care for the environment and sustainable development are not new trends. However, driven by the effects of climate change, ranging from increasing forest fires to flooding, sustainability is a priority at the federal, provincial, and municipal levels.

Broadly speaking, sustainability is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs. This definition recognizes that development is essential to satisfying human needs and improving quality of life, but that it must be based on the efficient and responsible use of natural, human, and economic resources.¹⁴⁴



Opportunities for Calgary

A SWOT (strengths, weaknesses, opportunities, and threats) analysis and PESTLE (political, economic, social, technological, legal, and environmental) analysis were completed to better orient Calgary's creative economy based on its internal drivers and wider trends that might affect its outcomes. These analyses allow us to build a roadmap for success that utilizes our strengths, builds capacity to improve our weaknesses, mitigates potential risks, and seizes opportunities to become leaders in trends that will shape the global creative economy. A full SWOT and PESTLE analysis can be viewed in APPENDIX 3.

STRENGTHS

Though Calgary's creative economy landscape trails behind other major Canadian cities, we already see the financial benefit of an arts and culture focus. For example, prior to COVID-19, the Calgary Stampede, which has a major creative and experiential component to its programming, generated \$540 million in annual economic impact for the city.¹⁴⁵ Some other key contributions include:

- Creative industries directly contributed \$2.1 billion to Calgary's GDP in 2016.¹⁴⁶
- Creative industries' total economic footprint, when considering supply chain impact and wages, reached \$3.85 billion in 2016.¹⁴⁷
- Tourists visiting Calgary spent just under \$71 million on creative industry goods and services in 2016.¹⁴⁸
- The average labour productivity per worker in creative industries is over \$90,000 of GDP per job.¹⁴⁹
- This economic impact resulted in \$48.8 million in municipal tax contributions and \$238.1 million in provincial tax contributions.¹⁵⁰
- There are 12,000 creative enterprises in Calgary. Many are self-employed individuals; however, these enterprises employ an additional 32,000 people in total.¹⁵¹

This economic impact is reflected in Calgarians' participation in the arts. In a 2018 survey, 93 percent of Calgarians reported being connected to arts and culture in some way.¹⁵² In a 2019 survey, 41 percent of Calgarians reported regularly attending live music performances, and 51 percent regularly attended community festivals.¹⁵³ According to the Conference Board of Canada, Calgary's creative economy could also have a major role to play in addressing some of its less tangible challenges, including "the retention of students and professionals aged between 20 and 40, people's perception of downtown Calgary as not livable, and the belief, among many Canadians, that Calgary does not offer a comparable level of arts and culture to their current home city."¹⁵⁴

Nationally, live music in particular is a strong industry. In Calgary, 50 percent of total consumer spending on music each year goes

\$3.85
BILLION

Creative industries' total economic footprint when considering supply chain impact and wages in 2016

towards admission for live music events. The city has a strong music industry, generating an output of \$1.6 billion in 2017. The industry has further employed 8,435 people receiving a total compensation of \$495.9 million.¹⁵⁵ In terms of Calgary's live music infrastructure, the Calgary Stampede remains a cultural staple in the city, and a new event centre is in development. On a national level, large amounts of tourism spending are concentrated in live events. Calgary is strong in this respect, receiving over \$70 million from tourism spending on creative goods and services.¹⁵⁶ Research shows that a vibrant live music scene contributes to attachment and a strong sense of place for a city, which will be crucial in the years to come as Calgary moves to shift from an oil and gas-oriented economy and identity.¹⁵⁷

Labour productivity is currently high in Calgary's creative sector. The strengths identified in the photography and advertising industries on the national level are reflected in Calgary, with a high GDP output per job in these industries.¹⁵⁸ This speaks to the broad trend toward technological advancement in both industries, which is fostering ease of entry and localization. Furthermore, with a high level of sector collaboration between photography and advertising, a correlation can be inferred that highly collaborative industries result in high labour productivity in Calgary. This is supported by the Conference Board of Canada, who states that high labour productivity can be seen in "culture industries that affect more than one culture domain and cannot easily be allocated to a single domain, such as the culture portion of convention and trade show organizers and of internet publishing and broadcasting and web search portal industries."

Alberta's film industry, the fourth largest in Canada,¹⁵⁹ is a notable creative sector in the midst of an unprecedented year of growth in 2021.¹⁶⁰ Alberta's unique landscapes, the exchange rate of the Canadian dollar, and government incentives make up the major draws for productions. Calgary, specifically, has the Calgary Film Centre, the recently opened Fortress Studio, and other spaces that provide the necessary infrastructure to handle large productions. Previous notable Calgary-based productions include Heartland, Wynonna Earp, Ghostbusters, and The Revenant, which have built up a pool of experienced local film crews. Other projects such as recent New York Times critical pick, Land, have furthered international recognition and put a spotlight on Alberta's natural beauty.¹⁶¹ Moreover, The Alberta government announced it was boosting the province's film and television tax credit by \$19.5 million to \$50 million and is eliminating the \$10 million per-production tax credit cap.¹⁶² Overall, Calgary is in an ideal position to take advantage of the film industry's growth over the coming years.

Localization and technological innovation are also strong points for Calgary's creative economy. Looking at concert promotion specifically, advancements in online data collection is allowing promoters to use analytics to create more targeted campaigns, increasing engagement with the live economy.¹⁶³

W WEAKNESSES

Despite Calgarians' commitment to the arts, creatives in this sub-sector of the creative economy face significant challenges. They typically see low wages for their work: the average annual salary for musicians, for example, is just \$23,000.¹⁶⁴ They also lack the government resources and professional development services to support their success in the industry, all of which has been made worse in the current crisis.

Calgary's creative economy has surpassed that of other Canadian cities in terms of growth. Yet, it still lags behind in several areas:

- When compared to other Canadian cities, Calgary has less access to resources and services for creatives and fewer policies supportive of arts and culture activation.
- Calgary is also below average when comparing the share of creative industry businesses to the total number of businesses across Canadian cities.¹⁶⁵
- In a survey of music industry professionals, 74 percent state that they lack professional support services. They also lack access to professional development training like marketing and PR, grant writing, and financial management.¹⁶⁶
- When music industry professionals were asked to rank aspects of Calgary's arts ecosystem, those aspects rated among the worst included collaboration with tourism agencies, grants and investment in the sector, ease and accessibility of special event permits, and laws and regulations for live venues.¹⁶⁷

Reliance on government funding fluctuates depending on the creative industry. When looking at the music category specifically, 20 percent of revenue comes from the government, primarily from the provincial government. This could pose an issue of sustainability as policies may be subject to change and government revenue is largely determined by individual and corporate income taxes, which fluctuate with the strength of the economy. The direct labour productivity of music (sound recording and music publishing) in the creative sector is also low compared to other categories. While Calgary's live music/festival industry remains prominent in the economy, support may have to be considered for parts of the industry not associated with live performances. Sound recording appears to have the least reliance on government funding compared to other creative industries such as audio, visual and interactive media, and live performances.¹⁶⁸

While the photography and graphic design/advertising industries are seeing high sector collaboration and high labour productivity, in part thanks to technological advancements, these industries are fragmented and appear to have low revenue per employee. The two industries are seeing a high level of freelance and contracting work, posing potential needs for more available

creative workspaces and support systems. Photography and graphic design/advertising fall under the "Visual and Applied Arts" domain under the Conference Board of Canada's classification.¹⁶⁹ This domain is one of the largest contributors to the direct GDP of Calgary's creative sector. As technological advancements will continue to decrease barriers to entry for not just photography and graphic design/advertising, but for many creative industries, more players will enter, contributing to further fragmentation. While this fragmentation can contribute to an increase in sector collaboration in the right conditions, sustainable growth of industry players may be a surfacing issue.

The live concert and event promotion industry is conversely seeing low sector collaboration with high capital requirements to enter the industry. This may be less of a problem upon the completion of major development projects, such as the Rivers District Master Plan and new entertainment centre on the Stampede grounds, which aim to create spaces for small businesses, foster collaboration, and attract local economic activity.¹⁷⁰ Technology does appear to be allowing the industry to better connect with customers via mobile advertising, which could increase audience sizes and create greater demand for more live experiences if more Calgarians are aware of events and concerts happening in the city.

Creative engagement appears to be a weak point regarding Indigenous artists in the music industry. A report commissioned by West Anthem identifies a strategic music opportunity to "work with Indigenous communities to integrate Indigenous music education programs into the provincial curriculum," and to further create a music export program.¹⁷¹



OPPORTUNITIES

Technological advancements, such as the digitization of content, are having an increasing influence on the creative economy. The broadcasting industry, for example, has had a steady decline in revenue in Canada since 2014. This trend is inversely connected to trends in internet use, which is now Canadians' number one avenue of media consumption. On average, Canadians spend almost six hours on the internet each day, compared to just over three hours watching TV (broadcast, streaming, etc.). While broadcasting still remains a significant creative industry, companies will have to consider adapting to the changing consumption patterns of Calgarians, which appear to be shifting towards streaming and online media. In large part, broadcasting represents an analogue (television) style of consumption.

For many creatives, the rise in tech presents a need for clarification on content rights and legal protections. Current content laws made by the Canadian Radio-television and Telecommunications Commission are only focused on support for radio and television.¹⁷²

There further appears to be a rising influence from alternative modes of funding and compensation. Blockchain, for example, surfaced as a way for artists to receive equitable compensation after frustration and multiple lawsuits arose with Spotify's payment practices. Alternative compensation presently exists in Calgary: Calgary Dollars launched digitally in 2018 with the goal of keeping spending in the local economy. Currently, over 150 businesses use Calgary Dollars.¹⁷³ The rise in a desire for alternative funding could speak to a need for stronger local support for the creative economy. Alternative funding in the form of blockchain has been observed in the US. Presently, sound recording and music publishing only account for a small portion of direct GDP of Calgary's creative sector in comparison to other domains; understanding barriers to funding may be key in growing this sector.¹⁷⁴

In terms of creative spaces, West Anthem highlights that "57 percent of Calgary based organizations said they would welcome operational grants and tax incentivization programs, funding and sponsorship support, and the provision of affordable performance, work and rehearsal spaces."¹⁷⁵ The same report states that about half of festivals expressed a desire to collaborate with the tourism sector. With the fragmentation that is prevalent in several industries in Calgary's creative economy, creating opportunities for freelancers, independent contractors, small businesses, and non-profit organizations to come together, whether in physical spaces or through organized programming, could be essential to the growth of these industries. The growth of this "gig economy," or the temporary nature of creative workers' sources of income, could reflect an additional need to invest in creating further resources to support these workers. In doing so, Calgary could further grow its creative economy and encourage creative talent to stay in the city by fostering a more gig-friendly climate.

Alternative educational models are also emerging in Canada as a way to engage young people to address civic problems in a collaborative, hands on fashion. The Rockefeller Foundation, 1UP Toronto, CITYSTUDIO Vancouver, and Mount Royal University's Catamount Fellowship all provide different models to directly engage both students and organizations in the community. In collaborating in this fashion, students, universities and organizations are able to make connections, understand community functions, and advocate for change. A similar model of learning could be implemented across industry lines in the creative economy in such a way that creative students can get industry experience, creatives could have a workspace, and connections could be fostered between creative organizations.

Alberta's music sector contributed \$2.1 billion to the provincial GDP in 2017, and it has shown steady growth.¹⁷⁶ Between 2010 and 2017, Alberta's music ecosystem grew by 25 percent while culture industries showed a more modest growth of 17 percent.¹⁷⁷ Calgary makes up the largest portion of the province's music scene, accounting for 37.3 percent of the provincial music GDP. It also has a storied music history and foundation which includes the Calgary Stampede. Moreover, Calgary's Music Mile along 9th Avenue SE is a host to various music assets from The Blues Can in Inglewood to Studio Bell (home of the National Music Centre) and the King Eddy in East Village.¹⁷⁸ With investment and a cohesive, city-wide approach, Calgary has an opportunity to shape its identity around music especially in the context of a post-COVID economic recovery, for which the federal government has earmarked \$70-million nationally over three years to support musicians and music venues.¹⁷⁹

For many creatives, the rise in tech presents a need for clarification on content rights and legal protections.

T THREATS

Low revenue growth, digitization, and a fractured industry are all mounting issues in the creative sector on the national level. With the large rise in streaming services in Canada, there is a threat to the audio-visual and interactive media domain, most specifically to broadcasting which is the largest contributor to GDP in Calgary's creative sector. Digitization will also have an effect on the written and published works category, most specifically on periodicals and newspapers as news consumption is likely to follow the same trend of digitization as books.¹⁸⁰

Regarding movie, television, and video production in Canada, film and video account for \$80.5 million in direct GDP in the creative sector, less than broadcasting and interactive media. A possible threat for growth in this industry is the prevalence of US content in streaming services. The US represents a large creative output, as does Toronto and Vancouver here in Canada. Though Calgary is currently seeing unprecedented growth, to see this trend continue, the city may have to consider cross-city collaborations. Effective policy implementation, collaboration, and capacity building could be critical factors in sustaining the important growth in Calgary's film industry so that it can remain a key strength of our creative economy and creative identity.

Many creative economies are sensitive to the per capita disposable income of consumers.¹⁸¹ Subscription models can be seen as a way to circumvent downturns as a music or video subscription encourages continued support. The challenge is to build a structure that achieves similar results in the context of the local creative economy, in which Calgarians, and national and international content consumers, will be exposed to local creative media and feel compelled to support it.

According to the United Nations Conference on Trade and Development, the climate crisis, limits to growth, intellectual property, copyright, digitalization, e-commerce platforms, the future of work, terms of trade, and access to distribution networks are all possible levers for change in the creative industry.¹⁸² These themes are all pressing issues for the development of Calgary's creative economy.

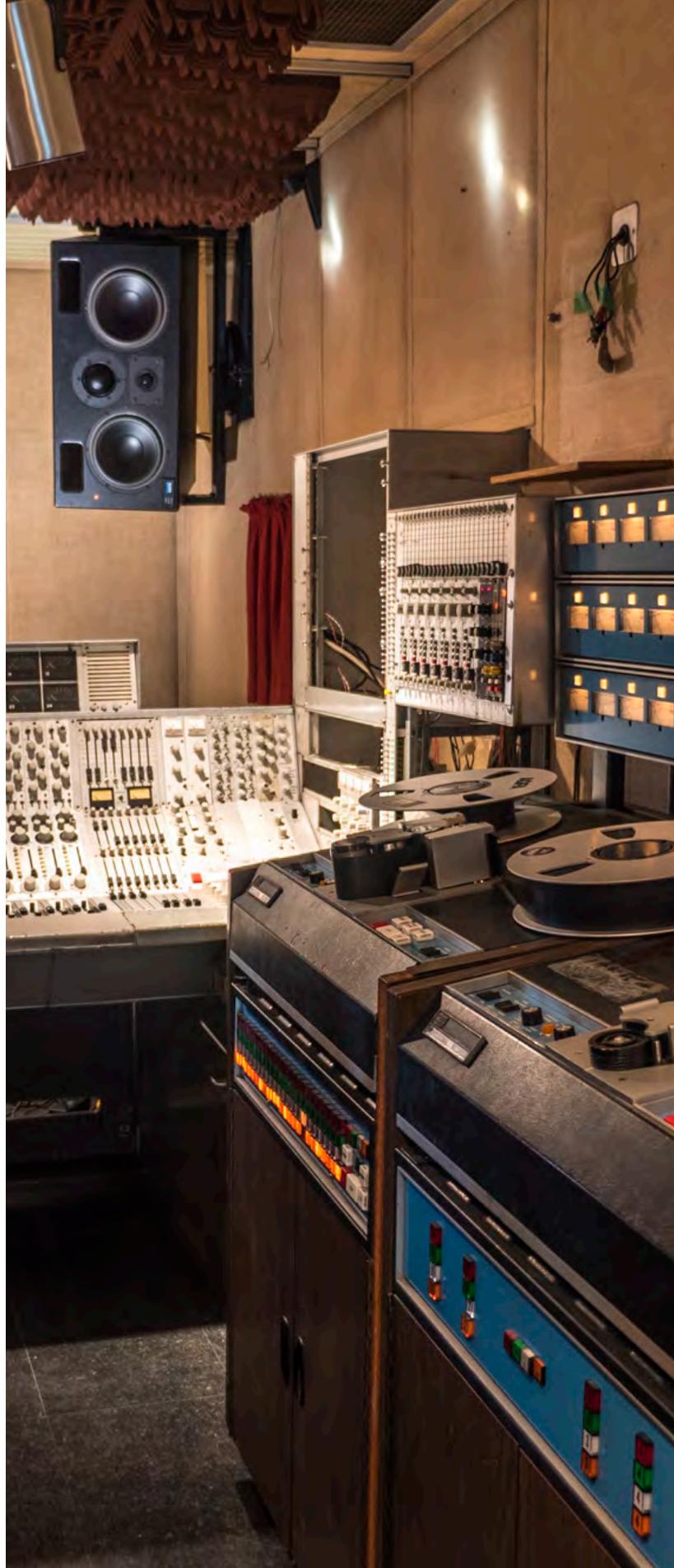


Photo Credit: Brandon Wallis
Rolling Stone Mobile Interior, courtesy of Studio Bell



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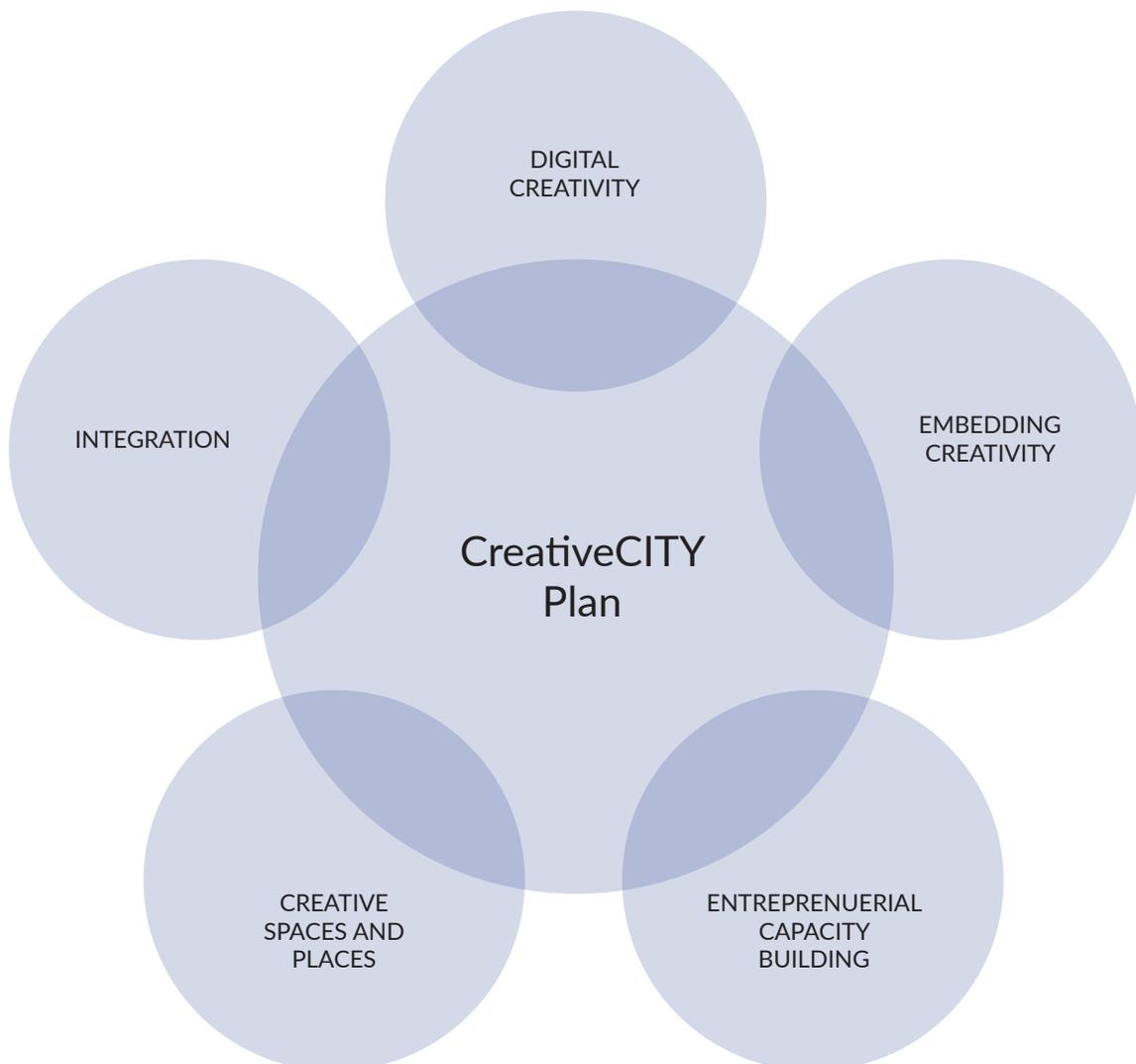
BEING INSPIRED:
CREATIVE SUCCESSES

Being Inspired: Creative Successes

In reviewing best-in-class creative cities across Canada, the US, and the world, five key themes were identified for which Calgary could align its own creative economy policies:

- Driving digital creativity
- Entrepreneurial capacity building
- Investing in creative spaces and places
- Integration through stakeholder collaboration
- Embedding creativity into decision-making

Incidentally, these themes already align with Calgary Economic Development's strategy, *Calgary in the New Economy*, which identifies talent, innovation, business environment, and place as its four key pillars. Working in collaboration with stakeholders from various supporting organizations and industries, Calgary can explore whether these five themes will also become best practice policies for our city.



Creative Successes Around the World

BRITISH COLUMBIA: New Media and Post-Secondary Education

BC's New Media sector—including video games, software, and internet-based entertainment—is the fastest growing creative subsector for the province, with interactive games leading this growth.¹⁸³ With revenues of over \$2 billion a year from over 1,000 companies, new media in BC is supported by a variety of creative and tech institutions with post-secondary programs geared toward building capacity and talent in the industry. These programs include:

- New Media Design and Web Development diploma at BCIT¹⁸⁴
- New Media + Sound Arts Major at Emily Carr¹⁸⁵
- Master of Digital Media at Simon Fraser University¹⁸⁶
- Digital Design Program at the Vancouver Film School¹⁸⁷
- Several digital media courses in the Media Studies bachelor program at UBC¹⁸⁸

Many of these programs also promote further career development for graduates in the form of industry connections. The technologically-focused arts programs provided by many of BC's post-secondary institutions illustrate the province's commitment to growth in this booming subsector.

Local Lessons

Post-secondary institutions' focus on aligning their creative programming with growth industries in BC and fostering further opportunities for career development through industry partnerships highlights a pathway to create the talent required to service growing creative industries.

BUENOS AIRES: IncuBA

With a goal of boosting creative entrepreneurship and creative businesses, the city of Buenos Aires created IncuBA, an assistance program aimed at aiding projects that are based on “design, creativity and innovation.” IncuBA stimulates creative production by focusing on creating networks where entrepreneurs with different competencies can share experiences and skills. The program offers four key resources: a maintained physical incubation space that encourages innovation and collaboration, phone and internet services, tech assistance and tutoring, and access to networking opportunities. To ensure that the most promising projects receive support, entrepreneurs are interviewed by sponsors and present their project to an evaluation committee. The program has so far assisted more than 140 businesses.¹⁸⁹

Local Lessons

The IncuBA program could serve as an inspiration for exploring how funding institutions could move away from the traditional granting model for creative-based ventures towards a model that builds capacities by creating opportunities for creation, cross-industry collaboration and resource-sharing.

SEATTLE: The Creative Advantage

The Creative Advantage is an initiative launched by Seattle Public Schools to provide equitable access to arts and arts education for students city-wide, including lessons on having a career in the arts. Through a comprehensive study completed to identify where access to arts education was lowest, they found that minority groups including children of colour, children from low-income households, and English language learners were most in need. After its first three years of implementation, over 5,000 elementary school students are now in music classes, and elementary schools providing music and visual arts programs have more than doubled. Student access to artists and community-based arts organizations is also increasing.¹⁹⁰

Local Lessons

As one of the most diverse cities in Canada, Calgary has an opportunity to consider whether its diverse populations have equitable access to creative resources and education. This could be particularly important during school-age years while kids are developing creative capabilities that will be used later in their careers. Getting kids passionate about creativity is also a way to ensure the long-term sustainability of the creative economy.

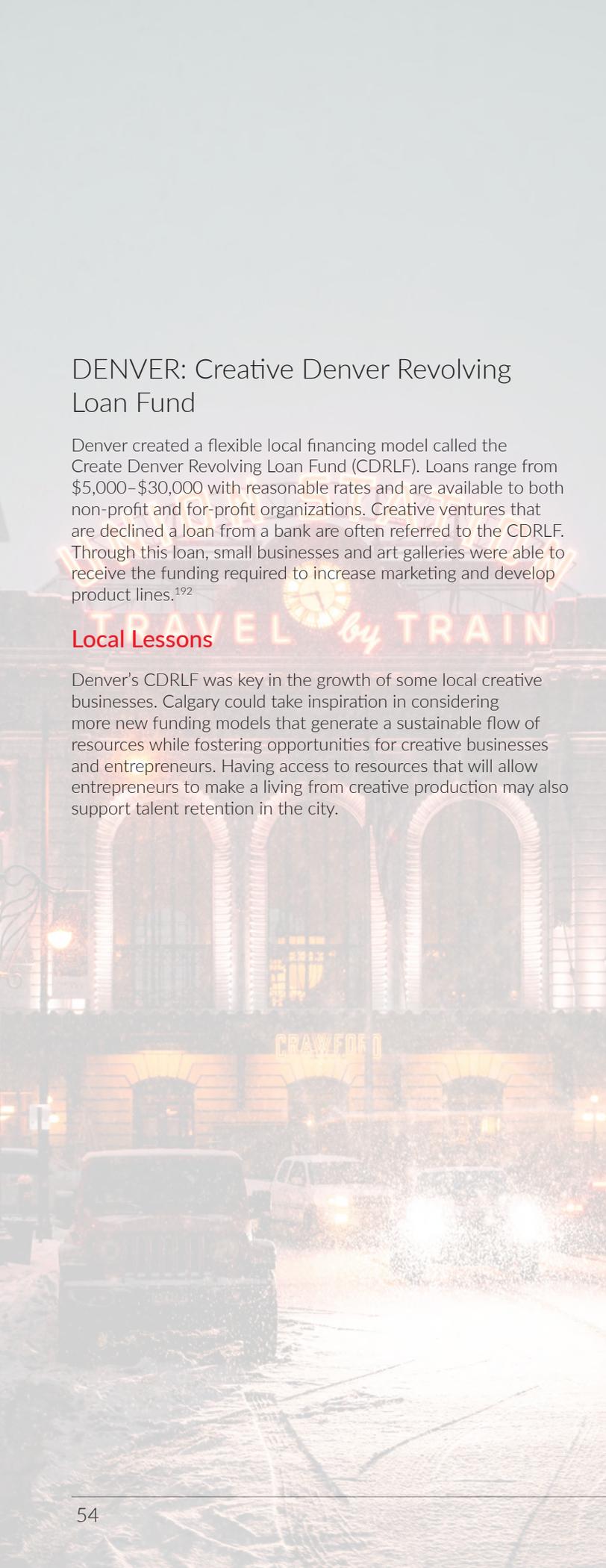
LONDON: Creative Enterprise Zones

Recognizing the explosive growth of the creative economy in the UK, London recently established six creative enterprise zones to help encourage creative workspaces, creative job and education opportunities, and cross-sector collaboration. The zones focus on four key themes: space, skills and support, community, and policy. Each is designated for a particular segment of the creative economy to draw similar businesses, organizations, and individuals to one area.

In total, over 40,000 square meters of affordable workspace is to be created across the six zones. The Croydon Creative Enterprise Zone, for example, has an objective to develop its rich musical heritage by designating over 4,000 square meters of creative workspace (studios, hot desks, etc.), operating a paid cultural internship programme with a focus on young people, and providing a subsidy scheme for young adults (under 25 years) to cover their costs for creative workspaces.¹⁹¹

Local Lessons

As Calgary's downtown vacancy rate remains high, Calgary has an opportunity to take a more strategic approach to incentivizing the use and refurbishment of vacant buildings in the downtown core for creative uses, creating affordable spaces for creatives, attracting new businesses, and encouraging collaboration.



DENVER: Creative Denver Revolving Loan Fund

Denver created a flexible local financing model called the Create Denver Revolving Loan Fund (CDRLF). Loans range from \$5,000–\$30,000 with reasonable rates and are available to both non-profit and for-profit organizations. Creative ventures that are declined a loan from a bank are often referred to the CDRLF. Through this loan, small businesses and art galleries were able to receive the funding required to increase marketing and develop product lines.¹⁹²

Local Lessons

Denver's CDRLF was key in the growth of some local creative businesses. Calgary could take inspiration in considering more new funding models that generate a sustainable flow of resources while fostering opportunities for creative businesses and entrepreneurs. Having access to resources that will allow entrepreneurs to make a living from creative production may also support talent retention in the city.



AUSTIN: Creative Economy Priority Program

Austin's success in the creative economy is in part due to the establishment of eight guiding sustainability goals for the City, including growing and investing in the creative economy, housing affordability, workforce development, and access to transportation. These goals are managed by cross-departmental teams who ensure each goal is embedded into the City's decision-making processes and is considered with every policy change so that they are not addressed in isolation. This program enables Austin to take a holistic approach to developing their creative economy.¹⁹³

Local Lessons

Approaching Calgary's creative economy through a systems lens that incorporates other key development areas and embeds creative economy considerations into City decision-making processes could be a key to success.

SANTA FE: Creative Marketing Funds

Santa Fe's "Lodger's Tax for the Arts" is a hotel tax that uses proceeds to incentivize creative organizations to play a role in tourism by giving funding for advertising and marketing. This policy allows for collaborative regional, national, and global arts marketing for the city. Santa Fe also has a Collaborative Arts Marketing program which helps foster citywide, multi-partner arts events by providing funding for advertising, publicizing and promoting tourist-related attractions, facilities and events. To qualify for funding, projects must be implemented by three or more non-profit organizations.¹⁹⁴

Local Lessons

Though vital for creative businesses and freelancers to attract customers and generate exposure, marketing can be a significant expense that is often not covered by grants. Santa Fe's programming highlights the importance of cross-sector collaboration and resource sharing to reduce operating and marketing costs, and to generate a greater collective impact. They also highlight the potential for leveraging creative professionals and organizations as active participants in the growing tourism industry.

TORONTO: Music City Alliances

In 2013, Toronto established a formal music alliance with Austin to further industry trade, export and mutual growth opportunities. The trade and export alliance works with private industry leaders in both cities to "encourage joint programming and exhibitions, meaningful trade partnerships for music products and services, and enable the growth of new commercial music business ventures by acting as a gateway for emerging entrepreneurs as well as established professionals."¹⁹⁵ This alliance has increased trade and export for local music businesses, created new opportunities for Toronto talent abroad, allowed for shared learning and best practices with other music-friendly cities, and encouraged cross-promotion of music tourism. The project has been so successful that Toronto has inspired outreach from other major cities like Chicago, New York, and Sydney.

Local Lessons

Creative industries cannot be viewed with only a micro-local focus: professionals and their content regularly travel across borders and will migrate to top creative cities for greater opportunities. Creative partnerships could generate shared benefits, further increase market exposure for local creatives, and attract new creative talent from other jurisdictions.

MONTREAL: High Tech/High Touch

Montreal's 2017-2022 Cultural Development Policy aims to make Montreal a leader among smart cities by shifting to an "incubator conducive to experimentation." A key pillar in the policy is the "High Tech/High Touch Principle"¹⁹⁶ which focuses on incorporating digital technology into venues, including implementing an assistance program for the digital upgrade of private performance halls. The city's Public Libraries Network has also adopted this principle, leading to significant increases in visitors. Here, libraries have become centres for the city's digital ambitions by democratizing technology: they have made tech and creative tools such as 3D printers available to the general population in the form of Fab Labs (fabrication and creation labs). Through these labs, Montreal has provided incubation space where aspiring entrepreneurs and creatives can access the technological tools needed to succeed.

Local Lessons

Montreal's strategy to increase digital access in the creative economy through publicly-accessible incubation spaces addresses an important need to reduce barriers to accessing the tools that aspiring creatives need for production.

HONG KONG: Hong Kong Design Centre

Creative industries are a large economic driver in Hong Kong with over 43,000 cultural and creative industry-related establishments in the city. Design, television, film, and music are among the largest sectors in the economy.¹⁹⁷ The Hong Kong Design Centre was created by five designer associations. The centre is strongly supported by the government to promote design as a "value-adding activity." They accomplish this by fostering design-related education and positioning the city as a leader in innovation and creativity. The major annual event that the Design Centre hosts is Business Design Week. Here, the centre partners with delegates from other countries (recently Japan, Denmark, Sweden, United States, and others) to host the most recent design and business influencers in a cross-sector forum on the strategic value of design and innovation. The event is a valuable networking tool and has elevated Hong Kong's creative influence in the region.¹⁹⁸

Local Lessons

The Hong Kong Design Centre is an excellent example of how collaboration can foster mutual success: by bringing design stakeholders from across the city together, the centre was able to make a global impact. It also allowed for cross-city and cross-country collaborations, which could further be a significant tool in growing Calgary's reputation as a creative and cultural city.

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ATLANTA: Airport Shorts

In 2017, Georgia was named the number one filming location in the world, according to Film L.A., with the industry having a large impact on the state's economy. The sustained growth of the industry is largely thanks to infrastructure investment in the sector, but it is also thanks to initiatives aimed at growing the local film scene.¹⁹⁹ The Airport Art Program in Atlanta “develops and integrates art, exhibits and performances into the fabric of the Airport environment for the benefit of passengers and employees.” The program commissions artists for a variety of exhibitions and performing arts to showcase in the airport. In collaboration with the program, the Atlanta Film Society has also developed “Airport Shorts” to showcase short films throughout the Maynard H. Jackson Jr. International Terminal. The commissioned films are shown throughout the year to over 14 million travellers. The project is open both nationally and internationally with special consideration for Georgia-based filmmakers.²⁰⁰

Local Lessons

Airport Shorts is a simple example of how a city can highlight its creative economy to international travellers. It is an opportunity to generate tourism while giving local filmmakers and artists an opportunity to showcase their work to a broader audience.

Creative Successes at Home

MARKET COLLECTIVE

Market Collective provides a platform for growing artists, musicians, and creative entrepreneurs to gain exposure in the city through large-scale, seasonal markets. They host several markets and pop-up shops, typically in the downtown area, where local creatives and businesses can sell their products to the public while retaining 100 percent of their sales revenue.²⁰¹ In addition to providing a platform for vendors, Market Collective also supports musicians and local food vendors, featuring food trucks, and local bands and singers at the major markets. The markets can be seen as a significant cultural event in the city, offering Calgarians another opportunity to connect with local creatives and support small businesses.²⁰²

Local Lessons

Market Collective is a strong example of how local entrepreneurship can flourish in a strong creative network and at a significant cultural event in the city. Market Collective also demonstrates that there is a demand for local creative products.

MOMENTUM

Momentum is an organization that uses a holistic approach to address many economic challenges Calgarians face. Work is focused on research used to inform public policy, programs and services for low-income individuals, and supports for communities and local businesses. Notably, Momentum provides a self-employment program and microloans for individuals who want to start a business and need extra support. Access to the self-employment program is focused on low-income and unemployed residents, residents who have an existing EI claim, or residents who are working less than 20 hours a week. The program is not limited to any particular industry, and it can support creative professionals seeking to launch a viable business.²⁰³ Those who have completed the self-employment program, or another business training program, are eligible to receive a microloan of up to \$10,000. This resource is open particularly to those who are unable to finance their start-up through a bank or credit union.²⁰⁴ Momentum has also featured local artisans in a small-scale Christmas market similar to that of Market Collective.

Local Lessons

The self-employment program and microloan funding model provide a strong case for more accessible funding for low-income individuals. They also demonstrate that low-income individuals can benefit from a reasonable lending program, rather than grant funding, to start a business. Finally, the self-employment focus is especially pertinent to the creative economy where most creative workers operate within the gig economy.



CSIF WORKSHOPS

The Calgary Society of Independent Filmmakers (CSIF) is a non-profit, artist-run centre that provides affordable access to workshops, equipment, space, and mentorship for emerging filmmakers. Members also receive discounts from community partners such as The Camera Store, Quickdraw Animation Society, and the Calgary Underground Film Festival. Their workshops include music video creation, introduction to editing, Digital Bolex, and directing post-COVID-19.²⁰⁵ CSIF further connects emerging filmmakers with several potential funding resources, such as the Telefilm Talent to Watch program which funds features and web-based film projects.²⁰⁶

Local Lessons

CSIF provides advanced technical tools, professional development opportunities, and a support network for emerging filmmakers. Providing this space for local creatives to connect and learn is a valuable asset in developing a growing film industry.

cSPACE KING EDWARD

cSPACE King Edward is a creative hub at the intersection of art and business located in a retrofitted historical school. The space aims to spark innovation through a collaborative, co-working model. It hosts over 30 tenants that include “artists (craft artists, dancers, performers, filmmakers and literary groups), creative entrepreneurs, and culture and community non-profit organizations.” cSPACE’s mission is threefold:

- Shared space - affordable and adaptable spaces that consider the changing needs of artists and provide a place for Calgarians to gather.
- Vibrant community - opportunities to engage with the community.
- Cross-sector collaboration - workshops and mentorship to promote creative entrepreneurship.

Some tenants include Sage Theatre, The Rozsa Foundation, Calgary Association of Lifelong Learners, and Calgary Allied Arts Foundation. cSPACE is also a multi-purpose space, hosting mobile grocery stores, vendor markets, boardroom rentals, and more.²⁰⁷

Local Lessons

cSPACE is a valuable example of a cross-sector incubation space that encourages collaboration and engagement. The use of a retrofitted building further highlights how we can develop creative infrastructure.



Photo Credit: Bruce Williams Photography
Film Workshop, courtesy of CSIF

CALGARY ALLIED ARTS FOUNDATION

The Calgary Allied Arts Foundation (CAAF)—located in cSPACE—is a non-profit organization that provides support for artists through residencies, galleries and exhibitions. They also advise the City on implementing policies and procedures regarding the development of visual arts in Calgary. Artists can apply for a residency lasting between one to three months. During that time, they receive a cash stipend, studio space, adjustable lighting, high-speed Wi-Fi and fibre connectivity, and opportunities to work with other artists. Throughout the residency, there are opportunities for programming and open studio hours, and upon the completion of the residency, CAAF provides a potential exhibition opportunity.²⁰⁸

Local Lessons

A residency model could act as a catalyst to kickstart creative professionals' careers. It can remove notable barriers that many creatives might face, such as lack of physical space, networks, and exhibition opportunities.

AE WEST - CANADA'S MUSIC INCUBATOR

In partnership with the National Music Centre and as an extension of Canada's Music Incubator (CMI) Artist Entrepreneur program, AE West supports music artists in western and northern Canada.²⁰⁹ The annual program is conducted over five weeks and covers all aspects of building a career in the music industry including building a business, live gigs and touring, copyright and royalties, streaming and radio, branding and marketing, and more. Ongoing access to CMI's mentors is further provided for musicians upon completion of the program. The program can be very affordable, as much of CMI's costs are subsidized (out-of-pocket cost is \$1,600 + GST).²¹⁰

Local Lessons

The music program demonstrates how short, flexible, and affordable educational models, along with a support network from working professionals, can help boost a creative's career and give them the resources they need without having to travel to other major music cities.



Photo Credit: Hero Images
Studio Space, courtesy of CAAF

PARK

PARK is a Canada-wide fashion organization that aims to “support aspiring and established entrepreneurs from all creative industries.” They create opportunities for designers and artists to share their work. These opportunities include PARKLUKE, a fashion show and art exhibition with a focus on established, high-end designers, and PARKSHOW, a fashion and art showcase with a focus on giving emerging artists and creative entrepreneurs brand exposure. The organization also runs PARKFORUM, described as “an educational seminar focused on teaching creative entrepreneurs how to grow and sustain their businesses.” Furthermore, PARK works with international brands to develop Canada’s fashion and arts scene through PARK Production House.²¹¹

Local Lessons

Through PARK’s initiatives, local designers are able to gain exposure on the national and international stage. The organization also highlights the importance of career building education in addition to industry support.

FUSE33

Calgary’s largest makerspace, Fuse33 provides a plethora of both hardware and software tools available for hobbyists, students, and creative entrepreneurs through a membership-based service. They also provide workshops, classes, and certifications in woodshop, metal work, 3D printing, laser cutting, and more. Included in their fees, members access a number of tools, class discounts, and collaboration opportunities.²¹²

Local Lessons

Fuse33 addresses a major gap in access to tools and technology for creative start-ups. Access to the tools and space required for creative production, in addition to affordable capacity building opportunities can give creatives a means to start and grow a career in the creative economy in Calgary.



Photo Credit: Hero Images
Makerspace Workshop, courtesy of Fuse33

Works in Progress

BLACK ARTIST REPRESENTATION

With the prominence of the Black Lives Matter (BLM) movement in 2020, many advocates are calling for the addressing of systemic racism in not just government and law enforcement, but also in the structures of private companies and organizations. An independent audit was conducted and published in late September 2020 by local artists, advocates, and students to “provide concrete data regarding the representation (or lack thereof) of Black artists in Calgary over the past ten years (2010-2019).” The end goal of the audit was to see increased meaningful representation of Black creatives and community members in not just contemporary art spaces, but also in leadership positions, as well as the addressing of systemic inequalities. The report highlighted that in virtually all local art galleries and festivals audited, the representation of Black artists was low to non-existent.²¹³

Some organizations featured in the audit, such as TRUCK Contemporary Art have released statements addressing their solidarity with BLM and their commitment to supporting the work and the voices of Black artists, further committing to addressing issues of equity in programs and operations.²¹⁴

BLM advocacy work has surfaced throughout the local arts community in Calgary with several organizations such as Arts Commons not only stating their support for BLM, but also highlighting actionable steps that will be taken for more equitable operations. Speaking on behalf of Arts Commons, their President and CEO Alex Sarian states: “In the immediate, we are going to take the time needed to engage with our community partners, to educate ourselves as much as possible in order to learn what we are certain we do not know, and to thoughtfully consider how we can contribute to this necessary change.”²¹⁵

“In the immediate, we are going to take the time needed to engage with our community partners, to educate ourselves as much as possible in order to learn what we are certain we do not know, and to thoughtfully consider how we can contribute to this necessary change.”

Alex Sarian - President and CEO, Arts Commons



Photo Credit: Ryan John Baculpo
King Ayisoba, Broken City (2019), courtesy of Sled Island

LOSING OUR HISTORIC ROOTS WITH NEW DEVELOPMENTS IN INGLEWOOD AND ACROSS THE CITY

This trendy neighbourhood is lined with unique storefronts owned by small, local businesses. The strong artistic presence is supported by several collaborative art spaces, especially along its historic 9th Ave SE. Inglewood is a cultural hub of Calgary. Prior to COVID-19, new restaurants and breweries were popping up throughout the Inglewood/Ramsay area, and it is home to the Music Mile: a collaboration of local live music venues spanning from the National Music Centre all the way to the Blues Can.

However, the attraction to this neighbourhood has also brought new construction development, and these new developments are not without controversy. Recently, a petition was signed by over 25,000 people to voice concern for three proposed major developments over worry that they “will destroy the historic charm of the street and create a poor pedestrian environment due to their height and design.” Consequently, a report analyzing the avenue’s corridor concluded that “Ninth Avenue’s unique and rich historic character is fundamental to its identity and sense of place. This character should be respected and celebrated through a sensitive approach to intensification.” Heritage spaces are integral to the community’s character and vitality, which could be threatened by major developments.

A long-standing local art space, Galleria, closed in September 2020 largely owing to the impacts of COVID-19. Moreover, rising real estate prices as a result of gentrification make it harder for similar businesses to start-up in Inglewood.²¹⁶ Galleria’s displacement is not alone—another local art space in downtown Calgary, the Art Central building, was demolished in 2014 to make way for Telus Sky.²¹⁷

In conversations on preserving the character of a community, policymakers may have to consider new developments’ effects on not just the historical aesthetics of a neighbourhood, but also the long-standing local creative organizations who have contributed to the community’s culture, vitality, and subsequent desirability.



Photo Credit: Joshua Platt
Family Day (2020), courtesy of Studio Bell



Photo Credit: Allison Seto
Suzanne Ciani, Master in Residence (2019), courtesy of Studio Bell

STRATEGIC FRAMEWORK

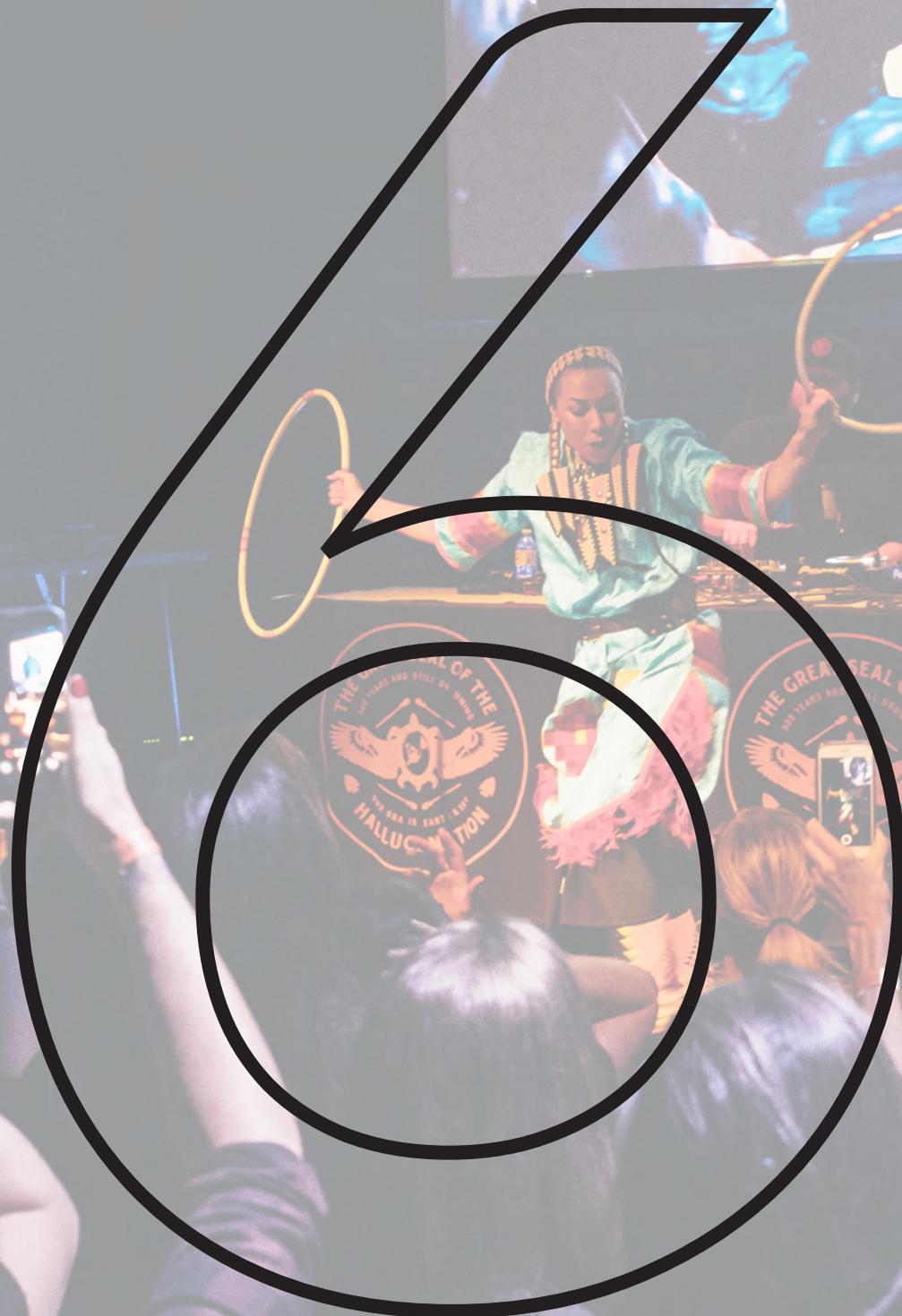


Photo Credit: Sebastian Buzzalino
After Hours (2018), A Tribe Called Red, courtesy of Studio Bell

Vision & Mission

Rooted in the same value chain as our predecessors and anchored to measures of community prosperity, CreativeCITY has adopted the following vision and mission, to align our work with the work of the CityXLab and Rethink Calgary with aspirations of harmonization across strategies and efforts.

CALGARY'S VISION

Calgary is Canada's Most Livable City

OUR MISSION

Calgary's creative economy is recognized as a global leader through a sustained collaborative commitment to the city's prosperity.

INSIGHTS

Though fragmented, our creative economy is already seeing significant progress that could be catalyzed under the right strategy.

- Calgary is above the national average for annual employment growth in the creative sector.²¹⁸
- Calgary has a long heritage based in culture and music. While the Calgary Stampede has been running annually since 1886, the cultural significance of this region was actually established long before by Indigenous inhabitants. The Calgary Stampede, for example, has been running annually since 1886.
- We are home to a number of quality educational and artistic institutions, such as the National Music Centre, the Alberta University of the Arts, and Banff Centre for Arts and Creativity located just a short drive away from the city.
- A recent survey showed that both Calgarians and industry professionals believe Calgary presents high quality and diverse local talent.²¹⁹
- Calgary was named the 2021 Creative City of the Year by the Creative City Network of Canada and was slated to host the Creative City Summit in October, prior to COVID-19.²²⁰
- There is a clear demand for creative experiences: 58 percent of Albertans regularly visit a movie theatre, 51 percent regularly attend community festivals, 41 percent regularly attend live music performances, and 37 percent regularly visit museums.²²¹ In total, 93 percent of Calgarians are connected to arts and culture in one way or another.²²²
- The West Anthem music ecosystem report published in fall 2020 identified music as a significant area of growth and opportunity in Calgary's creative economy.²²³
- Calgary has seen a significant uptick in film production and film services, attracting nearly every major Hollywood studio to the region, including Disney, MGM, Netflix, and Apple.
- Mount Royal University has put significant effort into CityXLab, a project created to align strategies across sectors with outcomes anchored in community prosperity.

These accomplishments were not achieved by luck or coincidence: they are the result of hard work and dedication of civic partners, community organizations, and local creative professionals who chose to stay and invest in Calgary, despite the draw of better opportunities elsewhere. Through a unified approach, Calgary now has the opportunity to build on this momentum and shape a new identity around creativity to improve overall community prosperity.

From Insights to Strategic Pillars

Over months of consultation, these pillars were developed in partnership with our CreativeCITY steering committee, a group of key industry leaders and partners who have acted as advisors and provided feedback on our work to date based on their diverse knowledge and experiences in the creative economy.

As a group, the CreativeCITY committee met over several months to discuss the gaps and opportunities in Calgary's creative economy, identifying these four broad strategic pillars. We then examined each pillar to identify what change might look like if we truly invested in it, and how we could achieve those outcomes.

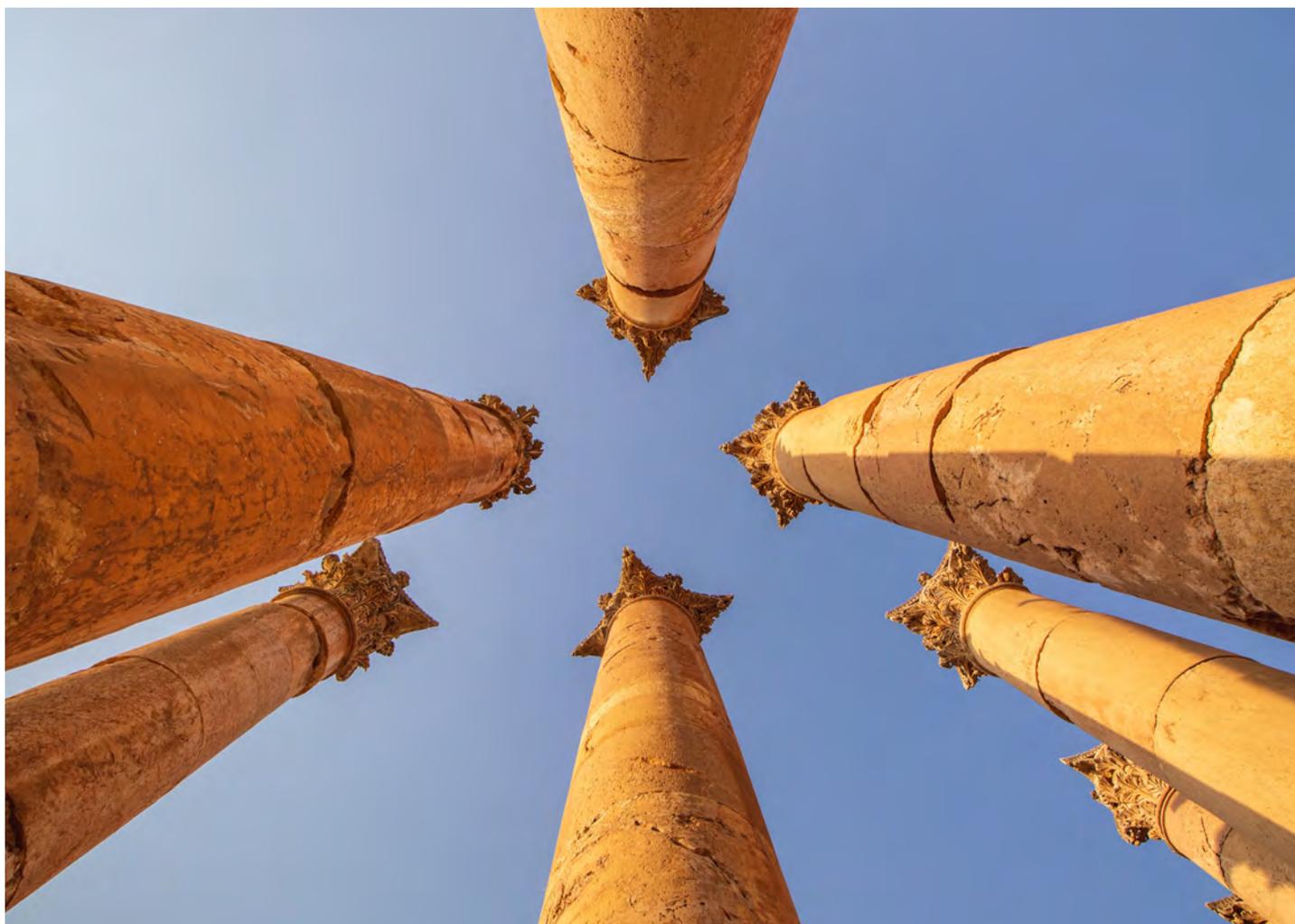
To deliver our vision and mission, Calgary's creative economy will be guided by four strategic pillars:

Pillar 1: Embed audacious creativity into our city's DNA

Pillar 2: Incubate creative collisions

Pillar 3: Mobilize Calgary's creative capacity

Pillar 4: Value the diversity of Calgary's creativity





PILLAR 1: Embed audacious creativity into our city's DNA

To fully leverage the robust, growing creative economy in Calgary, creativity needs to be at the heart of everything we do as a city. This includes embedding considerations for the creative economy into our decision-making processes, creating the conditions for success for local creative enterprises, and building a renewed, unified civic identity around creativity.

Goals

- By 2030, Calgary is known as a music city.
- By 2030, the greater Calgary region leads Canada for number of film shoots per capita.
- By 2030, Calgary will recognize itself for its culture and creativity.

Priorities

- Leverage the existing momentum of Calgary's film and music industries to embed creativity into our city's brand and identity.
- Model the success of Calgary's film industry and extend to music and other creative industries.

What change might look like

- Calgary is a more vibrant and resilient city.
- Calgary is known around the world as a hub for creativity.
- The creative economy drives Calgary's economy.
- Calgarians are engaged in and celebrate creative experiences.
- Calgary has a unified sense of identity.
- Entrepreneurship is celebrated and rewarded.



PILLAR 2: Incubate creative collisions

Unifying our creative economy under one identity requires creating conditions for collaboration, cross-sector partnerships, knowledge transfer, and resource sharing. This will require a shift in how our creative economy operates by digitizing our ecosystem, utilizing our existing spaces and institutions to facilitate collisions, and identifying, acknowledging and fostering creativity across industries.

Goals

- By 2030, Calgary will lead Canada in creative economy start-ups per capita.
- By 2030, Calgary is recognized as a global leader for its sustained commitment to collaboration.

Priorities

- Leverage our digital capacity to connect and strengthen Calgary's creative economy.
- Purposefully facilitate and encourage the collaboration of the creative economy across quadrants.
- Establish an implementing body to oversee the coordination and implementation of a creative economy strategy.
- Encourage play and exploration without fear of failure.

What change might look like

- Sectors, industries and occupations solve problems together.
- Occupations growing in demand make up most of Calgary's workforce.
- Calgary is resilient and future-proof.
- Calgary is no longer a pure energy town.
- Creative industries have well-established connections with other industries.
- Top talent from around the world moves to Calgary.



PILLAR 3: Mobilize Calgary's creative capacity

To develop and retain Calgary's exceptional creative talent, we must work to ensure creative professionals, new or seasoned, have the knowledge, skills and resources required to succeed. This means we need to adapt how we educate to create a more dynamic workforce; create opportunities for skill building in areas like business management and marketing; and work in partnership with cultural institutions, private sector leaders, and civic organizations to ensure creative education aligns with the needs of future employers and customers.

Goals

- By 2030, the Calgary region leads Canada in the integration of arts and experiential learning into our K-12 classrooms.
- By 2030, Calgary's post-secondary creative programs have the highest graduate employment rates in Canada.
- By 2030, Calgary leads Canada in the number of creative economy workers per capita.

Priorities

- Adapt educational programs to create a more dynamic workforce.
- Foster creativity by building programs in a way that layers career knowledge, skills building, and access to opportunities in a scaffolded approach.
- Embed experiential learning and arts into formal and informal curricula.

What change might look like

- As future employers, the private sector's human resource needs are actively considered in education from primary to post-secondary.
- Arts education is accessible to all.
- Creative thinking and cultural experiences are essential components of Alberta's education system.
- Calgarians are equipped with the resources, skills and knowledge to thrive in the creative economy.
- New graduate employment rates are the highest in the country.



PILLAR 4: Value the diversity of Calgary's creativity

As Canada's third most diverse city, Calgary has an opportunity to tap into the unique perspectives and experiences of our diverse creative class to build something new, authentic, and meaningful for everyone in the city. By creating new, unique experiences, and by ensuring every creative, regardless of their backgrounds or identities, has the skills, resources, and sense of value to succeed, Calgary can bring something different to the global creative economy.

Goals

- By 2030, the make up of Calgary's creative economy workforce is representative of the population.
- By 2030, equity, diversity, inclusion and accessibility are prioritized and embedded into creative economy workplaces and programming.
- By 2030, creative economy enterprises and organizations celebrate their board-level diversity with pride and are encouraging others organizations to follow suit.

Priorities

- Develop and adopt programs and policies to ensure diverse individuals have the knowledge, skills and tools to succeed.
- Embed principles of equity, diversity, inclusion and accessibility into the creative economy strategy.
- Choose new faces and new voices to lead change.

What change might look like

- Diversity is the creative economy's greatest asset.
- Calgary attracts creatives from all over the world.
- Calgary is known world-wide for its uniqueness and authenticity.
- Diverse creatives have the tools, resources, and platforms needed to succeed.
- Calgary's creative economy is steered by more voices and is more representative of the community.
- All Calgarians feel a collective sense of pride, value, and empowerment in our city.

A Roadmap for Calgary's Creative Economy

With the release of this report, Phase 1 of the CreativeCITY, Calgary's creative economy strategy, is complete. Over the next six months, we will endeavour to refine our understanding and prepare for the release of the *CreativeCITY Strategic Guidebook* by mid-2022, which will outline specific objectives and activities that will be undertaken to make Calgary a world-leading creative city and Canada's most livable city.

Below is an overview of the final two Phases of the CreativeCITY project.

PHASE 2. Bold Experiments with Radical Intent

Deliverable: Four bold experiments with radical intent in Calgary's creative and cultural ecosystem, one per strategic pillar.

Due Date: Fall 2021

After identifying what change might look like in the Calgary of the future, the CreativeCITY steering committee looked for synergies and similar opportunities already happening in our community that could radically tip the scales toward achieving the outcomes identified in each pillar. Over the next several months, we will be splitting the committee into working groups to partner with the projects and measuring their success to evaluate the potential of Calgary's creative economy. These small experiments will then be used to guide the development of the *CreativeCITY Strategic Guidebook*.

Deliverable: CreativeCITY round table events.

Due Date: Fall 2021

In partnership with the Mount Royal University CityXLab, the CreativeCITY steering committee will engage in five public conversations on the subjects of embedding audacious creativity into our city's DNA, incubating creative collisions across our city, mobilizing Calgary's creative capacity, and valuing the diversity of Calgary's creativity. The findings from these public conversations will be shared in the form of insight papers that will help expand and shape the conversation about how we might enable all Calgarians to live their most creative lives. Each round table event will also help engage new and diverse creative economy members in the Phase 3 work.

PHASE 3. Calgary CreativeCITY Strategic Guidebook and Implementation Plan

Deliverable: A creative and cultural city strategic guidebook that can guide the work of community and city partners moving forward.

Due Date: May 2022

We will bring together the findings from Phase 1 (CreativeCITY ecosystem report) and Phase 2 (findings from the small experiments with radical intent launched and researched by the working groups) to engage in detailed community consultation and develop Calgary's *CreativeCITY Strategic Guidebook*. This document can be used in conversation with city, provincial and federal partners by Calgary Arts Development, Calgary Economic Development and others looking to grow Calgary's creative economy. It will provide formal recommendations for policy, community and industry interventions to support community prosperity through the creative economy.



The COVID-19 pandemic was a shock to Calgary that exposed the cracks in a fragile ecosystem. While it encouraged people to rethink their values, many choosing to move closer to family and prioritizing their health, it also forced us to face the realities of an unsustainable economy that relies on underpaid creative work and volatile industries. As we recover, it is time for Calgary to rethink its values and look for new drivers that can reshape our economy and community under one unified identity.

Investing in Calgary's creative economy has the potential to make Calgary a more resilient, prosperous city known world-wide for its vibrant culture and innovative workforce.

Over the next six months we will embark on small experiments and widespread community engagement to challenge our assumptions as we refine our work and build a tactical implementation plan for the release of Calgary's *CreativeCITY Strategic Guidebook*. This guidebook will bring our city and our community one step closer to becoming known across the country as Canada's most livable city.

THE WAY FORWARD

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APPENDICES



Appendix 1: Nesta creative economy model mapped to NAICs

Nesta Title	Creative Intensity	NAICs Code	NAICs Title
Artistic creation	90%	711511	Independent visual artists and artisans
Artistic creation	90%	711512	Independent actors, comedians and performers
Artistic creation	90%	711513	Independent writers and authors
Artistic creation	90%	712111	Non-commercial art museums and galleries
Motion picture, video and TV program post-production activities	83%	512190	Post-production and other motion picture and video industries
Performing arts	80%	711111	Theatre (except musical) companies
Performing arts	80%	711112	Musical theatre and opera companies
Performing arts	80%	711120	Dance companies
Performing arts	80%	711130	Musical groups and artists
Performing arts	80%	711190	Other performing arts companies
Performing arts	80%	711311	Live theatres and other performing arts presenters with facilities
Performing arts	80%	711321	Performing arts promoters (presenters) without facilities
Performing arts	80%	711322	Festivals without facilities
Radio broadcasting	79%	515110	Radio broadcasting
Manufacture imitation jewelry and related articles	79%	515110	Jewelry and silverware manufacturing
Translation and interpretation services	74%	541930	Translation and interpretation services
Photographic activities	73%	941920	Photographic services
Graphic designers	70%	541430	Graphic design services
Motion picture, video and TV program production activities	66%	412110	Motion picture and video production
Architectural activities	65%	541310	Architectural services
Architectural activities	65%	541410	Interior design services

Nesta Title	Creative Intensity	NAICs Code	NAICs Title
Specialized design	65%	541420	Industrial design services
TV programming & broadcast activities	55%	515120	Television broadcasting
TV programming & broadcast activities	55%	515210	Pay and specialty television
TV programming & broadcast activities	55%	541490	Other specialized design services
Publishing of journals and periodicals	50%	511120	Periodical publishers
Other software publishing	43%	511211	Software publishers (except video game publishers)
Media representation	41%	541830	Media buying agencies
Media representation	41%	541850	Display advertising
Media representation	41%	541860	Direct mail advertising
Media representation	41%	541870	Advertising material distribution services
Media representation	41%	541891	Specialty advertising distributors
Media representation	41%	541899	All other services related to advertising
Sound recording and music publishing activities	40%	512230	Music publishers
Sound recording and music publishing activities	40%	512240	Sound recording studios
Sound recording and music publishing activities	40%	512250	Record production and distribution
Sound recording and music publishing activities	40%	512290	Other sound recording industries
Publishing of computer games	38%	511212	Video game publishers
Other publishing activities	38%	519110	News syndicates
Publishing of computer games	38%	541515	Video game design and development services
Book publishing	36%	511130	Book publishers
Motion picture, video and TV program distribution activities	35%	512120	Motion picture and video distribution
Motion picture projection activities	35%	512130	Motion picture and video exhibition
Publishing of Newspapers	33%	511110	Newspaper publishers
Library & archive activities	27%	519121	Libraries
Library & archive activities	27%	519122	Archives

Nesta Title	Creative Intensity	NAICs Code	NAICs Title
Other information services	25%	519190	All other information services
Advertising agencies	25%	541810	Advertising agencies
PR and communication activities	25%	541820	Agents and managers for artists, entertainers and other public figures
PR and communication activities	25%	541820	Public relations services
Other publishing activities	21%	811190	Other publishers
Museum activities	21%	712115	History and science museums
Museum activities	21%	712119	Other museums
Museum activities	21%	712120	Historic and heritage sites
Cultural education	20%	611610	Fine arts schools
Web portals	19%	519130	Internet publishing and broadcasting and web search portals
Public opinion & market research	19%	541910	Marketing research and public opinion polling
Computer programming activities	11%	541514	Computer systems design and related services (except video game design and development)
Computer consultancy activities	11%	541514	Computer systems design and related services (except video game design and development)
Other IT and computer service activities	11%	541514	Computer systems design and related services (except video game design and development)

Appendix 2: Outcomes Identified in Civic Plans and Strategies, by Theme

Placemaking	Economic Development	Civic Enrichment
Build City Brand and Personality (6)	Business Incentives (6)	Volunteering (5)
Accessibility (9)	Diversification (7)	Community Wellness (8)
Urban Revitalization (14)	Entrepreneurship and Innovation (8)	Creative Self-Expression (3)
Experience Creation (8)	Talent Retention (6)	Citizen Engagement (18)
Public Spaces (14)	Business Investment (11)	Cultural Diversity (7)
Environmental Sustainability (7)	Economic Resilience (6)	Digital Services (2)
Increasing Value and Credibility (6)	Sustainable Funding (7)	Access to Resources (5)
Safety and Security (7)	Cross-Sector Collaboration (9)	Tracking Engagement (6)
	Tourism (12)	Community Building (7)
Transportation	Affordability (9)	Sport and Recreation (8)
Parking (4)	Legacy Building (2)	
Transit Improvements (10)	Creative Industries (6)	
Walkability (10)	Government Funding (7)	
Regional Transit (6)	Job Creation (10)	
Cycling (6)	Capacity Building (4)	

Infrastructure	Education	Arts & Culture
Sport Infrastructure (2)	Learning Systems (2)	Civic Partners (2)
Hosting Infrastructure (3)	Acknowledging History and Culture (1)	Public Art (2)
Recreation Facilities (5)	Experiential Learning (1)	Programming and Events (13)
Infrastructure Improvements (8)	Children and Youth (1)	Supporting Artists (5)
Performing Arts Infrastructure (3)	Arts Training (4)	
Heritage Buildings (4)		
Arts Spaces (2)		

USEFUL REPORTS

The plans and strategies listed below will be critical references in drafting the creative economy strategy as they demonstrated alignment across the priority areas for the City that were identified in this assessment.

- Calgary's arts development strategy [Living a Creative Life](#)
- ActiveCITY Collective's [ActiveCITY Plan](#)
- City of Calgary and Calgary Arts Development's [Arts and Culture Infrastructure Strategy](#)
- Calgary Economic Development's [Calgary in the New Economy](#)
- City of Calgary's [Transportation Plan](#)
- City of Calgary's [Cultural Plan](#)
- City of Calgary's [Digital Strategy](#)
- City of Calgary's [Resilient Calgary Strategy](#)
- CityXLab's [Learning City—Learning Our Way Forward](#)
- City of Calgary's [Municipal Development Plan](#)
- City of Calgary's [Next 20](#)
- City of Calgary's [Recreation Master Plan](#)
- City of Calgary's [Climate Resilience Strategy](#)
- Tourism Calgary's [Destination Strategy](#)
- City of Calgary's [Downtown Strategy](#)
- West Anthem's [Music Ecosystem Report](#)

Appendix 3: SWOT and PESTLE Analyses of the Creative Economy

SWOT Analysis

STRENGTHS	
Canadian Creative Economy Overview ²²⁴	<ul style="list-style-type: none"> Some of Europe, the United States and Canada are leading creative goods exporters among developed nations. Canada ranks 12th in creative goods exports among developed nations.
Music in Canada ²²⁵	<ul style="list-style-type: none"> Live music remains a large part of the creative industry; consumers estimate that over 50 percent of their total spending on music each year goes towards admission for live music events. Additionally, around 81 percent of Canadians reported attending a live musical performance in 2017.
Concert & Event Promotion in Canada ²²⁶	<ul style="list-style-type: none"> There is strong localization with concert and event promotion. Industry players typically operate in their respective local markets. There may be greater access to creative spaces in the future, as the number of operators that lease or own their own venues is likely to increase. Technological innovations have fostered an increase in online data collection, allowing promoters to use analytics to target consumers based on their data. Access to music venues is also increasing.
Photography in Canada ²²⁷	<ul style="list-style-type: none"> Like concert and event promotion, there appears to be strong localization in the photography industry. This could be attributed to creative entrepreneurship with many small players in the industry. The fast rate of technological advancements can allow more players to enter as there are lower barriers to entry. The photography industry in Canada includes commercial photography and portrait services, and has grown over the five years to 2020 due to rising disposable incomes, positive business sentiment and growth in total advertising expenditure. Sector collaboration is high with advertising and marketing. Per capita disposable income is anticipated to be one of the primary drivers of demand moving forward, growing at a projected annualized rate of 0.6% over the five years to 2025.
Graphic Designers in Canada ²²⁸	<ul style="list-style-type: none"> Graphic design enjoys a high level of sector collaboration as it is increasingly integral for brand awareness across a variety of mediums, including print, internet and film. The demand for graphic design has typically followed advertising expenditure.
Advertising Agencies in Canada ²²⁹	<ul style="list-style-type: none"> Mobile advertising's skyrocketing growth has supported industry expansion. More independent agencies have entered the industry to cater to a niche market thanks to the low capital requirements to start. Consumers will likely continue to be increasingly fragmented.
Performing Arts ²³⁰	<ul style="list-style-type: none"> The live performance GDP grew at an annual rate of 4.2% between 2014 and 2018. Live performance jobs grew at an annual rate of 3.8% between 2014 and 2018. International visitors spent \$220 million in direct spending for live performance events in Canada in 2016 (\$188 million for performing arts events and \$32 million for festivals and celebrations). This represents 1.1% of total tourism spending and 6.4% of non-tourism commodities (expenses other than travel, accommodation and food). This is greater than any other culture and sports sub-domains, including organized sports (\$171 million). As a proportion of total domestic tourism spending, culture products accounted for 1.6%. Performing arts, crafts, and film and video were the top contributors to domestic tourism spending on culture products.²³¹

Video Games ²³²	<ul style="list-style-type: none"> • Video games represent a growing market in the creative industry. A larger demographic appeal can be attributed to the diversification of consumption methods. The industry has further expanded channels into merchandise sales and streaming. • Technological innovations (e.g., AR/VR) open opportunities into an untapped market. • The industry as a whole is experiencing steady growth with a bump in revenue due to quarantine. Online games sales appear to be taking over physical sales, especially with the prevalence of mobile games and a subscription model from major companies.²³³ • Calgary is currently home to over 60 companies in the video game industry, with an employee base of over 200 and growing.²³⁴
WEAKNESSES	
Creative Economy Outlook ²³⁵	<ul style="list-style-type: none"> • In 2015, Canada had a trade deficit of creative goods of \$7 billion. This could provide an opportunity for all major cities to develop their creative economies along growing digital trends, as digitization broadly appears to be a catalyst for the creative economy. • While Canada is the eighth largest exporter of visual arts among developed countries, the sector saw a decline in the period between 2003-2015. • Canada ranks fourth among developed countries in publishing and printed media, but the industry saw a decline in growth between 2014 and 2019.²³⁶
Concert & Event Promotion in Canada ²³⁷	<ul style="list-style-type: none"> • Concert and event promotion has historically been a fragmented market with little collaboration. • There are high capital requirements to enter the industry. • Despite a drop in revenue due to COVID-19, industry revenue is expected to recover with a small projected annualized growth of 2.9% from 2020-2025.²³⁸
Photography in Canada ²³⁹	<ul style="list-style-type: none"> • Industry revenue was anticipated to increase to \$1.2 billion over the five years to 2020, but had a projected decline of 2.1% in 2020 due to COVID-19. • Technological advancements have decreased barriers to entry, introducing high levels of competition. • The industry is marked by low revenue per employee.
Graphic Designers in Canada ²⁴⁰	<ul style="list-style-type: none"> • This industry is composed of many contractors and freelance designers, accounting for almost 80% of total industry establishments in 2019. With such a high number of freelancers, this industry could potentially benefit from more shared creative spaces. • Like the photography industry, graphic designers face high and rising competition and low revenue per employee.
Advertising Agencies in Canada ²⁴¹	<ul style="list-style-type: none"> • The profit margin for the sector has decreased by 1.9% in the last five years. However, it is expected to make a recovery thanks to advancements in machine learning and predictive modeling techniques. This will be dependent on access to consumer information.
Movie, TV & Video Production in Canada ²⁴²	<ul style="list-style-type: none"> • Many movie, TV and video production companies rely heavily on tax credits from provincial and federal governments to cover their production or labour expenditures. • This industry is characterized by high capital requirements.
Book Publishing in Canada ²⁴³	<ul style="list-style-type: none"> • Consumer tastes are shifting: Between 2014 and 2019, revenue for the book publishing industry in Canada declined at an estimated annualized rate of 3.6% to total \$1.5 billion. The growth of substitute leisure activities has increased external competition and curtailed revenue, resulting in decreased earnings over the last five years. • The industry is characterized by high competition. • The popularity of bookstores as a distribution channel has decreased.
Indigenous Art ²⁴⁴	<ul style="list-style-type: none"> • A report by the Canada Council for the Arts revealed a need for stronger infrastructure to support Indigenous arts including service organizations, training institutions, and Indigenous ventures.
OPPORTUNITIES	
Highlights and trends across nine segments of the Canadian entertainment and media industry ²⁴⁵	<ul style="list-style-type: none"> • Streaming services are rising: Video now accounts for over 83% of all internet data content and is expected to more than double in volume from 26.6 trillion megabytes in 2019 to 63.5 trillion megabytes in 2023.

Creative Economy Outlook ²⁴⁶	<ul style="list-style-type: none"> The US can greatly influence creative outputs through their advancements in AI. Here, AI has helped write pop ballads, mimicked the styles of great painters and informed creative decisions in filmmaking. It is clear that as digital content and delivery platforms continue infiltrating all forms of media and expression, the role of AI will expand.
Performers & Creative Artists in the US ²⁴⁷	<ul style="list-style-type: none"> Performers and creative artists have benefited from the rise of alternative forms of funding, such as crowdfunding, which have become much more mainstream in the US. American performance and creative arts is projected to grow at a considerable pace over the five years to 2025 as per capita disposable income and consumer spending are expected to rebound. This will lead to an increase in spending on creative goods and services. However, limited federal funding for creative arts is expected to constrain demand for industry services.
E-Book Publishing in the US ²⁴⁸	<ul style="list-style-type: none"> The rise in e-book publishing appears to speak to the broad trend of digitization of many creative industries. There is a limit to this, however, as digital fatigue appears to be an observed factor.
Concert and Event Promotion in Canada ²⁴⁹	<ul style="list-style-type: none"> The industry can further benefit from an increase in inbound international travel to draw additional audiences.
Blockchain in the Music Industry ²⁵⁰	<ul style="list-style-type: none"> Frustration with large tech companies like Spotify, regarding the proper compensation of music artists, has led to multiple lawsuits as well as investigations into alternative methods of compensation, including blockchain. This would, however, require significant investment.
Using Education as a Means to Engage Young People » The Rockefeller Foundation ²⁵¹ » 1UP Toronto ²⁵² » CITYSTUDIO Vancouver ²⁵³ » Catamount Fellowship ²⁵⁴	<ul style="list-style-type: none"> As a way to foster a new generation of social innovators, organizations like The Rockefeller Foundation are developing platforms and resources for university students to address world issues. “Fowler Global Social Innovation Competition,” and “MIT IDEAS Global Challenge” are just two competitions available for student entrepreneurs. Further initiatives such as 1UP Toronto and CITYSTUDIO Vancouver engage students directly with plug and play models to approach and address civic challenges. Mount Royal University’s Catamount Fellowship is a collaboration with a student researcher, a faculty mentor, and one or more organizations to address a systemic issue in a given field.
THREATS	
E-Book Publishing in the US ²⁵⁵	<ul style="list-style-type: none"> This industry has seen declines in sales caused by increases in pricing, and Canadian e-book publishing is likely to follow suit. The industry also faces the challenge of self-publishing. This practice exists outside of the e-book publishing industry and is on the rise. Working with established publishers may be viewed as costly and self-publishing offers authors an alternative. It is possible that this trend will contribute to a fragmented market.
Photography ²⁵⁶	<ul style="list-style-type: none"> In photography, as well as in many creative industries, success is dependent on the per capita disposable income of consumers.
Graphic Designers in Canada ²⁵⁷	<ul style="list-style-type: none"> While there is strong collaboration with advertising agencies, this sector is primarily dependent on advertising expenditure which can fluctuate depending on market conditions.
Advertising Industries in Canada ²⁵⁸	<ul style="list-style-type: none"> There is overall low revenue growth in this industry which has implications for collaborators like graphic designers.
Movie, TV & Video Production in Canada ²⁵⁹	<ul style="list-style-type: none"> American media influence remains prevalent. Legislation to protect Canadian content may become obsolete with the rise in streaming services and internet VPNs. Government investment in the industry is subject to shifts.
Book Publishing in Canada ²⁶⁰	<ul style="list-style-type: none"> Shifts in technological trends, as well as substitute leisure activities have led to a decline in growth. Changes in consumers’ disposable income can greatly affect industry revenue.

PESTLE Analysis

POLITICAL

- The Canadian government has provided support for the creative economy in various ways, but primarily with grants. One of the main sources of funding for live presentation at the federal level is the Canada Arts Presentation Fund (CAPF). Each year, the CAPF supports about 600 professional arts festivals and performing arts series in more than 250 cities and communities.²⁶¹ From 2013 to 2018, the program supported around 38,210 performances per year. Furthermore, the average number of attendees was about 22.4 million per year.²⁶² Grants and contributions totalled \$32.5 million in 2019 to 2020. For every dollar invested by the program, an average of \$8.50 is directly spent in the Canadian economy.²⁶³
- There is a strong sentiment among Canadians that the federal government should enact specific protection policies and support for Canadian culture to survive, according to the Angus Reid Institute.²⁶⁴
- Specific industries, such as movie, TV & video production in Canada, are reliant on public investment which may be subject to shifts in policy.²⁶⁵
- Through public policy, Canada has been able to regulate the exposure of Canadian content, notably with the Canadian content requirements for music on Canadian radio. However, with the rise in streaming, the perceived benefits of this policy may erode.²⁶⁶
- 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 support, including Ontario's cultural media tax credits.²⁶⁷
- The Government of Canada has also launched Creative Canada which will work to modernize creative and cultural programming to adapt to the digital world. Its policy framework includes three pillars: investing in Canadian creators, cultural entrepreneurs and their stories; promoting discovery and distribution at home and globally; and strengthening public broadcasting and supporting local news.²⁶⁸

ECONOMIC

- Canada is a high importer of creative goods, so much so that the country has a trade deficit of \$7 billion with creative goods imports.²⁶⁹
- In terms of creative goods exports, Canada ranks 12th among developed nations.²⁷⁰
- While Canada is the eighth largest exporter of visual arts among developed countries, the annual average growth rate is declining.
- Despite trade deficits and shrinking growth, Canada, along with the US and some countries in Europe, is leading creative goods exports from the developed economies group.
- Regarding the development of the film industry, crowdfunding is a rising trend for lower-budget independent films. This fast growing source of equity financing raised about \$2.6 billion for artists in 2015.²⁷¹ 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 environment.²⁷²
- The live performing arts industry saw both economic and employment growth between 2014 and 2018. This growth coincides with the tourism industry where synergies and sector collaboration exist.²⁷³ In Canada, international visitors spent \$220 million for live performance events in 2016 (\$188 million for performing arts events and \$32 million for festivals and celebrations). This represents 1.1% of total tourism spending and 6.4% of non-tourism commodities (expenses other than travel, accommodation and food). This is greater than any other culture and sports sub-domains, including organized sports (\$171 million).²⁷⁴
- A decline in growth is expected in the book publishing industry which coincides with a rise in digitization and alternative entertainment outlets.²⁷⁵

SOCIAL

- The music industry in particular is a large part of Canadian culture. Classic mediums of music consumption like physical albums and radio have given way to new technologies, namely streaming and digital music downloads. Canada has one of the largest music industries in the world.²⁷⁶
- Macroeconomic drivers such as disposable income, leisure time and demographic trends heavily influence creative industries.²⁷⁷
- The strong domestic tourism market speaks to Canadians' interest in the local arts. Domestic tourism spending on culture products (expenditures made by Canadian tourists in Canada) totalled \$1.2 billion in 2016, or around 70% of total tourism spending on culture products. Performing arts, crafts, and film and video were the top contributors to domestic tourism spending on culture products.²⁷⁸
- The arts have a notable influence on place retention and satisfaction: Canadians who regularly attend live music events are almost

twice as likely to have a stronger sense of attachment to their city. In other words, live music events contribute to a sense of place. Furthermore, Canadians who highly rate the arts, culture and leisure presence in their community are nearly three times more likely to report a “very strong” sense of belonging to their city or town.²⁷⁹

- There is a strong link between performing arts and strengthening social communities. According to the Government of Ontario, “82% of Canadians believe engagement with the arts leads to good health and well-being, 95% of Canadians say arts education assists in the intellectual development of children, 88% of Canadians believe youth engagement with the arts helps reduce youth crime and alienation.”²⁸⁰

TECHNOLOGICAL

- The creative economy is facing strong technological shifts, namely the shift towards streaming services in the music and entertainment spaces.
- 34% of consumers use their smartphones to listen to music compared to 19% who listen via the radio, and just 14% via home stereo. By the end of this year, the number of Canadians streaming music is expected to surpass 10 million. The digital music revenue from streaming in Canada is expected to grow from 245.08 million USD in 2019 to 313.64 million in 2025.²⁸¹
- IT World Canada created an Artificial Intelligence (AI) directory to encourage collaboration and innovation within the AI and machine learning communities that will likely bolster technological developments in the near future, driving innovation in audience engagement metrics.²⁸²
- Regarding concert and event promotion, event promotion has moved towards online data collection using more sophisticated analysis techniques. These advancements have encouraged promoters to segment and target consumers for events based on their interests.²⁸³
- Nationally, there has been a steady decline in revenue in the broadcasting industry since 2014. In 2014, industry revenue was \$18.2 billion. In 2018, revenue fell by over a billion to \$17.11 billion.²⁸⁴
- The internet is Canadians' (aged 16-64 years) preferred avenue of media consumption. On average, Canadians spend almost six hours on the internet per day compared to just over three hours watching TV (broadcast, streaming, etc.).

LEGAL

- Misleading marketing appears to be an issue regarding some online promoters in the music industry. Ticketmaster, specifically, is under investigation for violations of federal competition legislation. The Competition Bureau looked into allegations that Ticketmaster was supporting ticket touting by enabling resellers to sell inventory on the secondary market through its platform. Investigators found that advertised prices were being misrepresented; consumers needed to pay additional fees later on in the purchasing process. The Competition Bureau reports that Ticketmaster charges can inflate the advertised price by as much as 65%. Canadian law requires that all compulsory costs be included in the price of tickets.²⁸⁵
- There is a need for increased certainty around copyright distribution rights as creative content is increasingly becoming digitized. For the music industry in particular, income is lost due to piracy. Further, there is no apparent law for the compensation of artists from streaming services.²⁸⁶ Regarding the film and television industry, torrent sites and peer-to-peer networks are notable sources of piracy in Canada.²⁸⁷
- With freelancing on the rise, particularly in the creative economy, there may be a rising need for clarity on legal protections for gig economy workers and independent contractors.²⁸⁸

ENVIRONMENTAL

- The climate crisis, in addition to limits to growth, intellectual property, copyright, digitalization, e-commerce platforms, the future of work, terms of trade, and access to distribution networks, are all possible levers for change in the industry.²⁸⁹
- Players in the creative economy were faulted for not giving adequate attention to sustainable development and technology.²⁹⁰
- Regarding the rights of Indigenous lands and peoples, the Government of Canada is working together with Indigenous peoples to build a nation-to-nation, Inuit-Crown, government-to-government relationship based on respect, partnership and recognition of rights. The Truth and Reconciliation Commission highlighted the importance of Indigenous languages, arts and culture to cultural resilience, and they are important considerations in the process of reconciliation between Indigenous and non-Indigenous peoples.²⁹¹
- Culturally, many Indigenous artists view their community as a place that is sacred, as well as a place for renewal. Artists often involve the community with their art. It is important to recognize these artists' strong sense of responsibility to the community and to the land.²⁹²

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The Cast of *The Secret Garden*, courtesy of Theatre Calgary