

# Culture, Value and Place 2018

A report for NSW Department of Planning and Environment

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## 1. Introduction and Executive Summary

### 1.1 Purpose and Focus.

This background report on Culture, Value, and Place was prepared for the NSW Department of Planning and Environment, Arts and Culture Division, in December 2017 and February 2018 over an 8-week period.

The report aims to provide a thorough review and backdrop on the issues concerning how culture can be understood and utilised to help develop a successful and globalised metropolitan region.

This report is not a review of culture and arts in Greater Sydney or New South Wales. It does not research or assess Greater Sydney's cultural infrastructure, policy or strategy. It is rather an 'outside in' report that looks at evidence, benchmarks, and case studies of how culture and arts are supporting the globalising metropolitan areas of the world. By reviewing more than 100 global reports, benchmark studies, and comparative data sets, this report sets out the links between culture, place, and value with specific reference to world city regions.

A case study of the Greater Sydney region will be researched and prepared in April and May 2018 as a complement to this report.

Chapters 2, 3, 4 cover the core review of the public policy considerations associated with culture. How does it add value? What is the evidence? What are the rationales for intervention? How can State and other Governments effectively promote cultural policies and intervene on cultural issues. This chapter also reveals important links between culture and other public policy goals such as health, sustainable development, the innovation economy, and social inclusion.

### 1.2 Benchmarking and Case Studies.

Chapters 5, 6, 7, and 8 present the more precise review of how culture contributes to the success of world city regions as clusters of population growth, internationally traded and advanced economic activities, and as destinations for global populations, visitors, and capital. In these chapters we introduce a roster of 9 comparator city regions for the Greater Sydney region:

- ☐ Abu Dhabi
- ☐ Amsterdam
- ☐ Barcelona
- ☐ Hong Kong
- ☐ San Francisco
- ☐ Singapore
- ☐ Stockholm
- ☐ Tel Aviv
- ☐ Toronto

Using this set of City Regions allows us to create a peer group for Greater Sydney, such that the case studies that follow offer a comparative lens for Greater Sydney.

Why these city-regions?

These are city-region that are:

- ☐ 2,000,000 to 7,500,000 in population.
- ☐ Have fast growing populations.

- Dynamic city-regions that are increasingly recognised as the new wave of globalising city regions.
- Are striving to accommodate the innovation and creative economy.
- Are linking cultural investment to their aspirations for both liveability and productivity/innovation.
- Have great visitor brands and destination appeal.

Summary information is set out in the table below.

**Table 1** Summary of Sydney's peer group

	City Region Population	Rate of population change and diversification	Cultural priorities and focus	Active role of higher tiers of government
Abu Dhabi	2.0m	**	Global Institutions, Heritage, Tourism	(City-state)
Amsterdam	2.5m	**	Spreading culture to suburbs and wider region, align culture with liveability.	*
Barcelona	5.2m	**	Cultural Innovation, Education, Inter-cultural exchange	**
Hong Kong	7.4m	*	Large cultural districts, cultural heritage and preservation.	*
San Francisco	4.9m	**	Neighbourhood activation, culture-led regeneration, community participation	**
Singapore	5.6m	***	Identity, global prestige, consolidation in 2 key districts	(City-state)
Stockholm	2.2m	**	Managing population growth, social cohesion and integration, public art	*
Tel Aviv	3.2m	**	Align with liveability equation to support innovation; cultural events, architecture renewal	*
Toronto	6.1m	***	Music and film to promote global culture, affordable spaces for creators	**

These city-regions, like Greater Sydney, do not necessarily have the endowed cultural benefits of having been imperial capitals over hundreds or thousands of years (like Beijing, Moscow, Tokyo, London, Paris) or the size and scale of Shanghai, New York, Seoul, Mumbai, Delhi, and Sao Paulo. In later chapters of the report we argue that Greater Sydney should have strong cultural ties with both the emerging world city regions (the benchmark group) and the group of established cultural capitals (Beijing and others).

Chapter 10 provides detailed case studies of the nine comparator regions identified in Chapter 5 and for each case study we summarise how the cultural dimension of the region has evolved, what part leadership strategy and public policy have played, how these regions have developed their cultural quarters and precincts, and what the lessons are for Greater Sydney.

### 1.3 How does Greater-Sydney perform?

This benchmarking approach allows us to use the 10 city-region observation group as a basis for both benchmarking of performance, and also a more detailed discussion of the role of culture in

accommodating population growth and the ways in which culture contributes to both place-making and to localised agglomeration in cultural quarters, districts, and precincts. Key chapters of this report address the issue of how cultural investment can contribute to success management of population growth, to place-making, and to urban restructuring.

Table 2 below summarises how Sydney ranks overall in the cultural benchmarking. These benchmarks span measures at the city, metropolitan and regional level, with more data increasingly gathered at the Greater Sydney scale including Western Sydney.

**Table 2 Sydney's overall relative performance among group of 10 global peers across all cultural indices and metrics**

Rank	City	Score (Max=1)
1	Amsterdam	0.75
2	Barcelona	0.71
3	San Francisco	0.61
4	<b>Sydney</b>	<b>0.60</b>
5	Toronto	0.54
6	Singapore	0.46
7	Stockholm	0.43
8	Hong Kong	0.39
9	Tel Aviv	0.17
10	Abu Dhabi	0.10

Source: TBoC Research using ELO algorithm: based on 25 measures across 8 separate indices (see Chapter 6). The Elo Rating System rates cities or regions by comparing their performance in every possible permutation against a list of other cities/regions. The system produces the most accurate comparative assessment of city/region performance, as it accounts for the fact that some cities/regions appear in more rankings than do others, and that each ranking measures a different number of cities.

When we look at some of the specific benchmark results (see Table 3), we can observe that Sydney routinely rates in the global top 20 in the big culture assessments but performs especially strongly in studies that focus on social and demographic aspects of culture. The five measures in this table produce different outcomes for Sydney because of the different criteria they use to measure culture, so comparison between indices is challenging. However, it is notable that Sydney's position in these headline benchmarks is improving – between 2012 and 2017 it improved from 13<sup>th</sup> to 10<sup>th</sup> in the Global City Power Index for cultural interaction, and from 30<sup>th</sup> to 14<sup>th</sup> in AT Kearney Global Cities Index for cultural experience.

Sydney's high position and positive dynamic is partly because many of the largest culture-based indices are weighted strongly towards the demographic and lifestyle dimensions of culture, where Sydney is performing well, and much less on the attendance and production dimensions, which can be harder to compare directly. This weighting can mean that other cities such as New York City, Los Angeles and Milan are commonly penalised because of quality of life challenges that spill over into the way culture is often assessed and judged. Meanwhile Sydney's performance benefits from the weighting towards cultural and visitor appeal in these measures.

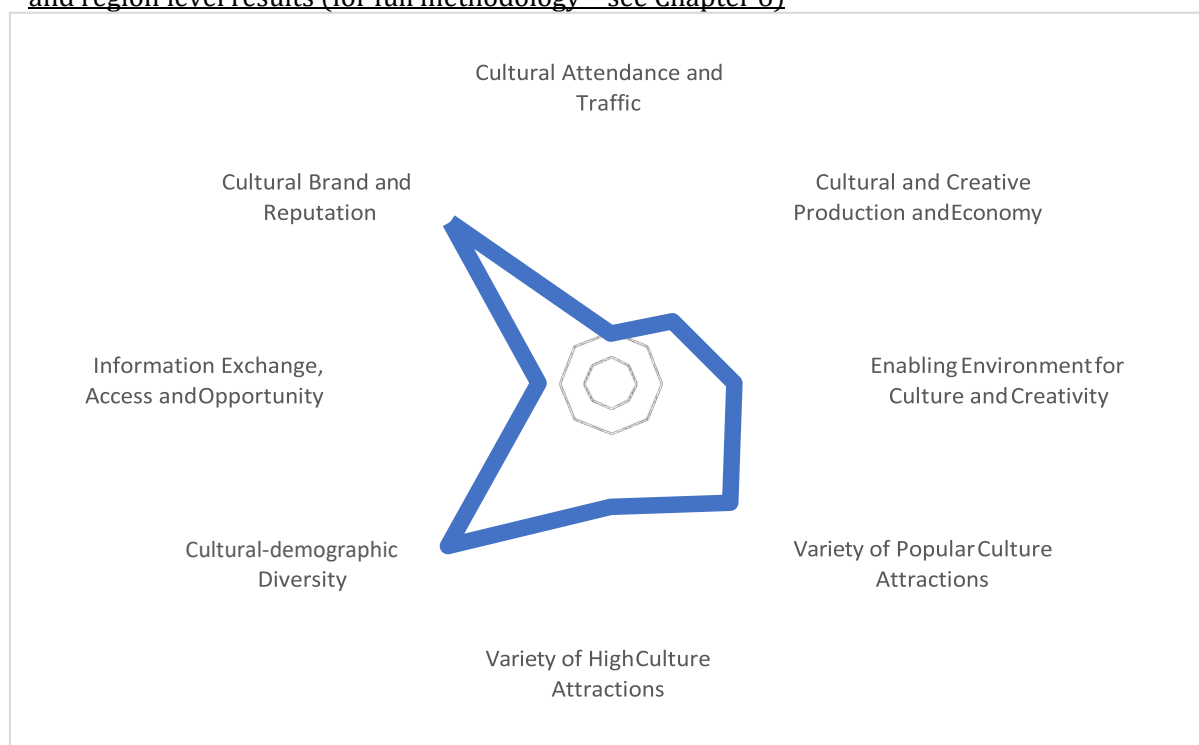
**Table 3: Greater Sydney's performance vs other peer cities in the cultural metrics of leading all-round city benchmarks**

	Mori Memorial Foundation Global Power City Index (Cultural Interaction)	AT Kearney Global Cities Index (Cultural Experience)	Tan et al: Global Liveable Cities Index (Socio-cultural conditions)	EIU Liveability Ranking (Culture & Environment)	EIU/Citigroup Hotspots (Social and Cultural Character)
<b>Sydney</b>	<b>10</b>	<b>14</b>	<b>11</b>	<b>20</b>	<b>2</b>
Amsterdam	14	8	4	2	16
Barcelona	12	12	21	16	5
Hong Kong	22	19	15	61	41
San Francisco	28	11		19	22
Singapore	5	24	12	73	42
Stockholm	32		13	41	22
Toronto	29	23		9	11

\*Tel Aviv and Abu Dhabi not included frequently enough in these indices.

Sydney's performance is summarised in the Spidergram below (Fig). On the one hand the city region maintains a strong lifestyle and cultural pull, and a competitive aggregate set of attractions. On the other hand, the overall rate of cultural attendance, higher-end cultural attractions, and information exchange is fairly modest by global standards, although improving with the help of public policy. It provides a preliminary indication that at the Greater Sydney scale the city may need additional government interventions to optimise access to culture and grow its cultural/creative industries.

**Fig 5: Sydney's overall performance benchmarked in different aspects of culture, spanning both city and region-level results (for full methodology – see Chapter 6)**



\*Based on the TBoC Elo Rating System, which rates cities/regions by comprehensively comparing their ranking performance against other cities/regions (see Chapter 6 for complete methodology).

## 1.4 Implications for Greater Sydney.

Chapters 9 and 10 provides an overview of our observations and analysis on themes and data reviewed and the implications for Greater Sydney and presents the detailed case studies of the 9 comparator regions.

### Greater Sydney and Its Peers.

Overall Greater Sydney performs well in benchmarks that measure culture in terms of visitor perception, lifestyle and education. But the Greater Sydney region performs less well in measures of cultural quality, cultural production, cultural economy and regular cultural access and attendance. Other cities such as Amsterdam and Toronto have had more success at fostering cultural production and enabling more of its regional population to visit and attend cultural activities.

Overall Sydney appears to be punching above its weight in some areas, such as its fashion school offering and the number of art and design students, suggesting that these can both become key competitive advantages that can be further built upon moving forwards. On the other hand, comparisons to its peers highlight that investments in Sydney's cultural offering in terms of its number of art galleries, bookstores, museums and concerts and shows could allow it to be positioned more competitively.

### The current context in Greater Sydney.

Greater Sydney is a metropolitan region in evolution. There are multiple dimensions to the changes in train that suggest important roles of culture and cultural investment into the future. As many of the city regions in this report show, culture plays a key role in helping cities and whole societies to evolve, change, accommodate growth, and retain core values as they transition into unknown futures.

Greater Sydney is in transition. This involves a society that is enjoying longer life expectancy and many years of active life after retirement from work. It is also a society that is diversifying rapidly as new migrants add vitality and aspiration to the workforce and community and bring vast cultural legacies and traditions to the region. It is an economy making the transition to a knowledge based, innovation led, and experience fueled economy that trades not on commodities, resources, and products but on knowledge, invention, discovery, and appeal. Sydney is on a voyage from 5 million to nearer 10 million people and is doing it faster than almost any other region in the OECD. As the region combines its historic role a global gateway with the north and west it now adds a new pivot to the Asia Pacific continent where so many new partners, collaborations, visitors and customers are to be found. These shifts present the metropolitan area with unique opportunities. Anthropologically, this is the most important trek that the people of Sydney have made together for several hundred years. Culture and cultural investment are critical to fuelling and resourcing such journeys. Culture brings narrative, identity, memory, self-expression, ritual and gathering places to the quest of good growth.

### What are other World City Regions doing?

Many of the city-regions highlight in our case studies are already developing sophisticated cultural investment strategies. As summarised above these strategies contribute positively to a wide range of policy objectives that include economic development, population growth management, health and wellbeing and multi-culturalism.

The full case studies are set out in chapter 10. Some of the key recent trends in the city regions include:

- ☐ Many city-regions are making very large up-front investments in cultural institutions with high visibility. These include the refurbishment and expansion of existing institutions as well as the creation or attraction of wholly new institutions.
- ☐ City-regions are increasingly selecting 3-5 key districts to focus efforts on around building a cultural cluster that has the scale to anchor a larger population or to accommodate new economic activities, or to underpin a wider spatial strategy supported by new connectivity.
- ☐ City-regions are recognising that cultural investment is a means to achieve densification and scale in locations where other positive factors are present such as transport and public space. The relationship between culture and public space in an area of increased integration.
- ☐ City-regions are recognising that the Innovation Economy is often fostered in inner city cultural districts. That means that they need to manage the life cycle of change in such districts and blend of uses. This requires strategies both to manage change and densification in such locations and to seek additional space for the displaced or growing activities.

More generally there appears to be a shift to:

- ☐ Managing the total place in which culture is a part of a whole
- ☐ Tactical urbanism and demonstration projects

Cultural Locations in other world city regions

All over the world, cities are fostering cultural destinations: quarters, precincts, districts and hubs. In total there are estimated to be more than 1,000 of these locations worldwide. Not all of these projects are successful or distinctive.

There appear to be some basic pre-existing ingredients without which cultural locations cannot succeed:

- ☐ Enough available cultural content
- ☐ A critical mass of visitors and interested locals
- ☐ Good public transport
- ☐ An already strong local identity
- ☐ The right frameworks to sustain new business models for culture
- ☐ Responsiveness to new ways and new preferences for finding and accessing culture

Some common ingredients of success then appear to be:

- ☐ Production as well as consumption elements
- ☐ Housing and other uses
- ☐ Concern about place performance as well as building performance
- ☐ High quality programming of festivals, events and pop-ups to generate momentum, foot traffic and place attachment
- ☐ Involvement of a leading cultural business, training or education provider
- ☐ Complementary day-time and evening uses



The challenge to prevent cultural districts evolving into generic sites of low-to-medium value consumption is clear. Experience in other competitive global regions suggests that it seems to require careful and deliberate investment and stewardship.

Some key ingredients that seem to work better where:

- ☐ Channels for private and civic sectors contribution are open, honest and constructive.
- ☐ Ability either to consolidate land ownership and/or build a shared vision among partners
- ☐ Professional district management

### Spreading the benefits of Culture

Most city regions have not developed explicit, sustained and implementable policies to spread cultural amenity around their growing urban area. But the majority are aware that access to existing cultural assets is a key imperative of their regional populations to achieve the benefits of cultural interaction and participation.

Many are also innovating in terms of:

- the kinds of partnerships being formed in different locations, spanning multiple public and private organisations who have shared interests in cultural development.
- Strategic attention to the affordable workspace, and small-scale creative economy
- Engaging with harder-to-reach communities
- Using cultural organisations to anchor a process of physical or economic change.

### 1.5 Key Imperatives for Greater Sydney:

Cultural provision is clearly an important dimension of Greater Sydney's current growth cycle. Successful and growing city-regions must invest in culture if they wish to sustain their advantage and appeal. Greater Sydney has a well-defined long-term metropolitan strategy that makes important choices about how population growth and economic transition should be accommodated across the region. This plan provides a good basis for considering cultural investment priorities. The imperatives for Greater Sydney and NSW Government are:

- 1) Recognise the wider impacts that investment in culture has for both public policy goals and successful metropolitan growth management. Cultural investment and interaction plays important roles in the education, health, wellbeing, identity, and inclusion of city regions. It is also a spur for enterprise, innovation, and creativity. Cultural investment also supports population growth management, densification, and place making. It is one of the critical amenities that makes growth acceptable and positive to resident populations.
- 2) The Greater Sydney draft Metropolitan Strategy provides an excellent basis to review the future cultural requirements of Greater Sydney. The shift to the 3-city metro provides a good framework for considering what the overall requirements are in terms of cultural investment if the three cities are each to succeed in terms of their lifestyle and public policy goals. It also suggests that consideration should be given to more comprehensive cultural planning as Sydney grows to a region of 7.5 million.
- 3) This review shows that building a clear, coherent, and compelling vision for culture is key to optimising its role in a growing and transitioning metropolitan area. Culture makes important contributions to diverse policy goals from health to inclusion to identity and belonging, to innovation and growth management. Culture also plays a role in driving

commercial goals from tourism to real estate to retail and to the creative economy. But this very diversity of role of culture has risks that it might fail to be fully recognised and an overarching vision is essential to avoid the costs that would accrue from that.

- 4) The location of key cultural infrastructure is an important issue for the optimisation of the role of culture in regional success. As Sydney moves from a single urban core to three urban cores within a larger metro region it will be important to consider the optimal location of cultural infrastructure both within their 'city' and within the 'region'. The rate of investment in transport infrastructure in the region is substantial. This will change medium term patterns of travel and re-orientate the importance of distinct locations, interchanges, and termini. In this context reviews of the location of institutions are merited.
- 5) Districts and place making. As this review shows, many of the benchmarking group of comparator cities are investing in fostering 'cultural districts'. In such districts important public goods are secured through co-location in terms of public space, creative industries clusters, tourism destinations, and educational facilities. By optimising the location of established and emerging cultural institutions with wider educational, enterprise and public space activities, new centralities are created. Such districts can add to the beneficial spread of activities within a region, helping to create compact cities and polycentric regions, and a 30-minute city.
- 6) Investment patterns in culture are now diversifying very rapidly across the comparator group. Alongside the role of traditional public investment there is growth in the use of user charges, crowd sourcing, levies, match funding, sponsorship, philanthropy, and endowments to fund cultural activity. For Greater Sydney it is important to review how far the existing public finance is adequate to the needs and whether additional financial instruments and investment sources should be encouraged.
- 7) Identity, Reputation, and Visibility. Greater Sydney is already a highly attractive visitor destination. But much of its appeal lies in its access to beaches, nightlife, lifestyle, and the holiday offer. As Greater Sydney develops its economic strategy towards corporate presence, innovation, higher value education, science, technology, & research, and soft power/diplomacy, it may be important to increase the 'cultural visibility' of Sydney so that it can broaden its appeal whilst also sustaining its existing attractiveness.
- 8) Creative enterprise and innovation economy. The links between cultural investment, creative enterprise and the innovation economy are widely recognised in the literature. But making the links between culture and economy work requires a sophisticated understanding of skills and education, enterprise processes, and local agglomeration and collaboration. Industry NSW and the NSW Innovation and Productivity Council are already developing NSW's approach to the Innovation Economy and to Innovation Districts. Adding the dimension of culture and creative industries to this work appears to be an important opportunity.
- 9) Access to culture for the widest base of population is a key issue for all of the comparator city-regions. Support for Government investment in culture is predicated on the basis that diverse groups of citizens will be able to benefit from the investments made. If the base of participation is too narrow, the case for public investment is diluted. For each of them, and for Greater Sydney, an important consideration is how can access be improved and shared both within the metropolitan area and for the wider regional population around them. This requires consideration of different processes such as digitisation and remote participation, touring and rotation, satellite venues, education, incentives, packaging and

marketing. Developing a metropolitan and wider regional access strategy is an important part of the overall approach.

- 10) Global Benchmarking and Global Networks and Asia Pacific Leadership. Improvements in cultural investment are supported by benchmarking. Greater Sydney and NSW should continue comparative benchmarking with the other emerging world city-regions to observe and track progress in cultural investment, production, and public policy outcomes. Preparing and making data available at Greater Sydney level may be an important means to increase Sydney's visibility and standing. Sydney could also build a wider network that also incorporates major cultural capitals in the Asia Pacific Region and the English-Speaking World (Tokyo, Beijing, Shanghai, Moscow, Seoul, and London, New York, Los Angeles). Sydney should successfully position itself as a Cultural Capital within the Asia Pacific Region and in The English-Speaking World. In this respect it can forge special relationships with both Hong Kong and Singapore.

## 2 What is the Value of Culture?

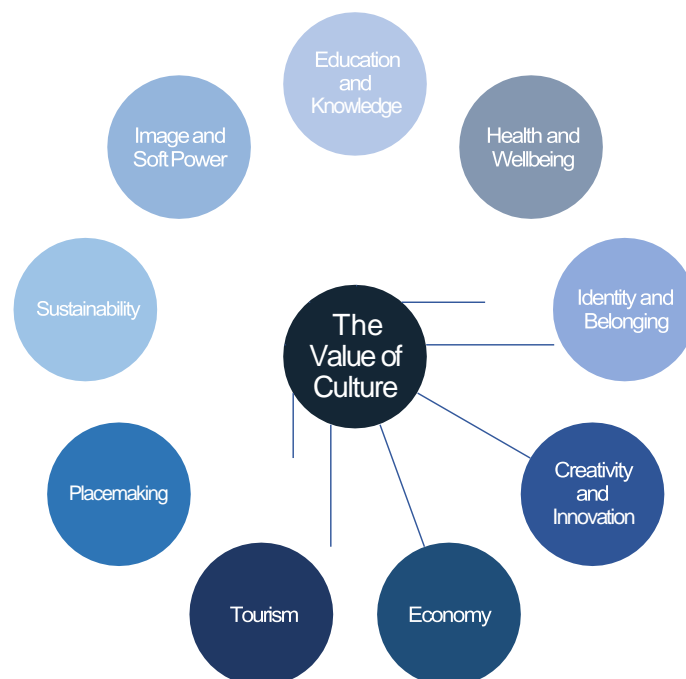
### 2.1 Introduction: the role of culture, a global evidence review.

The intrinsic and quantifiable value of culture to societies has become increasingly well understood and well analysed. The impacts of collective resources such as libraries, museums, theatres and galleries, and of cultural products such as literature, music and art, span many areas that are fundamental to the growth and development of nations, regions and local areas.

This chapter explores the ten main contributions of culture identified in the global literature. These combine intrinsic, instrumental and functional impacts.<sup>1</sup> Institutions consulted for this review include:

- ☐ Arts and Humanities Research Council
- ☐ Arts Council
- ☐ Culture 21
- ☐ Cultural Learning Alliance
- ☐ Montreal Urban Ecology Centre
- ☐ European Commission
- ☐ Nesta
- ☐ OECD
- ☐ UNCTAD
- ☐ UNDP
- ☐ UNESCO
- ☐ World Bank
- ☐ World Cities Culture Forum
- ☐ World Economic Forum
- ☐ World Tourism Organisation

Fig 1 10 Dimensions of the value of culture.



## 2.2 Education and Knowledge

Regular access to culture and participation in the arts has been shown to have strong positive links to learning, education and achievement in nations and regions around the world. Among the recognised benefits include:

- Improved Attainment: High school students that combine their study of core subjects with learning through engagement in structured art and cultural activities, such as taking part in drama, music and library activities, report higher levels of attainment in Mathematics and Language and Literacy. Arts-based community programs and arts-rich extra-curricular activities have also been shown to improve student retention rates in schools.<sup>2</sup>

In the UK, the Arts Council England Report 2014 found that participation in drama and library activities improves attainment in literacy, and participation in music classes improves attainment in maths, early literacy and language acquisition.

In the USA, a large-scale review of national longitudinal educational and youth databases of 25,000 students found a strong correlation between arts engagement and academic and social achievements, particularly among students with a lower socioeconomic status.<sup>3</sup> For middle school, high school and university students, engagement in structured and extracurricular arts activities has a number of positive outcomes, extending to higher grades, better exam results and the greater likelihood of honours society membership, high school graduation and university enrolment.<sup>4</sup>

- Increased Cognitive Ability of Children: Structured cultural activities are known to improve the thinking skills of children, increasing their performance at school and enabling them to achieve the high grades that will provide them with better life-chances in adulthood.<sup>5</sup>

A review of studies from the UK shows that participating in cultural and arts activities can increase the cognitive ability of children by 17%, making them better learners and providing them with the skills to apply knowledge and imagination to real-world problems more effectively.<sup>6</sup>

Data from the British Cohort Study shows that an increase of one standard deviation in the cognitive ability of an 11 year old is associated with a greater likelihood of entering higher education and a 10% increase in hourly wages at the age of 42.<sup>7</sup>

- Problem Solving and Critical Thinking: Learning through creative and innovative arts-based subjects can sharpen the critical thinking and problem-solving abilities of children. Observational studies of visual art classes in primary schools have shown that creative projects improve the ability of students to work collaboratively and to think and reason more creatively and critically.<sup>8</sup> These competencies are valued by 21<sup>st</sup> century employers and help students to succeed in the knowledge and innovation-based sectors in which Australia and its cities compete.<sup>9</sup>

## 2.3 Health and Wellbeing

There is a growing body of evidence demonstrating the instrumental effect art and culture on health and wellbeing. Participatory arts activities are being used to supplement the traditional

medicine and care used to treat people experiencing challenges of physical health, mental health and wellbeing. Global research shows that art and culture contribute positively to health and wellbeing in several ways:

- Good Physical and Mental Health: Participation in culture is significantly associated with individual reports of good health. Over the last 5 years, scientists have observed a positive link between the attendance of cultural sites, events or performances, and health and well-being, even when factors such as age, income, education, and disability are controlled for. Studies from Canada, Sweden, UK and USA show that specific local cultural interventions, such as reading groups, dance classes, music therapy sessions and art therapy sessions, can have a direct positive impact on the health conditions of people suffering with dementia<sup>10</sup> Parkinson's disease<sup>11</sup>, depression<sup>12</sup> and breast cancer.<sup>13</sup>

#### The Therapeutic Value of Art and Culture for Children

Clown-doctoring is an internationally established therapeutic practice which sees Doctors using the creative form of clown performance to diminish fear and calm children with cancer or those who are undergoing major procedures.<sup>14</sup> Countries with structured hospital clown programmes include Switzerland, Brazil, Belarus, Italy, South Africa, Spain, Turkey and France.<sup>15</sup> A qualitative phenomenological study from Finland found that clown care fosters a positive emotional state among young patients, creates an affirmative environment and promotes interaction between child patients, their parents and hospital staff.<sup>16</sup>

#### The Impact of Art on Physical and Mental Health

In the UK, a review of the medical literature by Arts Council England found a range of medical areas in which clinical outcomes have been achieved through patient participation in arts and cultural activities. Clinical outcomes identified by the review provide clear and reliable evidence supporting the relationship between art and improved health and wellbeing.<sup>17</sup>

Below are some of the key supporting findings:

A controlled study of patients in Chelsea and Westminster Hospital found that music reduced feelings of high anxiety among cancer sufferers undergoing chemotherapy by 32%.<sup>18</sup>

After listening to their preferred music for 20 minutes each day during a test period, patients with rheumatoid arthritis had significantly lower levels of perceived pain compared to their pre-test levels.<sup>19</sup>

In the USA, a study of 469 elderly individuals aged 75 and older found that frequent dancing reduced the risk of dementia by 76%. The study concluded that dancing has the greatest potential as a risk reduction activity compared to cycling, playing golf, reading or doing puzzles.<sup>20</sup>

#### Participatory Arts and Aboriginal Health and Wellbeing

In Canada, creative and participatory arts activities play a valuable role in the health and wellbeing of many Aboriginal communities. For the Cree people of northern Quebec, an ethnographic research study found that art is a highly accessible and effective tool for

Indigenous individuals to express their experiences and emotions in the therapy setting, compared to traditional modes of verbal communication.<sup>21</sup>

In Australia, since 1987 the Victorian Health Promotion Foundation (VicHealth) has been using arts to enhance the health and emotional wellbeing of the state's Aboriginal population. The organisation uses a mix of traditional and contemporary participatory creative activities, which are integral to Aboriginal heritage, as health promotional tools to build mentally and physically healthier and happier communities. The intangible health benefits of art and cultural participation play a key role in addressing the disparity in disease incidence, disability and life expectancy between Aboriginal and non-Aboriginal Victorians. The organisation supports arts projects which promote self-esteem, pride, reduce drug and alcohol consumption, and promote economic engagement at the individual level.<sup>22</sup>

- Wellbeing: There is both an intuitive and measurable connection between a sense of holistic wellbeing and participation in cultural activity.<sup>23</sup> Studies indicate that a higher frequency of visits to art events, historical sites and museums, is positively correlated with a greater level of subjective wellbeing, happiness and satisfaction with quality of life. The relationship between non-passive arts and cultural activities and reports of greater satisfaction is particularly strong due to the feelings of purpose and social interaction generated by participation and performance. The findings show that when people engage in passive activities, such as attending arts events, concerts, museums and historical sites, as little as once a year, they report greater life and leisure satisfaction and general happiness.<sup>24</sup>
- Mental Health and Social Resilience: Creative arts activities are a powerful tool for reducing depression, anxiety and stress in young people and can be used as therapeutic tools to alleviate the negative symptoms of serious mental health illnesses.<sup>25</sup> Half of the most serious mental health issues, such as schizophrenia and psychosis, manifest before the age of 14 and around a quarter of serious mental health issues are preventable through early intervention.<sup>26</sup> Recognising this, there has been a strong international call for early intervention in the form of creative programs, based on emerging findings that demonstrate the powerfully positive and consistently effective impact of the arts on mental health therapy and treatment.<sup>27</sup> This area has emerged as a priority for higher tiers of government in the developed world where social and employability resilience has become a policy concern following the recent economic downturn.

Well-designed cultural activities are also being shown to address stigma around mental health issues and help ease trauma in urban environments.<sup>28</sup>

#### Tackling Mental Health Stigma Through Art

The Cunningham Dax Collection at the Dax Centre, University of Melbourne is one of the largest collections of art created by people with a broad range of mental illnesses, experiences of serious psychological trauma, and children receiving treatment and therapy for emotional problems. The Collection is designed to reduce the stigma around mental health illnesses and promotes mental health literacy by emphasising the psychological dimension of the creativity exhibited by the creators. The Collection tours to community groups regionally, rurally and internationally as part of its attempt to promote of mental health awareness and the prevention of suicide through inspiring the launch of mental health activities.<sup>29</sup>

- Aging Populations: Participatory cultural and creative activities are effective mechanisms for improving the health, overall wellbeing and subjective quality of life of aging individuals. The findings of multiple randomised controlled studies show that participation in music and movement activities, such as playing instruments, singing and dancing, can nurture the social, emotional and physical health of aging adults.<sup>30</sup>

For those suffering with dementia, musical activities have been shown to reduce feelings of apathy, anxiousness and agitation.<sup>31</sup> There are also social benefits for aging individuals of interaction and participation, which in turn help to promote cognitive function and communication.<sup>32</sup>

#### The Benefits of Art and Culture for Individuals Suffering with Dementia

A diverse range of art and cultural activities have been shown to positively impact the health and wellbeing of patients with different stages of dementia:

Studies from the UK, Canada and the USA, show that the inclusive and participatory activity of social dancing provide dementia patients with a new way of communicating, enhance cognition, encourages them to be spontaneous and increases their physical movements and reaction times.<sup>3334</sup>

In the UK, the Museum Association partnered with the Tunbridge Wells Museum & Art Gallery, Canterbury Christ Church University and Alzheimer's Society Day Support services on a project designed to make interesting objects from the Museum's collections accessible to local people suffering with dementia. Research carried out by the Museum Association found that attendees with early and middle stage dementia reported measurable increases in subjective wellbeing after engaging with the activity.<sup>35</sup>

In Australia, a number of museums and galleries have programmes specifically tailored to the needs of the aging members of population and older adults with dementia. The Art Gallery of New South Wales' (AGNSW) Arts Access programme is one example which provides accessible art and social support to people living with dementia and their carers, health professionals and family members. Under the expert guidance of Gallery staff and volunteer programme facilitators, AGNSW enables people living with dementia to have meaningful and enjoyable creative experiences and reduce their social isolation through a range of community activities. The programme is designed to support lifelong learning, inclusivity and enrichment through engagement with art and has an active role in tackling the stigma associated with dementia.<sup>36</sup>

## 2.4 Identity and Belonging

In the current cycle, where political divisions along geographic lines have been exposed in a number of advanced industrialised nations and regions, and civic participation in many cases has declined, culture's role in building shared identities and overcoming perception barriers has become more emphasised. International scholarship and inter-governmental organisations observe four benefits in particular:

- Increased Civic Engagement and Volunteering: Engagement in arts and culture motivates children and young people to participate more frequently in civic activities, such as volunteering in community activities and for other causes. Through encouraging young people to participate in creative activities, arts-based youth programmes promote the long-term development of the skills and competencies which underlie pro-social



behaviour, such as initiative, self-efficacy, assertiveness, communication and an appreciation for diversity. The supportive arts instructors who lead these programmes actively encourage young people to remain connected to their local communities and feel valued as engaged citizens.<sup>37</sup>

#### Long-Term Social Benefits of Arts Engaged Students

In the USA, Catterall's analysis of the National Educational Longitudinal Study dataset found that students of a low socioeconomic status with high levels of arts and cultural capital were more likely to volunteer in their communities as adults than those without. By the age of 26, 24.3% of those who had been engaged in arts and culture as students were volunteering, compared to 10.8% of those who were non-engaged.<sup>38</sup>

In the UK, the Arts Council England Report 2014 found that secondary school students who engage in structured arts programmes at school are 20% more likely to cast votes in elections as young adults than non-engaged students.<sup>39</sup>

#### Cultural Volunteerism and Civic Engagement

Datasets from the UK show that cultural volunteers (such as festival, gallery, heritage or museum volunteers) between age 16 and 64 are more likely than non-volunteers to be involved in their local communities and feel confident that their contributions are positively influencing their local environment.<sup>40</sup> These findings support the strong correlation between cultural engagement and civic participation.

- Bridges Social Barriers: The presence of cultural institutions and the intervention of art and culture in the public realm helps to reduce social barriers (generational, class-based, ethnic, religious) in local areas that are becoming more diverse or fragmented. Participatory public art is one tool with low barriers to entry that is observed to encourage different groups of people to collaborate and share enthusiasm for a common creative experience.<sup>41</sup> It can also be a platform for inter-cultural dialogues and promote integration of migrant populations.<sup>42</sup> Many nations and regions are assessing how participatory culture in public places can reduce social isolation, improve trust and perceptions of neighbourhood safety.<sup>43</sup>

#### The Value of Public Art in Urban Infrastructure

In cities including Barcelona, Chicago, Seattle and Paris, public art and the role of artists are integral to cultural and public urban infrastructure. Public art in the public realm can contribute to the bridging of social barriers by celebrating the culture and traditions of diverse groups.<sup>44</sup>

In Perth, the Public Art Strategy prioritises the holistic engagement of all members the city's community, irrespective of their ability, age, social or cultural background, and celebrates all aspects of the city's unique identity, including the representation of Aboriginal voices, traditions and stories within the public art collection.<sup>45</sup>

#### Art Accessibility and Social Development

In 2015, AGNSW launched a collaborative programme of regional and Western Sydney engagement as part of its dedication to making art accessible and inclusive of the widest possible audience. In 2017, this programme saw the AGNSW partner with the Information

Cultural Exchange in a collaborative two-year project designed to creatively engage disadvantaged communities in Western Sydney.<sup>46</sup>

- Helps to Integrate Unemployed, Marginalised and At-Risk Groups: Cultural spaces are often focal points within communities. They encourage people to gather, collaborate and innovate together, promoting community identity and stewardship. These are valued spaces in all communities but are shown to be especially important in culturally rich, low or moderate-income communities that are facing challenges of marginalisation, unemployment and disadvantage.<sup>47</sup> The UN 2030 agenda has highlighted a growing recognition among governments, investors and foundations of the value that culture brings to strengthening the capacity of integrated development for all members of a community.<sup>48</sup>

#### Participatory Arts and Reduced Recidivism Rates

Cultural and arts programmes reduce re-offending rates by contributing to the long-term social and personal development of at-risk individuals.

In 2006, the UK's Youth Justice Board and Arts Council England formed a strategic partnership to launch the Summer Arts College (SAC), a structured arts programme aimed at reducing offending rates, developing basic life skills and increasing the educational engagement of young people at risk of reoffending. The recidivism rates of young offenders who completed the SAC were 54% between 2007 – 2012, compared to the UK national rate of 72%.<sup>49</sup>

- Promotes Cultural Democratic Norms: Cultural democracy is when individuals have the freedom, opportunity and tools (support, space, materials and time) to create their own forms of culture, such as singing, dancing, inventing, writing and building, outside of the professional creative and arts industries.<sup>50</sup> In several high-income countries, investment in accessible and participatory everyday cultural initiatives has been shown to enrich cultural democracy and local governance by empowering more members of a creative ecosystem in a community to enjoy culture together and co-create it in different ways. High cultural creative freedom is dependent on the opportunities in their environment which can be supported through public and private interventions and resources.<sup>51</sup>

## 2.5 Creativity and Innovation

Culture is the foundation of creativity and is therefore an essential component of the innovation-led post-industrial economy.<sup>52</sup> From the current global discussion on the role of culture in innovation, it is apparent that:

- Cultural entrepreneurship is growing as a share of total. Entrepreneurs who produce and market cultural goods and services generate significant economic opportunities and add cultural value for consumers.<sup>53</sup> Research shows that a rich cultural landscape has a strong influence on the performance and ethos of entrepreneurs
- Culture as a cross-sectoral enabler of innovation. Inter-disciplinary collaboration and competition is essential for the formulation of cutting edge ideas through diverse industry associations and the sharing of tacit knowledge across domains including higher education, technology and services.<sup>54</sup>

- Culture directly contributes to the dissemination of new technologies, the production of creative goods and services, and fostering of creative activity. Cultural anchors also invest in research and scientific work related to conservation and restoration, involving materials, skills and processes that cross-fertilise with other activities. Indirectly, arts and cultural facilities also showcase innovation and the design of new products through the display of collections, exhibitions and events.

For these reasons, the World Economic Forum recommends that national and regional government should stimulate the development of the cultural ecosystem in partnership with artistic, educational and cultural institutions.<sup>55</sup> Existing cultural assets can be catalysts for encouraging the ecosystem to grow but promoting new investment and activity is equally as important. Support for the view that culture and innovation can foster long-term economic growth is demonstrated by Finland, a nation that has placed culture at the very centre of its innovation policy.<sup>56</sup>

## 2.6 Economic Development

In nearly all modern post-industrial economies, 'cultural occupations' and creative industries are growing as a share of total jobs and are making greater contributions of value to local and national economies. Creative and cultural activity is recognised as a driver of job creation, employment, entrepreneurship and productivity, and contributes positively to both design led industries and to place-making and management.

- Many countries across the spectrum of wealth and GDP focus on using the arts, culture and heritage-related sectors as sources of renewed job creation in contexts of high youth unemployment.<sup>57</sup>

### Job Creation Potential of the Creative Industry

A demographic breakdown of creative industry employment in Australia shows that artist occupations, such as sculpting or painting, have an older profile (27% of employees are 55+) compared to art-related design occupations, such as graphic design or fashion (42% and 37% age 24 – 34 respectively). These figures suggest that the cultural and creative industry can alleviate wider problems of unemployment by creating job opportunities for those seeking employment across different sectors, irrespective of their age.<sup>58</sup>

- The creation of jobs in the creative industry is not limited to leading cities. In developed nations, there is a growing interface between the craft industries of regional and rural communities, and the new creative industries located in cities.<sup>59</sup> The rural creative economy consists of a hybrid of traditional craft industries, local cultural institutions and new creative industries. An analysis of the Italian craft industry, for example, revealed that such industries tend to locate in peripheral, non-metropolitan areas.<sup>60</sup>
- Graduates in art, design, media and craft subjects are well-equipped with the skills to encourage economic transition and in many countries, they report higher job satisfaction because of their access to work on interesting and innovative projects that are congruent with their interests.<sup>61</sup>
- The creative and cultural industry contributes to the diversification and resilience of the economy as the industry is accessible to people with varying skill and qualification levels. Across Europe, for example, regions with a higher share of cultural and creative occupations were more resilient to the economic downturn since 2008, able to sustain a higher rate of employment among low and medium skilled populations.<sup>62</sup> The sectors

which form the creative economy range from skilled occupations with no need for formal qualifications (musician or painter), to highly-skilled and highly-qualified occupations (architecture or marketing).<sup>63</sup>

- The economic benefits of museums, theatres, galleries and festivals, are being increasingly recognised in national and regional policymaking, because of their ability to act as magnets and gateways to visitors, investment, talent and even firms that would otherwise go elsewhere. They also act as anchors for districts, precincts, and cultural quarters. The multiplier effects for the local economy and tax base are now being more comprehensively accounted for.<sup>64</sup> As a result of relatively high wages within creative sectors, the industry has a high salary income multiplier effect which has positive macroeconomic benefits.

#### Multiplier Effects and Spillovers

In the UK, a report for Arts Council England by the Centre for Economics and Business Research found that for every £1 of salary paid by the creative and cultural industry, an additional £2.01 is created through induced and indirect multiplier effects.<sup>65</sup>

Data from the OECD, UNESCO and Nesta also point to the way cultural industries create many knowledge spillovers that are shared with commercial partners, or when cultural professionals move into different industries.<sup>66</sup>

- Following the boom of innovation and creative industries, global cities are failing to match the supply of commercial and residential real estate with the unprecedented growth in demand. As a result, young workers in the industry are struggling to find affordable accommodation and existing city residents are being priced out of their neighbourhoods. In cities seeking to attract and retain skilled and talented individuals, from London to Dubai, developers are reducing the size of new apartments to make them more affordable.<sup>67</sup>

There is a growing body of evidence to suggest that culture clusters drive adaptation in other parts of the economy through these previously un-studied crossovers.<sup>68</sup>

## 2.7 Tourism

According to OECD, cultural tourism is one of the fastest growing tourism segments in the world.<sup>69</sup> In Australia, the most recent figures from 2012 show that in one year, international cultural and heritage tourists contributed over A\$16,387 million to the national economy. International literature suggests that growth in the cultural tourism industry has two main drivers:

- The tangible and intangible benefits of cultural assets and facilities are enabling regions to establish a competitive advantage within the cultural tourism market place by creating a sense of authenticity and distinctiveness.<sup>70</sup>
- The experience economy is an important driver of cultural tourism, and this means more appetite for locations of all types to showcase local arts, heritage, landscapes, traditions and lifestyles.

A wider benefit of the growth in the cultural tourism industry is the strong case it creates for the preservation of heritage assets. As the demand for authentic and unique experiences grows, so too do the educational and economic values of heritage assets as cultural tourism resources.<sup>71</sup>

#### Defining Cultural Tourism

A person becomes a cultural and heritage visitor if they take part in one of the following activities or experiences during their trip:

- ☐ attend the theatre, a concert, or other performing arts event
- ☐ visit a museum or art gallery
- ☐ visit art and/or craft workshop or studio
- ☐ attend a festival, fair or similar cultural event
- ☐ experience Aboriginal art, craft or cultural display
- ☐ visit an Aboriginal site or community
- ☐ visit an historical and/or heritage building, site or monument

Source: Australian Bureau of Statistics (2014)

#### Growth in Cultural Tourism in Spain

Since the global economic downturn, growth in the cultural tourism industry has been central to the recovery of the Spanish economy. Between 2006 – 2014, the number of cultural tourists visiting Spain experienced a 16.9% growth rate, from 5.9 million to 7.1 million. From 2003 to 2014, cultural tourists' spending rose by 53%, from 4.9 billion euros to 7.5 billion euros.<sup>72</sup> The growing wave of cultural tourists are motivated to visit Spain because of its rich national heritage but also recent cycle of investments in different types of cultural attractions, such as galleries, museums, places of worship and historic city districts.<sup>73</sup>

## 2.8 Placemaking

The findings of the latest global literature suggest that as more attention is paid to the fabric and characteristics of very local areas, culture underpins the identity and quality of places that are attractive, valuable, liveable, and better able to accommodate population growth.

- ☐ Cultural assets firstly reveal the distinct and authentic Identity of neighbourhoods, precincts, and districts, providing physical and social form with a narrative and direction. Localities that have an art and cultural inventory allow people to understand the past, present and future social, economic and cultural contexts of a place. These qualities are revealed through materials in the built environment, art forms, unique customs, food culture languages, local educational institutions and art institutions.<sup>74</sup> They foster strong local identity and also encourage a sense of belonging and resilience.
- ☐ The participation of the public in urban planning and design, through art competitions, design workshops and the revitalisation of public space, can help urban designers and planners to develop initiatives which appropriately and effectively respond to local hopes and needs.<sup>75</sup>

- A mix of cultural services and infrastructures also make places more vibrant and can enhance the quality of life of citizens who live and work there. There is now a well-argued evidence base that cultural amenities and cultural venues boost resident happiness and the ability of places to attract and retain talent.<sup>76</sup>
- Culture is an especially popular tool for placemaking in urban areas.<sup>77</sup> Arts and culture-led regeneration projects, or new development areas, play a prominent role in enhancing neighbourhoods in post-industrial cities, and act as anchors to address broader social and economic issues.<sup>78</sup>
- Smaller-scale, creative and tactical place-making can activate a decentralised portfolio of innovative spaces that accommodate multiple uses and a mix of incomes and are also part of a broader canvas promoting more balanced and healthy communities.<sup>79</sup>
- Culture is an important source of public space. These approaches are proving especially important in communities where there are few public spaces that are destinations or gathering points.<sup>80</sup>

#### International Recognition of Value of Culture in Public Space

The importance of culture in public space was highlighted at the UNESCO Habitat III thematic meeting on Public Spaces in 2016. Delegates agreed that culture promotes better access to markets, public services, jobs and information, as well as a deeper citizen culture, in both developed and developing countries.<sup>81</sup>

## 2.9 Sustainability

Culture, heritage and the creative industries, are well placed to contribute to sustainable targets in a number of different ways.

- In particular, culture is a key element in the latest concepts of sustainability because of the role it plays in shaping attitudes towards the built and natural environment.<sup>82</sup> Investing in the conservation of cultural assets, and in traditional knowledge and adaptation skills to the environment, can help to strengthen environmental sustainability.
- The social identity of Aboriginal and local communities is expressed through different forms of traditional cultural and creative expressions, such as music, dance, design, names, ceremonies, handicrafts and art. Recognising the importance of these traditional cultural expressions and traditional knowledge bases is integral to the promotion of widespread social sustainability.<sup>83</sup>
- The Hangzhou International Congress was the first global forum to discuss the role of culture in sustainable development. It showcased evidence of the links between biodiversity and cultural diversity, through the influence it exerts on consumption patterns, and through the application of local knowledge to sustainable practices.<sup>84</sup>
- Culture is also recognised in a number of UNESCO's Sustainable Development Goals, including those focused on food security, sustainable cities, environment, consumption and production.<sup>85</sup>

#### Integrating Culture in Sustainable Development

Achieve a balanced flow of cultural goods and services and increase the mobility of artists and cultural professionals is the second of four key goals of the UNESCO Global Report Re/Shaping Cultural Policies. In order to deliver holistically sustainable development, it recommends that governmental and non-governmental actors collaborate much more in cultural policy-making.<sup>86</sup>

Source: UNESCO (2018)

## 2.10 International Image and Soft Power

Current research on the relationship between culture, image and power highlights the role of culture in improving the reputation, standing, and soft power of regions and countries in an increasingly competitive world.

- Cultural icons such as Sydney Opera House, The Eiffel Tower in Paris, or the new Monk Museum in Oslo can become themselves important signifiers of cultural power and place identity in key locations.
- Investment in the cultural resources of communities can promote the unique identity, image traditions, and cultural products and services of a region. The risks of cultural homogenisation mean that a distinct cultural identity enables a city, region or nation to continue differentiating itself and retaining its appeal to potential global visitors, residents, investors and students.<sup>87</sup> Extending investment of cultural resources to the conservation of Aboriginal heritage will benefit this community by supporting and strengthening the strong identity of this culture and their valued places.<sup>88</sup>
- UNESCO also highlights the way art and culture is also used as a diplomatic tool to promote the sharing of ideas, experiences and knowledge and to build bridges between cultures and communities.<sup>89</sup> In many cities cultural diversity, music celebrations and other tools are promoted as a source of innovation, peace, openness and dialogue.<sup>90</sup>

## 2.11 Culture and Indigenous People

There is increasing global commitment to invest in culture as a means of supporting Indigenous peoples, recovering their dignity and enabling them to pass on their distinctive knowledge, values and ways of life. Indigenous populations currently represent about 350 million individuals or 5% of the world's population and are recognised by the UN and UNESCO as a critical part of the world's cultural diversity.<sup>91</sup>

National and higher tier governments, including in North America, the Caribbean and the Middle East, are starting their commitments to support Indigenous programmes in areas such as music and screen-based storytelling, and address issues of under-representation and under-compensation. Initiatives include reducing barriers to entry, more integrated funding streams, providing access to distribution networks, improving incentives for firms in the supply chain to participate, professional development, capacity building, and inclusive governance of cultural sectors.<sup>92</sup>

Although detailed global studies are still to fully assess the impact of supporting indigenous culture, there are some indications that they can have positive effects on both individual and community self-esteem and on wider economies. For example, the World Intellectual Property

Organisation has emphasised that many innovative and creative businesses are created and inspired by traditional cultures, and that these in turn boost the creative economy, foster community enterprise and drive job creation, skills development and tourism.<sup>93</sup>

#### Investing in Aboriginal culture in Toronto

The City of Toronto has the fourth largest Aboriginal population in Canada, and it takes its responsibility to preserve and promote Aboriginal culture seriously. When surveyed in 2010, half of Aboriginal peoples in Toronto said that Aboriginal cultural activities are widely available in the city, and by a ratio of more than ten to one, First Nations peoples, Métis and Inuit thought that Aboriginal culture in Toronto had become stronger rather than weaker in recent years.

This response may owe to the fact that the city hosts regular Aboriginal events, which recognise and celebrate Aboriginal cultural diversity. Each year thousands of people attend Toronto's Traditional Pow Wow to enjoy traditional food and watch drummers and dancers perform. In 2017 the city also hosted an Indigenous Arts Festival as well as the North American Indigenous Games, the largest sporting and cultural gathering of Indigenous people from across North America. Toronto has recently installed five Indigenous Flags in a central city square, which are raised to celebrate days of cultural significance such as National Aboriginal Day and Luis Reil Day.

In 2015 the city's Aboriginal Affairs Committee identified Calls to Action for all levels of government – including the city government --- in support of eight identified priorities from the Truth and Reconciliation Committee of Canada's report. Some of these priorities concerned Aboriginal cultural preservation, for example, the AAC called upon the relevant city authorities to ensure long term Aboriginal athlete development and growth, and to fund commemoration projects on the theme of reconciliation.

#### Abu Dhabi's support for traditional and indigenous culture

While also investing in large cultural districts, Abu Dhabi's authorities have been careful to take a range of measures to preserve and raise awareness about traditional Emirati culture in the recent cycle. These include:

- holding festivals and events such as the Sheikh Zayed Heritage Festival – an interactive collection of performances, pavilions and events celebrating Emirati culture. Traditional cultural festivals have proven extremely popular and draw large crowds;
- forming clubs like the Emirates Heritage Club which conduct research on Emirati heritage and organise activities to promote heritage awareness;
- establishing a heritage village – a reconstruction of a traditional oasis village, with traditional houses, schools, markets and public spaces
- establishing and maintaining heritage museums such as the Al Ain National Museum and the Delma Museum which focus on history and Emirati culture. On Saadiyat Island important investments are also being made to local heritage through the planned Zayed National Museum, which will form the centrepiece of the development and will tell the history of the UAE and its cultural connections across the world. A new Maritime Museum on Saadiyat Island is dedicated to Abu Dhabi's sea-faring history and people;
- Preserving and renovating historical buildings for the enjoyment of the public, including the Al Ain Palace Museum, Al Jahili Fort and Qasr Al Muwaji in Al Ain;



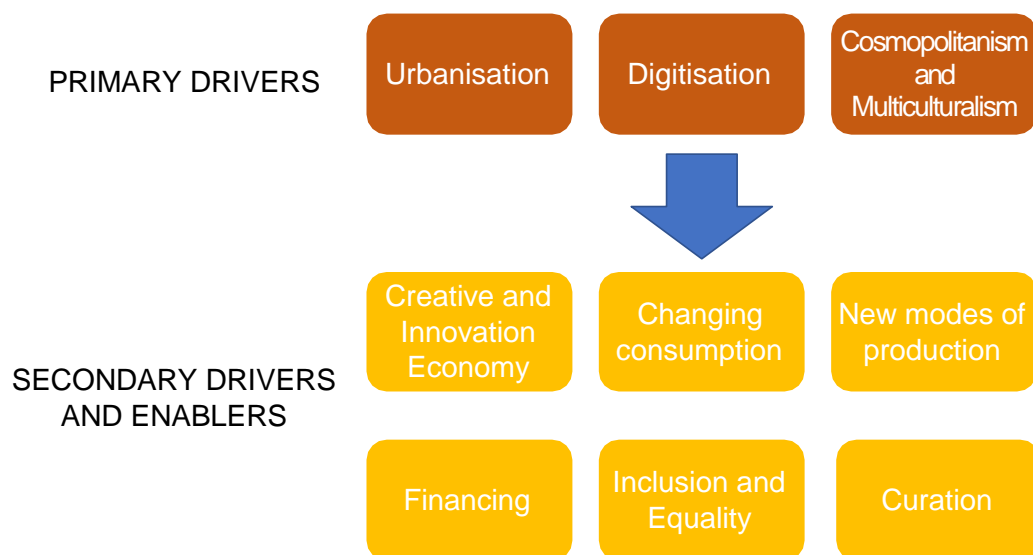
- constructing and maintaining mosques.

### 3 – Trends in Cultural Development and Investment Worldwide

#### 3.1 Introduction: Key Trends

As the value of culture to multiple goals of society and government has become clearer, more nations and regions have developed new approaches and new investment strategies to enhance cultural provision. The kinds of cultural development and investment that are prioritised are influenced by other megatrends that shape where and how culture is produced, enacted and consumed. This chapter explores ten current trends and future drivers of cultural development and investment around the world.

Fig 2 Drivers and Enablers of Cultural Development and Investment



#### 3.2 Urbanisation

Humanity's shift from 45% urbanised to 85% urbanised by 2100 is unprecedented in its speed and scale. The larger cities in nearly all nations are reaching a level of population larger than at any point in their history, their societies and economies are typically more diverse and globally connected than ever.

As Peter Hall famously argued in *Cities and Civilization*, cities have always been places where the world's great art, ideas, technologies has developed and flourished, and where the next cycle of industries and modes of production are forged. Cities have been crucibles of culture in multiple periods of history, from in Athens in the fifth century BC; to Renaissance Florence between 1400 and 1450; Elizabethan London around 1600, the time of Shakespeare; Vienna throughout the 19th century up until the first world war; Paris between 1870 and 1910; and Berlin in the 1920s. What is common in all great cities of culture, for Hall, is a critical mass of creative people that help to overcome cultural inertia and have a transformative and positive effect on wider society. Culture's own 'agglomeration effects' means that the cultural leadership of cities are set to continue despite advances in technology and communication.

The current wave of urbanisation is striking for a number of reasons:

- There are more types of cities and more pathways to success: there is competition among the world's leading cities and a much larger number of competitive smaller and medium-sized cities, whether for investment, talent, specialisations, students, visitors or institutions. This means firstly that culture plays different roles in different types of city. Secondly it means that more cities are under pressure to compete in terms of urban liveability, vibrancy, heritage protection and global identity.<sup>94</sup>
- Citizen expectations are rising in cities at all income levels, especially around the availability of services and amenities including culture.<sup>95</sup>
- Growing frictions between successful cities and their nation states. Political and social divisions that can accompany are an important driver of government action and collaboration to spread benefits that concentrate in cities, address perception gaps, and to use culture as a tool in this process.
- Metropolitanisation and development at the peripheral edges of cities. The enlargement of the spatial footprint of cities and the decline in their overall density, presents new challenges around how and where cultural amenities are located.

As mass global urbanisation unfolds and cities grow the role of culture can be seen to link to distinct future scenarios for cities.

**Box 1 Six scenarios for the future of culture in cities in 2065**

1. **Tourist Experience City:** An augmented reality of the city will shape the organisation of the immersive experience city, in which physical and virtual worlds are blended and tailored to the needs of the individual.
2. **Homeland City:** Traditional values will prevail in the homeland city. It will be a pre-retirement oasis for people over 50 who seek to be protected from change.
3. **Campus City:** The city will consist of distinct locations and quarters devoted to high value economy; science and technology hubs, smart city districts, advanced office and business districts and others serving the creative class. Culture and education will be used instrumentally to serve the needs of different enclaves.
4. **Business Lounge City:** Inequalities and disparities grow within and between cities, and culture increasingly is customised for transnational elites. Those with the ability to pay will be fully catered for. Culture will be about display.
5. **The Omnivore City:** An open city tailored to accommodate a fast-moving cosmopolitan culture. Higher densities than today, high interaction environments (co-working etc), home to a large educated middle class with appetites for cultural performance and innovation.
6. **Edge City:** Highly populated but least cultured cities; spatial fragmentation and lack of critical mass means culture struggles to attract investment. Local governments stuck in low investment low return equilibrium means public investment in culture declines.<sup>96</sup> Culture becomes more linked to retail, TV and online.

Source: Prof Andy Pratt (2015). Future Cities Foresight<sup>97</sup>

### 3.3 Digitisation

Contrary to fears that digitisation would drive standardisation and homogeneity in culture, research shows that it is accelerating diversity and hybridity within culture, innovation and creation.<sup>98</sup> The speed and quality of digital platforms has resulted in much greater appetite for

access to cultural content at any time, on any device, with the shift from physical to digital forms of culture very pronounced in the music, gaming and video-on-demand sectors.<sup>99</sup>

Digitisation is enabling much greater citizen consumption of media and culture but paradoxically, it is also reaffirming the value of physical and embodied cultural experiences, such as shows and events, and the physical production of cultural products. In 2015, 80% of all books were sold in print form, despite growing availability of e-books.

Despite rapid digitisation in the music industry, there is still a strong appetite for live music shows and festivals. The UNESCO Cultural Times report found that in Europe, ticket sales from live performances (valued at US\$16.5bn) generate over double the revenue from recorded music sales (US\$6.3bn).<sup>100</sup>

### 3.4 Cosmopolitanism and Multiculturalism

21<sup>st</sup> century cities and regions bring together melting pots of established residents and new immigrants, the old and the young, and the haves and the have-nots.<sup>101</sup> As the World Cities Culture Forum observes, in large multi-racial regions, in particular, new challenges have emerged about how to strengthen bonds between citizens and communities to generate a shared sense of identity while also celebrating difference.<sup>102</sup>

In many parts of the world, attachments to national symbolic culture increasingly sit alongside a hybrid of overlapping cultural, social, economic, political, personal, intellectual and virtual identities. This is particularly true for residents who live in multi-cultural cities. This presents numerous audiences and opportunities to produce, consume and sell culture.<sup>103</sup>

### 3.5 Creative and Innovative Economy

One of the major economic trends of the last 20 years is the shift from the Industrial Economy and the Corporate Economy towards the Innovation Economy. The Innovation Economy refers to the advanced industries and firms that are being transformed by disruptive technologies, faster product lifecycles, new business models and the new work and lifestyle preferences of talent. It is widely viewed as the major source of future trade and productivity growth in established and upper-income cities. It spans sectors such as digital media, life sciences, maker/manufacturing, and clean technology, but also erodes recognised boundaries between sectors because of breakthrough effects in the use of materials, IT, virtual reality, big data, logistics, construction, space, currency and infrastructure.<sup>104</sup>

All over the world, city and local governments, landowners and developers are responding to the opportunities and the clustering dynamics of the innovation economy. In more than 100 cities, buildings, districts or larger locations are being designated as future centres of innovation for the urban, regional or even national economy. These locations often have cultural industries and anchors, or they require a cultural presence as part of the sequencing of infrastructure to realise their potential.

The acceleration of the Innovation Economy itself is also likely to create radical disruption to the products, consumer tastes, social and cultural norms, and other trends that affect culture – such as the future of tourism and solutions for sustainability.<sup>105</sup> The need to ensure cultural development and investment fits with these demand-side changes will be important moving forward.<sup>106</sup>

### 3.6 Inclusion and Equality

The trend for global inequality to be shrinking and in-country inequality to be rising is now widespread. Among the many effects of this trend – aside from the divides between cosmopolitan ‘Anywheres’ and rooted ‘Somewheres’ – is that the political and democratic urgency to address social inclusion and spatial rebalancing has become more visible.<sup>107</sup>

Because of the growing global body of research on the role of culture in promoting social inclusion, social cohesion and equality, many policymakers around the world are now orienting their cultural investments around these concerns. This brings with it strongly contested debates about the kinds of culture, the locations of culture, and the financing models of culture to be approved.<sup>108</sup>

At a smaller and more local scale, the concern about inequality of access is also encouraging more investment development of multi-disciplinary and participatory cultural events co-created by and for people within local communities.<sup>109</sup>

### 3.7 Consumption

Data from the last decade in upper income countries indicates that there has been a move away from the consumption of mass cultural products and services in favour of active cultural participation, novel experiences and desire for self-improvement.<sup>110</sup> From 2011 to 2017, there has been a downward trend in subscriptions and memberships, highlighting a growing phenomenon known as ‘cultural promiscuity’. People want to be able to experience a variety of different types of cultural activity and be exposed to a range of new ideas and cultural traditions.<sup>111</sup>

These consumer experiences take place in both physical and online spaces. In cities where more people are time-poor, there is a growing appetite for unique, stimulating and entertaining digital experiences, such as accessing museum or art collections online.<sup>112</sup> People have nuanced attitudes towards digital cultural experiences but are generally open to their role in the future of cultural consumption, particularly for access to history, technology and science museum collections, art, pop music, zoos and botanical gardens, film, dance and theatre.<sup>113</sup>

Trends show that there are clear patterns in consumption and production in different regions around the world; Asia Pacific leads in the revenue generated from gaming and architecture, Europe leads in advertising and the USA leads in film and television revenue, and is the highest consumer of digital content.<sup>114</sup>

### 3.8 Production

In addition to the role of mainstream theatres, museums, galleries, and other formal cultural spaces, there are two types of spaces now enabling cultural production in cities: informal gathering spaces and affordable workspaces. Cities recognise the role that informal gathering spaces, such as bars, cafes and public spaces, have in enabling people to share creative ideas and discuss new cultural projects. In some nations and regions, this has resulted in a shift in cultural development and investment away from the support for mainstream cultural production in large venues (museums, art galleries, concert halls), towards the provision of quality informal spaces and the fostering the development of creative clusters.<sup>115</sup>

Artists and producers of cultural goods, services and experiences rely on access to affordable workspaces in proximity to other artists, which fosters experimentation, knowledge and cost sharing. However, rising urban land values means that in many cities cultural producers are relocating to the edge of cities or often to urban cores of nearby cities. How governments support the agents of cultural production is a major policy challenge that is creating innovative solutions around how and where to invest and develop culture.

### 3.9 Financing

There are strong differences between the sources and approaches used to fund culture worldwide. A 2015 World Cities Culture Forum report on the funding of culture in 16 world cities found that funding for culture and creative industries was 20% private donation and sponsorship, 73% public direct, and 7% public incentives. It found that where public funding for culture is falling, policymakers are using measures such as tax breaks, public match of crowdfunding, and fundraising training to support cultural organisations.

In recent years, there has been an increase in private and civic sector finance for culture. Cultural projects produced by non-profit organisations often receive funding through grants. Partnerships between city government, philanthropic organisations and private companies are also being encouraged to mitigate the rising cost of homes which put artists, cultural producers and art organisations at risk.<sup>116</sup>

### 3.10 Curation

The curation of exhibitions, collections and public space has become a critical part of the equation of cultural development. Indeed, there is a wide literature on the increasing prevalence of curatorial practices in contemporary social life (and indeed the rise in online curation that is increasingly unprofessional, uncommodifiable, and subject to algorithms on streaming platforms).<sup>117</sup>

Professional curation requires very high levels of skill and understanding in order to use culture to achieve institutional but also social goals. The curation and orchestration of public and everyday space and the communities that use them has also become important trend, especially in cities, using installations, gardening projects, live encounters, etc. As part of the experience economy, this involves investment in a high degree of customisation and sometimes an attempt to blend physical, historical and virtual environments through technology.<sup>118</sup>

As curatorial approaches to placemaking expand across more cities and regions, some instances involve urban curation where arts organisations are outsiders to a civic or corporate planning process, others have been shown to involve a planning process for transformation that is arts-led. In most cases, analysts detect a shift from stakeholders being concerned about only a performance or a building, towards having a 'total place' perspective. For this perspective to emerge relies not only on finance and expertise but also on partnership and leaders of land owners and developers, and a mechanism for effective management.

## 4 – Public Policy: Why and How Should Governments Intervene in Cultural Provision?

This chapter explores the cases for intervention and the modes for intervention available to governments when it comes to cultural provision and development.

### 4.1 The Cases for Intervention

Government intervention in culture can take place at a city, sub-national or national level and is often delivered through a cross-cutting coordination between different agencies. As Box 2 highlights, the value and power of culture is interpreted differently and is leveraged for different outcomes. The important role of culture in sustainable social and economic development is clear.

#### Box 2: Justification of Cultural Policies

##### City of Aarhus, Denmark (Cultural Policy 2017 – 2020)

The vision for the new Cultural Policy is: Aarhus – an international city where culture sets the agenda. The vision paints a picture of a city where culture is a key driving force in the city's development, and where 'the good life' is the focal point. The city will benefit from the experience and insight gained from Capital of Culture 2017 in the form of an enhanced level of artistic expertise with strong professional networks, and the innovative art and culture that will be produced and presented in the city in a strengthened environment for cultural productions.<sup>119</sup>

##### Cape Town, South Africa (Arts, Culture and Creative Industries Policy):

Intercultural events, projects and campaigns develop and promote projects that advocate harmonious relations between cultures or cultural communities, using tools that enable intensive exchanges in order to foster a common identity without eliminating differences.<sup>120</sup>

##### Ontario, Canada (The Ontario Culture Strategy):

Ontario's rich and diverse cultural heritage gives our communities identity and character, and it enhances our sense of place and pride in where we live... Ontario's outstanding cultural institutions, attractions, festivals and events infuse our communities and our province with energy and vitality — and contribute to economic development and tourism.<sup>121</sup>

##### Australia (Creative Australia):

Creative Australia celebrates Australia's strong, diverse and inclusive culture. It describes the essential role arts and culture play in the life of every Australian and how creativity is central to Australia's economic and social success: a creative nation is a productive nation.<sup>122</sup>

##### Ireland (Culture 2025: Draft):

Through this Framework Policy, the Government seeks to nurture creativity, boost citizen participation, help more people to follow a sustainable career in the cultural sector, promote Ireland's cultural wealth and ensure a cultural contribution to wider social and economic goals.<sup>123</sup>

##### Finland (Strategy for Cultural Policy 2025):

Arts and culture had a strong role in the development leading into the country's independence, and they have continued to do so in the era of independence. Finland will also rely on the power of creativity to develop and renew itself in the future, and arts and culture are at the core of this

creativity. Arts and culture also play a key role in promoting an open and tolerant society: rooted in our personal identities, they open our eyes to understanding others.<sup>124</sup>

There are four primary cases made for intervening and investing in culture:

#### Achieving Value

As explored in Chapter 2, the tangible and intangible benefits of culture experienced by communities, local and national economies and the environment create a strong case for government intervention. The individual and national value of culture is leveraged by governments at many tiers to create a sense of shared identity in politically divided communities, to support placemaking projects and to boost education, health, tourism, creativity and innovation in the creative industry, sustainable development and international image.

#### Matching Demand with Supply

Research from the last decade shows that demand for culture is shifting away from cultural products and experiences in mainstream venues, towards cultural participation in a range of exciting new activities in physical and digital spaces. Demands in the experience economy are being driven by the rise of ‘cultural promiscuity’,<sup>125</sup> advancing technologies and growing interest ‘total place’ perspectives. Meeting this demand will require cultural policies to intervene in organising the supply of resources and spaces for these types of cultural activity to take place.

#### Coordination

In sub-national and national governments around the world, the risk of coordination failure and the need to drive integrated approaches to fully leverage the value of culture across different spheres of governmental activity is driving new ways of working. Cultural policies are being developed through coordination between government agencies and are being created to provide support a wide range of existing policies.<sup>126</sup> Cross-departmental coordination allows for exchanges on topics of common cultural interest, encouraging mutual learning. Cross-cutting initiatives include promoting the educational role of museums, cultural and arts education programmes for people with disabilities and creating art exhibitions in retirement homes to promote the health and wellbeing of the elderly.<sup>127</sup>

#### Dealing with Demographic Change

For many countries, population change is being driven by fertility, longer life expectancy and high-levels of net overseas migration, causing the demographics to shift towards an ageing and increasingly diverse population.<sup>128</sup> Intervening in culture is part of how governments address challenges around the health of the ageing population, overcoming the perception of social barriers and the investment of resources in the creative and innovative economy will boost economic competitiveness at the local and national level.

### 4.2 Modes of Intervention

Governments adopt different modes of intervention in culture, depending on the tools they possess, the mandate they have, and the challenges and opportunities their cultural system has. Below we detail five common modes of regulatory, planning and financial intervention available to governments seeking to enact cultural policy.

Box 3 Questions Governments Think About Before Enacting Cultural Policy in a City or Region

- ☐ What cultural assets does the city/region have? Which should be highlighted in cultural policy?
- ☐ What cultural projects in the city/region can act as catalysts for development, reinforce the image of the city or boost personal confidence and empowerment?
- ☐ Is there an opportunity for cross-departmental working between those responsible for culture and other governmental departments (education, tourism, planning, economic development)?
- ☐ Do other cities/regions in the country have cultural policies? How can their strongest features be assessed?
- ☐ Does the city have a culture of creativity? What are its cultural attitudes and attributes?
- ☐ Other than the availability of financial resources, what are the main obstacles in achieving the objectives set out in the cultural policy?

Source: Charles Landry (2004) *Imagination and Regeneration: Cultural Policy and the Future of Cities*<sup>129</sup>

## Regulation

Copyright and the protection of intellectual property through patenting form the basis for the regulation of physical and digital products and services in the cultural and creative industry.<sup>130</sup> These mechanisms ensure that creators, cultural producers and entrepreneurs receive recognition, payment and protection for their work.<sup>131</sup> Copyrights and patents also provide an incentive for businesses to invest in the industry. The government has a responsibility to regulate the copyright protection of creative products and patent creative intellectual property within cultural policy. The digitisation of culture promotes open, free and sharing cultural processes.<sup>132</sup> It will therefore require special copyright and patenting arrangements to address the challenges associated with the ownership of ideas, the use of cultural material and acquisition of use rights.<sup>133</sup>

## Planning

The rapid growth of cities around the world is putting pressure on the cultural and creative assets that are key to their success. Cultural planning policy and cultural strategies should deliver sustainable development while maintaining urban heritage, such as historic squares and buildings, and should also aim to provide affordable living and working spaces for artists, designers and creative talent.<sup>134</sup> Cultural strategies should highlight the importance of a full range of formal and informal cultural and heritage assets, should be developed with the engagement of culturally diverse communities and should integrate placemaking strategies. They also should reference both day time and night time economies. In many countries, cultural planning strategies complement other strategic plans, such as transport, economic development and land use.<sup>135</sup>

## Financing

The cultural sector is supported by an economic mix of private donations and sponsorships, public direct investment, and public incentives. In recent years, there has been an increase in tax incentives, private/public creative partnerships, and private and civic sponsorship for culture as public resources for direct support are falling. The economic mix used to finance cultural activities shapes the organisation of cultural policies and influence the way they are implemented. In many countries, the devolvment of administration has led to more active financial involvement from lower levels of government and private donors incentivised through benefits provided by new tax provisions. As this process continues, it will be important for policymakers to stimulate private investment by boosting people's awareness of the value of supporting arts and culture through communication campaigns or by proposing to match donations.<sup>136</sup>



Encouraging this diverse economic mix of public investment, public incentives and private sponsorship is considered to be the strongest way of financing culture.<sup>137</sup>

## Taxation

Widespread decreases in the availability of public resources, and the decentralisation and devolution of cultural policy, has led to the rise of indirect methods of government support for culture. Tax policies are now becoming intertwined with specific national and sub-national cultural policy goals in countries including Australia, USA, Chile, Singapore, France and Romania. Favourable tax provisions are particularly beneficial for non-profit arts and cultural organisations who may become exempt from sales taxes, income taxes on surplus revenue and property taxes, and artists who may become exempt from income taxes and sales taxes under some circumstances. Tax policies have also been shown to incentivise philanthropists and donors who can benefit from provisions that reduce the cost of making donations.<sup>138</sup>

## Sponsorship

Private and corporate sponsorships include all donations provided by individuals, trusts, foundations and businesses for culture. Like tax incentives, support for sponsorships is growing as public resources for culture are decreasing, representing a move from a top-down bureaucratic system to one that actively involves individuals and businesses in the cultural decision-making process.<sup>139</sup> In most cities and countries, the cultural sector is supported by an economic mix but the precise proportion of private and corporate sponsorships varies according to local contexts. In some countries, individuals and foundations provide the largest donations, in others corporate giving is the dominant form of sponsorship. In the current political, social and economic climate, private and corporate sponsorships are volatile. Cultural policymakers need to be aware of these pressures and are encouraged to utilise the toolkit that is available to them to support all types of sponsorship.<sup>140</sup>

## 4.3 Conclusion: Towards a place agenda

Over the decade, all across the developed world, there has been a shift towards cultural policy that does not look at culture in a sectoral way, such as only policies for the development of theatre, dance, literature, the crafts and other cultural forms, but also adopts a territorial remit.<sup>141</sup> Cultural policymakers are now focusing on enacting sub-national and national policies that profoundly enhance cultural life, experiences and memories, create a distinct sense of place, and holistically support sustainable development.

“Urban cultural policies were primarily focused on creating or expanding an infrastructure of traditional, building-based arts institutions located in city centres, such as opera houses, museums, and civic theatres, and on widening access to them through the provision of public subsidy. In part this has left a problematic legacy of physical infrastructure that needs to be maintained, but also buildings that may not be fit for contemporary purposes where people seek more flexible spaces and uses. In addition as cities have expanded provision of culture for suburban areas has become an increasingly important issue.”<sup>142</sup>

Charles Landry, author of *The Creative City*

## Chapter 5. Culture and World City Regions

In Chapters 5 to 8, we turn to review the role of culture in 21<sup>st</sup> century global city regions. We examine in what ways culture contributes to the success of global city regions as they occupy an increasing share of nations' population growth, high value traded activity, and destinations for global visitors.

### 5.1 World city regions and culture

World city regions have become increasingly proactive at developing cultural policies and approaches. As recently as the 1980s and 1990s it was rare for cities or regions to have a clearly defined cultural policy, or an organisation whose remit was clearly to deliver cultural development or investment. In this period, the idea of cultural infrastructure tended to focus on buildings alone: the construction and maintenance of museums and galleries, concert halls and public libraries. Culture's role in wider economic or social processes was not widely understood or acted upon.

In the 2000s leaders in global city regions began to start prioritising culture because they observed substantial economic, cultural and social change, and the role their cities appeared to be playing in accommodating and driving this change. There has been a shared recognition, both among city and local governments, and higher tiers of government, that:

- World city regions are growing and becoming more diverse. Their populations have become more cosmopolitan, both in terms of long-term and full-time residents, but also short and medium-term visitors such as tourists, students, and business people. This has encouraged cities to welcome the cultural and economic dynamism that their openness brings.
- World city regions are globally integrated. Their trade links have become more diversified, and this has raised positive awareness of global influence and interdependencies that ought to be celebrated.
- World city regions are hubs for cultural development and innovation. Growing cities were witnessing specialisation and agglomeration in culture, where cultural institutions and firms could share costs and equipment, and where the skills for the specific tasks of cultural commissioning, distribution, management and production could be found in depth. The depth and scale of world city regions mean they are also best placed to absorb the high failure rates associated with cultural ideas and initiatives. And their size means they have the audience base to sustain many more projects and ventures. Cities give cultural experiments the ability to survive with just a small minority audience, providing the 'breathing space' they often need to become a worldwide hit.<sup>143</sup>
- World city regions have a responsibility to their past, present and future. Growing public and media debate about the merits of cultural preservation versus redevelopment, and the balance between cultural heritage and renewal. On the one hand, for example, Paris is sometimes described as a 'museum' because it is too focused on its historic tourist-friendly built environment and does not foster enough cultural reinvention. On the other hand, Shanghai, Mumbai or Moscow are sometimes described as having been too hasty in redeveloping large areas of their cities that had significant cultural value.
- World city regions need a holistic identity. There has been an aspiration to move beyond the 'blunt tool' of place branding that prevailed in the 1990s and early 2000s, and instead develop a fully-fledged account of the cultural life of their cities. This was matched by

efforts to sustain sources of culture across the city and identify where policymakers should best intervene.

- World city regions should collaborate with each other. Culture was viewed as a platform on which global city regions could take a lead and build soft power and global networks, in lieu of wider devolved capabilities.

These shared interests resulted, among other things, in a global network being set up called the World Cities Culture Forum. This now brings together 32 city regions, including Sydney, to share ideas and best practices about policies, investments and developments to support culture. Over time, the Forum has developed more sophisticated tools for measuring, defining and comparing outcomes.

#### Members of the World Cities Culture Forum, as of January 2018



Source: World Cities Culture Forum

## 5.2 What does culture bring to global city regions?

Over time, as global city regions have become more specific, strategic and evidenced-based, they have come to actively embrace cultural policies and investments for five main reasons:

- Competitiveness in high value sectors. Culture does not just play a larger role in urban economies than they did in the past, in terms of jobs, export earnings, tax revenue or new business formation. It also cross-fertilises with other high-value sectors (e.g. software, technology, business and professional services, high-end tourism, higher education, luxury retail, fine art) to drive the competitiveness of cities in many of their highest value sectors. Cultural policies and investments are in part designed to promote culture's synergies with these sectors. Cities also observe that the cultural spaces that they provide create opportunities for risk-taking, experimentation, and innovation that drive not only the cultural vitality of the city but also the wider capacity for innovation.
- Destination power and identity. Culture is now at the centre of how cities promote and differentiate themselves, helping them to create a territorial identity that is coherent and can be communicated to the world. The character of culture promoted will vary depending on the assets in the city region. In some cases the cultural infrastructure (the opera houses, the cultural resorts) are foregrounded. In others, it is the rich population mix, the carnivals and nightlife. And in others it is the authentic character of place, architecture, customs, food and lifestyle that is communicated globally and helps tell the story of the city's DNA.

- Openness and cosmopolitanism. The right cultural policies, services and infrastructure help make cities more open to new and young populations. This may be an important aim to improve the structure of the future labour force. But it also improves variety and opportunity for existing local populations; fostering creativity, energy, opportunity, and choice in many aspects of culture, public life and leisure, as well as work and enterprise. Open cities provide a connection to the global flow of knowledge, capital, and services, and they offer a rich environment for lifestyles and quality of life for all city populations.
- Liveability and talent attraction/retention. The cultural offer a city region has is increasingly recognised as fundamental to its ability to attract and retain talent. Highly educated workers, especially of younger age but across all age groups, show a strong preference for being able to access culture 'on demand' in the vicinity of where they work and live. Although the debate about whether 'jobs follow people' or 'people follow jobs' continues, it is clear that more and more firms build their strategies about where to move or invest based on the preferences of the talent they seek, and these in turn are driven substantially by the variety and quality and proximity of culture (highbrow, midbrow, lowbrow) that is available.
- The ability to accommodate growth, regeneration, new districts, and placemaking. The increase of cultural provision, amenity and quality has become a critical tool for global city regions as they look for new ways to accommodate growth in a sustainable way. On the one hand, there is more than 30-40 years accumulated knowledge in many global regions about the risks and costs of developing new districts or areas that have a single use and a single income profile, and that lack access to cultural facilities. On the other hand, the supply of cultural amenities can be an important trade-off for populations that are experiencing rapid population growth and change.

This means that global city regions are using culture as a vehicle for growth management. They may build or relocate cultural assets as part of a more managed approach to urban expansion and redevelopment. Or they may invest in cultural education, programming and outreach in fast-growth or under-served areas. Or they may work with existing cultural providers in the ecosystem to improve the standard of placemaking in a variety of inner-city and outer-city locations. All of these approaches are designed in some way to make the process of growth, densification and mixity, more tolerable and sustainable.

### 5.3 Making policies and investments work

Global city regions also tend to share particular dynamics which shape the outlook for culture: economic transition, population growth, and re-urbanisation of jobs, talent, and capital create pressures around how and where to foster and protect culture. This tends to result in:

- New kinds of partnership spanning multiple public and private organisations, recognising shared interests in cultural development.
- Strong attention to the 'human infrastructure' – the assets that enable culture to thrive – affordable workspace, independent retail, studios, small venues, markets, internet access, and managed/curated public space.
- Placemaking to ensure that citizens see, access and participate in arts and culture in the life of their communities.
- Engaging with hard-to-reach communities or groups who are disadvantaged in terms of accessing culture because of geography or income.

- Working with, and leveraging the expertise of, cultural organisations.

The ability of each given global city region to address its challenges depends on many factors: public appetite, the institutional framework, span of control, financial capacity, priorities of leadership, and degree of sustained engagement from higher tiers of government. This also affects the ability to cities to build a cultural strategy that aligns the agenda for the city centre with the needs of the wider region, and surrounding regional cities.

In many regions around the world, ‘doing more with less’ has become part of the challenge of delivering cultural policy, and there is an imperative to innovate in the way initiatives are mounted, managed, financed and delivered.

#### 5.4 Greater Sydney’s peers

Through the following chapters, we assess Greater Sydney at the metropolitan scale within a peer group that includes:

- Abu Dhabi, the oil-rich emirate that has made a high-investment pivot to culture and liveability in order to diversify its future economy and build global prestige and identity.
- Amsterdam, the world capital of liberal values and one of the world’s most popular culture and tourism locations, which has used culture to spread and balance activity around its region in order to manage concerns of over-concentration and over-tourism.
- Barcelona, the proud capital of Catalonia and a city that has used cultural investments to upgrade public space and maintain a strong identity in a period when its population has grown and diversified to an unprecedented degree.
- Hong Kong, the former British colony and trading entrepot which since the 1997 handover to China has successfully managed the development of its unique hybrid culture, invested in two huge cultural districts, and fostered integration with the surrounding Pearl River Delta.
- San Francisco, the Californian centre for technology and innovation which has successfully combined tech and culture in redeveloping multiple inner city districts, while also fostering successful clusters of cultural production in the wider Bay Area region.
- Singapore, a city-state that has invested in cultural assets in designated and well-planned locations and continues to use culture to maintain a stable and unifying identity as its population becomes more varied by nationality, ethnicity and income.
- Stockholm, the largest city region in Scandinavia and a city that uses culture and quality of place to underpin its innovation brand, while also investing in cultural participation in very customised ways in suburban and semi-urban neighbourhoods away from the centre.
- Tel Aviv, Israel’s business hub and tourist gateway that for 20 years has used architecture, waterfront redevelopment, night time culture and cultural tolerance, to attract a new generation of investors, entrepreneurs and visitors.
- Toronto, Canada’s centre of business, finance and medicine that has become one of the most diverse city regions in the world over the last 30 years and has a distinctive approach to branding and signposting its cultural locations.

**Table 1** Summary of Sydney’s peer group

	City Region Population	Rate of population change and diversification	Cultural priorities and focus	Active role of higher tiers of government

Abu Dhabi	2.0m	**	Global Institutions, Heritage, Tourism	(City-state)
Amsterdam	2.5m	**	Spreading culture to suburbs and wider region, align culture with liveability.	*
Barcelona	5.2m	**	Cultural Innovation, Education, Inter-cultural exchange	**
Hong Kong	7.4m	*	Large cultural districts, cultural heritage and preservation.	*
San Francisco	4.9m	**	Neighbourhood activation, culture-led regeneration, community participation	**
Singapore	5.6m	***	Identity, global prestige, consolidation in 2 key districts	(City-state)
Stockholm	2.2m	**	Managing population growth, social cohesion and integration, public art	*
Tel Aviv	3.2m	**	Align with liveability equation to support innovation; cultural events, architecture renewal	*
Toronto	6.1m	***	Music and film to promote global culture, affordable spaces for creators	**

The full case studies of these nine global city regions are presented in chapter 10.

## 6: Benchmarking Culture in World City Regions

### 6.1 Introduction: benchmarking culture

Culture is a strongly emerging field of inquiry for global benchmarks of metropolitan areas. The concept of culture is interpreted and measured in very different ways, spanning cultural consumption, amenities, diversity, access, production, reputation & identity, cosmopolitanism, and social cohesion.

In the past many culture measures assessed ‘municipal city’ versus ‘municipal city’, rather than metropolitan areas. So, Sydney was measured in terms of the ‘City of Sydney’ or some definition of the ‘central/inner city’. Today, most measures are at the Greater Sydney metropolitan region scale.

Overall Greater Sydney performs competitively against its global peers across cultural measures, and in some high-profile indices it has been improving in recent years (see Chapter 6.3, below).

This is partly because many indices and benchmark studies weight culture strongly towards the visitor, lifestyle and knowledge dimensions of culture, where Sydney performs well, and much less on the quality, production, and resident access dimensions, where Sydney tends to perform less well.

Although the benchmarks do not yet explain the full picture, the wider set of measures suggest that at the metropolitan scale Sydney is still to fully succeed in widening access to culture across Greater Sydney or unlocking the growth potential of cultural/creative industries.

Based on the comparative indices, other cities such as Amsterdam and Toronto appear to have had greater success in these respects.

#### Benchmarks and capturing the performance of Greater Sydney

Global benchmarks of city performance, including of culture, measure performance at a variety of territorial scales. Some collect data at the city level. Some gather data at a wider metropolitan or ‘urban area’ level. Some assemble regional level data. In fact, most benchmarks use data at a mix of levels.

This variation happens because:

- ❑ Data is not always easily available beyond the ‘core city’ or inner city.
- ❑ Benchmark authors and producers strive to achieve comparability between cities that have different territorial boundaries. For example, some benchmarks identify that Greater London (London’s citywide boundary) is more consistent with the Ile de France (Paris’s regional territory) than with the City of Paris.
- ❑ Some topics are more likely than others to be accurate when gathered at a simple citywide scale. For example, the number of large music venues tends to be accurately measured because nearly all are concentrated in the urban core. By contrast, measures of resident proximity to a cultural institution, are likely to vary dramatically if data is gathered for the ‘inner city’ or the ‘whole city’.

These considerations are often addressed implicitly rather than explicitly by international benchmarks. This means that in some cases it is not clear exactly what scale data applies to. Nevertheless, the cultural measures gathered in this chapter have relevance for the whole of Greater Sydney for the following reasons:

- ❑ Because the City of Sydney has for many decades been a very small part of Sydney's urban population, most benchmarks have tried to gather data across the whole of Greater Sydney.
- ❑ Most benchmarks do not make a distinction between Metropolitan Sydney and Greater Sydney – their default is to measure Sydney at the whole '5 million person' city level.
- ❑ They do not disaggregate Western Sydney, which is not yet a well-known territorial concept internationally.
- ❑ Measures of cultural events, major institutions, visitor numbers and cultural attendance are usually based on the most visited locations, which in most cities are concentrated in the urban core.
- ❑ Measures of international perceptions reflect total impressions of the city and do not differentiate between city and region.
- ❑ Measures of number of bookshops/libraries/galleries etc tend to use databases that are based on radius from the city centre, rather than jurisdictional boundaries, so are more likely to be comparable and inclusive of the wider metropolitan area.

As competition increases between cities for their cultural offer, and as cases for cultural investment are increasingly supported by evidence-led benchmarking, the need to capture and supply data at the appropriate level becomes more important. As such there is a case for Greater Sydney and NSW to make comparative data more widely available and support the process of benchmarking against other similar world city-regions.

## 6.2 How is Culture Measured in Global Indices?

The rise of global indices and benchmarks is a striking feature of the current cycle of globalisation since 2008. The number of measures comparing the performance and perception of cities has soared from just 20 a decade ago to more than 300 today. These indices span everything from quality of life, to infrastructure, smartness, innovation and competitiveness.

Culture specifically has emerged as an important area of inquiry, with many new indices created by national and international think tanks, multi-lateral agencies, consultancies, media outlets and academic teams. The performance of cities and regions in comparative measures of culture has become an important input to policy-making and case-making in cities, and in some cases, has helped to inform and shape cities' identity and international brand positioning.

**Fig 3 Sample of Cultural Indices and Metrics developed worldwide**





Across the more than 20 indices that benchmark culture in cities and regions in different parts of the world, there are 8 main ways 'culture' is interpreted. There are a number of reasons for this wide variety of methods and interpretations:

- (i) they reflect differences in the way organisations or countries understand the meaning of culture;
- (ii) they reflect different priorities around culture that organisations are concerned to address in their city or globally; and
- (iii) they reflect the large data challenges associated with understanding subjective notions of culture and of squaring quantitative and perception measures.

The 8 dimensions of culture in current global indices are:

1. Variety of Cultural Attractions – indices assess cities and regions by the number of museums, sporting events, food and drink, and other attractions. In some cases this is divided between the number of 'high' culture attractions and the number of 'popular' or everyday attractions. This kind of measure is popular with consultancies and media outlets because the data can be fairly easily tracked and updated. Greater Sydney scores well in terms of popular attractions (e.g. live music, nightlife, dining and shopping) but less well in terms of number of high culture institutions (e.g. galleries, museums).
2. Cultural Attendance and Traffic – indices assess the number of tourists and visitors attending key attractions and institutions in a city or region, and the attendance by visitors of key cultural events. This mode of comparison is employed by MORI Global Power City Index in Japan, as well as by global cultural organisations. Greater Sydney performs modestly compared to its peers here, partly because its distance from main global visitor markets means its visitor economy is not as large.
3. Cultural-Demographic Diversity – several indices assess culture by simply calculating the size of foreign born populations, the number of foreign students, or the number of countries with a demographic presence as residents or students. In a small number of national cases they also evaluate degree of proximity or segregation by nationality or race. Greater Sydney scores very well in these measures because of its recent cycle of population diversification.
4. Enabling Environment for Culture and Creativity. A small but growing number of indices assess the underpinning conditions that foster culture, by focusing on education, community cohesion, attitudinal openness, social trust, and social equality. These indices – such as the Global Liveable Cities Index and EU Creative Cities Monitor – draw on large scale national and regional surveys as well as quantitative data. So far Greater Sydney's performance is only average in this area.
5. Information Exchange, Access and Opportunity – some indices view culture through the prism of information access and availability. They assess issues such as censorship, variety of media, deterrence of crime, access to cultural amenities nearby, and other factors. This approach is favoured by AT Kearney and Economist Intelligence Unit among others. Greater Sydney scores fairly well in the media and free circulation of information aspects but less well in terms of access and usage of cultural amenities.
6. Cultural Production and Creative Economy – there is increasing attention to the production side of the culture equation, which is measured in terms of number of jobs or start-ups in creative/cultural sectors, the IP/innovation framework to support cultural production, and the trade value of cultural exports. This type of analysis has been

undertaken by EU bodies, as well as Japan's Mori and the technology firm Adobe. Initial figures from a small sample suggest that Greater Sydney does less well than most European and North American peers, with a smaller relative size of cultural/creative economy and less of a critical mass of cultural production.

7. Cultural Reputation and Brand – a number of brand studies and opinion surveys have been developed to assess the extent to which cities are associated with culture and have visitor appeal that is driven by their cultural assets. Leading companies such as IPSOS-Mori and Anholt have adopted this approach, as well as travel magazines and other perception-oriented organisations. Sydney excels in these measures.
8. Cultural Integration and Cohesion – spurred by large-scale influx of migrants and refugees, a new generation of measures seeks to assess how well new arrivals in cities are integrated and the degree of social cohesion. Often these indices look to measure policy 'inputs' – such as the strategic coherence or investment by cities or regions to support integration – rather than 'outcomes' such as the subjective feeling of cohesion or belonging, because of the difficulty of acquiring data or comparing across countries. So far, these kinds of measures have only been created at a continental scale and do not yet cover Australian cities or regions.

As the capital and economic engine of New South Wales, Greater Sydney features in international indices spanning all these dimensions, except for the final one on cultural cohesion. Most indices now measure Greater Sydney. In the following chapters, we assess and analyse Sydney's relative performance in these indices.

### 6.3 How does Greater Sydney perform in Culture as a Whole?

In the 10 largest and highest profile indices that have a strong culture component, Sydney performs well compared to its peers. Across all indices and comparative measures that feature a clear cultural component, Sydney rates 4<sup>th</sup> among a group of 10 peers, below leaders such as Amsterdam and Barcelona, on a par with San Francisco and Toronto, and ahead of medium-sized Asian and Middle Eastern cities.

Table 2 Sydney's overall relative performance among group of 10 global peers across all cultural indices and metrics

Rank	City	Score (Max=1)
1	Amsterdam	0.75
2	Barcelona	0.71
3	San Francisco	0.61
4	Sydney	0.60
5	Toronto	0.54
6	Singapore	0.46
7	Stockholm	0.43

8	Hong Kong	0.39
9	Tel Aviv	0.17
10	Abu Dhabi	0.10

Source: TBoC Research using ELO algorithm: based on 25 measures across 8 separate indices. The Elo Rating System rates cities or regions by comparing their performance in every possible permutation against a list of other cities/regions. The system produces the most accurate comparative assessment of city/region performance, as it accounts for the fact that some cities/regions appear in more rankings than do others, and that each ranking measures a different number of cities.

When we look at specific indices results (see Table...), we can observe that Sydney routinely rates in the global top 20 in the big culture assessments but performs especially strongly in studies that focus on social and demographic aspects of culture. These measures vary substantially because of the different criteria they use to measure culture, so comparison between indices is challenging. However, it is notable that Sydney's position in these headline indices is improving – between 2012 and 2017 it improved from 13<sup>th</sup> to 10<sup>th</sup> in the Global City Power Index for cultural interaction, and from 30<sup>th</sup> to 14<sup>th</sup> in AT Kearney Global Cities Index for cultural experience.

Sydney's high position and positive dynamic is partly because many of the largest culture-based indices are weighted strongly towards the demographic and lifestyle dimensions of culture, where Sydney is performing well, and much less on the attendance and production dimensions. This weighting means that other cities such as New York City, Los Angeles and Milan are penalised because of quality of life challenges that spill over into the way culture is often assessed and judged. Meanwhile Sydney's performance benefits from the weighting towards cultural and visitor appeal in these measures.

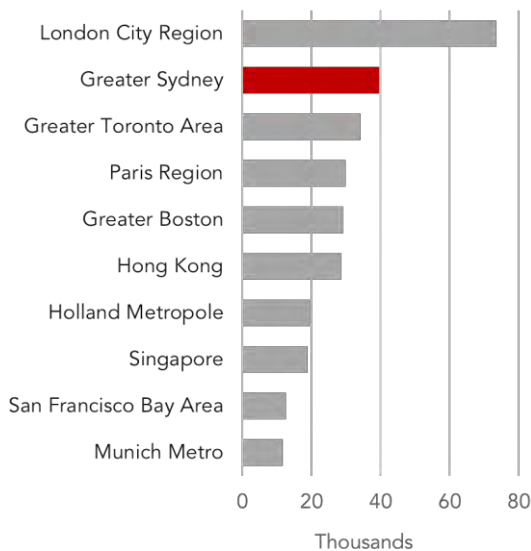
**Table 3 : Greater Sydney's performance vs other peer cities in the cultural metrics of leading all-round city indices**

	Mori Memorial Foundation Global Power City Index (Cultural Interaction)	AT Kearney Global Cities Index (Cultural Experience)	Tan et al: Global Liveable Cities Index (Socio-cultural conditions)	EIU Liveability Ranking (Culture & Environment)	EIU/Citigroup Hotspots (Social and Cultural Character)
<b>Sydney</b>	<b>10</b>	<b>14</b>	<b>11</b>	<b>20</b>	<b>2</b>
Amsterdam	14	8	4	2	16
Barcelona	12	12	21	16	5
Hong Kong	22	19	15	61	41
San Francisco	28	11		19	22
Singapore	5	24	12	73	42
Stockholm	32		13	41	22
Toronto	29	23		9	11

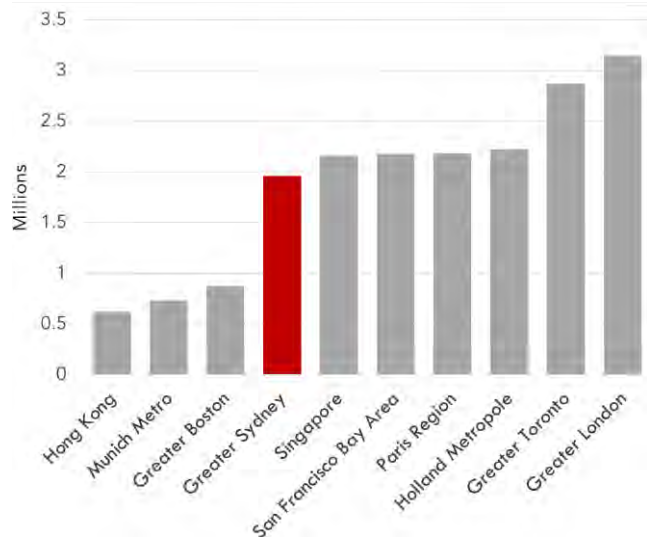
\*Tel Aviv and Abu Dhabi not included frequently enough in these indices.

In particular Sydney performs very strongly where culture and diversity are assessed in tandem, because its current figures for international students and foreign-born population are among the top cities in the world (see Figures and ). Greater Sydney is well ahead of Toronto, Boston and Hong Kong for overseas students and its total international population ranks on a par with much larger global regions. These all feed very positively into measures of culture in global indices.

No. of intl students enrolled in top 500 universities



Foreign-born population



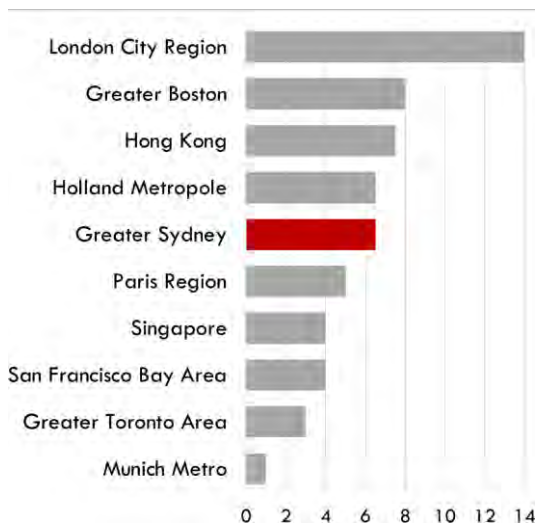
Source: The Business of Cities (2017). Fit for the Future?. Amsterdam

Sydney's cultural performance also is especially strong in measures that factor in educational specialisation in arts, fashion and culture.

- Greater Sydney's universities ranking performance in arts and humanities subjects is very competitive globally, on a par with the Amsterdam region and ahead of Paris, Singapore and San Francisco Bay Area (Figure ).
- The number of fashion schools and their global ranking performance is also strong, well ahead of many larger cities that are closer to the traditional global capitals of fashion. On aggregate, Sydney's fashion schools perform very strongly for their global influence, although the Whitehouse Institute of Design, which has campuses in both Sydney and Melbourne, emerges as joint 2<sup>nd</sup> globally for the quality of learning experience.

These results also boost Sydney's score in a number of indices.

#### Specialisation in arts and humanities



Source: The Business of Cities (2017). Fit for the Future?. Amsterdam

	Rank (total)	Rank (global influence)	Rank (learning experience)	Rank (long-term value)
University of Technology Sydney	13 <sup>th</sup>	=15 <sup>th</sup>	=19 <sup>th</sup>	=17 <sup>th</sup>
Whitehouse Institute of Design	27 <sup>th</sup>	19 <sup>th</sup>	=2 <sup>nd</sup>	=35 <sup>th</sup>
Fashion Design Studio – TAFE	28 <sup>th</sup>	=28 <sup>th</sup>	=38 <sup>th</sup>	=35 <sup>th</sup>

Source: Business of Fashion Global Fashion School Rankings 2017. \*Indicators; (1) Global influence: Academic reputation (10%); selectivity (10%); awards (10%); (2) Learning experience: Student body (10%); resources (10%); teaching (10%); (3) Long-term value: Careers (10%); preparedness (20%); alumni network (5%)

However Sydney's performance is more mixed when it comes to measures of cultural amenities and provision that reflect the situation across the whole of Greater Sydney. Data from World Cities Culture Forum suggests that while Sydney performs strongly in terms of live music venues and non-professional dance schools, it has a smaller number of art galleries and bookshops and lower attendance of its top cultural attractions, compared to many of its peer cities around the world (Table 4, see also chapter 9). In these areas cities such as Berlin, Madrid and Toronto tend to have a stronger record. Similarly although its overall number of attractions is competitive, the number of museums, concerts and shows is lower than nearly all peers (see Figure 6). This is one reason why Sydney's performance in cultural indices that are weighted to amenities and attendance is lower.

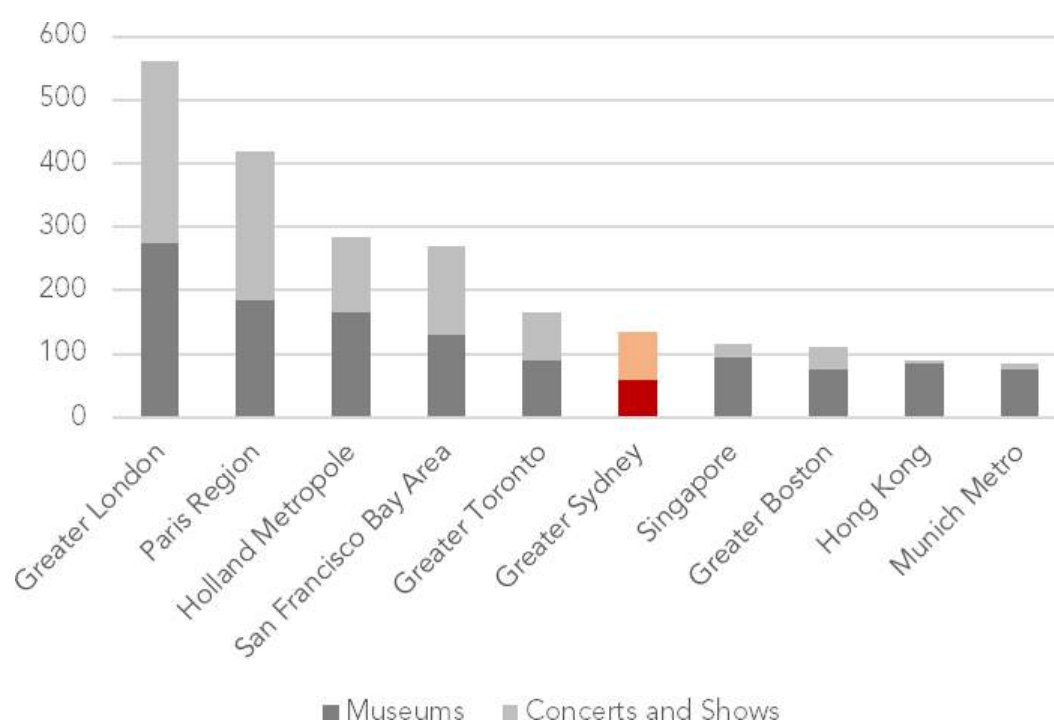
**Table 4 Data on provision of cultural facilities, based on World Cities Culture Forum figures**

	Live music venues per 100,000 population	Art galleries per 100,000 population	Bookshops per 100,000 population	Markets per 100,000 population	Non-professional dance schools per 100,000 population	No of visits to top 5 most visited attractions
<b>Sydney</b>	<b>8.9*</b>	<b>4.3</b>	<b>9.4</b>	<b>2.4</b>	<b>8.6</b>	<b>3.2m</b>
Amsterdam	6.2	8.2	5.7	4.0	11.0	6.0m
Berlin	7.2	12.2	7.1	---	3.0	4.7m

Hong Kong	...	1.7	20.1	1.4	...	3.1m
Los Angeles	5.1	4.3	4.7	2.6	0.8	4.5m
Madrid	2.9	9.4	15.7	1.6	4.6	8.3m
San Francisco	24.9	20.3	11.5	...	7.8	4.4m
Singapore	...	4.8	3.0	...	1.8	2.0m
Stockholm	6.5	12.0	...	...	20.0	4.1m
Toronto	1.6	6.0	13.9	2.5	1.0	2.6m

Notes: Year of most recent data is varied based on WCCF's research findings. Data is therefore indicative rather than directly comparable. \*Sydney data source: Australian Performing Right Association. \*\*Sydney data refers to all public performance licensed venues in the metro area with expenditure or box office \$10K+ (denoting regular activity).

Fig 6. Number of cultural attractions – Greater Sydney's performance vs. peers



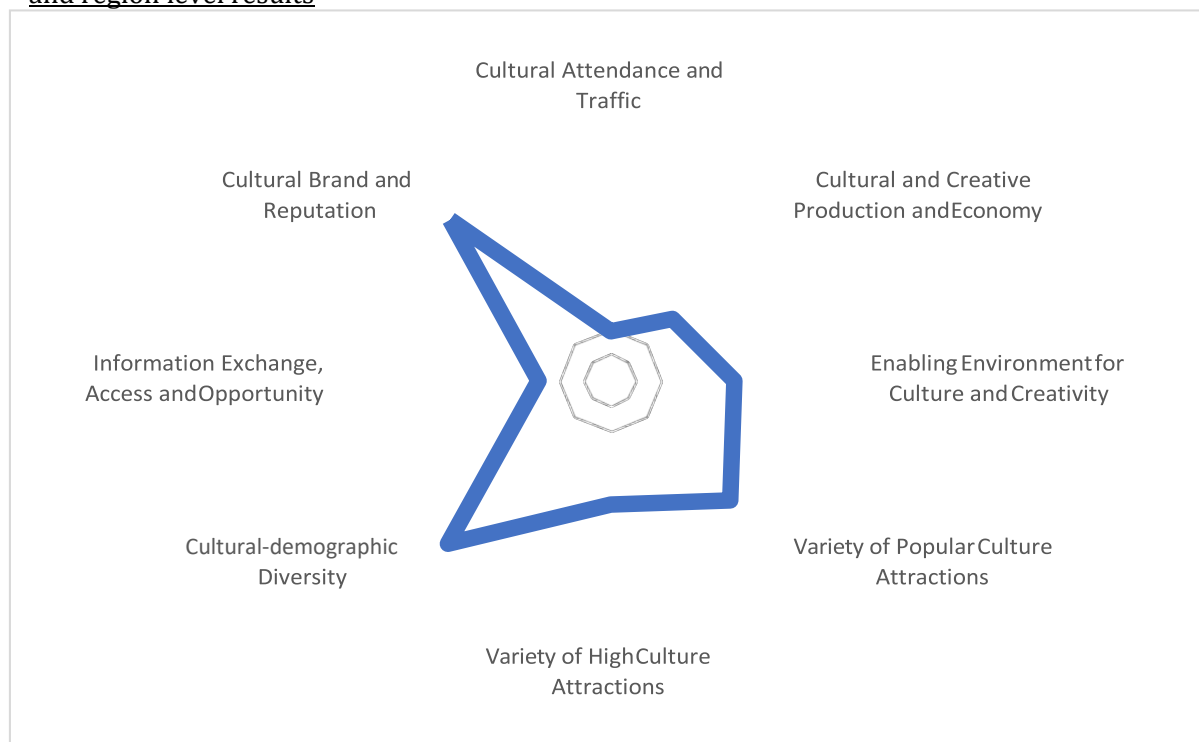
When we look at a wider set of cultural benchmarks, it is apparent that Sydney performs much less strongly in measures of cultural production, size of the cultural/creative economy, the enabling environment for culture to thrive, and cultural participation and opportunity.

A number of other cities perform more strongly in areas where Sydney's ratings are modest. Amsterdam performs consistently very well on the enabling environment theme, including the availability of cultural and creative spaces and cross-city cultural stimulation. The Dutch city also excels in terms of the wide mix of high culture attractions and volume of attendance, both locally and internationally.

Meanwhile although Toronto does less well on measures of number of large-scale cultural events and popular cultural attractions, it is very highly rated in terms of, information exchange and access to literary culture.

Sydney's performance is summarised in the Spidergram below (Fig ). They highlight that Sydney's cultural performance varies depending on which aspect of culture is being measured. On the one hand the city maintains a strong lifestyle and cultural pull, and a competitive aggregate set of attractions. On the other hand, the overall rate of cultural attendance, higher-end cultural attractions, and information exchange is fairly modest by global standards, and provides a preliminary indication that at the Greater Sydney scale the city has not yet succeeded in optimising access to culture or unlocking its cultural/creative industries.

**Fig 5: Sydney's overall performance benchmarked in different aspects of culture, spanning both city and region-level results**



#### Methodology

\*For each theme, the relative positions (1-10) of the regions were compiled and inputted into an Elo algorithm. Designed as a Chess tournament ranking system, the Elo Rating System rates cities or regions by comparing their performance in every possible permutation against a list of other cities/regions. The Elo system produces the most accurate comparative assessment of city/region performance, as it accounts for the fact that some cities/regions appear in more rankings than do others, and also that each ranking measures a different number of cities.

\*\*Indicators used to derive scores for each theme are listed in table below. Indicators include:

- Performance in relevant global indices where available (*italicised*)
- Ranking in large (~45 cities) sub-indices of the Mori Global Power City Index (*non-italicised*)
- Ranking in indicative World Cities Culture Forum (WCCF) data sets covering only the 10 peers (*non-italicised*).

Cultural attendance & traffic	Cultural and creative production & economy	Enabling environment for culture & creativity	Popular cultural attractions	High cultural attractions	Cultural-demographic Diversity	Cultural freedoms and access	Cultural reputation & brand
No. of large, world-class cultural events held (GPCI)	Accumulation of artists (GPCI)	Environment of creative activities (GPCI)	Number of world heritage sites within 100km (GPCI)	Number of theatres and concert halls (GPCI)	No. of foreign residents (GPCI)	Public safety (GPCI)	Anholt City Brands Index-- People
Number of visitors from abroad (GPCI)	Trade value of audiovisual and related services (GPCI)	Cultural Stimulation (GPCI)	Number of stadiums (GPCI)	Number of museums (GPCI)	No. of intl students (GPCI)	Opps. for cultural, historical and traditional interaction (GPCI)	Anholt City Brands Index-- Pulse

No. of visits to top 5 most visited attractions (WCCF)	Accumulation of art markets (GPCI)	Environment for creative activities (studio rent and spaces) (GPCI)	Attractiveness of shopping options (GPCI)	Art galleries per capita (WCCF)	IOM Foreign-born population in major cities	Public libraries per 100,000 population (WCCF)	IPSOS Index ---- Visit
	No. of art + design students (WCCF)	Daily life (GPCI)	Attractiveness of dining options (MORI GPCI)	Major concert halls (WCCF)		AT Kearney Global Cities Index - Info Exchange	Resonance World' Best CityBrands---- Programming
	Most Creative Cities (Adobe Survey)	Tan et al. Global Liveable Cities Index - Socio-cultural conditions	Richness of tourist attractions (GPCI)	Dance schools per capita (WCCF)		Bookshops per capita	
			Leisure activities (GPCI)	Theatre performances (WCCF)			
			Live music venues per capita (WCCF)				
			Markets per capita (WCCF)				



## Chapter 7 --- Culture and World Cities: Cultural Quarters, Districts, and Precincts

### 7.1 Introduction: Culture and Place

The notion of a cultural district, quarter or precinct is not new: cities have always had spaces for entertainment, arts and cultural consumption, and the idea of designated or nominated cultural quarters, districts, precincts and neighbourhoods has been around for more than 30 years.

Many cities around the world have initiated the planning and development of a cultural quarter in an attempt to stimulate growth and attempt to shape economic and social development. Indeed, there is now a Global Cultural Districts Network, launched at the New Cities Summit in São Paulo in 2013. In this chapter we observe:

- What kinds of cultural locations are there?
- Who and what is involved in their development?
- How are they led and managed?
- What factors tend to make them more successful?

	Example Cities	Distinguishing features
Cultural quarters	Barcelona, Montreal, London	<ul style="list-style-type: none"><li><input type="checkbox"/> Small in scale and reach.</li><li><input type="checkbox"/> Cultural production and consumption.</li><li><input type="checkbox"/> Variety of cultural venues and events</li><li><input type="checkbox"/> Strong night-time economy</li><li><input type="checkbox"/> Well activated public realm.</li><li><input type="checkbox"/> Organic growth and tactical facilitation</li></ul>
Cultural precincts	Sydney, Christchurch, OR Tambo (Johannesburg) Boston	<ul style="list-style-type: none"><li><input type="checkbox"/> Well known and recognisable parts of a city/region.</li><li><input type="checkbox"/> Larger-scale transformation</li><li><input type="checkbox"/> Short, low-cost, enjoyable experiences</li><li><input type="checkbox"/> Contrasted with the rest of the city</li></ul>
Cultural districts	Singapore, Hong Kong, Seoul, Toronto	<ul style="list-style-type: none"><li><input type="checkbox"/> Mixed-use.</li><li><input type="checkbox"/> Anchored by cultural institution.</li><li><input type="checkbox"/> Usually some heritage focus</li></ul>
Cultural parks and zones	Shanghai, Beijing, Taipei, Guangzhou, Ueno, Calcutta	<ul style="list-style-type: none"><li><input type="checkbox"/> Common in Asia</li><li><input type="checkbox"/> Strong theme around natural assets, low pollution</li><li><input type="checkbox"/> Dedicated to hosting artists and other creative industries</li><li><input type="checkbox"/> Use of re-purposed industrial premises</li></ul>

### 7.2 Cultural Clustering

In the last 20 years, the agglomeration of cultural organisations and cultural production has become more visible and more pronounced. Cities of many different sizes and kinds, and different locations within them, have come to host a high concentration of cultural organisations, occupations or jobs. Many explanations have been put forward for why this occurs.

Analysis of hundreds of metropolitan areas in North America reveals that arts and cultural organizations tend to be more clustered than other non-profits, and that this clustering has become tighter since the 1980s.<sup>144</sup>

A major 2014 study assessed the impact of cultural agglomeration on worker wages found evidence that skilled workers sacrifice higher wages to locate in areas with strong cultural clustering. Workers may, other things equal, be willing to take a wage cut to reside in cities with relatively more cultural amenities, as these contribute to its quality of life. The study also found evidence of a positive wage premium in high creativity cities even after controlling for individual skills. And it found that creative workers in cities with high levels of cultural clustering enjoy a wage premium, suggesting that not-for-profit arts and cultural sectors may generate knowledge spillovers for the commercial creative economy.<sup>145</sup>

### 7.3 The cycles of cultural location development

Cultural locations have been fostered for many reasons:

- A tool for urban regeneration in industrial areas (e.g. Glasgow and Sheffield)
- Re-connect a city with its waterfront (e.g. Frankfurt).
- Generate global profile and status (e.g. Bilbao, Abu Dhabi)
- To provide more of a metropolitan and regional population with access to amenities

In some countries, states and cities have passed laws to facilitate the establishment of cultural locations. This legal adjustment provided a range of benefits, including business marketing and visibility, tax exemptions for artists and firms, enhanced tourist wayfinding, and a facilitation of labour market pooling and shared inputs. The 2010s saw the launch of a more nuanced approach to cultural location development, aimed not just at city centre or tourism locations, but at metropolitan-level development. This is in response to changing citizen expectations of cultural districts and buildings, which has heralded a new kind of design, planning and business model centred around new combinations of technology, immersion and culture.

Meanwhile many cities in Asia have recognised that cultural infrastructure is necessary to support their efforts to become more global and have created new urban locations anchored by cultural infrastructure, often impressive for their size and scale and architectural distinctiveness. The state is highly involved in these activities, and plays an important role in planning, building, organising and managing the new facilities.

As more types of cultural location, have emerged, more definitions have arisen (see Box).

Time period	Examples
19 <sup>th</sup> century	Berlin Museum Island London's South Kensington Kelvingrove Glasgow
1950s-1980s	London's South Bank and Barbican New York Lincoln Center and Kennedy Center Pompidou, Paris Ticinese quarter in Milan
1990s	Vienna Museum Quarter UK City centre regeneration ---- Glasgow Tramway, Liverpool St George's Quarter, Sheffield Cultural Industries Quarter
2000s	Dallas Arts Districts Miami Wynwood Arts District, Design District and Arts and Entertainment District Westergasfabriek Amsterdam Helsinki Glass Palace Quarter Shanghai Entertainment District

2010s	New York Park Avenue Armory Miami New World Symphony Hall Kings Cross, London West Kowloon Cultural District Abu Dhabi Saadiyat Island
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Box 7 highlighting different definitions of Cultural District/Quarter over time

“A geographical area which contains the highest concentration of cultural and entertainment facilities in a city or town.”

Wynne, 1992

“Demarcated, named mixed-use precincts anchored by cultural facilities.”

Brooks and Kushner, 2002

“A geographical area of a large town or city which acts as a focus for cultural and artistic activities through the presence of a group of buildings devoted to housing a range of such activities, and purpose-designed or adapted spaces to create a sense of identity”.

Montgomery, 2003

“A cultural quarter has a commercial dimension, being mainly intended for tourist consumption and entertainment, while a cultural district has an artistic dimension, being aimed at the production and export of cultural goods and activities”

Cinti, 2008<sup>146</sup>

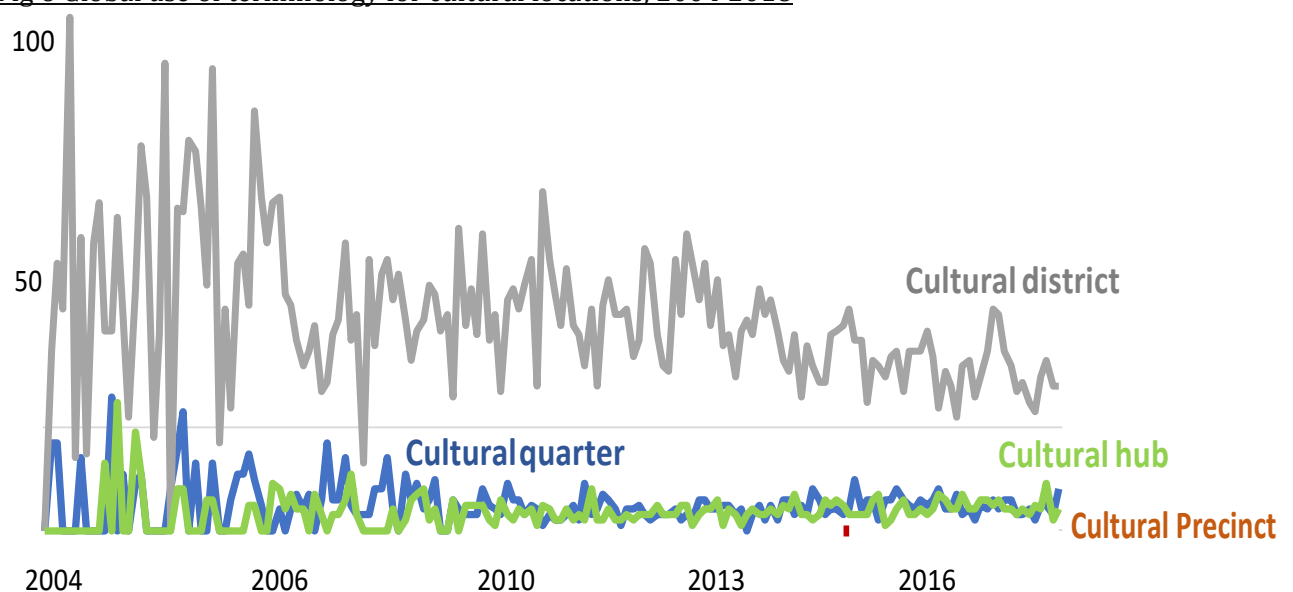
“A geographical area of a large town or city which acts as a focus for cultural and artistic activities through the presence of a group of buildings devoted to housing a range of such activities, and purpose-designed or adapted spaces to create a sense of identity”

Roodhouse, 2010<sup>147</sup>

“A concentration of cultural projects carefully planned and advertised”

Dumortier, 2016<sup>148</sup>

Fig 6 Global use of terminology for cultural locations, 2004-2018



Source: Google Trends

### 7.3 What do cultural locations possess?

Global analysts observe that cultural locations in and around cities tend to possess many, most or all of the following features:

- ☐ Cultural venues at a variety of scales
- ☐ Festivals and events
- ☐ Availability of workspaces for artists and lower-income cultural producers
- ☐ Small-firm economic development in cultural sectors
- ☐ Managed workspaces for office and studio users
- ☐ Cultural development agencies and companies
- ☐ Arts and media training and education
- ☐ Culture in the public environment
- ☐ Community arts development initiatives
- ☐ Complementary day-time and evening uses
- ☐ Stable arts funding

### 7.4 The rise in interest in cultural eco-systems

A shift towards 'place-bound strategies' is underway, that focuses on the wider eco-system that fosters culture.

Several ingredients in the 'cultural ecosystem' have been observed:

- ☐ available content to fill cultural centres
- ☐ a critical mass of visitors and interested locals
- ☐ a strong local identity.
- ☐ political and legal frameworks to sustain new business models for culture
- ☐ responsiveness to new ways and new preferences for finding and accessing culture.

Together, this results in a new kind of ingredient for a cultural location – the role of placemaking.

### 7.5 How are cultural locations developed and managed? What are the lessons?

Many cultural locations have emerged by accident, but almost all have been sustained, supported or managed in some way by public and private intervention. In general, there are four components which cultural locations have to consider:

- ☐ Delivery structure: how does the institutional landscape change as a result of creating a cultural location?
- ☐ Degree of public involvement (regulatory structures): how is the government involved in the location?
- ☐ Degree of change (spatial relationships, physical rebuilding): how much physical change will happen in the location as a result of cultural designation?
- ☐ Programming: what is the content, centralised or decentralised programming of cultural activity?

The designation of cultural locations is often the result of the build-up of webs of connections between players in the cultural industries and the public sector. A strategy to develop a cultural location is informed by the idea that mixed-use planning initiatives and a mix of public and private investment can accelerate the cultural development of a place.

Once created, cultural locations must be managed and overseen. There are many development, planning and management models:

- ❑ a department of local government
- ❑ a highly autonomous precinct management authority.
- ❑ a voluntary and cooperative alliance focused on achieving common goals.
- ❑ higher tier department-led
- ❑ an agency empowered only to control particular aspects of location development
- ❑ a Business Improvement District (BID) or similar area management group

The practice of managing and planning a cultural location is often complicated by the governance and organisational context. It is common for local and higher-level governments, chambers of commerce, business associations, and tourism marketing bodies to have divergent and even conflicting aims, which makes district management more challenging.

Two common mechanisms have proven effective internationally at running cultural districts:

## 7.6 Role of Proactive Governments and Development Agencies

Development agencies or corporations have been used for cultural location development in examples such as Baltimore, Brisbane and Boston. In these cases, an agency was given wide powers to achieve their goals, such as zoning power in the case of the Boston Redevelopment Authority, and powers of eminent domain/compulsory acquisition of private property in the case of Baltimore. The Brisbane South Bank project was overseen by similarly powerful development authorities (BESBRA), which successfully acquired and developed the site for Expo 88, organised the event and managed the site afterwards.

## 7.7 Business Improvement Districts (BIDs)

In recent years, BIDs have evolved to become key managers and partners of cultural locations. They are led principally by property owners with strong stakes in the local neighbourhood. Through such roles, in countries such as Canada, Chile, South Africa, USA and the UK, BIDs can help many types of location, including outside the city centres, to boost the economy, attract funding, foster a sense of community, promote tourism and civic pride, and revitalise forgotten neighbourhoods.

BIDs usually help in the following ways:

- ❑ Placemaking — using their local knowledge, BID stakeholders are well placed to help develop bold, innovative neighbourhoods and support communities. BIDs become active in urban design and tactical urbanism, especially in less promising locations such as satellite city business districts and suburban town centres.
- ❑ Place-branding — BIDs actively promote an area as distinctive and attractive for locals and visitors. In Toronto, the Toronto Entertainment District Business Improvement Area has collaborated with The Planning Partnership since 2008 to undertake a Master Plan for the district that is specifically aimed at raising awareness of the district through image building.
- ❑ Cultural business development — BIDs help industry professionals, entrepreneurs and small businesses to grow and develop their business in a location. Supply of pop-up spaces, protection of at-risk venues, accelerator programmes and interest-free loans are ways BIDs engage to foster cultural production.
- ❑ Community support — BIDs help to build stronger coalitions around culture by involving local people as ambassadors, volunteers and campaigners.

- Programming and events — BIDs are proactive at running activities that highlight a location's unique offer. As such they help direct tourists and locals to explore previously underexplored districts, or in different ways.

## 7.8 Cultural Locations: Success and failure

What makes cultural locations successful?

- Effective and positive collaboration with business
- Links with universities, education providers and other larger local institutions.
- A ready supply of people with the right skills for the location.
- Community support and conflict management.
- The ability to build a multi-cycle approach that can adapt to new cultural trends and requirements.

### Commonly observed features of successful cultural locations

Activity	Built form	Meaning	Urban cultural 'fit'
Diversity of primary and secondary land uses	Fine-grain urban morphology	Important meeting and gathering spaces	Complexity of activity, especially cultural activity
Scale and variety of cultural venues and events	Variety and adaptability of building stock	Sense of history and progress	Many patterns of (pedestrian) movement
Presence of an evening economy, including café culture	Permeability and legibility of streetscape	Area identity and brand	Variety in opening hours
Strength of small-firm economy	Active frontages	Knowledgeability	Presence of people attractors, such as venues and galleries, good restaurants and speciality shops
Access to education providers	Amount and quality of public space	Design appreciation and style	Active street life

Source: Simon Roodhouse, *Cultural Quarters: Principles and Practice*

Why do they fail?

Commonly observed reasons why cultural locations do not meet expectations, either in their first cycle or at all, include:

- Erratic interest of local governments or higher tiers of government in the ingredients required to nurture and scale up the cluster (e.g. Piraeus Avenue, Athens)
- Insufficient economic incentives to the small-scale businesses that generate foot traffic in a location (e.g. Seoul). This means that these businesses ultimately cannot stay in the district for long enough for its identity and appeal to take hold.
- Unsatisfactory public transport leading to low footfall. Poorly connected or remote districts have often not attracted new types of visitors.
- Laws too tight to facilitate meaningful change (e.g. restrictions on clubs and restaurants w/ live music). Many designated locations near to residential areas have not been able to attract the mixed use of activity intended because of legal objections – as a result they develop a different character and set of uses that first planned.
- Many locations lack a multi cycle and multi-stage vision about what institutions and amenities are needed and in what order. This means the location is shaped by which projects and investments are first contracted, rather than which will promote the kind of

activities that are sought after. A lack of a clear plan also provides limited signals to the private sector.

- Activities in some locations become dominated by a single segment of culture – this has been observed to create insufficient appeal to a broad spectrum of social groups. One result of this is lower potential to attract a wider range of activities.
- Insufficient attention paid to retaining creative residents in the area can mean that a location rapidly loses its reputation for culture, authenticity and vibrancy. This can affect its appeal more broadly. It also can mean that it is harder for institutions to benefit from a nearby workforce or from spillovers from nearby creative activity, and results in fragmentation and missed opportunities.
- The risk that leisure rather than culture drives the expansion of district, eroding distinctiveness. This is a common concern for locations in smaller and medium sized cities where accompanying retail investment may be more readily available.

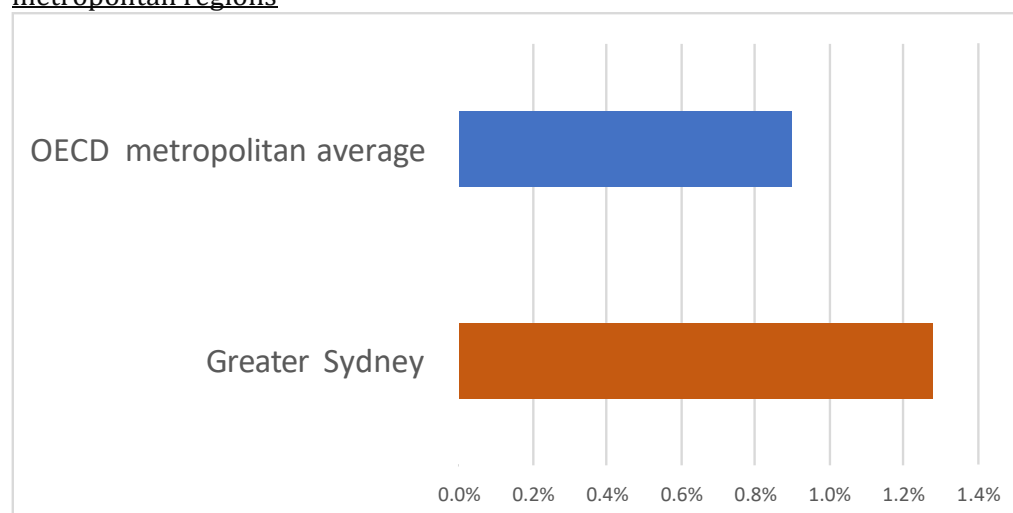
## 8. Culture and World Cities: Population and housing growth: the role of culture in liveability

### 8.1 Growing urban populations and culture

In recent years, discussion has move away from talking only about the role of culture in driving inner city urban renaissance and growth in city centres, towards how culture can serve growing metropolitan regions; from the epicentre to the edges, providing cultural amenity, supporting place making, and spreading the locations of the creative and innovative economies.

Many of the world's more competitive and attractive cities are experiencing a long cycle of population growth (see Chart). In most cases their current and future urban population growth will be highest in expanding suburban areas, where growth is being driven by a combination of personal preference or high land prices and other cost inflation. A strong case is now being made for a complementary suburban or metropolitan renaissance to promote liveability, smart growth and inclusive sustainable development on the edge of cities by investing in cultural amenities, social infrastructure, housing and transport infrastructure.<sup>149</sup>

#### Greater Sydney's forecast annual population growth to 2050 compared to other OECD metropolitan regions



Source: The Business of Cities Research

As many metropolitan cores and city centres are becoming permanently too expensive for certain kinds of people to live, and for artists and creators to work, there is growing opportunity for art and culture to become a fundamental part of future sustainable growth across a metropolitan region, and also in certain satellite or secondary cities.

The promotion of culture through investment in cultural infrastructure, such as localised cultural institutions and quarters, affordable art studios and work spaces, and innovative public spaces will be an ongoing priority in bringing forward growth and renewal in a wider mix of locations. Not only does this add to the range of locations where people may be willing to live, but it also provides alternative hubs for cultural producers who are considering leaving cities altogether.<sup>150</sup>

Building cultural capital as part of the place-making to make such areas more attractive

Cultural activities play a critical role in shaping the charm, identity and ambiance of areas right across metropolitan regions.<sup>151</sup>



- In degraded urban areas and areas with low cultural amenity, culture-led urban revitalisation projects are providing opportunities for personal development, social interaction in weak community groups and are giving marginalised individuals a chance to engage economically and socially.<sup>152</sup>
- In greenfield developments at the metropolitan fringe, investment in creativity and innovation is being harnessed to increase the perception of attractiveness held by visitors, residents, economic talent and creative industries.<sup>153</sup>
- In new towns and expanding settlements cultural investment creates the potential to increase identity and sense of place, expanding associated amenities (such as retail, hospitality, and public space) and to anchor a new cluster of wider facilities. This can help to transform otherwise undifferentiated suburbs into successful hubs, and it can create new awareness and appeal in locations.
- At the same time cultural investment can help to reduce resistance to growth within established residential populations. It provides an important visible amenity that demonstrates that growth in population can indeed increase resources and opportunities. However, such an approach only sustains if there are wider infrastructure and amenity investments in transport, schools, and medical facilities for example.

Cultural policymakers are recognising the benefits of investing in arts and culture in edge cities for sustainability, inclusivity and innovation.<sup>154</sup> In particular, there has been a focus on investment in arts and cultural amenities, facilities and activities, such as festivals, performing arts, museums, design, art and cuisine.

In town centres, placemaking activities along these themes promote inclusive access to culture and community stabilisation in diverse and growing populations.<sup>155</sup>

### Culture for everyone

Areas with increased but well-planned density and strongly anchored cultural amenities can act as catalysts for sustainable urban growth and cultural development in suburban and metropolitan locations.<sup>156</sup>

However, leaders in global city regions share the view that unless urban growth is for everyone it will not be sustainable.<sup>157</sup> If managed correctly, the long-term benefits of cultural amenities can be experienced by all members of the population because of the ability of culture to holistically support a wide range of services, such as transportation, healthcare, education, employment and environmental sustainability.

In these cases, it is important that cultural amenities are multi-functional and can reach members of different social groups without stigmatising them.<sup>158</sup> In diverse multi-cultural communities, the social benefits of cultural investment are being leveraged to promote individual personal development, self-fulfilment, communal pride and cohesion among different groups.<sup>159</sup> Among cultural policymakers, there is a growing recognition of the significant role played by culture in sustaining inclusive social and economic growth.<sup>160</sup>

Culture makes otherwise unattractive places acceptable and attractive to new populations

Communities in suburbs, small metropolitan centres and other locations are sometime faced with challenges such as vehicle-dominant street networks, poor pedestrian environments, deficiency of quality semi-public and public spaces, and a lack of social capital and cohesion. On a growing

scale, culture-led placemaking activities and sustainable community development initiatives are being carried out to make such areas more enjoyable places to live, work and visit.<sup>161</sup>

These activities and interventions can take the form of public space creation, neighbourhood beautification through public realm enhancement, community art murals, urban garden projects and small congregation events, such as markets and food events. The organisation of cultural events in suburban areas is multi-scalar and requires different levels of collaboration and partnership between grass-roots organisations and community members, local organisations and facilities, and local government. The outcome of culture-led placemaking is an enriched quality of life for the local community, employees, visitors, who will inevitably benefit from the recreational, social, cultural and creative aspects of the successful and vibrant place.<sup>162</sup>

### 9.1 The Value of Culture in Global City Regions

The intrinsic and quantifiable value of culture to societies has become better understood and better communicated in many regions and nations around the world. The demonstrable impacts of culture on wellbeing, on skills development for a modern workforce, and on civic engagement and identity, have been important to securing cultural investments and initiatives. At the same time, culture is now an established tool for placemaking in urban areas that have a variety of needs.

We are nearly half way in the world's long cycle of urbanisation and globalisation. Culture now underpins the success and competitiveness of many more city-regions, of different types and sizes.

Cultural vibrancy, heritage, preservation and identity are big competitive edges as cities seek to attract and retain people and activities. The supply of cultural amenities is important both to meet growing expectations of citizens and mobile talent, but also to manage the frictions between successful cities and their nation states, and between more and less advantages populations. Culture contributes positively to place-making and the amenities and identity that underpin successful population growth management. The enlargement of the spatial footprint of city-regions as metropolitan population grows presents new challenges around the choices of which cultural institutions to invest in, and how and where cultural amenities are to be located.

The drivers of digitisation, cosmopolitanism and individualisation are increasing rather than reducing demand for live, richly experiential culture. They also present new opportunities to export cultural products and services.

### 9.2 Greater Sydney and Its Peers.

Overall Greater Sydney performs well in benchmarks that measure culture in terms of visitor perception, lifestyle and education. But the region performs less well in measures of cultural quality, cultural production, cultural economy and regular cultural attendance.

Other cities such as Amsterdam and Toronto have had more success at fostering cultural production and enabling more of its regional population to visit and attend cultural activities.

Overall Sydney appears to be punching above its weight in some areas, such as its fashion school offering and the number of art and design students, suggesting that these can both become key competitive advantages that can be further built upon moving forwards. On the other hand, comparisons to its peers highlight that investments in Sydney's cultural offering in terms of its number of art galleries, bookstores, museums and concerts and shows could allow it to be positioned more competitively.

### 9.3 What are other World City Regions doing?

Many of the city-regions highlighted in our case studies are already developing sophisticated cultural investment strategies. As summarised above these strategies contribute positively to a wide range of policy objectives that include economic development, population growth management, health and wellbeing and multi-culturalism.

The full case studies are set out in chapter 10 below. Some of the key recent trends in the city regions include:

- Many city-regions are making very large up-front investments in cultural institutions with high visibility. These include the refurbishment and expansion of existing institutions as well as the creation or attraction of wholly new institutions.
- City-regions are increasingly selecting 3-5 key districts to focus efforts on around building a cultural cluster that has the scale to anchor a larger population or to accommodate new economic activities, or to underpin a wider spatial strategy supported by new connectivity.
- City-regions are recognising that cultural investment is a means to achieve densification and scale in locations where other positive factors are present such as transport and public space. The relationship between culture and public space in an area of increased integration.
- City-regions are recognising that the Innovation Economy is often fostered in inner city cultural districts. That means that they need to manage the life cycle of change in such districts and blend of uses. This requires strategies both to manage change and densification in such locations and to seek additional space for the displaced or growing activities.

More generally there appears to be a shift to:

- Managing the total place in which culture is a part of a whole
- Tactical urbanism and demonstration projects

#### 9.4 Cultural Locations

All over the world, cities are fostering cultural destinations: quarters, precincts, districts and hubs. In total there are estimated to be more than 1,000 of these locations worldwide.

There appear to be some basic pre-existing ingredients, sometimes forgotten, without which cultural locations cannot succeed:

- Enough available cultural content
- A critical mass of visitors and interested locals
- Good public transport
- An already strong local identity
- The right frameworks to sustain new business models for culture
- Responsiveness to new ways and new preferences for finding and accessing culture.

Some common ingredients of success then appear to be:

- Production as well as consumption element
- Housing and other uses
- Concern about place performance > building performance
- High quality programming of festivals, events and pop-ups to generate momentum, foot traffic and place attachment.
- Involvement of a leading cultural business, training or education provider
- Complementary day-time and evening uses

The challenge to prevent cultural districts evolving into generic sites of low-to-medium value consumption is clear. It seems to require very careful and deliberate investment and stewardship. Governments are not usually successful re-naming their districts/precincts but fostering organic and authentic identity.

Some key ingredients that seem to work better where:

- ☐ Channels for private and civic sectors contribution are open, honest and constructive.
- ☐ Ability either to consolidate land ownership and/or build a shared vision among partners
- ☐ Professional district management

## 9.5 Spreading the benefits of Culture

Most city regions have not developed explicit, sustained and implementable policies to spread cultural amenity around their growing urban area.

Many are also innovating in terms of:

- the kinds of partnerships being formed in different locations, spanning multiple public and private organisations who have shared interests in cultural development.
- Strategic attention to the affordable workspace, and small-scale creative economy
- Engaging with harder-to-reach communities
- Using cultural organisations to anchor a process of physical or economic change.

## 9.6 Key Imperatives for Greater Sydney:

Cultural provision is clearly an important dimension of Greater Sydney's current growth cycle. Successful and growing city-regions must invest in culture if they wish to sustain their advantage and appeal. Greater Sydney has a well-defined long-term metropolitan strategy that make important choices about how population growth and economic transition should be accommodated across the region. This plan provides a good basis for considering cultural investment priorities. The imperatives for Greater Sydney and NSW Wales Government are:

- 1) Recognise the wider impacts that investment in culture has for both public policy goals and successful metropolitan growth management. Cultural investment and interaction plays important roles in the education, health, wellbeing, identity, and inclusion of city regions. It is also a spur for enterprise, innovation, and creativity. Cultural investment also supports population growth management, densification, and place making. It is one of the critical amenities that makes growth acceptable and positive to resident populations.
- 2) The Greater Sydney draft Metropolitan Strategy provides an excellent basis to review the future cultural requirements of Greater Sydney. The shift to the 3 city metro provides a good framework for considering what the overall requirements are in terms of cultural investment if the three cities are each to succeed in terms of their lifestyle and public policy goals. It also suggests that consideration should be given to more comprehensive cultural planning as Sydney grows to a region of 7.5 million.
- 3) This review shows that building a clear, coherent, and compelling vision for culture is key to optimising its role in a growing and transitioning Metropolitan Area. Culture makes important contributions to diverse policy goals from health to inclusion to identity & belonging, to innovation and growth management. Culture also plays a role in driving commercial goals from tourism to real estate to retail to the creative economy. But this

very diversity of role of culture has risks that it might fail to be fully recognised and an overarching vision is essential to avoid the costs that would accrue from that.

- 4) The location of key cultural infrastructure is an important issue for the optimisation of the role of culture in regional success. As Sydney moves from a single urban core to three urban cores within a larger metro region it will be important to consider the optimal location of cultural infrastructure both within their 'city' and within the 'region'. The rate of investment in transport infrastructure in the region is substantial. This will change medium term patterns of travel and re-orientate the importance of distinct locations, interchanges, and termini. In this context reviews of the location of institutions are merited.
- 5) Districts and place making. As this review shows, many of the benchmarking group of comparator cities are investing in fostering 'cultural districts'. In such districts important public goods are secured through co-location in terms of public space, creative industries clusters, tourism destinations, and educational facilities. By optimising the location of established and emerging cultural institutions with wider educational, enterprise and public space activities, new centralities are created. Such districts can add to the beneficial spread of activities within a region, helping to create compact cities and polycentric regions, and a 30-minute city.
- 6) Investment patterns in culture are now diversifying very rapidly across the comparator group. Alongside the role of traditional public investment there is growth in the use of user charges, crowd sourcing, levies, match funding, sponsorship, philanthropy, and endowments to fund cultural activity. For Greater Sydney it is important to review how far the existing public finance is adequate to the needs and whether additional financial instruments and investment sources should be encouraged.
- 7) Identity, Reputation, & Visibility. Greater Sydney is already a highly attractive visitor destination. But much of its appeal lies in its access to beaches, nightlife, lifestyle, and the holiday offer. As Greater Sydney develops its economic strategy towards corporate presence, innovation, higher value education, science, technology, & research, and soft power/diplomacy, it may be important to increase the 'cultural visibility' of Sydney so that it can broaden its appeal whilst also sustaining its existing attractiveness.
- 8) Creative enterprise and innovation economy. The links between cultural investment, creative enterprise and the innovation economy are widely recognised in the literature. But making the links between culture and economy work requires a sophisticated understanding of skills and education, enterprise processes, and local agglomeration and collaboration. Industry NSW and the NSW Innovation and Productivity Council are already developing NSW's approach to the Innovation Economy and to Innovation Districts. Adding the dimension of culture and creative industries to this work appears to be an important opportunity.
- 9) Access to culture for the widest base of population is a key issue for all of the comparator city-regions. Support for Government investment in culture is predicated on the basis that diverse groups of citizens will be able to benefit from the investments made. If the base of participation is too narrow, the case for public investment is diluted. For each of them, and for Greater Sydney, an important consideration is how can access be improved and shared both within the metropolitan area and for the wider regional population around them. This requires consideration of different processes such as digitisation and remote participation, touring and rotation, satellite venues, education, incentives, packaging and marketing. Developing a metropolitan and wider regional access strategy is an important part of the overall approach.

- 10) Global Benchmarking and Global Networks and Asia Pacific Leadership. Improvements in cultural investment are supported by benchmarking. Greater Sydney and NSW should continue comparative benchmarking with the other emerging world city-regions to observe and track progress in cultural investment, production, and public policy outcomes. Preparing and making data available at Greater Sydney level may be an important means to increase Sydney's visibility and standing. Sydney could also build a wider network that also incorporates major cultural capitals in the Asia Pacific Region and the English-Speaking World (Tokyo, Beijing, Shanghai, Moscow, Seoul, and London, New York, Los Angeles). Sydney should successfully position itself as a Cultural Capital within the Asia Pacific Region and in The English-Speaking World. In this respect it can forge special relationships with both Hong Kong and Singapore.

## 10. Culture in World City Regions: Case studies

**Table 1** Summary of Sydney's peer group

	City Region Population	Rate of population change and diversification	Cultural priorities and focus	Active role of higher tiers of government
Abu Dhabi	2.0m	**	Global Institutions, Heritage, Tourism	(City-state)
Amsterdam	2.5m	**	Spreading culture to suburbs and wider region, align culture with liveability.	*
Barcelona	5.2m	**	Cultural Innovation, Education, Inter-cultural exchange	**
Hong Kong	7.4m	*	Large cultural districts, cultural heritage and preservation.	*
San Francisco	4.9m	**	Neighbourhood activation, culture-led regeneration, community participation	**
Singapore	5.6m	***	Identity, global prestige, consolidation in 2 key districts	(City-state)
Stockholm	2.2m	**	Managing population growth, social cohesion and integration, public art	*
Tel Aviv	3.2m	**	Align with liveability equation to support innovation; cultural events, architecture renewal	*
Toronto	6.1m	***	Music and film to promote global culture, affordable spaces for creators	**

### 10.1 Abu Dhabi

Purpose of Cultural strategy	Scale of cultural investments being made	Locations of key cultural assets and districts	Lessons for Greater Sydney
<ul style="list-style-type: none"> <li>■ Build reputation as a world cultural capital</li> <li>■ diversify economy from oil</li> </ul>	<ul style="list-style-type: none"> <li>■ Huge public investment in purpose-built Saadiyat Island project, expected to cost US\$27 billion</li> </ul>	<ul style="list-style-type: none"> <li>■ Consolidation of assets in Saadiyat Island –mega-development ten minutes outside of CBD</li> </ul>	<ul style="list-style-type: none"> <li>■ Development of deliberate complementary approach with surrounding cities</li> <li>■ Leverage large-scale cultural development to highlight ancient cultural heritage.</li> </ul>

#### Culture in Abu Dhabi

Over the course of its history Abu Dhabi has developed a rich culture based around local tribal traditions, customs and activities including poetry, popular stories, handicrafts, weaving, folk dancing and traditional sports. The discovery of oil in the UAE in the 1960s heralded the transformation of Abu Dhabi into an international location and began a new chapter in the city's cultural journey, as economic migrants wove their own traditions into the city's cultural fabric.

More recently, Abu Dhabi's leaders have realised the importance of diversifying the city's economy away from oil and have used culture as a key tool, investing significant sums of public



money into flagship cultural anchors whilst simultaneously looking to protecting the Emirate's cultural heritage. Since 2004 the city has aimed to become an international cultural hub, launching a dedicated Cultural Heritage Management Strategy and a well-funded Authority for culture.

Our benchmark study shows Abu Dhabi still lacks profile in culture benchmarks despite the scale of its initiatives. In the benchmarks it does appear in, the city has an improving environment for culture to thrive, but still has a long way to go for variety and appeal of cultural experience and attractions.

### Cultural Strategy

Culture is a cornerstone of Abu Dhabi's Vision 2030, the Emirate's long-term economic and urban-development plan to reduce the city's dependence on oil revenue. It envisions enhancing the city's cultural offer (by developing new locations as well as leveraging existing heritage) to help transition into the knowledge economy and boost the tourism industry. As a result, over the last 10 years, the strategy has focused on a capital-intensive effort to:

- highlight the Emirate's rich national heritage; and
- bring the best global art, museums and music to the region.

This approach reflects a long-standing commitment to culture in the Emirate

"The institutionalisation of cultural heritage has been [a priority] since 1969, through the first tourism department, by Sheikh Zayed, and the first museum in Abu Dhabi. What has been happening is [Abu Dhabi has] been moving from one phase to the other recently. The first 40 years has been the initial phase of laying the foundations and structure, and now we are moving to the global stage where big museums and global entities are making Abu Dhabi and the UAE their home."

Zaki Anwar Nusseibeh, Assistant Minister of Foreign Affairs and cultural adviser at the  
UAE Ministry of Presidential Affairs, 2017

The formation of the Abu Dhabi Authority for Culture and Heritage and the adoption of a defined Strategy in 2005 saw a step change in the level of effort and investment. This has involved consistent investment in local cultural districts, promoting education, and grand scale plans of urban transformation – most notably the cultural mega-district in Saadiyat Island (see below).

#### Support for traditional and indigenous culture

Abu Dhabi authorities have been careful to take a range of measures to preserve and raise awareness about traditional Emirati culture in the recent cycle. These include:

- holding festivals and events such as the Sheikh Zayed Heritage Festival - an interactive collection of performances, pavilions and events celebrating Emirati culture. Traditional cultural festivals have proven extremely popular and draw large crowds;
- forming clubs like the Emirates Heritage Club which conduct research on Emirati heritage and organise activities to promote heritage awareness;
- establishing a heritage village - a reconstruction of a traditional oasis village, with traditional houses, schools, markets and public spaces
- establishing and maintaining heritage museums such as the Al Ain National Museum and the Delma Museum which focus on history and Emirati culture. On Saadiyat Island important investments are also being made to local heritage through the planned Zayed National Museum, which will form the centrepiece of the development and will tell the history of the UAE and its cultural connections across the world. A new Maritime Museum on Saadiyat Island is dedicated to Abu Dhabi's sea-faring history and people;

- Preserving and renovating historical buildings for the enjoyment of the public, including the Al Ain Palace Museum, Al Jahili Fort and Qasr Al Muwaji in Al Ain;
  - constructing and maintaining mosques.

In order to maximise its global competitiveness (and therefore resilience), it has been important for Abu Dhabi to offer a distinct cultural proposition from its neighbouring UAE cities, Dubai and Sharjah, and the three have developed distinct yet complementary cultural ecosystems.

- Abu Dhabi, as the capital city, is focused on large-scale museum developments, international partnerships, and long-term capacity building.
- Dubai has used its trade and finance infrastructure to become a regional art market location
- Sharjah has a content-rich cultural production scene.<sup>163</sup>

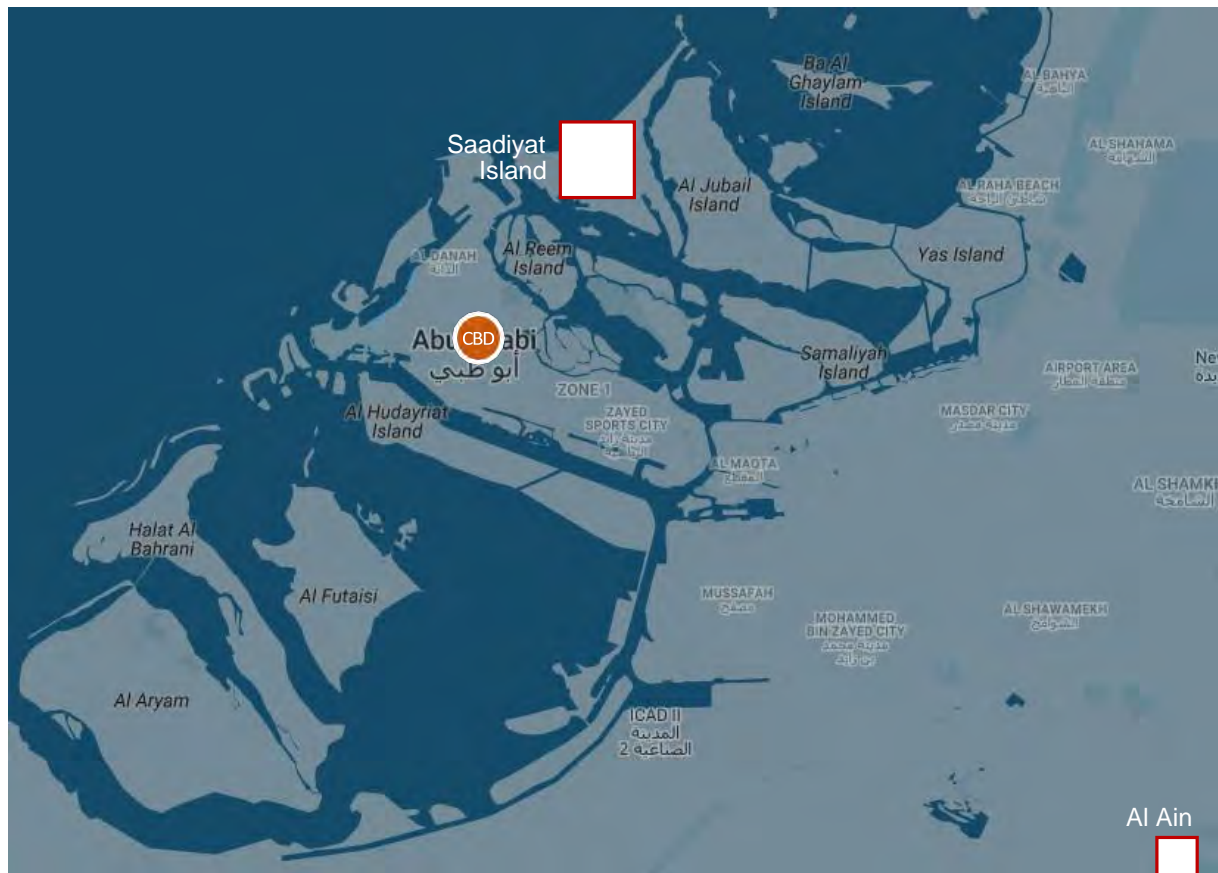
### Cultural Assets and Investment

Abu Dhabi's most significant cultural assets are those created as part of the Saadiyat Island cultural hub [see below], some of which are already complete and open. The Louvre Abu Dhabi is the island's main anchor and opened in November 2017. The intention is that the Louvre will act as a gateway to visit other cultural assets, including the UNESCO and other archaeological sites in Al Ain, the local museums at Qasr Al Muwajji and the Al Ain Palace Museum.

In terms of softer cultural assets, Abu Dhabi has launched a suite of modern cultural events, including Abu Dhabi Art (an annual art expo), the Abu Dhabi Film Festival, and the Abu Dhabi Classics --- a series of opera and classical music concerts at venues around the city, which is thought to be the first year-round performing arts series in the Arab World. These are additional to a series of festivals which celebrate the more traditional aspects of Emirati culture, especially targeted at younger generations.

Abu Dhabi's government have certainly been serious about investing in cultural infrastructure over the last two decades. The total cost of the Saadiyat Island project is expected to be around US\$27 billion. The powerful Louvre brand alone is being leased by the U.A.E. from the French for a fee of about US\$460 million for more than 30 years, and it is anticipated that eventually the UAE will have paid a total of US\$1bn for French expertise, guidance and loans.

### Map of Abu Dhabi's main cultural locations



There has been some investment in more upstream cultural creation:

- agreements with top universities and business schools to attract students, researchers and future professionals in the field of culture.
- A Film Commission (ADFC) with the purpose of developing the local film industry, and local film production.
- The SANAD fund to provide meaningful support for talented filmmakers from the Arab world.

Nonetheless some analysts have argued that Abu Dhabi is “parachuting in” culture and focusing the bulk of its investment on cultural infrastructure rather than education, incubators and funding for artists.

#### Key Cultural District

Saadiyat Island (the Island of Happiness) is a 27km<sup>2</sup> urban development project located just outside Abu Dhabi’s existing city centre. The project is being developed by the state owned [Tourism Development & Investment Company](#) (TDIC). Once complete in 2020, Saadiyat Island be a cultural district and tourism destination that will put Abu Dhabi on the world cultural map.

The island’s new Cultural District will bring together art and culture from all over the globe in centres, institutions and exhibition halls which have been designed by some of the world’s best known contemporary architects. The centrepiece of the island will be the Zayed National Museum, which tells the story of the region’s history and the unification of the UAE.

International cultural institutions have been signed up as residents of Saadiyat – most notably the Louvre, the Guggenheim, and New York University. The Louvre Abu Dhabi is dubbed the first “universal” museum in the Arab world. Its displays will originate from cultures all around the world, with global themes and influences highlighted to illustrate the shared human experience. The island will also be home to a new Performing Arts Centre (housing a music hall, opera house, five theatres and a drama theatre, as well as a new Academy for Performing Arts and retail and food areas), a 15,000m<sup>2</sup> exhibition centre, a maritime museum and an equestrian centre.



Altogether the projects under construction are valued as high as US\$27 bn. Cultural attractions are being combined with high-end retail, luxury residential, boutique hotels, educational and sporting facilities.

## Future Agenda

The immediate imperative for Abu Dhabi’s leadership is to complete the Saadiyat Island project according to its original ambition, and gain global recognition once opened. The Guggenheim Museum, Zayed National Museum and Performing Arts Centre projects are presently stalled or delayed.

## 10.2 Amsterdam

Purpose of Cultural strategy	Scale of cultural investments being made	Locations of key cultural assets and districts	Lessons for Greater Sydney
<p>Maintain global image and reputation,</p> <p>Attract international visitors and investment,</p> <p>Support economic development.</p>	<ul style="list-style-type: none"> <li>After two decades of large scale public investment, onus on institutions to be self-sustaining.</li> <li>National institutions privatised to run as private foundations</li> <li>Private or PPP</li> </ul>	<ul style="list-style-type: none"> <li>Historically in CBD which struggles with overtourism</li> <li>Effective efforts are being made to disperse cultural assets throughout metropolitan area</li> </ul>	<p>Illustrates how to foster new cultural assets in suburban areas.</p> <p>Foster organic development rather than relocating institutions.</p> <p>Culture outside of CBD must be supported by good infrastructure links.</p>

## Culture in Amsterdam

Amsterdam's culture is synonymous with liberalism, free thinking and innovation. Since its Golden Age in the 17th century, in which the city was a global capital for trade, science and the arts, Amsterdam has been open to the world, to new people and to new ideas. The city has been a pioneer on issues relating to civil liberties and gay rights and has adopted tolerant attitudes towards soft drugs and prostitution for which it has become world famous. Today, one third of Amsterdammers are foreign born, and as such the city has not so much one cultural offering, but rather a multi-cultural one.

The city's historic urban fabric adds an additional dimension to the city's cultural development. Amsterdam has the largest and one of the best preserved historical city centres in Europe and became a UNESCO world heritage site in 2010. Heritage and preservation also form important elements of cultural ethos and planning.

Amsterdam performs consistently very well in cultural benchmarks, particularly in those measuring cultural experience, the underlying conditions for culture, local cultural attendance and access, and appeal of city's culture to global audiences.

### Cultural Strategy

Amsterdam sees maintaining and enhancing its cultural offering as crucial in maintaining its global image and reputation, continuing to attract international visitors and investment, and accordingly supporting its economic development.

The city has adopted innovative solutions to protect its liberal culture in the past. Most famously it was the first to have a city "Night Mayor", charged with protecting nightlife culture, a model that has proven highly successful and has been replicated in other cities around the world including Paris, London, Zurich, and New York.

Amsterdam City Council formulates plans every four years, outlining goals and spending plans. The most recent, the Seventh Plan for the Arts, looks ahead from 2017 to 2020. Key aspects of policy for the period are:

- Creation of a multi-pole city of culture. The city council plans to create "new cultural epicenters" in the north, south-east and west of the Amsterdam metropolitan area. The aim is to improve quality of life and community links in Amsterdam's suburbs, whilst simultaneously relieving pressure on the overstretched central cultural hubs such as Museumplein and Leidseplein. The city will encourage its visitors to explore the wider metropolitan area by branding and promoting its neighbourhoods, and increasing funding for their cultural organisations.
- A deepening of cultural education. Increase cultural teaching in most schools in the metropolitan area.
- A commitment to strengthening the cultural participation of the elderly, together with local partners in welfare and care. Amsterdam was one of five pilot cities participating in the WHO's 2016 and 2017 in the program 'Long Live Art: Towards Age Friendly Cities'.

### Assets and investment

The City of Amsterdam is home to a large number of iconic cultural institutions, including three main theatres, a collection of world-leading art galleries and other internationally recognised museums. Museumplein forms the city's cultural hub and is itself the most prominent site in Amsterdam for festivals and outdoor concerts. Amsterdam's nightlife is one of its biggest tourist

attractions, and legendary dance venues such as Paradiso and Melkweg are supported by a numerous more intimate venues, cafes and bars.

Over the last two decades the city has invested tremendously in its major cultural infrastructure, refurbishing or (re)building 25 venues including the central public library, the Rijksmuseum, the Stedelijk Museum, Hermitage Amsterdam, the De La Mar theatre and the Eye Film Institute. In the 1990s Amsterdam's national institutions were privatised to run as private foundations, and these refurbishment projects were financed either wholly by private means or via PPPs.<sup>164</sup> Indeed, the city is placing an increasing onus on cultural institutions to be financially sustainable – its 2013-16 Plan for the Arts required every funded cultural institution to generate at least 25% of its own income.

Nonetheless, the city itself continues to invest heavily in arts and culture. The latest Plan for the Arts allocates €90 million annually for the sector from 2017-2020, its largest budget to date. Significant investments will be made in four cultural community centres, and individual organisations can apply for investment from a number of sources including:

- The Amsterdam Fund for the Arts (AFK) which supports 130 organisations, with a focus on audience development, new finance models and local cultural identity.<sup>165</sup>
- The Arts Factories program which helps to fund new creative workspace in old buildings.<sup>166</sup>
- Innovation funding: cultural organisations can apply for innovation funding based on their track record in developing international, national and local partnerships, talent development and cultural education.

#### Cultural Policy for the Amsterdam Region

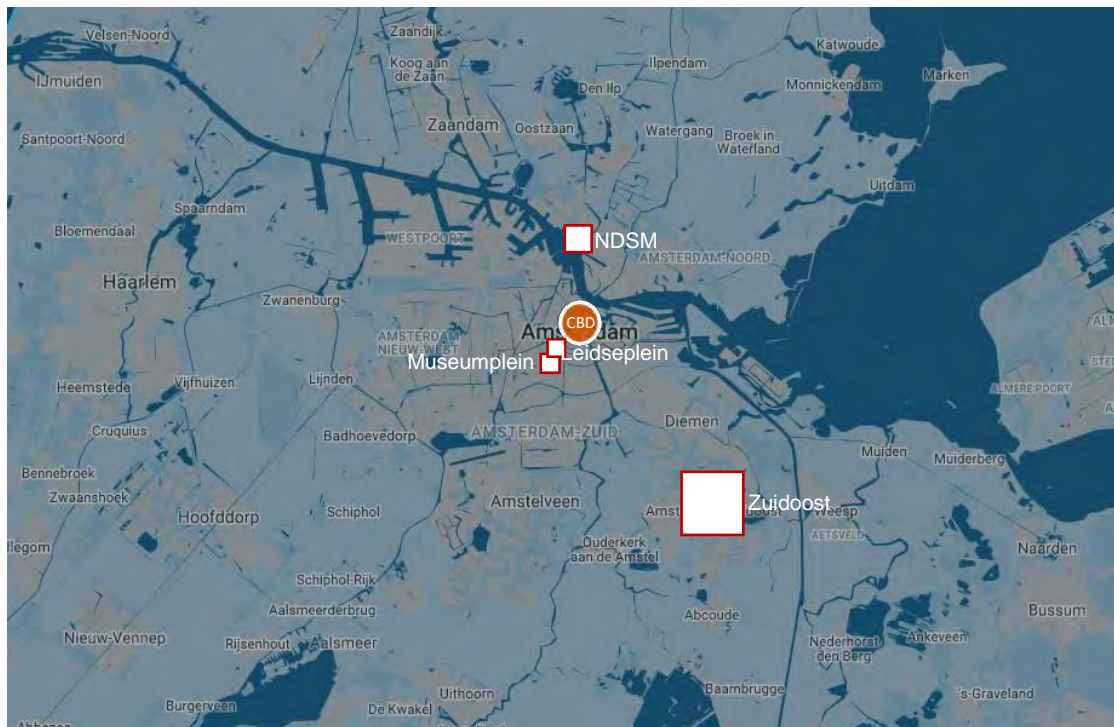
By more expansive definitions the Amsterdam City Region comprises the majority of the Netherlands population. The Netherlands (population 15 million), the central government is the only tier of authority above the local governments, so it takes responsibility for supporting cultural institutional of development, cultural education and entrepreneurship. Six national cultural funds receive a budget – they focus separately on Creative Industries, visual arts and heritage, Film Fund and Cultural Participation. These funds have grown and are targeted at fewer institutions in order to have a bigger impact. Around AUD 1 bn is spent each year.

The national government fosters cultural cooperation between the four largest cities (the G4), and also between the country's nine main cultural centres (the G9) and the 35 largest municipalities (the G35). Priorities moving forward include decentralisation of funding to encourage cooperation between higher tier of government and the nine main cultural centres. A strong focus on educational and youth access to cultural amenities is visible.

Since 2010 national culture spending has been focused on the locations outside the largest centres in or near Amsterdam. This reflect the fact that Netherlands has been through a process of urban expansion and growth which has meant some areas now host continuous urbanisation but lack cultural amenities. National and regional cultural policy is now focused on serving this growth that has taken place at edges of the urban region.

#### Map of cultural districts and priority areas in Amsterdam metropolitan area





### Shifting Culture out of the historic core: NDSM

Rising population and growing visitor numbers in Amsterdam are posing a challenge both for the city centre, which is struggling under the excessive footfall, and for fringe artists and creatives who cannot afford escalating rents. As such, current cultural policy is partly focused on dispersing Amsterdam's cultural sector around the city.

Three new cultural epicentres are planned in the North, South East and West of the city. The Zuidooit (SE) area is home to concert halls and the Amsterdam arena, whilst the West has interesting alternative cultural complexes such as [OT301](#) and [Lab111](#), which both mix music, film and art. Meanwhile NDSM is a former shipyard in the North of the city, a short ferry ride from the city centre, which has been transformed into a new cultural district.

NDSM began life as one of the world's largest shipyards. By the 1990s empty buildings were squatted by nomads, craftsmen and artists, turning NDSM into a creative and artistic breeding ground.<sup>167</sup> A guild of artists, Kinetisch Noord, arose out of this squat culture, and the City Council – via the Arts Factories programme – agreed to fund the collective to manage and develop the district.

With this funding, the shipbuilding shed was transformed into 'Kunststad' ('Art City'), an architectural monument housing some four hundred artists, designers, architects and set designers: one of the biggest artistic incubators in the Netherlands. Experimental working space / ateliers was (and is) rented out to artists at affordable rates.

With this funding and development, both of the Kunststad and other former industrial buildings, the area has become a cultural hotspot and a destination enjoyed by both tourists and locals. It retains its vibrant artist community, which has been joined by a variety of bars, restaurants and even a manmade beach. The enormous IJ-hallen warehouse now holds Europe's largest flea market and throughout the year the area hosts multi-disciplinary festivals, performances, exhibitions, dance parties and a wide range of other events in unique, post-

industrial surroundings. Young-at-heart corporates such as Red Bull and Hema have even moved to locate in the district. NSDM continues to develop – in 2018 the largest Street Art museum in the world will be located on the wharf.<sup>168</sup>

## Future Agenda

Amsterdam's challenge as a small city is to preserve its heritage, encourage tourism and economic growth, and yet remain a liveable city. The city council has recognised a need for Amsterdam's visitors to disperse beyond its historic core, and is using arts and culture as a means of achieving that goal. However, cultural programming alone will not be sufficient to draw people away from the mega-sites - sustainable transport systems are needed to connect Amsterdam's outer urban areas with the city center. Another element of the challenge for the future will be ensuring that both the city centre and the outer districts retain the very distinctiveness that is their appeal, under the pressures and homogenising influence of global tourism.

## 10.3 Barcelona

Purpose of Cultural strategy	Scale of cultural investments being made	Locations of key cultural assets and districts	Lessons for Greater Sydney
<ul style="list-style-type: none"> <li>■ Creation of a vibrant cultural ecosystem as an end in itself</li> <li>■ Enhance social cohesion</li> </ul>	<ul style="list-style-type: none"> <li>■ Significant public sector capital investment</li> <li>■ High level of funding from private sector too</li> </ul>	<ul style="list-style-type: none"> <li>■ Architectural assets throughout central city</li> <li>■ Reclaimed suburban industrial areas e.g. Poblenou, L'Hospitalet</li> </ul>	<p>Integration of culture within strategic plan for population growth and diversification.</p> <p>Strong focus on the eco-system</p> <p>Citizen-led suburban cultural district</p>

## Culture in Barcelona

Barcelona is the proud capital of the Catalan culture, and can trace its cultural roots back 2,000 years. Founded in Roman times, the city fell under the influence of numerous different ethnic groups during its first 1000 years, from the Visigoths (Germanic peoples) to the Jews and later the Moors, each weaving their own DNA into the city's heritage. By the second millennium, Barcelona had become the largest city in Catalonia and the de facto cultural and economic centre of the Crown of Aragon. Although power and prestige switched to Madrid following the unification of Spain in the 18th century, by the early twentieth century, the relative success of Barcelona as an industrial centre and port and its consequent prosperity restored its role as a cultural centre. It was at this time that some of its most famous artists and architects, including Gaudi, Picasso, Dali and Miro lived and worked in the city.

During Franco's four decades of dictatorship (1939-75) Catalan culture was repressed and official recognition of the Catalan language was withdrawn. By the 1970s the number of Catalan speakers had fallen and Barcelona's cultural vibrancy was a shadow of its former self. After Franco's death, Barcelona fought hard to revive its reputation as a cultural hub. Large-scale urban regeneration in preparation for the 1992 Summer Olympics played an important part in shining new light on the city's architectural treasures, and in cleaning up the city to bring cultural tourists calling. Catalan culture has been promoted (the city today is officially bilingual) and the city once again is a lively centre for arts, design, architecture, performing arts, media and fashion.



Our benchmark review reveals that Barcelona ranks consistently very highly in cultural benchmarks, recording particularly strong performances for cultural experience and social and cross-cultural interaction. One area where the city could improve is in its enabling environment for cultural entrepreneurship, which currently lags the likes of Amsterdam and Stockholm.

## Cultural Strategy

Barcelona's focus on culture as a core part of its development strategy really began in 1999. In 1999 the city developed a Strategic Plan which placed culture as a central part in the framework of the city strategy and recognised the link between culture and economic and technological development.

In 2004, Barcelona together with many other local municipal governments worldwide committed to a document called Agenda 21 for Culture which committed cities and local governments to pursuing an active role in the development of culture. The document stated that cultural development was a key element of urban development.

Based on Agenda 21, Barcelona transformed its cultural strategy in 2006 with The Second Strategic Plan for Culture. By this time it was considered that the goals of the 1999 strategy had been achieved: culture had re-emerged in Barcelona and through initiatives such as 22@ (an initiative to transition the rundown industrial Poble Nou neighborhood into a technology and knowledge-driven innovation hub), themed years (e.g. Gaudi Year 2002) and the Universal Forum of Cultures (a four month long event), the role of culture in the economic and technological development of Barcelona had been recognised and exploited.

A changing demographic landscape drives the new cultural agenda for Barcelona – the metropolitan area experienced an increase in foreign residents from 1.8% to 18.1% between 1996 and 2009. Utilising culture as a means of fostering social cohesion became an imperative.<sup>169</sup> As a result, the city plan has three main culture objectives:

- Proximity: Local access and participation in local cultural programmes
- Quality and excellence in cultural production: Top-class artistic productions as a basis for city level cultural projects
- A more connected cultural ecosystem: The strengthening of relationships within the cultural sector of the city in order to more effectively organise resources.

10 programmes / groups of projects were implemented to support the cultural ecosystem. These programmes were:

1. Barcelona Laboratory – a programme to promote conditions that stimulate creativity e.g. the development of the Barcelona-Catalonia Film Commission; the creation of experimental spaces in disused industrial precincts “Factories for Creation”
2. Culture, Education and Proximity – network of educational cultural facilities, and a cultural centres network.
3. Barcelona, Reading City – construction of a new Central City Library, updating of the cities Libraries Plan and promotion of the publishing sector in the city.
4. Programme for Intercultural Exchange – a long term programme to promote spaces for intercultural exchange in the city
5. Barcelona Science – brings scientific projects and programmes to the whole city
6. Quality of Cultural Facilities – increasing the quality of existing cultural infrastructure, through expansion, more investment, refurbishment etc
7. Knowledge, Memory and City – a programme of strategies and projects to highlight the importance of shared heritage

8. Barcelona Cultural Capital – broadening the institutional cooperation between Barcelona and the Catalan and Spanish governments. Co-operation on funding, and on the Barcelona Charter (which agrees funds for cultural development). Promotion of the Catalan Cultural Industries Institute, and a new International Documentary Festival in the city.
9. Cultural Connectivity – increasing the connections between the city’s different cultural agents.
10. Barcelona Council of Culture – a new instrument for analysing local cultural policies, checking and updating the Strategic Plan.

### Cultural Policy in Catalonia

The cornerstone of cultural policy in the higher tier government of Catalonia has traditionally been the need to foster and conserve Catalan identity. While it does not have a strong location focus or desire to designate key districts, it does focus on the enabling environment throughout the region.

Culture is wholly devolved to the responsibility of the Catalan Government (although the situation is fluid at present following the unrecognised independence referendum of autumn 2017). The Ministry of Culture works to promote and popularise Catalan culture.

Public cultural policies in recent years have included:

- The mapping of cultural and creative industries, the declaration of strategic fairs and markets, and conferences and support from the Catalan Institute for Cultural Companies. These have boosted the presence of Catalan culture at major international events.
- Policies that address participation and cooperation between the sectors, the authorities and civil society, with the creation of bodies such as the Culture Social Council or the Fundació Catalunya Cultura to encourage collaboration between the business and cultural sectors.
- Promotion of citizen participation in popular culture events and voluntary organisations or associations.
- Promotion of knowledge of the Catalan language among the adult population and the use of Catalan in specific sectors.

In terms of funding, new types of financial support have been created, such as refundable contributions and participatory loans for digital cultural companies. A telecommunications company tax has been created to boost the audio-visual industry and the European Projects Accelerator has been launched to increase the number of projects that are entered for European subsidies via the Creative Europe programme.

The Catalan government works closely with Barcelona provincial council and with the city council, collaborating and co-funding on many projects (see investment chapter above) e.g. a single library card agreement with Barcelona Provincial Council.

The Ministry has identified three long-term priorities for the future: to secure decision-making powers over cultural VAT, to introduce a patronage law, and develop an appropriate legal framework for intellectual property.

## Cultural Assets and Investment

Barcelona has a huge array of cultural assets all located in the inner city. Its Art Nouveau architecture is some of the world's most famous, and the works of two of its architects Lluís i Montaner (Palau de la Música Catalana and Hospital de Sant Pau) and Antoni Gaudí (Park Güell, Casa Milà, Sagrada Família, Casa Batlló) are designated UNESCO World Heritage Sites. Indeed Barcelona won the 1999 RIBA Royal Gold Medal for its architecture, marking the first and only time that the winner has been a city, and not an individual architect.

Barcelona has a handful of museums dedicated to world famous artists who have lived and worked in the city: those for Picasso, Miró and Dalí, as well as a Museum of Contemporary Art and the National Museum of Art of Catalonia. Countless other museums cover history, science, sport, maritime culture, archaeology, perfumes, textiles, food and drink and more. One of the most celebrated is the CosmoCaixa, a science museum which received the European Museum of the Year Award in 2006.

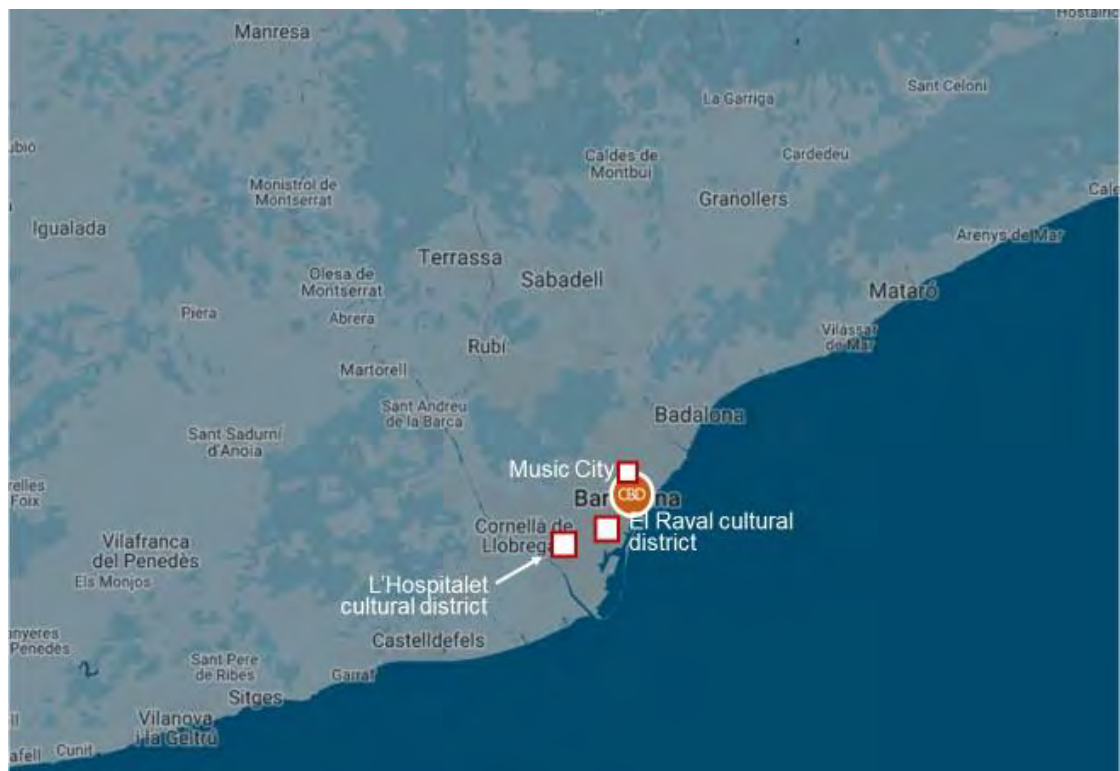
The city has a similarly large number of venues for live music and theatre, including the world-renowned Gran Teatre del Liceu opera theatre, the National Theatre of Catalonia, l'Auditori and the Palau de la Música Catalana. The city hosts major music festivals including Sonar and Cruïlla, a large Pride parade, the CaixaForum Summer Nights series of concerts, and the major cultural festival of the year, Festival del Grec which brings together dozens of shows from around the world, encompassing dance, music, theatre and circus.

Other cultural assets in Barcelona include its unique streetlife (particularly around the world famous Ramblas boulevard), its Catalan cuisine, the redeveloped city-beach and seafront and the Camp Nou: home to Barcelona FC, one of the world's largest football clubs.

Investment in culture in Barcelona really took off following the introduction of the 1999 Strategic Plan --- between 1995 and 2007, the combined expenditure on cultural activities by the three relevant governments almost tripled, and public financing also helped to build a web of consortia and networks to sustain and ensure continuity in cultural activities.<sup>170</sup>

Public investment in both cultural infrastructure and cultural programming continues apace (see Cultural Strategies chapter for details of investments). The city's annual budget for culture is around €110m, which is around 5% of the city's total expenditure. Libraries have been a particularly important area for public spending – since 1998 19 new libraries have been built, 6 moved and 3 enlarged or renewed at a cost of around €110m from Barcelona City Council, with further funding from Catalonia.

## Map



## Barcelona's suburban Cultural District: L'Hospitalet de Llobregat

Barcelona's city centre has been enjoying a cultural renaissance and drawing tourists from around the world, while many of the metropolitan region's suburbs are rarely visited. L'Hospitalet de Llobregat is officially Catalonia's second city but is effectively a suburb in the Barcelona metropolitan area, a 10-15 minute train ride to the South West of the city centre. L'Hospitalet is an industrial city which through its history has been home to flour mills and distilleries, ceramic, textile, metallurgical and chemical industries. With the decline of these industries the city has become run-down, and the City Council aims to embark on a programme of culture-led regeneration, creating a new 25 hectare cultural district in the industrial heart of the city (Sant Josep).



L'Hospitalet already has an established music scene as well as some stand-alone cultural assets, perhaps most notably a new central library which was converted from a disused factory in the early 2000s. However, it is hoped that with the wholesale creation of a new cultural district, the city can follow the example (perhaps ambitiously) of New York's Meatpacking District, and other declining industrial areas in Berlin, Miami, Stockholm and Helsinki, kickstarting its economy. Culture is seen as an appropriate vehicle for regeneration given its synergies with Barcelona's own economy.

The creation of a new cultural district was first proposed by L'Hospitalet's citizens who contributed proposals for the future of the city as part of a participatory democracy process. The project is planned as a medium-term development: an investment of 30m Euros (AUD 45m) will cover the 8 years of development between 2015 and 2023, half of which is financed by the EU.

Initiatives planned under the project include:

- a general face-lift of the district, with pedestrianisation of streets and creation of a new Parc de les Arts on the site of a former wasteland at the side of the commuter railway line.
- The City Council provides tax breaks to re-locating cultural organisations
- the Tecla Sala (cultural centre) is acting as a facilitator, joining up owners of disused industrial space with potential creative tenants.
- Sponsorship of creative activities in the district including exhibitions by several well-known local artists, experimental music performances and artistic installations in metro-stations. In most cases these activities are timed to coincide with major cultural events in Barcelona itself e.g. musical performances before the Sonar festival, or art exhibitions during Barcelona Gallery Weekend.

## Future Agenda

A major future priority for the Barcelona government is modernisation of the city's cultural sector in terms of innovation and digitisation. Ever increasing cultural diversity of the citizenship of Barcelona also remains a challenge and an opportunity for the city. Population diversity provides the city with new breadth of culture, and the city continues to work out how best to use culture as a tool for promoting social cohesion.

## 10.4 Hong Kong

Purpose of Cultural strategy	Scale of cultural investments being made	Locations of key cultural assets and districts	Lessons for Greater Sydney
<ul style="list-style-type: none"> <li>■ Preserve city heritage and identity.</li> <li>■ sustain global competitiveness.</li> <li>■ improve access for existing residents.</li> <li>■ develop the city's global brand.</li> </ul>	<ul style="list-style-type: none"> <li>■ Large, typically publicly funded and managed</li> <li>■ Private sector investment growing in importance</li> </ul>	<ul style="list-style-type: none"> <li>■ CBD</li> <li>■ Hugely ambitious new cultural district in West Kowloon (2km from CBD)</li> </ul>	<ul style="list-style-type: none"> <li>■ Weak sequencing of cultural infrastructure can attract unanticipated types of culture.</li> <li>■ Importance of software as well as hardware.</li> </ul>

## Culture in Hong Kong

Hong Kong developed in the 19<sup>th</sup> century as a British free port with an economy centred around finance and trade. Its unique geopolitical location lent Hong Kong a distinctive cultural identity, developing under the influence of both East and West, but public policy traditionally treated culture and the arts as low priority. However, since being handed back to China in 1997 and particularly since the early 2000s, culture in Hong Kong has risen up the agenda due to:

- A desire to preserve art and heritage post-1997 handover
- Demand from HK residents for greater access to cultural facilities
- Aspiration to host high art and culture to gain global influence and prestige coupled with recognition from the city tourist board (after a survey conducted in 1996) that HK's lack of cultural reputation would be a competitive disadvantage
- An aim to use culture for community development and upgrading of new districts
- A view that public sector was too inert in its cultural policy. A submission to the Home Affairs Bureau by the Director of the MOST Museum in 2006 alleged that the city had in recent years, engaged in insufficient cultural policy research and development, provided inadequate funding to the sector, ignored culture at a district level (with districts having no cultural 'vision' or policies and no artist incentives), and lacked – amongst other things --- a cultural exchange policy and a policy for library / readership development.<sup>171</sup>

As a result, the Government has heightened its focus on culture in the last 15 years, and this change of focus is beginning to reap rewards. Between 2005 and 2014, creative and cultural industries grew significantly faster than the Hong Kong economy as a whole, both in terms of employment and value added.<sup>172</sup> Today benchmarking analysis shows that Hong Kong is recognised as having a fairly strong enabling environment for culture, and performs well for cultural tourism, but it has room to improve the provision of high-culture attractions, particularly art galleries.

### Cultural Strategy

**Delivery.** Policies for culture in Hong Kong are administered by the Home Affairs Bureau (HAB) and typically carried out by one of two dedicated agencies --- either the Leisure and Cultural Services Department (LCSD – which manages all the civic centres, libraries and most museums) or the Hong Kong Arts Development Council (HKADC – which is more focused on art in public space, community building and awareness).

**Aims.** Hong Kong recognised that the city's unique 'East meets West' identity needed to underpin its cultural profile, and that more facilities needed to be nearer where people live and work, if culture was to be enjoyed by more than 10% of Hong Kong residents. It diagnosed a need for a change for Government to be a cultural facilitator rather than an administrator, and should proactively subsidise more cultural venues and organise more cultural events, whilst encouraging NGOs and ultimately private firms to take the lead in funding cultural development. Government investment in arts and culture has since risen to around HKD 4 billion (AUD 640 million) per annum (see details in Assets and Investment chapter below).

Government also recognised the need for cultural industries to grow as part of a more diversified economy, and a way to boost the city's liveability and meet the promise of its brand – Asia's World City. The city developed a sophisticated set of indicators for benchmarking its progress in culture.<sup>173</sup> These sought to track Hong Kong's progress to becoming a regional cultural hub, particularly assessing it in comparison to Asia-Pacific leaders and to competitors with similar aspirations.

## Culture in the wider Hong Kong Region: the 'Greater Bay Area'

Cultural projects have been an important part of regional development beyond the city of Hong Kong. The Chinese Premier Li Keqiang has encouraged deeper collaboration and planning between Mainland China, Hong Kong, and Macao (now called the "Greater Bay Area"), with culture a core part of the strategy.

The Greater Bay Area consists of eight cities plus Hong Kong: Guangzhou, Foshan, Zhaoqing, Shenzhen, Dongguan, Huizhou, Zhuhai, Zhongshan, Jiangmen, and Macau, which share rich cultural, linguistic (Cantonese speaking) and historic ties. Cultural collaborations are already growing in the region. For example:



- The Guangdong-Hong Kong-Macao Greater Bay Area Cultural Forum has been established to strengthen cultural projects in the region. The forum is launched by Guangzhou University, and especially focuses on the role Hong Kong popular culture has influenced the wider region and what opportunities there for cultural ties in future.
- A civic alliance for education in traditional Chinese Culture has been joined by 20 higher education institutions in Guangdong, Macao, and Hong Kong. Initiated by the University of Macau (UM), the alliance is a non-profit, non-political academic and cultural association dedicated to promoting the study of traditional Chinese culture and disseminating it among residents in the Greater Bay Area, particularly young people.
- The Tourism Federation of Cities in Guangdong-Hong Kong-Macao Greater Bay Area was launched in December 2017. Efforts are to be made to build the Greater Bay Area into a world-class cultural tourism destination by further coordinating policies and integrating its tourism market and resources.

## Cultural Assets and Investment

Hong Kong has traditionally lacked the depth of cultural assets expected of a global city, because of:

- high property prices have discouraged the development of cultural venues
- a lack of space on Hong Kong Island has restricted the development of a cultural 'fringe'.

The city's main cultural role is as a vibrant market for visual art, and it is home to a number of renowned international art fairs, most notably Art Basel Hong Kong. The film, music and TV

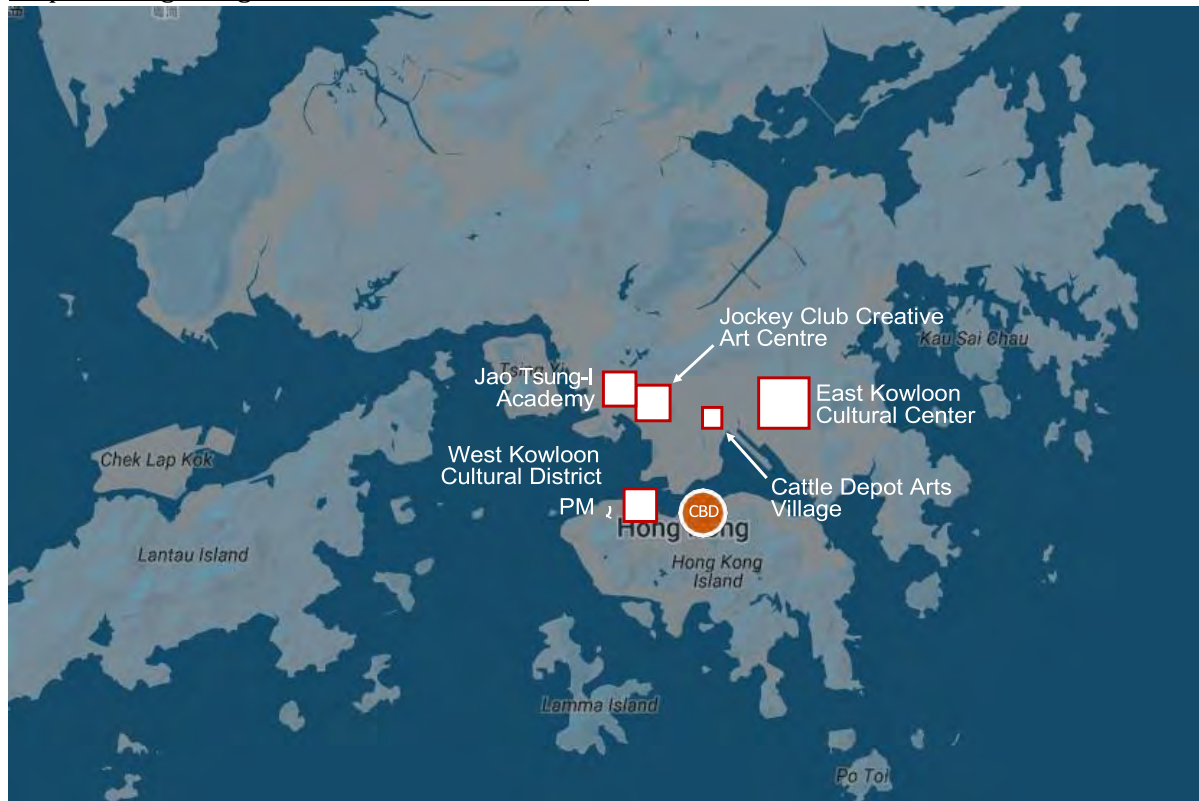


industries are also well established and the Hong Kong International Film Festival is a notable event in the sector.

The two major projects are the cultural district in West Kowloon (see below) and the HK\$4.1 billion development of the East Kowloon Cultural Centre (expected to be completed in 2021). The Government's investment also focuses on:

- The creation of new cultural spaces. historic government buildings have been repurposed into cultural or creative centres through PPPs. Examples include a former hospital complex which has become the Jao Tsung-I Academy (a cultural centre) and the former Police Married Quarters which have become PMQ, a hub for the design and creative industries which includes studios, shops and offices and houses nearly 100 businesses. PMQ now receives more than 2 million visits per year.
- Delivery and Promotion. "Create Hong Kong", established in 2009, is a dedicated Government agency for promoting creative industries and providing one-stop services.
- Skills and Training. Cultural skills needs now receive more systematic public sector attention.
- Finance: Creation of a Film Development Fund to support local cultural production<sup>174</sup>.

Map of Hong Kong's main cultural districts<sup>175</sup>



### Hong Kong's Keynote Cultural District

The West Kowloon Cultural District is arguably the world's most ambitious cultural project designed to position Hong Kong as Asia's cultural capital. Originally intended as a way to attract a wider range of tourists to the city (beyond those looking to eat and shop), the project has since taken on a broader purpose, shouldering the government's hopes of catalysing the local art scene and providing intellectual and creative fulfilment for the next generation of Hong Kong's residents.<sup>176</sup>



The project involves the repurposing of a 40 hectare site just west of the CBD, creating an entirely new district where multiple cultural venues are clustered together. The venues include an Opera House; a 60,000m<sup>2</sup> museum for contemporary visual culture; a flexible performance venue; a Theatre Complex; and a 23 hectare Art Park.



The development is managed by the West Kowloon Cultural District Authority, a public sector body which received a HK\$21.6 bn (AUD 3.5 bn) investment direct from government for construction and operation of the first two phases of the project. Private sector investors are being engaged to jointly fund the third

phase, to develop hotel, office and residential facilities in the district in partnership with the WKCD. The WKCD is also responsible for helping to develop cultural software in co-operation with academia, NGOs and the community, and for organising activities, performances and exhibitions.

Development of the Cultural District has not been without issues. Initial plans and subsequent construction were stalled due to criticisms of financing models, transparency around property developer involvement, and the architectural design (later altered). Concerns have also been raised around the focus on cultural hardware, rather than software, and limited ideas for cultural content beyond the traditional “East meets West” theme.

### Future Agenda

The success of the West Kowloon Cultural District will be a key determinant of the city's international cultural reputation in the medium term. A long-term challenge for the sector is to thrive amid the high rental and land prices which curb the growth of innovative cultural businesses. The city also faces challenges in attracting philanthropy for the arts from within the community and the corporate sector.<sup>177</sup>

## 10.5 San Francisco

Purpose of Cultural strategy	Scale of cultural investments being made	Locations of key cultural assets and districts	Lessons for Greater Sydney
<ul style="list-style-type: none"> <li>■ activate the urban environment</li> <li>■ improve residents' quality of life.</li> <li>■ strengthen neighbourhoods and foster positive social change.</li> </ul>	<ul style="list-style-type: none"> <li>■ Large investments through grant funding and technical expertise to local artists and cultural bodies</li> <li>■ successful national-level bidder</li> <li>■ Private funding and PPPs play important role in cultural hardware and regeneration.</li> </ul>	<p>Concentration in/near CBD in 1<sup>st</sup> cycle</p> <p>Culture regenerated well-located but rundown districts in 2<sup>nd</sup> cycle.</p> <p>Now shifting to wider Bay Area where there are distinctive locations of culture production.</p>	<ul style="list-style-type: none"> <li>■ Use of innovative financing tools and strategies to support the ecosystem as unaffordability grows.</li> <li>■ Customised state gov help for regional districts, on pilot basis.</li> </ul> <p>Capacity building. Multi-cycle approach.</p>

### Culture in San Francisco

San Francisco became a city rich in culture on account of its port, trading history, early Mexican settlement, and successive waves of immigrants, including from Asia. The variety of peoples and races fostered a liberal culture that became the city's hallmark during the 20<sup>th</sup> century which saw San Francisco become home to the Beat artists and poets in the 1950s, to the hippy movement in the 1960s, and the birthplace of the gay rights movement in the 1970s. Counterculture and liberalism became interwoven in the city's DNA and artists, creators and innovators were drawn to the city like a magnet.

In recent decades, San Francisco has grown rapidly, in part due to the success of the neighbouring tech region of Silicon Valley. This growth has not been matched by a building boom, leading to rising land prices in San Francisco which have placed pressure on artists and cultural producers. Some argue that with the influx of tech workers and the pricing out of some creatives, there has been a perceptible change in the city's culture.

Nevertheless San Francisco still remains a global centre for arts and culture. It has more artists and art organisations per capita than any other major city in the USA<sup>178</sup> and its neighbourhoods retain highly distinctive identities. It is estimated that culture-inspired tourism generates US\$1.7 billion in local visitor spending and supports \$500 million in household income to local residents.<sup>179</sup> The benchmarks show that San Francisco performs consistently well in cultural comparisons, particularly those assessing cultural experience and the provision and variety of cultural attractions.

### Cultural Strategy

Cultural development in San Francisco is chiefly the concern of the San Francisco Arts Commission (SFAC), a city agency whose members are appointed by the Mayor. The commission's role as a grantmaker, capacity-builder, and resource within San Francisco's arts ecosystem is unique amongst art commissions in similar sized US cities, where boards serve in an advisory capacity only. The SFAC envisions a San Francisco where culture plays a critical role in strengthening neighbourhoods and fostering positive future social change.

SFAC, together with other cultural organisations in the city prioritise stabilising what is perceived as the threatened arts ecosystem. A number of strategies are in place:

- The Community Arts Stabilisation Trust (“CAST”), an innovative public private partnership established in 2013 which enables donors to contribute their tax deductions to the fund. The trust then purchases and leases space for the exclusive use of non-profit arts organisations who might otherwise have been priced out of the city. Its five pronged approach is detailed in the Figure below:

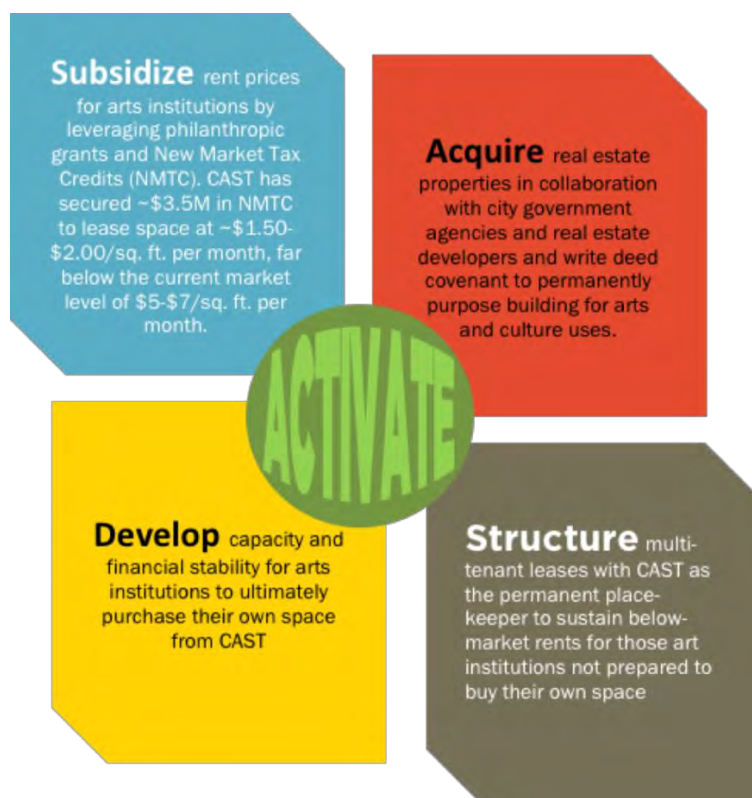


Figure: How CAST addresses the critical real estate needs of art anchored institutions  
Source: cast-sf.org

- Central Market / Tenderloin Strategy: a public private effort to revitalise Central Market, the downtown arts district (see more below).
- The Public Art Trust fund: San Francisco’s planning code requires that 1% of private development project costs downtown be allocated to include publicly accessible art. In 2012, this legislation was expanded to create the Public Art Trust—a mechanism that gives private developers the option to satisfy their 1 percent art requirement by paying all or part of the equivalent value into a newly established Fund administered by the SFAC. The Trust allows a broader array of uses, including conservation of existing city-owned public artworks, capital improvements to non-profit arts spaces, and temporary art installations or art activation programming within downtown.<sup>180</sup>
- The San Francisco Entertainment Commission polices new regulations that aim to protect the night-time economy.
  - Living Innovation Zones: site-specific projects that engage the public in interactive science, art, and technology exhibits on sidewalks, plazas, and other accessible areas.
- LGBTQ Cultural Heritage Strategy (developed by San Francisco Planning, together with the Office of Economic and Workforce Development (OEWD) and the San Francisco Entertainment Commission) will look to safeguard LGBTQ cultural heritage through a series of identified projects, procedures, programs or techniques.

Aside from preventing cultural erosion in the city, another major priority for the SFAC is achieving cultural equity, championing all cultural voices and particularly those which have been historically marginalised. Its Cultural Equity Initiative programme, funded by an endowment,

offers grants focusing on underserved communities, and has become a national model. Funding for this programme was increased by 50% in 2015.

Rising prices in San Francisco are driving more cultural workers and producers across the water to Oakland. The city in particular has become a cultural hub and its story has been likened to that of Brooklyn.

#### Assets and investment

The centre of cultural activity is the city's Civic Center, which includes one of the largest performing arts complexes in the US, a Ballet, Opera and Symphony orchestra, the main library, the Asian Art Museum and Orpheum Theatre. Major cultural landmarks elsewhere in the city include the Palace of Fine Arts and San Francisco Museum of Modern Art (SFMOMA), which since its expansion in 2016 is now North America's largest modern art museum.

Among San Francisco's strongest cultural assets are its patchwork of vibrant and distinctive neighbourhoods, from the Castro district (heart of the LGBT community) to Chinatown, the Mission District with its Hispanic origins and Dogpatch where dockside warehouses have been turned into artists' studios. The wider region (the Bay Area) has its own assets including the Oakland Museum of California, California Symphony Orchestra and the Berkeley Repertory Theatre, and the Pixar Animation Studios.

With an annual grantmaking budget of over \$4 million, the SFAC makes medium-size resource investments in the arts community through grant funding and technical expertise to local artists and arts organisations. SFAC's Cultural Equity Grants program awards \$1.8 million each year to artists and arts organizations working within the City and County of San Francisco. The SFAC also provides \$2.2 million in non-competitive operating grants to the City's six Cultural Centers, two of which are virtual, and provides support to an array of programs within the Community Arts and Education program.

At the metro level across the Bay Area, for-profit organisations tend to dominate, with five for-profit cultural organisations for every non-profit. The cultural sector in the Bay Area has been fairly successful at winning both public and private funding on a national scale: San Francisco metro area organisations win 7% of national arts grants over 10,000 dollars in size<sup>181</sup> (and 12% in 2011).<sup>182</sup> Since the 2000s several major museums have been redeveloped or expanded.<sup>183</sup>

Alternative giving vehicles e.g. crowdfunding, also make a mark. More than \$25 million was raised on the Kickstarter platform for arts and culture-related projects in the Bay Area in 2013, compared to c.\$1million in 2010.<sup>184</sup>

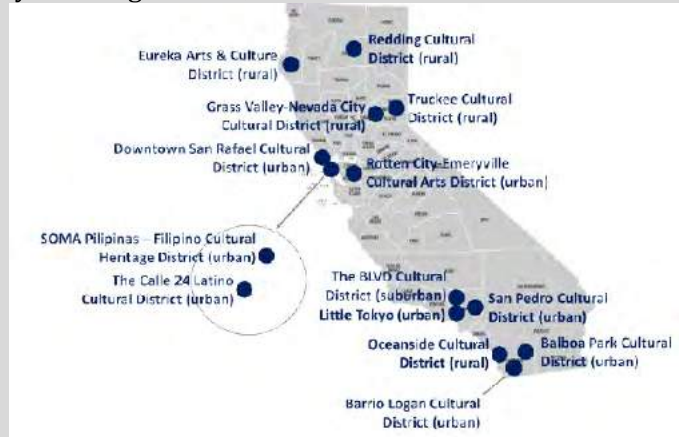
#### Fostering regional district development: California State's Cultural Districts



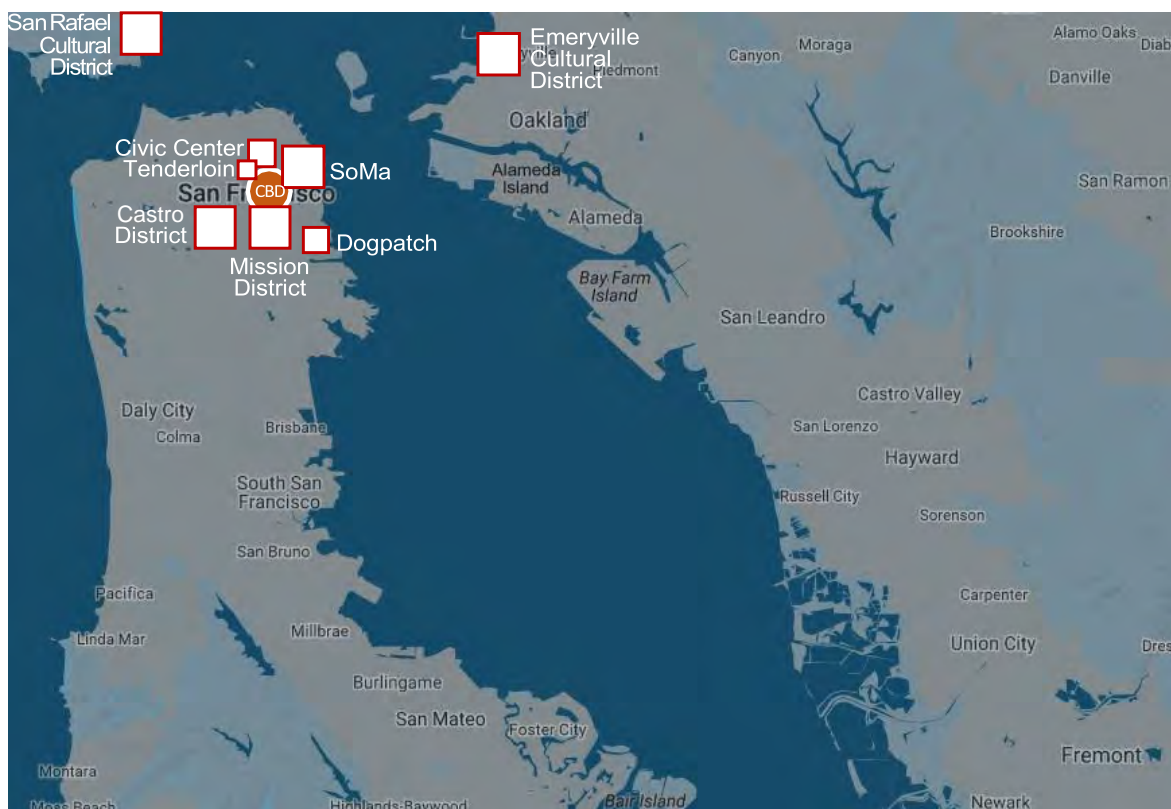
In 2015 the state of California identified 14 cultural districts across the state as part of a programme designed to celebrate regions with unique artistic identities. The programme is partly about highlighting the states' cultural assets, and at the same time rewarding 14 communities for their commitment to culture and grassroots arts and diverse community participation.



The designation lasts 5 years, and offers technical assistance, peer-to-peer exchanges, and branding materials and promotional strategy help, provided by Visit California and Caltrans.



### Map of Bay Area's main recognised cultural districts



## San Francisco's revived Cultural District: art and tech innovation

Central Market is San Francisco's original downtown arts district, the mid-20th century home of the city's grandest theatres and the epicentre of cultural life. Between about 1960 and 2010 however the area suffered from disinvestment and neglect, with many businesses leaving the

area and buildings falling into disrepair. In 2011, the city launched the Central Market Economic Strategy, an effort to co-ordinate public and private investment to revitalise the area.

Under the strategy, city agencies engaged private stakeholders – including community-based non-profit organisations, arts groups, property owners, and small businesses – to direct attention to the district. These stakeholders, soon joined by new tech companies and real estate developers, implemented programmes focused on cleaning, safety, sidewalk activation, business attraction, and arts development.

The district approach features:

- Strong focus on creating positive street life with regular day- and night-time arts and cultural activities (free classes, performances, publicly accessible pianos, light and other public art installations, and arts engagement opportunities all featured).
- A payroll expense tax exclusion offered to growing companies locating in the area. This led to the arrival of Twitter headquarters and emergence as a major innovation hub, occurring alongside a revitalisation of its arts scene. 18 technology companies, 22 new small businesses, and 11 new arts venues have arrived. The strategy is credited with generating \$7.6 million in additional business tax revenue.<sup>5</sup>

The Central Market strategy has been recognised nationally as a success and in 2014 was updated to deepen and sustain the recovery and to expand its geographic impact into the neighbouring Tenderloin district.

## Future Agenda

Resisting the ongoing pressure that San Francisco's affordability crisis places on the arts scene will be the critical issue on the cultural horizon, as cost of living and real estate remain steadily on the rise. Pressure on infrastructure is a major challenge facing the city in the medium term. As with many American cities, San Francisco's transport system is aging, and it faces pressure on water and sewerage systems. Unavoidable investment in these fundamentals is expected to divert resources from art and cultural projects. As San Francisco host the World Cities Culture Summit in 2018, these financing challenges will be top of the agenda.

## 10.6 Singapore

Purpose of Cultural strategy	Scale of cultural investments being made	Locations of key cultural assets and districts	Lessons for Greater Sydney
Stronger cultural identity  Sense of belonging and unity  Global prestige	Medium scale, typically publicly funded and managed	<ul style="list-style-type: none"> <li>■ CBD and nearby</li> <li>■ Historic civic district repurposed as a cultural hub</li> <li>■ Older cultural district (also in CBD) which has been cleaned up</li> </ul>	low-cost outreach to less culturally engaged populations

## Culture in Singapore

Singapore has only been an independent city-state since 1965 and as a young city its cultural identity is still developing. The city is a melting pot of different cultural influences, with historical ties to Britain, Malaysia and China in particular. Singapore has four official languages: English,

Malay, Chinese and Tamil as well as an ethnically diverse population, only around 60% of whom are Singaporean citizens. This multiculturalism has created a varied cultural scene, but in the past cultural development has been a secondary priority compared to business and trade.

Since the late 1990s, however, the government has begun to turn its attention towards culture and the arts and is working not only to enhance the city's cultural infrastructure but also to develop grassroots participation in the arts, broadening the city's appeal to visitors and residents alike.

Our benchmark review shows Singapore has strong public investment record for culture and achieves high visitation of its main cultural attractions. But the city is behind in terms of the overall number, variety and quality of its attractions, and its rate of uptake among local residents across the island.

### Cultural Strategy

More than 20 years ago, a national committee mapped out a blueprint for Singapore's arts and culture landscape. The report was widely considered a watershed in Singapore, providing a much-needed boost for a nascent cultural scene and emerging cultural identity. Subsequently, three phases of "Renaissance City Plans" built on the recommendations, with a focus on vibrancy, building capabilities, and strengthening community outreach.

"For the past few decades, the main challenges for Singapore were to increase our cultural content, establish the necessary cultural infrastructure and supporting services, boost the capabilities of the cultural sector and address local and international perceptions that Singapore was a 'cultural desert.'"

Alvin Tan, Assistant Chief Executive (Policy & Community)  
National Heritage Board,<sup>185</sup>

Today, cultural policy in Singapore is set by the Ministry of Culture, Community, and Youth, with delivery managed by two statutory boards, the National Arts Council and the National Heritage Board. Singapore's most recent policy is the 2011 Arts and Culture Strategic Review, which sets the city's cultural direction to 2025. The Review considers that having made significant achievements in developing infrastructure and content, the next phase of cultural development is the creation of a Singaporean cultural identity, strengthening citizens' sense of nationhood and national unity. The Review reflects a desire to forge new, Singaporean forms of culture that reflect the emerging identity of the city and its diverse population.

Singapore is trying to dispel the perception that culture is an elitist pursuit limited to traditional 'high culture' genres like opera or ballet, and to include hobbies and handicrafts, street culture, popular entertainment, and community activities within the state's definitions and popular conceptions of culture.

In order to effect this change and engage wider chapters of the Singaporean population, the Ministry of Culture is developing a network of Community Arts and Culture Nodes, either purpose built or opened in existing libraries and community centres, which will serve as venues for hobbyists and (newly established) community groups.

The Ministry is also supportive of events which promote home grown talent from all chapters of the community, such as The Singapore Writers Festival; The Esplanade's 'local' performances including those presenting Malay, Chinese and Indian cultural festivals; and the new 'Migrant Workers Poetry Competition'.

## Cultural Assets and Investment

Singapore's cultural assets are centred around two different districts: Bras Basah.Bugis (BBB), and the Civic and Cultural District. The Civic and Cultural District forms the historic heart of Singapore, and several historic civic landmarks in this area have been adapted into cultural buildings, including the Asian Civilisations Museum (the former Empress Place Building), the Arts House (the former Old Parliament House) and a new National Gallery (in the former Supreme Court). Many other assets have been constructed since the 1990s, with high up-front public investment.

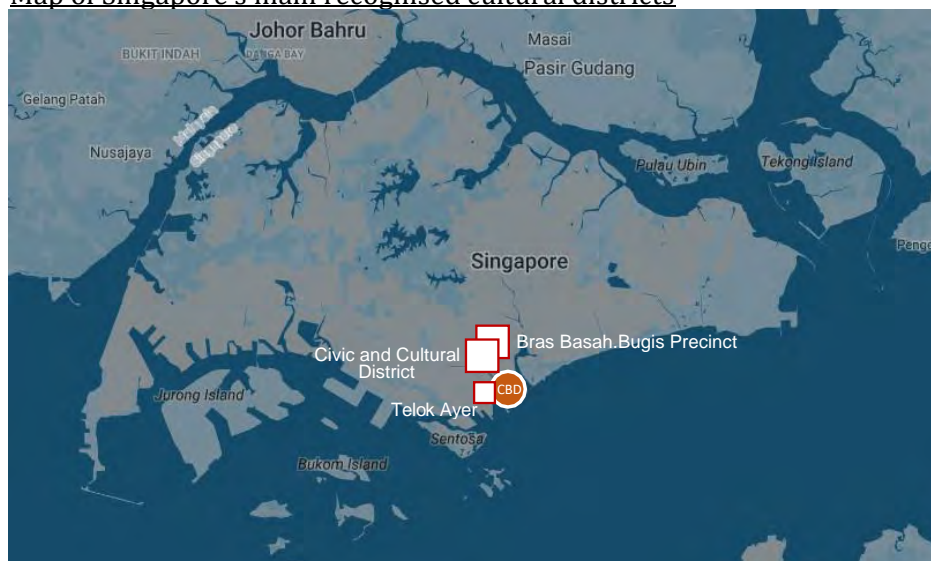
Bras Basah.Bugis (BBB) is an amalgam of what used to be known as the "European district" of the city, and its neighbouring Indonesian area (which was considered down at heel until a 1980s clean up). The BBB district is home to museums and national monuments but with a mature residential dimension. All three educational establishments focused on the arts are located in the district.

Gardens and gardening also have a special place in Singaporean culture and the Singapore Botanic Gardens are an important tourist attraction as well as being the world's only tropical gardens to be honoured as a UNESCO World Heritage Site. In terms of cultural events, the Singapore Writers Festival attracted nearly 20,000 attendees in 2015 and is unusual for its multilingual nature. Other festivals include the Singapore International Festival of Arts, the Singapore Biennale, Singapore HeritageFest, and the Singapore Night Festival.

2015 marked Singapore's 50th anniversary celebrations and the city completed a major programme of investment in cultural infrastructure to mark the occasion. Under this programme the National Museum of Singapore and the Asian Civilisations Museum were remodelled, and a new National Gallery opened with a focus on Southeast Asian Art. The Victoria Theatre and Concert Hall reopened in 2014 after a four-year, \$183 million SGD refurbishment. A partial refurbishment of The Esplanade performing arts centre was completed in 2016 with a further phase of works to come (see 'Key cultural district' chapter below).

The Singaporean government has – as with all aspects of life in the city-state – taken a keen hands-on and whole-of-government approach to culture creation. However, in recognition of the unique value of organic growth to the arts sector, it is beginning to explore strategies to move the arts towards being self-sustaining rather than over-reliant on state funding or planning.

### Map of Singapore's main recognised cultural districts





## Civic and Cultural District

The Civic and Cultural District, located on the banks of the Singapore River, was the birthplace of modern Singapore and contains many of its oldest civic institutions and public spaces. The district was originally masterplanned in the 1980s and combines more than 10 old and new-build assets.



Singapore's Urban Redevelopment Authority (URA) has recently transformed the district through building renovations and enhancements to public space and pedestrian connections. The aim has been to make the Civic District closer to becoming a world class arts and cultural hub for the city.

Programming has adjusted and the District is already being used in new ways. On New Year's Eve 2017/18 the district became "a car-free activity hub" with free outdoor activities such as the Health Promotion Board's Fitness Countdown Dance Party, a sunset yoga session, music performances by local talents and movie screenings.

Further redevelopment for the district is planned for the future – in particular the performing arts centre will be extended further, with the addition of a flexible 550 seat theatre and an outdoor activities plaza. The work will be completed in 2021 and it is hoped will inspire and nurture the next generation of artists, by providing the space to commission and produce more new works by Singaporean artists and companies.

## Future Agenda

Concerns remain that Singapore lacks the capacity to manage its cultural difference, particularly as socio-economic differences between citizens appear to be widening. Tensions between immigrant workers and wealthier groups persist, and income inequality is rising. It is hoped that culture can provide a means of bridging these divides, but it may be that Singapore will need to also address social cohesion more directly.

A scarcity of land for development also poses challenges for arts infrastructure – particularly in the city centre – meaning that in future cultural policies will need to be innovative in their relationship with land use planning.

## 10.7 Stockholm

Purpose of Cultural strategy	Scale of cultural investments being made	Locations of key cultural assets and districts	Lessons for Greater Sydney
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Strengthen social cohesion	Moderate public investment	<ul style="list-style-type: none"> <li>Historically in city centre fringes</li> <li>Individual Assets (especially heritage sites) scattered around, not a strong district approach.</li> <li>New cultural district being created in major urban redevelopment project.</li> </ul>	<ul style="list-style-type: none"> <li>Focus on the innovation ecosystem as a priority. Highly localised and customised approach to culture.</li> </ul>
Ensure access to culture for all	Private investment plays an important role in mixed use cultural projects		

## Culture in Stockholm

Culture takes a variety of forms in 21<sup>st</sup> century Stockholm. The city's medieval heart, the Gamla Stan, is one of the best preserved medieval settlements anywhere in the world, and is in itself a cultural centre. Most of its large cultural institutions were built nearby for the enjoyment of the growing population. Between 1990 and 2015, significant immigration from overseas (chiefly the Middle East and other parts of Europe) has added a diversity to cultural life in the city, where nearly a third of people are of non-Swedish background.<sup>186</sup> In 1998 Stockholm was awarded the title of European Capital of Culture.

The cultural activities on offer in Stockholm have historically focused on the traditional forms of art, but in recent times Stockholm has become a leader for performing arts, pop music, fashion and food. Today, Stockholm has more workers in the creative and cultural sector than any other European region.<sup>187</sup> It has emerged as a leader in digital, clean tech and biotech and a growing strength in gaming, which grew by 300% between 2010 and 2013.<sup>188</sup> Our benchmark review reveals that Stockholm now emerges as having a very competitive social and economic environment for culture, but performs less strongly in terms of cultural breadth and openness when compared to the world's leading cities.

## Cultural Strategy

Stockholm City Council has a long history of supporting cultural development. Since 1963, the city has made compulsory the so-called "One Percent Rule", which requires 1% of the cost of all building projects to be allocated to funding publicly accessible artwork. The rule's objective is to ensure public access to arts for all.

Democratic access to culture is a priority for the City Council to this day. The Council's Vision 2040 is subtitled 'A Stockholm for everyone' and imagines a city that is 'versatile and full of unique experiences'. Increasing cultural participation is a key objective.

Cultural policy in Stockholm is formulated by the Culture Committee which consists of 11 elected members of the city Council. Recent investments have been targeted at enhancing cultural access through investments in children and young people, diversity and culture in the outer suburbs.

In the outer suburbs the committee is collaborating with local businesses in five prioritised 'growth' areas of the city (Bredäng, Farsta, Husby, Skärholmen and Tensta) to create highly localised cultural agendas. The intention is to bring culture to more people, to make it more visible and accessible.

In relation to young people, in recent years the council has launched a number of 'access' initiatives, including a culture year for children and young people, an extension to the Culture School and a major reading initiative. Investments in digital libraries, free park theatre shows, adult education organisations, and cultural and community centres are a priority.<sup>189</sup>

## Assets and investment

Stockholm's cultural assets help attract around 15 million visitors a year to the city. The city has one of the highest museum densities of any in the world. Many are in Djurgården, a major centre for culture and recreation set within the Royal National City Park. The city has a very dynamic theatre, dance and gastronomy scene.<sup>190</sup> The wider Stockholm county is home to three UNESCO World Heritage sites, while further North in the wider region the city of Uppsala is an important historic and cultural centre.

The main recent cultural projects involve renovations to existing institutions rather than big new projects. The largest development project is taking place at former docklands ten minutes from the city centre (see below, Stockholm Royal Seaport), which will incorporate a new cultural quarter.

Substantial investment is also being made in film-making to ensure that the Stockholm region will once again be the obvious location for film production in Scandinavia. A new public film fund, has seed capital to support Swedish film-producers.

Map of Stockholm's cultural districts and priority areas.



#### Key Cultural District

Stockholm Royal Seaport is one of the largest urban development areas in Northern Europe with 12,000 new homes and 35,000 workplaces. Planning work started in the early 2000s and the new city district will be fully developed around 2030. It is an example of Stockholm's push to create culturally rich districts with a large housing component.

Prior to re-development the city-owned land was used as a port and centre for heavy industry. The development is centred around a 120-year old gasworks which will be transformed into a public area containing a culture centre with performance stages, a tram museum, music hotel, artists' studios, indoor and outdoor markets as well as retail and eating establishments. A new sculpture park will adjoin the gasworks area.

The intention is to create an attractive and modern environment with a good range of services, culture and entertainment. The area is designed with a focus on quality of life, accessibility, safety and proximity to services, relaxation and entertainment. The project benefits from the support of the Clinton Climate Initiative due to its ambitious environmental targets.

## Future Agenda

Stockholm has identified four challenges of strategic importance for culture up to the early 2020s:

- The Diversity Challenge: how can the Culture Administration do more to meet the greater diversity of cultural expression, cultural activities and citizens?
- The Growth Challenge: Stockholm is one of the five fastest growing regions in Europe. How will cultural life be funded and be part of the urban development taking place? How will the Administration create an attractive cultural life with international appeal?
- The Premises Challenge --- How will the Administration's activities meet rent increases, the need for modern premises and improved access in a 24/7 society?
- The Skills Challenge -How will the Administration develop and renew skills in a world where great changes are taking place in business development, digitalisation and security?<sup>191</sup>

## 10.8 Tel Aviv

Purpose of Cultural strategy	Scale of cultural investments being made	Locations of key cultural assets and districts	Lessons for Greater Sydney
<ul style="list-style-type: none"> <li>■ Communicate city's openness and tolerance.</li> <li>■ Support for economic development and innovation brand</li> </ul>	<ul style="list-style-type: none"> <li>■ Limited public capital investment apart from for key celebrations.</li> <li>■ Private sector teams initiate some project ideas.</li> <li>■ PPPs, and financial incentivisation of cultural institutions and entrepreneurs.</li> </ul>	<ul style="list-style-type: none"> <li>■ Five key districts identified, all around heritage sites.</li> <li>■ Some (e.g. JaffaPort) not in city itself but neighbouring suburbs / towns</li> </ul>	<ul style="list-style-type: none"> <li>■ Culture should be fully aligned with an integrated territorial brand</li> <li>■ Heritage anchors key to creating vibrant destinations in lesser known areas</li> <li>■ Education as important to cultural development in disadvantaged areas</li> </ul>

### Culture in Tel Aviv

Tel Aviv was founded in 1909 and was planned by its founders to be a modern and vibrant city, providing the newest utilities, infrastructure and public services. In its early decades the city offered what was seen as a slice of modern (European) culture – cinema, opera, theatre, architecture, restaurants and cafes. Successive waves of immigration meant that Tel Aviv's culture diversified with the growing population – from across Europe and Asia --- gave a breadth to the city's culture, epitomised by its fusion cuisine.

Tel Aviv's warm weather, beachfront location and academic institutions have contributed to its development into a young, lively, cosmopolitan city. City leaders' active support of pluralism and lifestyle tolerance has made Tel Aviv into a global LGBT capital --- named "the best gay city in the world" on multiple occasions and has also fostered a vibrant atmosphere attractive to new creative industries. Tel Aviv's culture also reflects ancient influences – from its 100+ synagogues to its street markets to the Museum of the Diaspora. This hybrid cultural identity was well

summed up by writer Etgar Keret who described the city's culture as "half Iran, half California; it's a synagogue meets sushi bar."<sup>192</sup>

Our benchmark analysis shows that Tel Aviv has low visibility in culture benchmarks despite its cultural and historic assets. In benchmarks in which the city does appear, it performs strongly for its cultural openness information exchange, but less strongly for its range of attractions and overall cultural experience.

## Cultural Strategy

Tel Aviv has a history of developing strong cultural strategies to promote urban renewal, development and revitalisation. In the 1990s and 2000s, cultural policy was mainly oriented to:

- Cultural events – expanding the mix and size of festivals, celebrations and concerts;
- Cultural pluralism and tolerance – support for LGBT movement, minorities and nightlife; and
- Cultural renewal through renovation of Bauhaus architecture – generously subsidised by the municipality, and ultimately culminating in UNESCO awarding the city Heritage Status for its White City neighbourhood.

Since 2005 the City has had a 20 year strategic plan, which was updated in 2017. Culture is one of 9 priority areas in the plan. This strategic plan sits alongside Tel Aviv's own 2010 cultural strategy, which falls under the purview of the Department of Culture and the Arts. Its key goals are:

- Aligning culture with Tel Aviv's "Nonstop City" brand: Culture Never Stops
- Greater integration between culture and economic development (e.g. through enhanced international cultural tourism)

In order to meet these goals the city has upgraded many of its signature cultural institutions e.g. the Habima National Theatre. It has also sought to concentrate cultural activities into five defined districts, each of which will have its own identity (although not explicitly branded as cultural districts), with heritage acting as a strong anchor in each case. The five districts are:

- Old Jaffa port
- Tel Aviv port
- Sarona (a large market)
- Levant Fair
- Hatachana train station

### Tel Aviv and Israeli Cultural Strategy : Two Ends of the Spectrum

The attention that Tel Aviv's government has paid to culture as a motor for economic development and for building international reputation, contrasts somewhat with the Israeli nation state's approach to international culture promotion.

An EU preparatory report in 2013 explained that the Israeli government has 'little regard for exporting its culture abroad', and 'cultural exchanges are not a priority'. In general, cultural budgets at the national level are limited, partly due to the prioritisation of other areas --- in particular defence. In consequence, government cultural programmes largely rely on foreign support, especially from the EU and from Jewish organisations in the US.<sup>193</sup>

The lack of financial support from higher tiers of government mean that Tel Aviv has been especially proactive in its cultural internationalisation. The city hosts regular cultural exchanges and international events, and markets its brand consistently. The "Tel Aviv in



London (TLV in LDN)" festival is a celebration of Tel Aviv's culture which will be hosted in London in Autumn 2018. Tel Aviv is twinned with more than 30 cities around the world.

Tel Aviv has also used culture as a way to upgrade the poorer neighbourhoods of Neve Sha'an'an, Shapira and Hatikva. Here it places a strong focus on cultural education and outreach, providing over 200 cultural and educational activities in the city's youth centres, sports centres, public libraries, museums and sports centres. One example is the city's efforts to promote reading as part of the community's culture, via the expansion of electronic books available for loan, and a programme of 50 story hours which are held in the public spaces next to the city's libraries.

### Cultural Assets and Investments

Tel Aviv is home to most of Israel's artistic and cultural institutions, including the Israel Symphony Orchestra, the Habima National Theatre, the Eretz Israel Museum (history / archaeology), the Diaspora Museum, Tel Aviv Museum of Art, the Suzanne Dellal Center (dance) and the Tel Aviv Performing Arts Centre which hosts the Israeli Opera. It also is home to Ottoman and Levantine to Bauhaus and Modern architecture. Perhaps most notable is the White City which was built in Tel Aviv in the 1930s, is the world's largest concentration of Bauhaus style buildings, and was designated a UNESCO World Heritage Site in 2003. The city has a world-famous nightlife, with several different nightclub hubs and a particularly large concentration around Tel Aviv port. Nonetheless, the city retains its spiritual side – with more than 100 synagogues as well as numerous churches and mosques, including the Hassan Bek Mosque which forms one of the city's most famous landmarks.



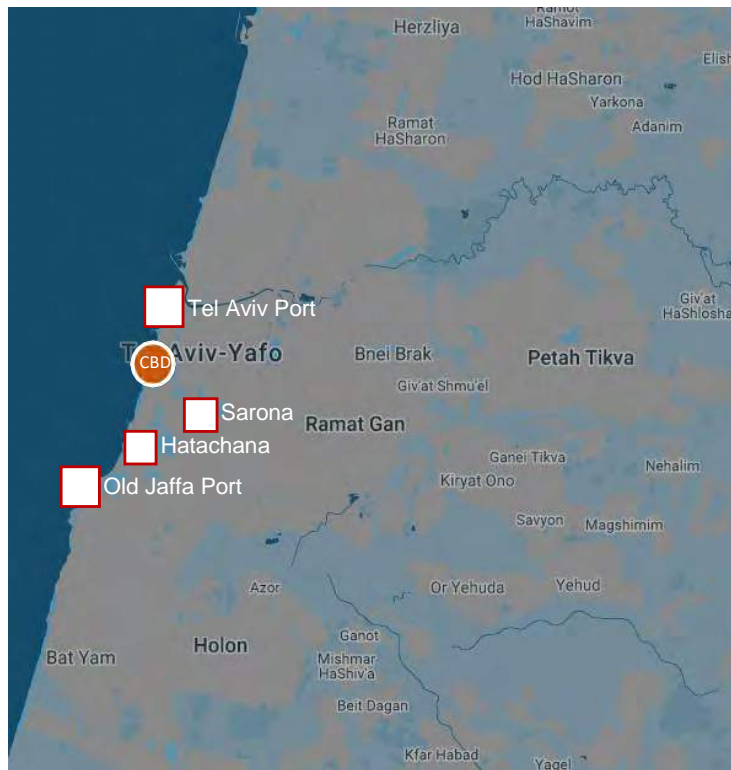
Tel Aviv University is itself a cultural asset, offering the only and also being the only university in Israel with a School of Music, or a Department of Film and Television. The University plays an important part in supporting the city's film industry, and Tel Aviv has become home to several international film festivals. Other cultural events of note are the largest Pride festival in Asia, a new Israel Design Week, as well as the annual Open House Tel Aviv weekend, which offers the general public free entrance to the city's famous

landmarks, private houses and public buildings.

The municipality of Tel Aviv invested heavily between 2000 and 2009 in 20 mega projects which were carried out in preparation for the city's centennial anniversary. Requiring an investment of hundreds of millions of dollars, these projects included: the New Tel Aviv Museum of Art, the Habima National Theater and the Tel Aviv Cinemateque.

Subsequently, the city has continued to invest in culture via PPPs, and by providing financial incentives for cultural institutions and cultural entrepreneurs.

### Map of Tel Aviv's main cultural districts



### Key Cultural District and building the identity of Traditional Culture

One of Tel Aviv's five defined cultural districts is Old Jaffa Port, one of the oldest city ports in the world, dating back 4000 years. It is the priority district located furthest from the city core. It is also interesting because it is a location whose history makes it politically and culturally contested.

Jaffa was, and is, the main enclave for the region's native Arab population – indeed in 2013 Jaffa was home to 16,000 of Tel Aviv District's 18,500 Arabs. Its cultural regeneration is aligned with the agenda to preserve Arab culture and heritage. Tel Aviv's authorities have taken some steps to preserve Arab heritage in Jaffa, for example through the establishment and funding of the Arab-Hebrew Bilingual Theater in the Old Town. National level policy has also been supportive of the preservation of Arab culture in recent years: since 2002 street signs in Judo-Arab towns such as Jaffa are required to be bilingual in recognition of the Arabic speakers and readers living there.

For much of the 20<sup>th</sup> century Jaffa became an industrial poor relation of Tel Aviv, struggling with crime and a deteriorating physical environment. The situation remained unchanged until 1999 when the municipality founded the Jaffa Development Authority (JDA), aimed at improving infrastructure and all aspects of daily life.



In the past decade, the municipality has invested more than 1bn shekels (AUD370m) in renovating Jaffa's main sites and streets.<sup>194</sup> The redevelopment of Jaffa's port was transferred to the private sector, with the aim to cultivate tourism, recreation and sea sport.<sup>195</sup> Strengthening the port's cultural offering, and its restaurant / café scene were viewed as the key enablers of this goal.

Many old warehouses and hangars have been converted into versatile

spaces which host art, design or photography exhibitions, performing arts events and conferences. Some have been transformed into new permanent cultural institutions such as the Jaffa Art Salon (exhibition space supporting Israeli artists), a dance venue for the Israeli Choreographers Association, and the world's first deaf-blind theatre. A new 7km cycle path connects the Old Port to Tel Aviv to encourage day trips by tourists staying in the larger city. The port retains its operations as a working fishing port by night.

The district has had initial challenges related to:

- Over-reliance on gastronomy as a catalyst, and not enough consideration for the wider place needs
- Large office space deal unexpectedly changed the feel of the area.
- Municipality did not manage to fulfil all parts of the agreed investment burden to construct surrounding buildings.
- Limited signage and place navigation
- Lack of public subsidy to support food companies during the 1<sup>st</sup> year
- Developer-investors that were inexperienced with cultural districts.<sup>196</sup>
- Criticisms of gentrification

The municipality has proposed affordable housing projects aimed at Arab populations, as well as by placing greater emphasis on citizen input and public participation in decision making.<sup>197</sup> The process of managing the area's multiple identities and cultures is ongoing – and includes issues of street names,<sup>198</sup> bookstores and music with different origins and heritage.<sup>199</sup>

## Future Agenda

Tel Aviv is presently investing in Smart Culture – using public funds to finance 'beach libraries', electronic book access, and expanding cultural access to the widest possible demographic via the internet. This aligns the city's cultural strategy with its economic development strategy to establish itself as a global centre of technology and innovation. The initiative involves collaborations between government, academic, research and development centres, leading technology companies as well as the young creative sector, cultural centres and artists.



## 10.9 Toronto

Purpose of Cultural strategy	Scale of cultural investments being made	Locations of key cultural assets and districts	Lessons for Greater Sydney
<ul style="list-style-type: none"> <li>■ Drive economic development,</li> <li>■ Establish its identity as an open city and global cultural capital</li> </ul>	<ul style="list-style-type: none"> <li>■ Moderate capital investment but significant support via incentives and loans</li> <li>■ PPPs are key to most cultural investment</li> </ul>	<ul style="list-style-type: none"> <li>■ Highly concentrated in CBD, strong district branding and identities.</li> <li>■ Smaller high quality locations at edge of metropolitan Toronto</li> </ul>	<ul style="list-style-type: none"> <li>■ Sustained alignment of culture and economic development at city level</li> <li>■ State strategy does not join up with city approach, focusing nearly exclusively on activities outside Toronto core.</li> </ul>

### Culture in Toronto

Toronto is one of the most diverse cultures in North America. Its 19<sup>th</sup> century expansion into surrounding villages means that Toronto is a “city of neighbourhoods” that each have distinctive characters, heritage, architecture and atmosphere. Toronto has also experienced successive waves of immigration over the last 70 years, and more than 40% of Greater Toronto is now foreign born. The communities of Chinese, Filipino, Indian, Greek, Korean, Italian, Irish, British and Jamaicans, each have established their own ethnic neighbourhoods.

Toronto has grown to have a very high density of cultural amenities in its Downtown, but two locations in the wider region are an important source of regional tourism and community building. The Living Arts Centre in the suburb of Mississauga is visited by over 300,000 visitors annually, who come to view performing and visual arts programmes or participate in community events. As is the case for many projects, it is run by a non-for-profit organisation funded by the local government and the federal government. Meanwhile the Peel Heritage Complex in Brampton (35 km from Toronto city centre) is an important gallery and public centre

Today, Toronto is home to more artists and cultural workers than anywhere else in Canada. Its creative and cultural economy employs 6% of the overall workforce, and growth in this sector has been rapid over the past 20 years.<sup>200</sup> Overall Toronto performs well in global cultural benchmarks, particularly for its cultural and demographic diversity and range of high-culture institutions, but has scope to improve further its cultural attendance and global interest in its cultural offer.

### Cultural Strategy

In Toronto, cultural strategy has been (and continues to be) embedded within the economic development strategy of the city, for 3 main reasons:

- Culture and economic development are viewed to face many of the same issues, including the availability of space and talent and the impact (positive and negative) of technological change
- Economic development and culture are seen to be mutually reinforcing
- The city’s economic development and culture are both dependent on creativity.

Toronto has used high quality research and evidential case-making to generate funding and buy-in for its cultural and creative strategy over the last 15 years, from higher tiers of government and

from the private and civic sectors. Its strategies have been focused on keeping pace with international competitors by making a firm commitment to sustain Toronto's cultural sector and position Toronto as a creative capital at the top global level. Its most recent strategies have been:

The 2011's Creative Capital Gains: An Action Plan for Toronto sought to:

- Ensure a supply of affordable, sustainable cultural space.
- Support the development of for-profit music and film sectors
- Promote Toronto's cultural festivals (although no plan for Museums or Heritage)

This was followed by 2013's Collaborating for Competitiveness: A Strategic Plan to Accelerate Economic Growth and Job Creation in Toronto. This strategy recommended specific changes:

- Better networking and industry support for the music sector- including an Austin – Toronto Music City Alliance Advisory Committee.
- Repurposing city-owned property for cultural purposes.

These strategies have helped lead to some concrete changes in Toronto:

- New dedicated teams. Music and Film Sector Development Teams,
- A reformed Toronto Film, Television & Digital Media Board;
- major increases in arts grants to the non-profit sector;
- a roadmap to managing the future portfolio of museums and heritage buildings
- two new Local Arts Services Organizations
- better promotional apparatus of cultural events and celebrations such as Nuit Blanche, TIFF, World Pride in 2014, the Pan Am Games in 2015.

#### The Ontario Culture Strategy

While the city and federal governments have long had cultural strategies, the province of Ontario (of which Toronto is the capital) developed its first ever Culture Strategy in 2016. This followed a long consultation process that considered everything from heritage, identity, creative arts, public spaces and cultural institutions. The final Strategy is more focused on the surrounding region (historically Ontario's strategies have tended to focus on lagging regions, not Toronto), although it does not have a strong location focus, and is focused on 4 goals:

- cultural engagement and inclusion
- strengthening culture in communities
- growing the creative economy
- promoting the value of the arts throughout government.

A big priority is to conserve heritage buildings with low carbon technologies, and support the embedding of heritage in all local cultural plans. The strategy also looks to create opportunities for cultural workers to boost their technical and business skills training, and ensure the tax and regulatory framework is most favourable for the cultural economy to grow.

Two new funds have been set up in conjunction with the new Ontario Culture Strategy. One is a new fund to support cultural activities in indigenous communities, as well as youth leadership skills. The other supports publishers in developing learning resources to encourage the use of diverse Canadian content in schools.



The Ontario Culture Strategy  
**Telling our stories,  
growing our economy**



The City of Toronto's Economic Development and Culture Division (EDC) is now developing a new Divisional Strategy to establish priorities over 2018-2022 period. This aims to address the facts that:

- Investment, development and employment growth outside the downtown core is uneven.
- Suitable space is becoming unaffordable, and in some areas, space is simply not available for cultural organisations and start-up companies. This is forcing business to either set up in a smaller space that limits growth or move out of the City.<sup>201</sup> In this respect the TOcore initiative will be important (see Future Agenda below).

#### Investing in Aboriginal culture in Toronto

The City of Toronto has the fourth largest Aboriginal population in Canada, and it takes its responsibility to preserve and promote Aboriginal culture seriously. When surveyed in 2010, half of Aboriginal peoples in Toronto said that Aboriginal cultural activities are widely available in the city, and by a ratio of more than ten to one, First Nations peoples, Métis and Inuit thought that Aboriginal culture in Toronto had become stronger rather than weaker in recent years.

This response may owe to the fact that the city hosts regular Aboriginal events, which recognise and celebrate Aboriginal cultural diversity. Each year thousands of people attend Toronto's Traditional Pow Wow to enjoy traditional food and watch drummers and dancers perform. In 2017 the city also hosted an Indigenous Arts Festival as well as the North American Indigenous Games, the largest sporting and cultural gathering of Indigenous people from across North America. Toronto has recently installed five Indigenous Flags in a central city square, which are raised to celebrate days of cultural significance such as National Aboriginal Day and Luis Reil Day.

In 2015 the city's Aboriginal Affairs Committee identified Calls to Action for all levels of government – including the city government ---- in support of eight identified priorities from the

Truth and Reconciliation Committee of Canada's report. Some of these priorities concerned Aboriginal cultural preservation, for example, the AAC called upon the relevant city authorities to ensure long term Aboriginal athlete development and growth, and to fund commemoration projects on the theme of reconciliation.

## Cultural Assets and Investment

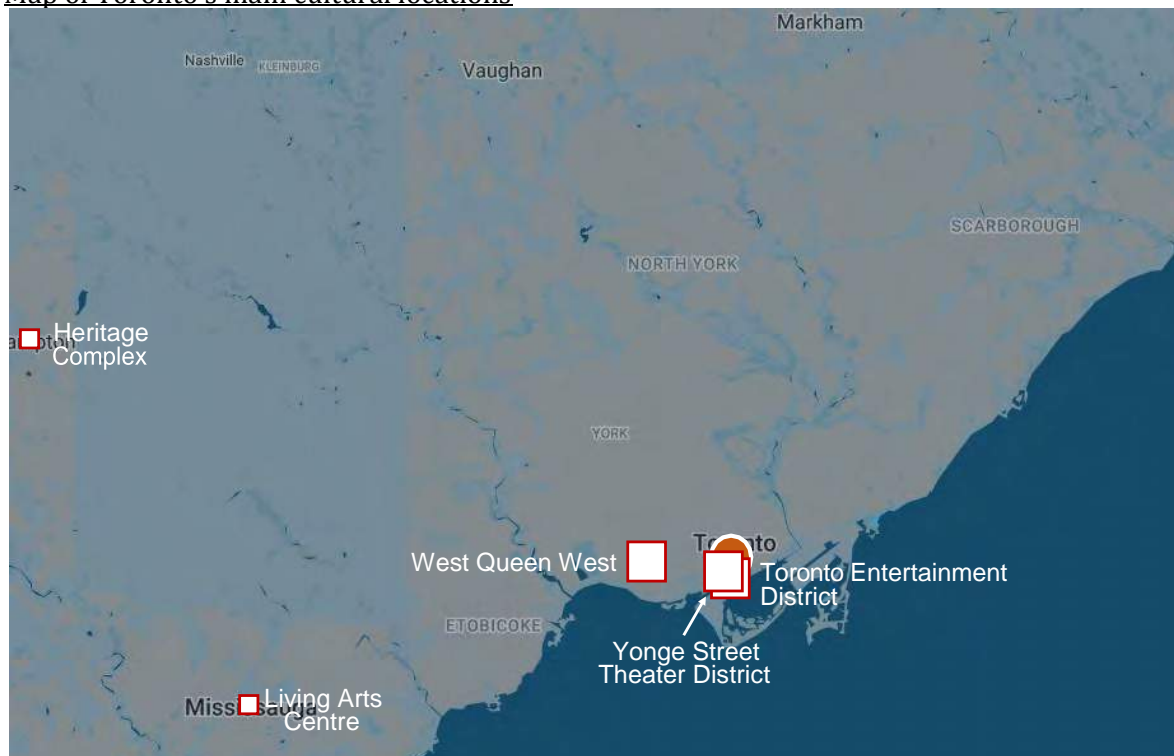
Toronto is Canada's leading production centre for film and television. It hosts some of the leading festivals in Canada, including the International Film festival, Caribbean Festival, Salsa in Toronto, and the Pride Festival. The city also has a Theatre District (part of the Entertainment District, see below) which has the largest concentration of theatres in Canada. Meanwhile Fort York is a 43-acre Heritage Conservation District located in the heart of downtown Toronto, and West Queen West is known as one of the city's most creative areas, with a concentration of street art along its 'Graffiti Alley.'

The city government offers a range of support to the cultural sector:

- capital loan and line of credit guarantees
- below-market rent leases
- 'Chapter 37' benefits (community amenities provided by developers in exchange for receiving planning permission typically with extra density associated).

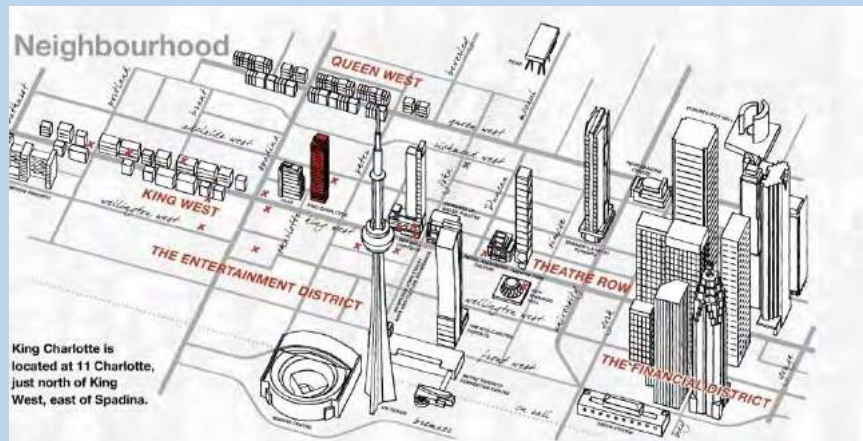
It also invests via PPPs – leasing city owned cultural buildings to private companies for cultural operations. Recent examples include the development of the Guild Inn (a former artist colony) and Casa Loma house (now a museum). PPPs have been behind the repurposing of several industrial heritage buildings.<sup>202</sup>

### Map of Toronto's main cultural locations



## The consolidation approach: Toronto's Keynote Cultural District

The Toronto Entertainment District is an officially designated area of downtown Toronto, home to many of the city's theatres, performing arts centres, nightclubs and all five of the city's major-league sports teams' venues. Originally an industrial district thanks to its proximity to the waterfront and the railways, by the mid-1990s, the district was home to one of the largest concentrations of nightclubs in North America<sup>203</sup>, and restaurants, bars and theatres drove a booming night-time economy in 2000s. The Toronto apartment boom also transformed the



area, as warehouses were turned into loft apartments or demolished and rebuilt as flats.

In 2008 the District gained Business Improvement Area status, which meant a proper district management function was introduced to

promote and preserve the area, harmonising relationships between businesses and tenants.

Today, the Entertainment District includes more than 20 of Toronto's most iconic cultural landmarks. It continues to evolve with the construction of Mirvish+Gehry Toronto, a major mixed use project which will retain four heritage warehouse buildings and transform them into a free-to-the-public art gallery, an arts centre for OCAD University, as well as retail and commercial space topped by two residential skyscrapers of record height for Toronto.

## Future Agenda

Rapid development is the most significant future threat to Toronto's cultural ecosystem. Rising property prices and gentrification displacing creative people from the city core. The city is working (in conjunction with not-for-profit organisation Artscape) with developers to ensure that there is 'no net loss' of affordable creative workspaces in future development plans.<sup>204</sup>

Toronto's next 25-year Downtown Plan, which will set the direction for the city centre as the cultural, civic, retail and economic heart of Toronto, is presently under development. The plan will be the first comprehensive update to the city's downtown planning since the mid-1970s. TOcore, the initiative to prepare the new plan Downtown plan, issued a Proposals Report in late 2016 which pays special attention to the cultural sector, in particular recommending that the plan make provision for retention of cultural spaces and support for live music and filming.

Equitable distribution of cultural services and access to cultural programs across the city also remain a future challenge for the city, as poverty remains concentrated in the suburbs.

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