

**Strategic Planning Steering Committee: Strategic Plan
2020-2024: Environmental Scan and Consultation Plan**

Date:	June 17, 2019
To:	Toronto Public Library Board
From:	Strategic Planning Steering Committee

SUMMARY

The purpose of this report is to request the Toronto Public Library Board’s approval of the Strategic Planning Steering Committee’s recommendations regarding the Strategic Plan 2020-2024: Environmental Scan and Phase 1 Consultation Results.

RECOMMENDATIONS

The Strategic Planning Steering Committee recommends that the Toronto Public Library Board:

1. receives the environmental scan as outlined in the report;
2. receives the first phase of consultation results outlined in the report; and
3. approves the focus areas for phase 2 consultations resulting from the May 31, 2019 Strategic Planning Steering Committee strategy session.

FINANCIAL IMPACT

The costs associated with the development of the strategic plan, have been incorporated in the 2019 operating budget.

The Director, Finance and Treasurer has reviewed this financial impact statement and agrees with it.

DECISION HISTORY

At its February 2019 meeting, the Library Board approved the terms of reference for the Strategic Planning Steering Committee: <https://www.torontopubliclibrary.ca/content/about->

[the-library/pdfs/board/meetings/2019/feb25/04-selection-of-committee-members-2019-combined.pdf](https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2019/feb25/04-selection-of-committee-members-2019-combined.pdf)

At its March 2019 meeting, the Library Board approved the report *Creating a New Strategic Plan: 2020-2024*: <https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2019/mar25/13-creating-a-new-strategic-plan-2020-2024-combined.pdf>

The Strategic Planning Steering Committee, at its April 10, 2019 meeting, considered the *Strategic Plan 2020-2024: Preliminary Environmental Scan and Consultation Plan* report and made its recommendations for the Library Board to receive the areas of focus for the environmental scan for information and approve the consultation plan and implementation at the April 29, 2019 meeting.

At its April 2019 meeting, the Library Board approved the report *Strategic Planning Steering Committee: Strategic Plan 2020-2024: Preliminary Environmental Scan and Consultation Plan*: <https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2019/apr29/11-sp-sc-strat-plan-2020-2024-prel-environ-scan-and-consult-plan-combined.pdf>

The Strategic Planning Steering Committee, at its May 31, 2019 meeting, considered the *Strategic Plan 2020–2024: Environmental Scan and Phase 1 Consultation Results* report and made its recommendations for the Library Board to approve the focus areas for phase 2 consultations resulting from the strategy session at the June 17, 2019 meeting.

COMMENTS

At the May 31, 2019 Strategic Planning Steering Committee meeting, members reviewed the environmental scan, phase 1 consultation results and draft focus areas, and provided the input and feedback outlined below.

Identified Seven Focus Areas for Phase 2 Consultation:

1. Affordability & cost of living
2. Vulnerable populations (e.g. newcomers, seniors, low income families and youth) & growing inequity
3. Library as public space
4. Changing demographics (e.g. population growth)
5. Rapid growth and disruptive technology
6. Responsive programming
7. Partnerships

At the session, Steering Committee members discussed the approach for phase 2 consultations. The two questions asked at the session were:

1. What unique value can the Library add in these focus areas?

2. What information should the Library gather in phase 2 consultations to ensure the Library is responsive to changing community needs?

Below are key highlights from the discussion:

- Offer a wide range of programs and services through various delivery channels and service points;
- Provide access to new and current technology and a wide range of digital literacy training;
- Increase awareness and promotion of the full range of library services;
- The Library can strengthen partnerships by describing its unique value and the benefits of partnerships in increasing reach and service delivery to communities and vulnerable populations;
- Libraries are impartial and trusted institutions and can be advocates for data governance and stewardship, ethical AI, civic engagement etc.;
- Confirm the public's perception of libraries being impartial and leaders in providing access to technology;
- Explore opportunities for new, existing and innovative partnerships;
- Consult public on the different types of programming they would like to see offered at the Library;
- Further explore the Library as public space (e.g. revenue generation, use of library space, alternative service points etc.);
- Explore intersectionality of vulnerable population groups e.g. newcomer seniors.

Next Steps

- Once phase 2 consultations conclude, staff will develop a report outlining proposed priorities for the new Strategic Plan and present the report to the Strategic Plan Steering Committee for review and comment.

The *Strategic Plan 2020–2024: Environmental Scan and Phase 1 Consultation Results* report considered at the May 31, 2019 meeting of the Strategic Planning Steering Committee is provided as Appendix 1.

CONTACT

Elizabeth Glass; Director, Policy, Planning & Performance Management; Tel: 416-395-5602;
Email: eglass@torontopubliclibrary.ca

Shawn Mitchell; Manager, Planning & Development; Tel: 416-395-5551;
Email: smitchell@torontopubliclibrary.ca

SIGNATURE

Vickery Bowles
City Librarian

ATTACHMENTS

Appendix 1: Strategic Plan 2020-2024: Environmental Scan and Phase 1 Consultation
Results Report to the May 31, 2019 Strategic Planning Steering Committee



STAFF REPORT ACTION REQUIRED

Strategic Plan 2020–2024: Environmental Scan and Phase 1 Consultation Results

Date:	May 31, 2019
To:	Strategic Planning Steering Committee
From:	City Librarian

SUMMARY

At its April 29, 2019 meeting, the Toronto Public Library Board approved areas of focus for the environmental scan and the consultation plan for the new strategic plan. The purpose of this report is to present the environmental scan and a summary of the results from the first phase of the public and stakeholder consultations. The environmental scan and consultation results will inform the strategy session with the Strategic Planning Steering Committee and, as a result, the Steering Committee will recommend focus areas for the second phase of consultation.

Toronto Public Library conducted a detailed environmental scan and on April 15, began the public and stakeholder consultations. Consultations ran through to May 12 and included an online public survey for residents and branch-led public and community partner consultations. To engage residents and community partners, consultation toolkits were made available for staff to use at library and community events. To date, over 2900 residents, stakeholders, and community partners have participated in the process. The results of this consultation deepen understanding of resident and community needs gained from recent public and stakeholder consultations, including TPL Experience 360 and Staff Town Halls. Over 400 staff members from across the city participated in the Staff Town Halls.

The next phase of the public and stakeholder consultations will refine and validate the focus areas and inform draft priorities for the strategic plan. The consultation plan is designed to be flexible and provide opportunities for residents, communities, stakeholders and partners to provide input into the new plan throughout the process.

RECOMMENDATIONS

The City Librarian recommends that the Strategic Planning Steering Committee:

1. receives the environmental scan as outlined in the report;
2. receives the first phase of consultation results outlined in the report; and
3. recommends focus areas for Phase 2 consultations resulting from the May 31st strategy session to the Library Board for implementation.

FINANCIAL IMPACT

The costs associated with the development of the strategic plan, have been provided for in the 2019 operating budget and are up to \$60,000.

The Director, Finance & Treasurer has reviewed this financial impact statement and agrees with it.

DECISION HISTORY

At its December 2015 meeting, the Toronto Public Library Board approved the report *Expanding Access, Increasing Opportunity, Building Connections – Toronto Public Library’s Strategic Plan 2016-2019* including the 2016 work plan for the Strategic Plan: <http://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2015/dec14/10c-spsc-strategic-plan-2016-2019.pdf>

At its December 2016 meeting, the Toronto Public Library Board approved the report *2017 Strategic Work Plan*: <https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2016/dec12/14-2017-strategic-plan-work-plan.pdf>

At its January 2018 meeting, the Toronto Public Library Board approved the report *2017 Strategic Work Plan Status Update and 2018-2019 Strategic Work Plan*: <https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2018/jan29/15-2017-strat-plan-work-plan-update-2018-2019-work-plan-combined.pdf>

At its December 2018 meeting, the Library Board received the report *2018-2019 Strategic Work Plan Status Update*: <https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2018/dec10/12-2018-2019-strategic-work-plan-status-update-combined.pdf>

At its February 2019 meeting, the Library Board approved the terms of reference for the Strategic Planning Steering Committee: <https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2019/feb25/04-selection-of-committee-members-2019-combined.pdf>

At its March 2019 meeting, the Library Board approved the report *Creating a New Strategic Plan: 2020-2024*: <https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2019/mar25/13-creating-a-new-strategic-plan-2020-2024-combined.pdf>

At its April 2019 meeting, the Library Board approved the report *Strategic Plan 2020-2024: Preliminary Environmental Scan and Consultation Plan*: <https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2019/apr29/11-spsc-strat-plan-2020-2024-prel-environ-scan-and-consult-plan-combined.pdf>

EQUITY STATEMENT

The areas of focus for the environmental scan and consultation plan for the new strategic plan for the years 2020–2024 will be developed considering the City’s equity lens. This ensures the removal of barriers for equity-seeking groups in the City of Toronto. The approach strives to achieve equitable outcomes for all, and to ensure that all benefit equally from programs and services delivered by the Toronto Public Library.

COMMENTS

This report presents the environmental scan and a summary of the results from the first phase of the public and stakeholder consultations.

A Look Back: Toronto Public Library’s Strategic Plan 2016-2019 Expanding Access, Increasing Opportunity, Building Connections

The 2016-2019 Strategic plan identified six priority areas that harness the potential of new technologies and innovation to create greater awareness, access, and use of library services at the customer’s point of need. To inform the plan, TPL conducted a detailed environmental scan and extensive public consultation. The priorities closely align with and support City strategies and direction including the Poverty Reduction Strategy. An accountability framework was introduced to enhance accountability and transparency, monitor and assess performance, report on progress, and measure outcomes for residents. The balanced scorecard shows that TPL achieved most key performance indicator targets with one exception related to the closure of the North York Central Library for renovation. Logic models and outcomes are now in place for all system level programs and the performance dashboard included outcome measures from participatory evaluations undertaken by the library in 2018.

Key results of the 2016-19 Strategic Plan

Priority 1: Advancing our digital platforms

- The TPL Innovation Strategy was approved in Q4 2018 to create a culture of staff experimentation, collaboration and effective problem solving, and to improve the Library's customer experience.

Priority 2: Breaking down barriers to access and driving inclusion

- Sunday Service (September to June) is now offered at 50 branches, including 23 branches serving NIAs with research and reference and 17 district libraries offering year-round service.

Priority 3: Expanding access to technology and training

- Programs offered new technologies, including virtual/augmented reality and gaming to our customers with expanded their access to technology including partnerships with CISCO Net Academy and the Google IT Support Professional Certificate Program with three other Canadian public libraries.

Priority 4: Establishing TPL as Toronto's centre for lifelong and self-directed learning

- Expanded the use of eLearning resources by targeted outreach to communities to engage current and new users. eLearning tools include Brainfuse, Gale Courses, Learning Express Library, lynda.com & Mango Languages
- Eleven youth hubs established reaching youth most in need

Priority 5: Creating community connections through cultural experiences

- On Civil Society: A high-profile, multi-channel programming initiative that positions the Library as a platform where the most challenging issues of our time involving Democracy, the Media, Urbanism, Equality, Wellness and Economics can be discussed openly and respectfully, through live events, digital content and community engagement.

Priority 6: Transforming for 21st century service excellence

- Leadership competencies established and implemented to build a skilled future workforce, and to support management staff development and succession planning.

Priority Areas to Advance in the 2020-2024 Strategic Plan:

- TPL's Digital Strategy:
 - Continue to build a strategy on how TPL delivers web- and mobile-based services on TPL.ca
- Open Hours
 - Implement TPL's Open Hours Plan to expand access by increasing open hours at branches across the city
- Accountability Framework

- Continue to build on TPL’s existing Accountability Framework with a goal including a focus on outcomes and evidence based decision making
- Youth Hubs
 - Continue to expand Youth Hubs and place them in priority neighbourhoods that would most benefit

In addition to the above continued priorities, the 2020-2024 Strategic Plan will include a robust development process, including a phased consultation plan. The new accountability framework will strengthen the Board’s prioritization of initiatives, and monitoring assessment of progress towards Library outcomes and demonstrate the Library’s contribution to the impact of City strategies in concrete terms.

Together, the consultation plan and accountability framework enhance public accountability and transparency and demonstrate the value of investment in TPL’s services to the public.

Environmental Scan

Library staff completed an environmental scan to understand the external environment and influences that will impact service delivery for the next five years. The environmental scan provides context for the overall strategic planning process, situates the library in the broader environment and identifies cross-cutting themes. The scan focuses on 10 areas: politics and government, economy and work, housing, transportation, social development (children and youth, seniors, immigrants and refugees, indigenous, poverty, equity and diversity), education, health and safety, arts and culture, environment, and technology. In addition, the environmental scan situates the Library within the wider non-profit and service space, as well as related commercial markets, such as entertainment and media, publishing, and retail.

Phase 1 Consultation Results

The consultation plan fulfills requirements of the Library Board’s *Public Consultation Policy*. Building on recent public and stakeholder consultations, including TPL Experience 360 and Staff Town Halls, the first phase of the Consultation Plan began on April 15 and ran through to May 12, and included an online survey for residents and branch-led public and community partner consultations.

Consultation toolkits were made available for staff to use at library and community events to engage residents and community partners. The online public survey was promoted on tpl.ca, in branches and community events, the Library’s wifi landing page and computer workstations, and on the Your Account web page. To date, over 2900 residents, stakeholders, and community partners have participated in the process. Topic areas from the first phase of consultation include concerns over budget cuts to city services, affordability and cost of living, environment, aging population and increased population density. Residents also said libraries could continue to support individuals and communities by providing increased access to public space and types of programming, including programs for different types of literacies (e.g. digital, media and print literacy).

CONCLUSION

The development of a new strategic plan is an exciting opportunity for the Library to be outward looking and future focused, and to harness technology and innovation to drive excellent public service efficiently. Online and digital services create new possibilities for connecting and engaging users and delivering personalized services. Flexible public space support study, work, collaboration, community building and civic engagement. Consultation with residents, stakeholders, including City Councillors, City departments, community agencies, service partners, staff and the Toronto Public Library Workers Union 4948 throughout the planning process ensures that the Library fulfills both its legislative mandate to provide responsive service, and the aspirational vision to be recognized as the world's leading library making Toronto, its residents and communities more resilient, knowledgeable, connected and successful.

CONTACT

Elizabeth Glass; Director, Policy, Planning & Performance Management; Tel: 416-395-5602;
Email: eglass@torontopubliclibrary.ca

Shawn Mitchell; Manager, Planning & Development; Tel: 416-395-5551;
Email: smitchell@torontopubliclibrary.ca

SIGNATURE



Vickery Bowles
City Librarian



Strategic Plan 2020 – 2024: Strategy Session

Strategic Planning Steering Committee
May 31, 2019



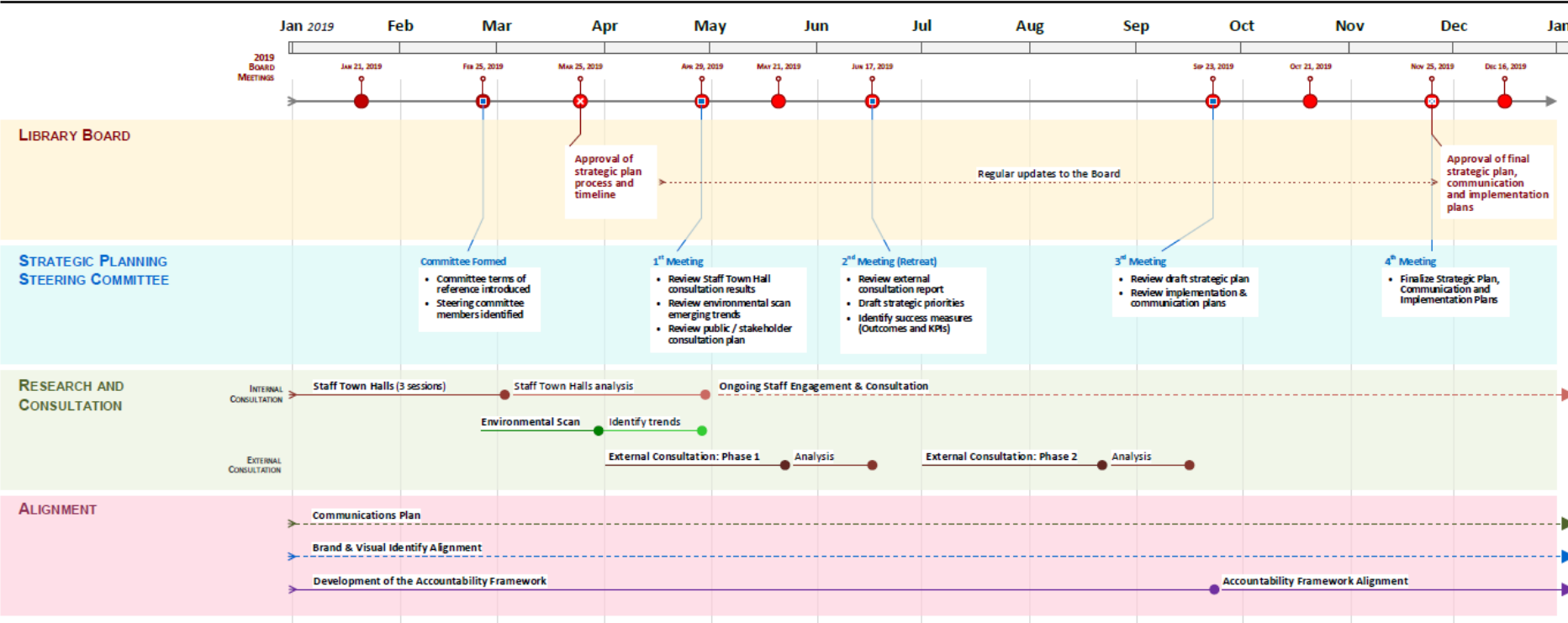
Agenda

- 1. Progress to date**
- 2. Look back: Strategic Plan 2016-2019**
- 3. Environmental Scan**
- 4. Phase 1 Consultation Results**
- 5. Focus Areas for Phase 2 Consultations**
- 6. Next Steps**




Progress to date

2020 – 2024 Strategic Plan Roadmap



Upcoming Timeline

1. Environmental scan and Phase 1 public and stakeholder consultations
April / May
- 2. Review environmental scan & Phase 1 consultation results and identify focus areas with Strategic Planning Steering Committee**
May 31 ***we are here*** 
3. Seek approval by the Board on draft focus areas
June 17
4. Phase 2 public and stakeholder consultations
Summer / Fall

Questions answered through the Strategic Planning Process

1. How will the strategic plan have a robust and inclusive consultation strategy to empower the participation of residents and communities? *April*
2. What should the research process focus on? *April*
3. What is the current socio-economic state facing Torontonians? *May*
4. Where can the library add value? *May*
5. What are our strategic priorities that will bring this value to Torontonians? *September*
6. How will we demonstrate our value and impact? *November*
7. What actions should we prioritize from 2020 and beyond? *November*



Look back: 2016 – 2019 Strategic Plan

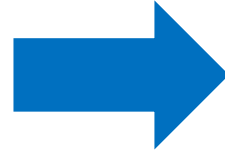
expanding access. increasing opportunity. building connections.

Planning Process

2016 - 2019



Continuous Improvement



- **Comprehensive Environmental scan** that situates the Library within the wider non-profit and service space as well as related commercial markets
- **Phased consultation plan** with residents and stakeholder to draft, refine and focus strategic priorities

2020 - 2024

Toronto Public Library

Strategic Plan
2020-2024

Accountability Framework

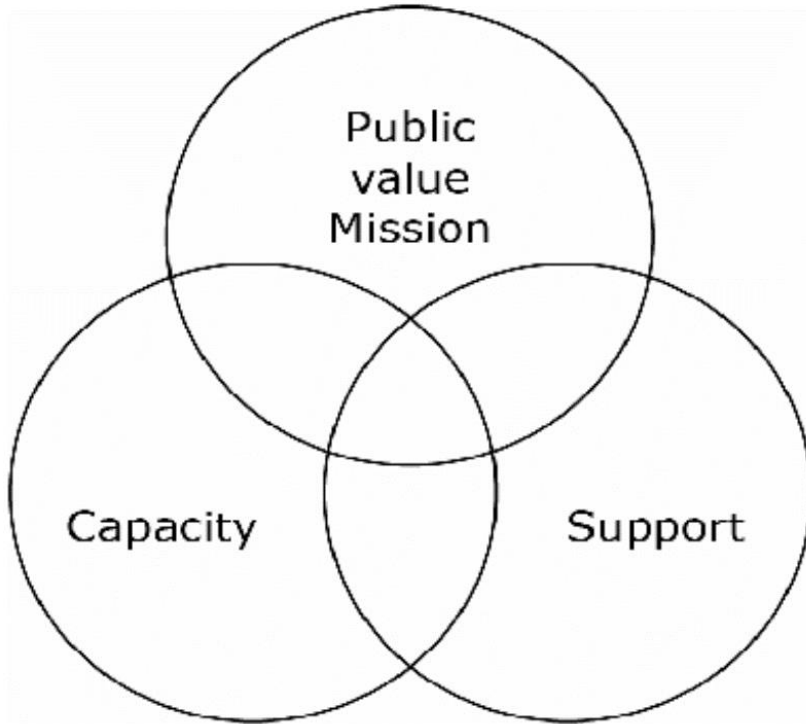
2016 – 2019

1. **Logic Model**
2. **Balanced Scorecard**
3. **Dashboard visualization**

2020 – Onwards

- **Build on the strengths** of the current framework
- **Tie operational planning to the strategic plan**
- Strengthen the Board's **prioritization of strategic initiatives**
- **Demonstrate value** to residents, community and funders

Value, Capacity and Support



Strategic Analysis Framework

Professor Herman B. "Dutch" Leonard

**Strategy, Leadership and Performance
Management in the Social Enterprise Sector**

Copyright 2007 President and Fellows of Harvard College. All rights reserved. This material is provided for use with the video only and is not intended for publication or attribution



**our six strategic
priorities**

advancing our
digital platforms

breaking down barriers
to access and
driving inclusion

expanding access to
technology and training

establishing TPL as
toronto's centre for **lifelong
and self-directed learning**

creating **community
connections** through
cultural experiences

transforming for 21st
century **service excellence**



expanding **access**
increasing **opportunity**
building **connections**

1 advancing our digital platforms

Online Card Renewal

Delivered **100% mobile friendly** "Your Account" pages

Launched **lists feature** and **borrowing** history for customer accounts on tpl.ca/account

More **new seasonal Sunday service**

Open Hours Plan approved by Board in June 2018

Launched **Extended Open Hours pilot**

Launched **WiFi Hotspot Lending Program**

Increased the number of **Digital Innovation Hubs**

Introduced **Pop-Up Learning Labs**

2 breaking down barriers to access and driving inclusion

3 expanding access to technology and training

4 establishing TPL as toronto's centre for **lifelong and self-directed learning**

5 creating **community connections** through cultural experiences

6 transforming for 21st century **service excellence**

Implemented **online courses for technology job skills**

Launched an **eLearning tool for homework support**

More Youth Hubs

Launched **Musical Instrument Lending Library**

Launched **Chinese Canadian Archive**

TPL's Indigenous strategies

Data-driven decision-making & program development

Back office transformations and upgrades

Tools and frameworks to **measure outcomes & value**

Potential areas to advance in the 2020 - 2024 Strategic Plan

- **TPL's Digital Strategy:** Continue to build on the strategy including business intelligence and how TPL delivers web and mobile-based services on tpl.ca
- **Open Hours:** Implement TPL's Open Hours Plan to expand access by increasing open hours at branches across the city
- **Accountability Framework:** Continue to build on TPL's existing Accountability Framework
- **Digital Inclusion & Literacy:** Continue to explore ways in which libraries can build digitally inclusive communities that support individual opportunity and community progress
- **Customer Experience:** Transform the library's capacity and culture to deliver exceptional customer experiences, how, when and where our customers want and need them
- **Service Development to Vulnerable Populations:** Continue to serve the needs of vulnerable populations

Innovation in the library sector

- **New applications of technology:** Libraries are offering new technologies and services for learning, research and information
- **Re-thinking library spaces:** Libraries are partnering to create vibrant public spaces and designing flexible library spaces to accommodate multiple uses that support users through all life stages
- **Innovative funding models:** Libraries are adopting new funding models as local budgets become increasingly strained
- **Evidence based approach:** Libraries are using evidence based approaches to inform decision making, evaluate and deliver services
- **Innovative partnerships:** Libraries are leveraging public and private partnerships to optimize resource sharing, program and service delivery and service integration

New applications of technology



Fig. 1. Toronto Reference Library, Maker Festival

Re-thinking library spaces



Fig. 2. Calgary Central Public Library from: <https://calgarylibrary.ca/central-library/room-bookings/>

Re-thinking library spaces



Fig. 3. Seton Library, Calgary Public Library from: <https://calgarylibrary.ca/locations/SETON/>

Re-thinking library spaces



Fig. 4. Albion Library, Toronto Public Library

Innovative funding models



Fig. 5. Independence Branch, Chicago Public Library from: <https://www.chipublic.org/locations/37/>

Evidence based approach

project | **OUTCOME**
MEASURING THE TRUE IMPACT
OF PUBLIC LIBRARIES



bridge | TECHNOLOGY SERVICES
ASSESSMENT TOOLKIT

Innovative partnerships



Fig. 6. Toronto Reference Library, Toronto Comic Arts Festival



Environmental Scan

Results



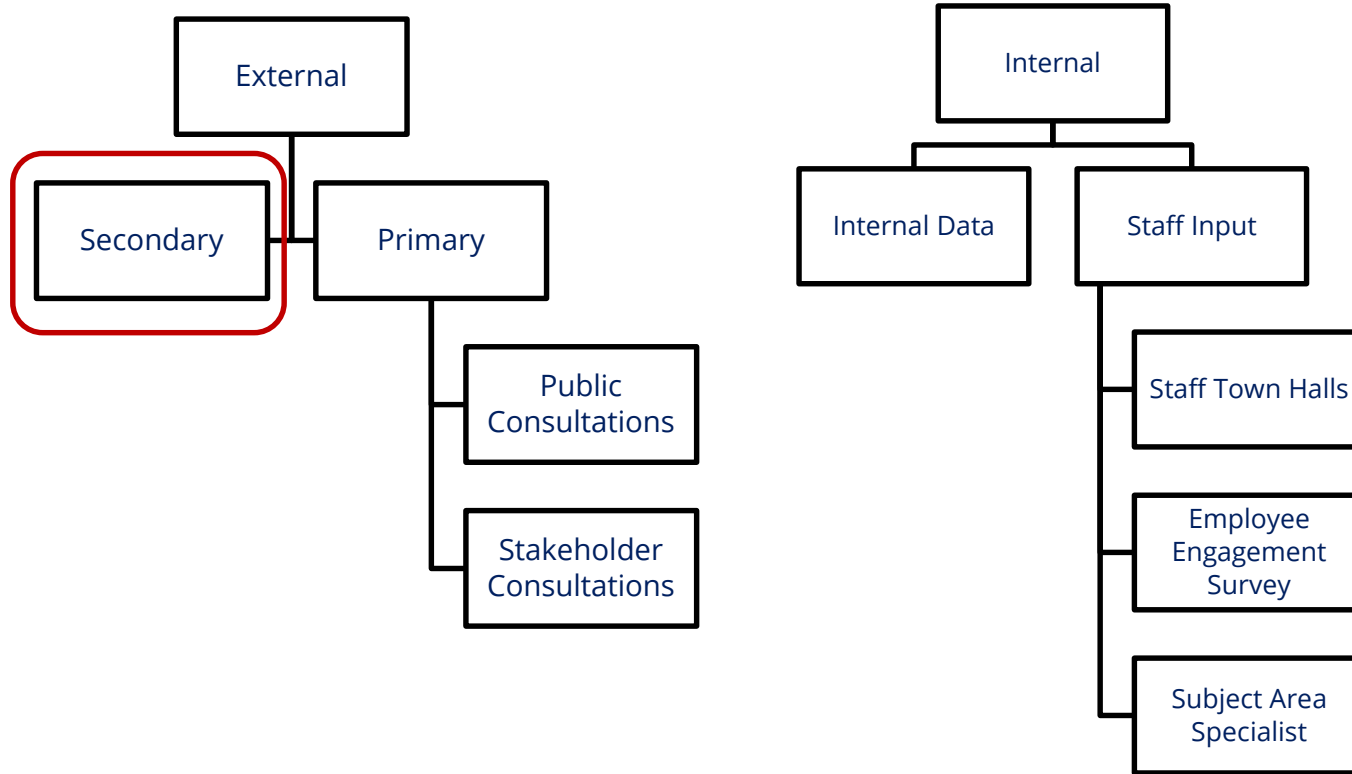
Environmental Scan Results

- 1. Environmental scan process**
- 2. Key trends from 10 areas and cross cutting themes**
- 3. Non-profit space and commercial markets**

Environmental Scan Results

- 1. Environmental scan process**
- 2. Key trends from 10 areas and cross cutting themes**
- 3. Non-profit space and commercial markets**

TPL's strategic planning process draws on a number of internal and external inputs



Why conduct an Environmental Scan?

- Understand the larger environment in which TPL operates
- Provides data for subsequent strategic analyses (e.g. SWOT analysis; scenario planning)
- Informs consultation plan
- Identify initial themes and seek Board input



External scan at a glance

- Work streams organized around PESTLE-type analysis and aligned with the City
- Conducted without specific library lens, not constrained by what we already do
- Main focus is Toronto and Ontario, but also look nationally and globally
- Limit to secondary sources, no direct interviewing or consultation

10

Staff

10

Issue Areas

3

Markets

200+

Sources

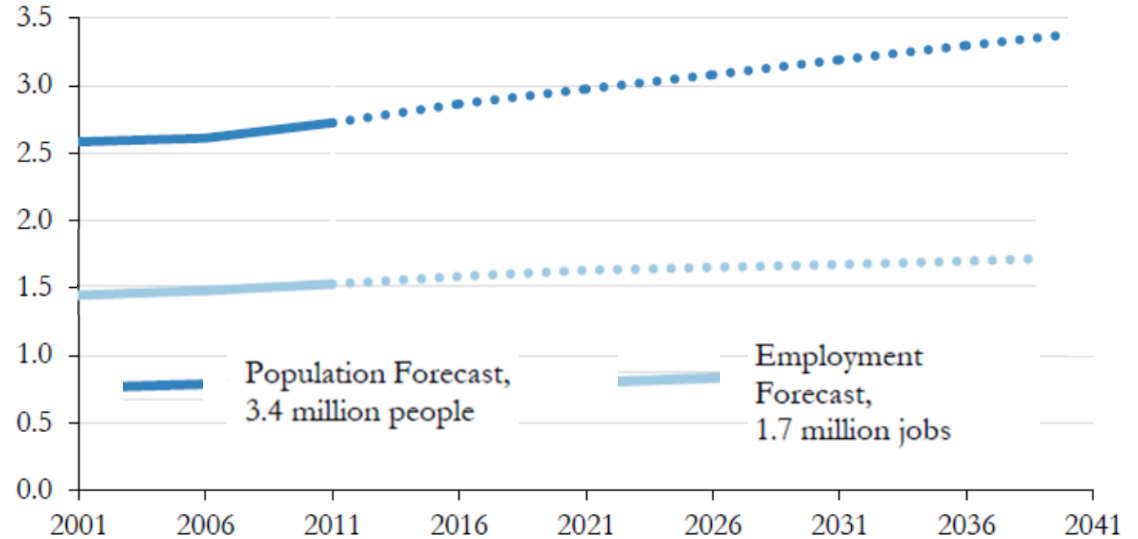
Environmental Scan Results

1. Environmental scan process
2. Key trends from 10 areas and cross cutting themes
3. Non-profit space and commercial markets

Significant period of growth for Toronto is forecasted to continue

- **Population** projected to grow 34% to 3.4M by 2041
- **Jobs** have grown at double the rate anticipated by Growth Plan and forecasted to reach 1.7M by 2041
- **Gross Domestic Product (GDP)** has grown 2.4% annually outpacing the national average

2017 Growth Plan City of Toronto Population and Employment Forecasts (in millions)



10 areas were identified for TPL environmental scan



Politics & Government



Health & Public Safety



Economy & Work



Arts & Culture



Housing



Environment



Transportation



Technology



Education & Training



Social Development*

*Children & youth, seniors, immigrants and refugees, indigenous, equity, poverty

Priorities were identified across three levels of Government



- Economy
- Housing
- Transportation
- Social Development
- Equity & Poverty
- Health & Safety
- Growth Management
- Sustainability



- Creating & protecting jobs
- Economy
- Environment & Energy
- Health Care
- Transit & Transportation
- Housing Supply
- Education, Skills & Training
- Social Assistance & Pensions
- Secure Communities & Safer Streets
- Broadband Expansion



- Economy
- Strong Middle Class
- Jobs & Innovation
- Exports & Investment
- Environment & Climate Change
- Sustainable Infrastructure
- Diverse & Inclusive Canada
- Healthy Canadians
- Indigenous Peoples
- Safety & Security

10 areas were identified for TPL environmental scan



Politics & Government



Health & Public Safety



Economy & Work



Arts & Culture



Housing



Environment



Transportation



Technology



Education & Training



Social Development*

*Children & youth, seniors, immigrants and refugees, indigenous, equity, poverty

Politics & Government

- Aging workforce
- Emerging technologies and e-government
- Strained Federal-Provincial and Inter-Provincial relations (e.g. carbon tax)
- Fall Federal election
- Potential for election interference

Provincial-Municipal

- Provincial government has introduced multiple policy changes and funding cuts in a number of areas e.g. education, transit, public health, and development charges (Bill 108)
- Originally introduced retroactively for 2019, now pushed to 2020

10 areas were identified for TPL environmental scan



Politics & Government



Health & Public Safety



Economy & Work



Arts & Culture



Housing



Environment



Transportation



Technology



Education & Training



Social Development*

*Children & youth, seniors, immigrants and refugees, indigenous, equity, poverty

Key trends – Economy & Work

- **Increasing inequality;** racial and neighbourhood disparities
- Investment, development, and employment **growth outside downtown core is uneven**
- **Unemployment** disproportionately higher among youth and newcomers
- High and increasing **cost of living**
- **Diverse and educated workforce**
- Shifting **nature of work** and increase in precarity
- Industry **diversification**
- **Businesses relocating** outside the City and outside the core



Economic Development and Culture Divisional Strategy

2018 - 2022



City of Toronto's four focus areas for **Economic Development:**

1. Equity and inclusion
2. Talent and innovation
3. Space and access
4. Operational excellence

10 areas were identified for TPL environmental scan



Politics & Government



Health & Public Safety



Economy & Work



Arts & Culture



Housing



Environment



Transportation



Technology



Education & Training



Social Development*

*Children & youth, seniors, immigrants and refugees, indigenous, equity, poverty

Housing in Toronto is scarce and expensive

Shelters at or above capacity
Lack of affordable housing #1 driver of homelessness

Shortage of mental health & addictions supportive housing
Shortage of social housing: increased demand + decreased funding = long waiting lists

Lack of low and mid-range rental housing due to high rents, low vacancy rates, and insufficient inventory

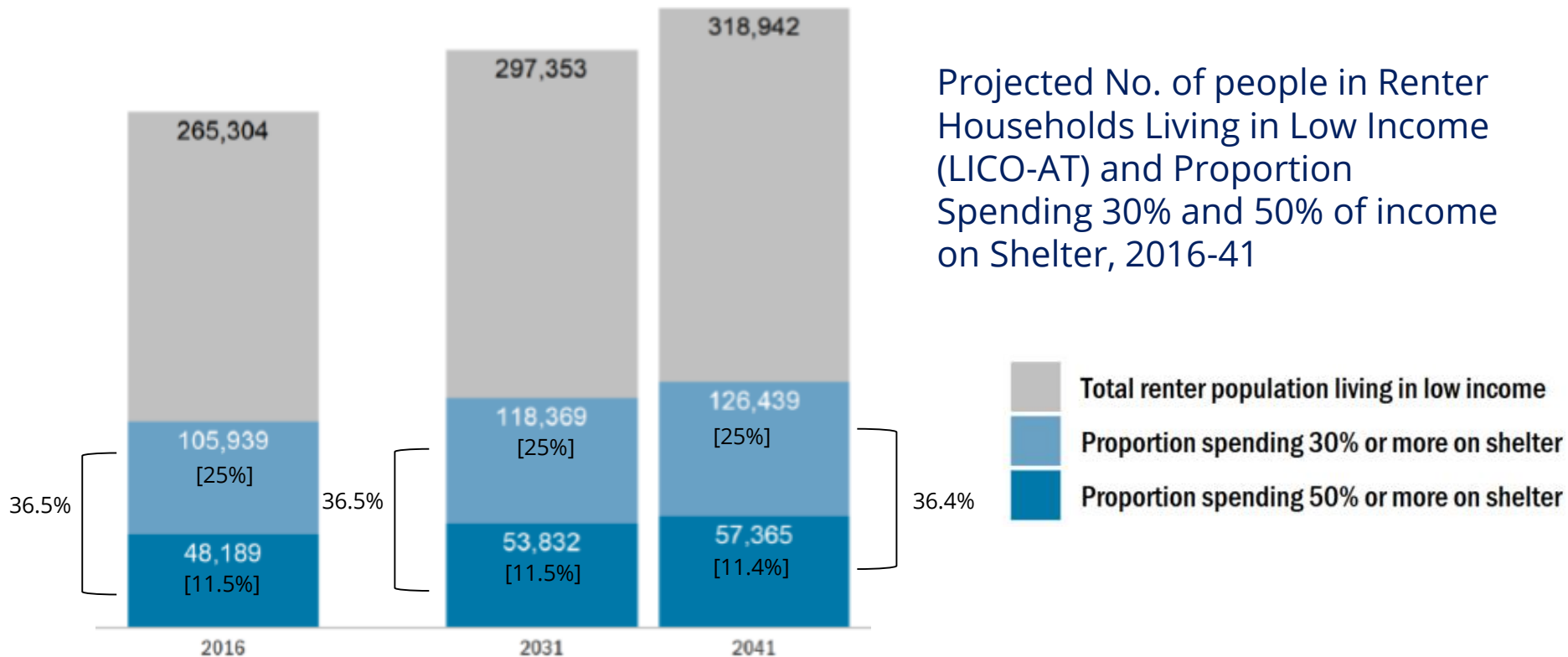
Decoupling of house prices from wages resulting in lack of affordable purchase options

Low vacancy rate and high rents
Increased AirBnB and short term rentals adding to shortage

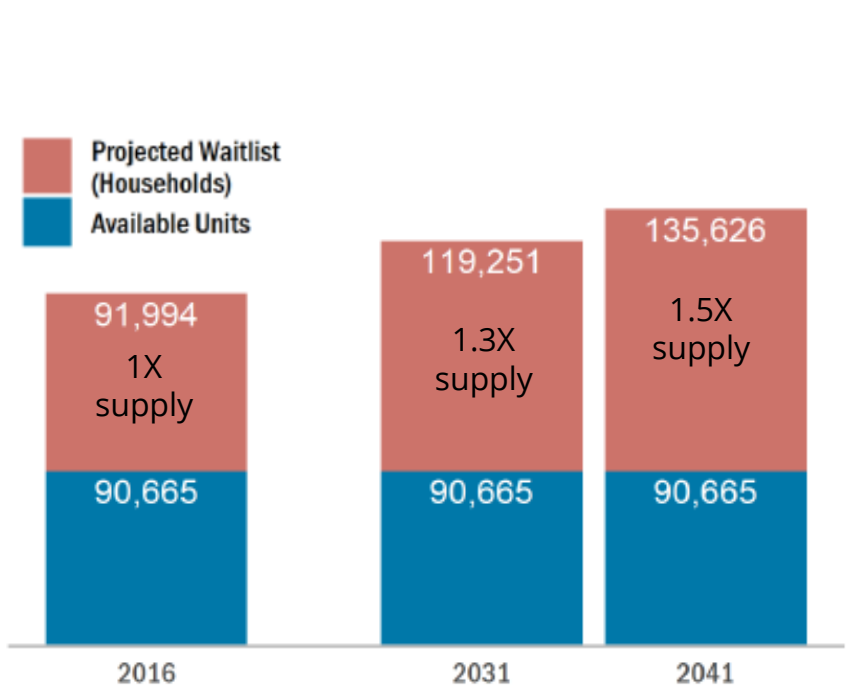
High prices
New builds dominated by condos
Higher interest rates and tougher mortgage rules



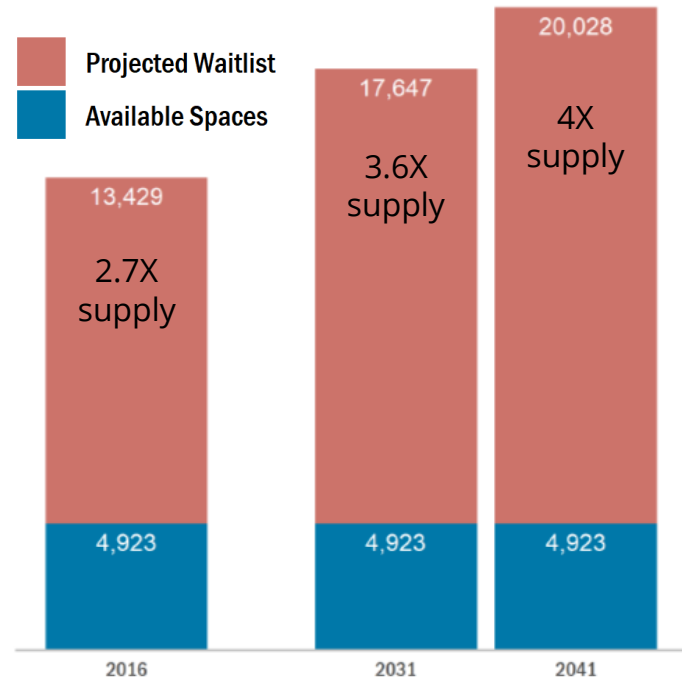
Low income households will continue paying disproportionately high % of income to housing



Demand for social and supportive housing will continue to increase and outpace supply



Projected Demand for Social Housing 2016-41



Projected Demand for Mental Health and Addictions Supportive Housing 2016-41

- Torontonians paying a high and increasing **proportion of their income to housing**
- **Shortage of social and supportive housing**
- **Lack of affordable** market rental units and purchase options
- Historically **low vacancy rates** for market housing

Key trends - Housing

- Many people are living in **unsuitable housing**, units in need of repairs, and core housing need
- **Newcomers** disproportionately represented in the **shelter system**
- Low vacancy rates increases potential for **housing discrimination and renoevictions**
- More **young adults still living with parents**

10 areas were identified for TPL environmental scan



Politics & Government



Health & Public Safety



Economy & Work



Arts & Culture



Housing



Environment



Transportation



Technology



Education & Training



Social Development*

*Children & youth, seniors, immigrants and refugees, indigenous, equity, poverty

Torontonians are still heavily reliant on cars and consider transportation a high priority issue

Over half of people drive to work



57.5% drive



24.3% take transit



24.3% car pool



5.2% walk to work



1.4% bike

Nearly half of people identified transportation as the top issue in the last Municipal election

Transportation 46%

Housing and planning 26%

Toronto's economy 8%

Policing and public safety 7%

How government is run 6%

Key trends - Transportation

- Lack of access to transit (**transit deserts**) contributes to the growing inequality between Toronto's neighbourhoods
- **High prices in core** driving people further into suburbs
- Increasing **commuting times** and **road congestion**
- **Stop to Ontario high speed rail project**
- Increased **aggressive and distracted driving**
- More **traffic accidents** and **pedestrian fatalities**
- Ontario **increasing speed limit** on 400 series roads
- Increasing use of **ride share** (Uber and Lyft)
- **King Street pilot** made permanent
- Increase in **Bike Shares**

TTC - Transportation



- **Consistent underfunding** of TTC has resulted in least subsidized transit system in North America
- **No predictable revenue stream** from a dedicated tax or levy - majority of operations funded by fares
- **High cost.** Rates increasing above rate of inflation
- **Aging infrastructure**
- Significant **delays and overcrowding**
- **Highly politicized.** Recent Provincial involvement and changes to planned expansion and funding

Forecasts - Transportation

- Hyperloop rail system
- Automation. Partially and completely automated for freight, public transit, commercial, public sector and personal use
- Zero emissions public transportation (electrification)
- Congestion pricing

Spotlight on autonomous vehicles (AVs): Toronto



- 709,000 AVs by 2035
- 5,000 automated taxis and 2,000 automated buses
- 90% reduction in traffic accidents and 38 fewer annual fatalities
- \$1.2B in reduced collision costs and \$2.7 reduced congestion costs
- 40% reduced demand for parking

10 areas were identified for TPL environmental scan



Politics & Government



Health & Public Safety



Economy & Work



Arts & Culture



Housing



Environment



Transportation



Technology



Education & Training



Social Development*

*Children & youth, seniors, immigrants and refugees, indigenous, equity, poverty

Education Landscape in Toronto

Primary and Secondary	Toronto District School Board is the largest and one of the most diverse school boards in Canada. Serving 246,000 students in 583 schools , and 140,000+ life-long learners in its Adult and Continuing Education programs
	Toronto Catholic District School Board provides publicly-funded Catholic education to more than 91,000 students in its 195 schools
	Conseil scolaire Viamonde and Conseil scolaire de district catholique Centre-Sud . French-language public education
	80+ private elementary and secondary schools
Universities and Colleges	Nine colleges and universities. Four publicly-funded universities, one private university, and four publicly-funded community colleges
Language schools	55 language training schools and programs , both private and publicly-funded. Targeted mostly to foreign students and professionals
Private career colleges	140 private career colleges that offer certificate and diploma programs in fields such as business, health services, human resources, applied arts, information technology, electronics, trades and services

Key trends – Primary and secondary education

Inequity

- **Achievement gap** for **Indigenous** students
- Unequal **school fundraising**
- **Uneven access to music and arts**
- Shortage of **guidance councilors**
- Increase in indigenous education in curriculum but **lack of indigenous staff**
- Student **mental health** – often related to bullying
- **Student activism**, strikes, and walkouts
- **Mindfulness** and **growth mindset**
- **Maker** learning and maker spaces
- Lack of **physical education**
- **Technology and digital literacy** (e.g. AI, VR and AR, online safety)*

* AI=Artificial Intelligence, VR=Virtual Reality, AR=Augmented Reality

Primary and Secondary Education funding and policy changes

Funding



TDSB facing \$67.8 M shortfall –
\$42.1M Provincial funding cut

- Teacher layoffs and bumping
- Cuts to after school programs aimed at helping youth at risk
- Itinerant music
- Transportation (FI, gifted)

Policy changes



- Increase in class sizes
- Mandatory online courses in high school
- Cellphone ban
- Curriculum changes to math and indigenous education, inclusion of financial literacy


Key trends – Higher education

- **Changes in funding** model
- **Affordability and access.** Rising tuition and high levels of student debt
- **Equity, diversity and inclusion** – students and Faculty
- **Reconciliation** – Indigenous curriculum and student achievement
- **Intellectual freedom / free speech**
- **Partnerships**
- More issues with student **mental health** and need for services
- **#Metoo and sexual assault**
- Focus on **data and performance measures**
- **Technology.** AI, VR, game based learning, online program management providers*

Key trends – Training and lifelong learning

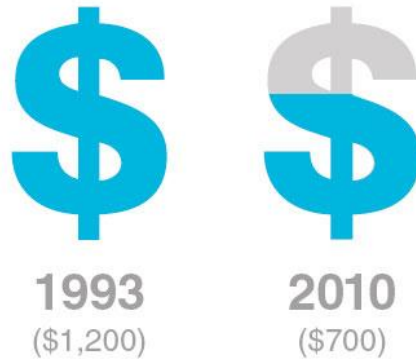
Ontario's skills shortages cost the economy up to **\$24.3 billion** in forgone GDP and **\$3.7 billion** in provincial tax revenues annually.

 **73%**
of employers say skills requirements have **increased** over the past decade

 **76%**
of employers say skills requirements will **increase further** over the next decade

AND

there is a misalignment between the number of PSE graduates in Ontario, their subject areas, and employers' needs.



Employers are **investing less** than ever in training and development.

They are **also losing** skilled and experienced workers due to aging and retirement.

- Lifelong learning and ongoing reskilling critical
- Flexible, accessible, pathways based programs
- Specific, relevant qualifications, including micro-credentialing, alternative credentials, badging
- Technology. AI, VR, mobile

60% or \$3B of funding for colleges and universities will be performance based increased from 1.2-1.4%

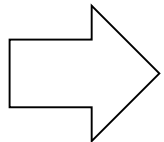
Evaluation metrics (10)

Skills & jobs outcomes

- Graduate earnings
- Experiential learning
- Skills and competencies
- Graduation rate
- Graduate employment
- One related to an institutional focus

Economic & community impact

- Funding from industry
- Funding for research or apprenticeship
- Institution-specific measure for economic impact
- Institution-specific measure for community impact



Phase-in:
2020-21: 25% (\$1.27B)
2021-2021: Increase 10% yearly
2024-25: 60% (\$3.04 B)

10 areas were identified for TPL environmental scan



Politics & Government



Economy & Work



Housing



Transportation



Education & Training



Health & Public Safety



Arts & Culture



Environment



Technology



Social Development*

*Children & youth, seniors, immigrants and refugees, indigenous, equity, poverty

Social determinants of health such as income and race drive health inequity in Toronto

Low income groups had worse health for a majority of indicators*



*Worse on 20/34 indicators including premature mortality, low birthweight, diabetes and colorectal cancer

Racialized and Indigenous Torontonians face significant health inequities

- Less access to health care
- Experiences of discrimination in health care system
- Worse health outcomes across a number of indicators (overweight or obesity, high blood pressure, asthma, diabetes)

Health System

- **Stress on system** - funding below level of inflation, cuts to Public Health funding, and aging population
- **Health inequity**
- Call for National **Pharmacare** and discontinuation of OHIP+ for those with private insurance
- **Emerging technologies** (consumer genetic testing, robotics/telemedicine, AI, mobile)

Key trends - Public Health

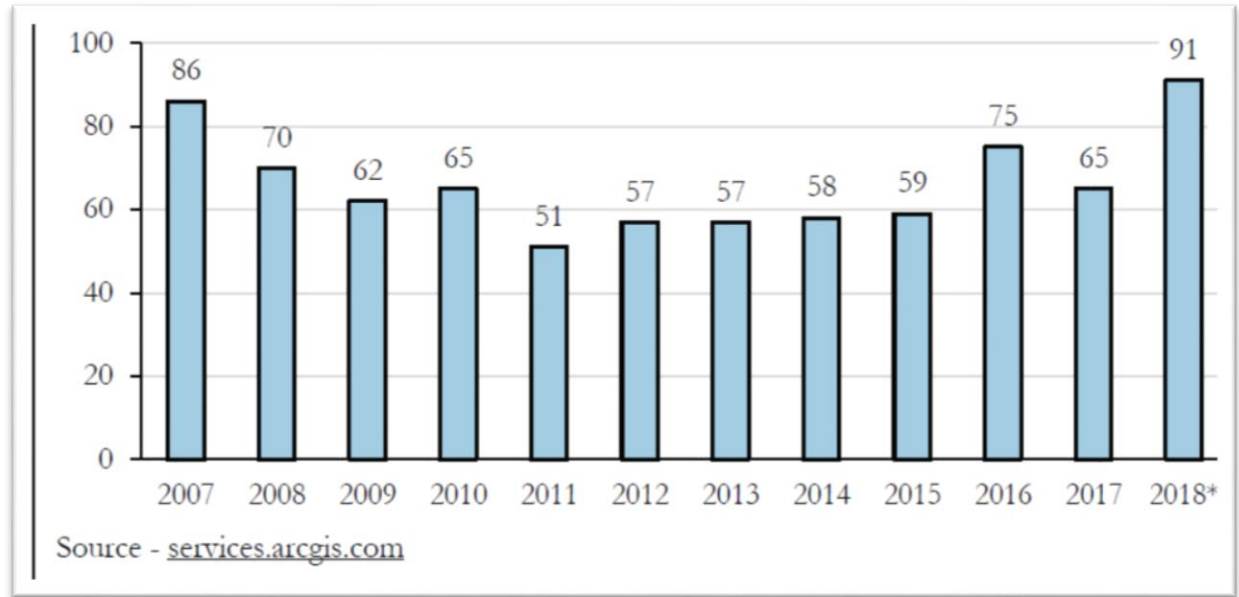
Health concerns

- **Opioid crisis**
- Declining **mental health**
- Increase in **climate-related** health issues
- **Decreasing immunization** rates/anti-vaccination movement
- Legalization of **cannabis**

Toronto's homicide rate has been increasing but is still below the National average until 2018 spike

- Gun violence involves youth more than any other group
- In addition to causing injury and death, gun violence is traumatizing and negatively impacts the mental health of residents

Toronto Homicides 2007-2018



* mid-November 2018, total for 2018 is 96, majority of homicides committed with guns

- **Increase in traffic-related fatalities.** Pedestrians, cyclists, older adults
- **Carding** is banned but tensions persist between vulnerable communities and police
- **Aboriginal and black people are over represented in incarcerated populations** and are more likely to be crime victims
- Use of **big data/GIS/mapping** by police

Key trends – Public Safety

Firearm violence

1. Increasing access to firearms (including illegal guns)
2. Violation of spaces considered safe
3. Escalation on social media
4. More demands on victims services

Toronto has seen the highest increase in youth crime in a decade – primarily robbery and homicide

Toronto's Youth Violence Prevention Plan addresses five areas:



10 areas were identified for TPL environmental scan



Politics & Government



Health & Public Safety



Economy & Work



Arts & Culture



Housing



Environment



Transportation



Technology



Education & Training



Social Development*

*Children & youth, seniors, immigrants and refugees, indigenous, equity, poverty

Arts & Culture in Toronto represents 8% of GDP and 7% of workforce

Managed
\$31.2 million
in grant allocations



30,000
cultural events,
that received
some City
funding



Toronto Arts Council Priorities:

- Growth & Sustainability
- Community Connections
- Innovation & Partnerships

Key trends – Arts & Culture

- **Inequitable access** to culture in Toronto
- Need for sustainable and affordable access to **space**
- Links between cultural exposure and **educational outcomes**
- Connection between arts and culture and **health**
- **Placemaking** and **community building**
- **Globalization** of capital, labour, information, and markets
- **Private and public fiscal restraint** – push for innovative funding models
- Focus on **performance based funding** and **outcomes**
- **Collaboration** and **partnerships**
- **Digital transformation** and **emerging technologies**

10 areas were identified for TPL environmental scan



Politics & Government



Health & Public Safety



Economy & Work



Arts & Culture



Housing



Environment



Transportation



Technology



Education & Training



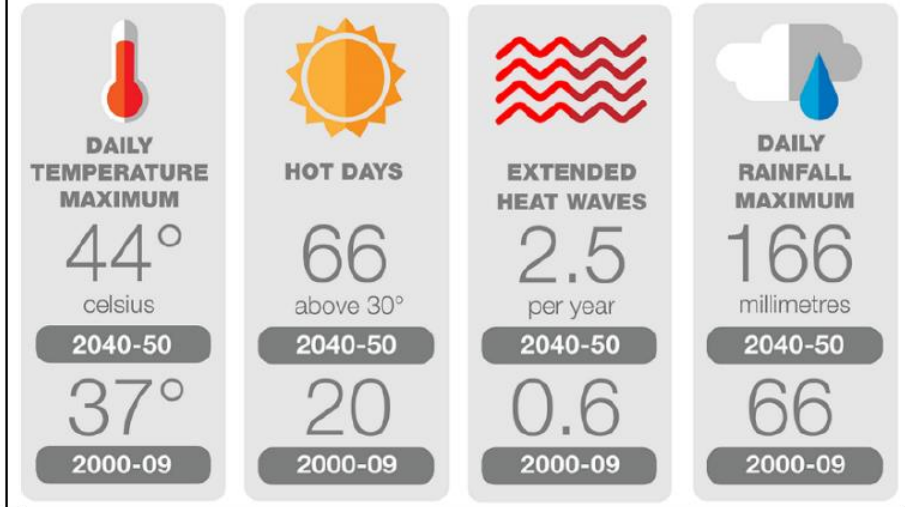
Social Development*

*Children & youth, seniors, immigrants and refugees, indigenous, equity, poverty

Toronto is experiencing weather, health, and immigration effects of climate change

Increase in extreme weather including heat waves, severe rain and flooding, and higher average and maximum temperatures

How Toronto's climate could change by 2050



- Costs of catastrophic insurable events has doubled
- Increased cost of food
- Negative health effects
- Focus on climate adaptation
- Climate refugees

Key trends - Environment / Sustainability

- Pressure on Toronto's **green spaces** and ecosystems
- **Air pollution** in Toronto
- Growth of **clean tech sector**
- Increase in **green buildings**
- Decreasing **species diversity**
- **Rising activism** and advocacy by generation Z
- **Greenhouse gas** reductions
- **Circular economy** zero waste future
- Province **cancelled Cap and Trade program**
- Controversy over **pipelines**
- **Electronics waste** - right to repair
- **Emerging technologies.** Artificial intelligence (AI), Internet of Things (IoT), 5G, automated vehicles

10 areas were identified for TPL environmental scan



Politics & Government



Health & Public Safety



Economy & Work



Arts & Culture



Housing



Environment



Transportation



Technology



Education & Training



Social Development*

*Children & youth, seniors, immigrants and refugees, indigenous, equity, poverty

Technologies

- Artificial Intelligence
- Augmented Reality/Virtual Reality
- Fifth Generation (5G)
- Block chain
- Automation
- Internet of Things (IoT)
- Drones
- Sensors
- Smart Cities

Key trends - Technology

Social/Ethical

- Digital Divide / Digital Inclusion
- Digital / Data Literacy
- Discrimination and inequality embedded in development process and technologies
- Digital Ethics and Privacy

10 areas were identified for TPL environmental scan



Politics & Government



Health & Public Safety



Economy & Work



Arts & Culture



Housing



Environment



Transportation



Technology



Education & Training



Social Development*

*Children & youth, seniors, immigrants and refugees, indigenous, equity, poverty



Social Development

- Poverty
- Equity, diversity, and human rights
- Equity Seeking Groups
 - Children & youth
 - Seniors
 - Newcomers (immigrants and refugees)
 - Indigenous

One in four children and one in five adults live in poverty in Toronto

46%

OF RECENT IMMIGRANTS LIVE
IN POVERTY

37%

OF FEMALE LONE PARENTS LIVE
IN POVERTY

33%

OF PEOPLE IN RACIALIZED
GROUPS LIVE IN POVERTY

30%

OF PEOPLE WITH DISABILITIES
LIVE IN POVERTY

- **Increased cost of living.** Cost of housing, food, utilities, and transportation have increased substantially and are some of the highest in the country
- **Increase in precarious employment.** Proportion of jobs that are part time has doubled in last 30 years
- Poverty in Toronto is **gendered** and **racialized**

TO PROSPERITY: TORONTO POVERTY REDUCTION STRATEGY



Key themes:

- Housing Stability
- Service Access
- Transportation Equity
- Food Access
- Quality Jobs & Liveable Incomes
- Systemic Change

Collective Impact: focus on coordination and alignment of a range of government, community, and private sector organizations working collectively towards a shared impact

13.7% of Canadians live with a disability, and 1/10 disabilities are not visible

- **Education.** Adults with disabilities were only about half as likely to get university-level degrees
- **Income and employment.** Adults with disabilities generally have lower incomes and employment rates
- People living with disabilities (both mental and physical) are twice as likely to live below the **poverty** line

Access to school and work

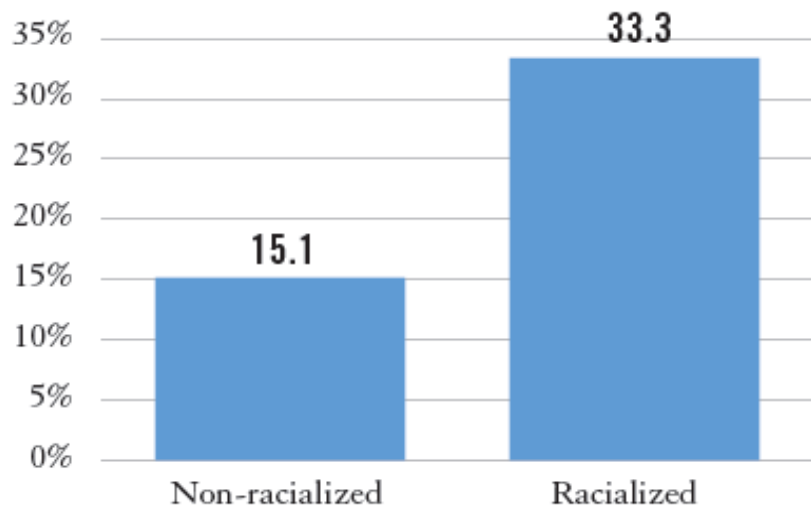
- 30%+ of persons with disabilities report their disability makes it **difficult for them to change jobs or advance their careers**
- 30% of persons with disabilities report having asked for **workplace accommodation** that was not made available
- 50%+ Ont. Human Rights Com. complaints are disability related

Equity seeking groups in Toronto still face many barriers

- **Black Torontonians** experience racial profiling and are disproportionately stopped by police, poorer educational outcomes, and have higher rates of unemployment, poverty and violence
- **Women** experience gender wage gap, lack of affordable and accessible child care, gender-based violence, higher poverty rates, and lack of representation in leadership
- **LGBTQ2S** Torontonians continue to face discrimination and violence

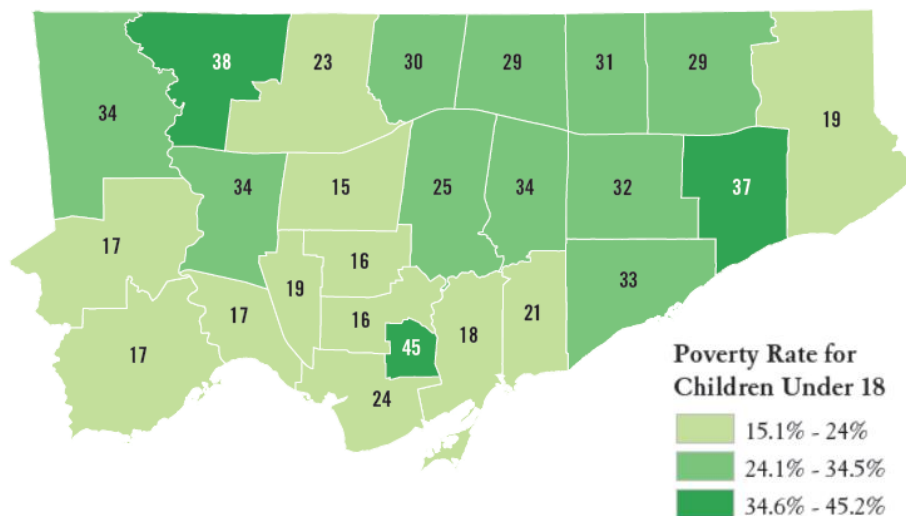
Child poverty in Toronto is higher among racialized groups and in certain neighbourhoods

Children from racialized groups have twice the poverty rate compared to those from non-racialized groups



Child poverty rates vary from 15-45% between neighbourhoods

Figure 9. Child Poverty Rates for Children Under Age 18 by Ward, City of Toronto, 2015



Key trends – Children & Youth

Health

- Increasing obesity and lack of activity
- Decreasing vaccination rates
- Worsening mental health, increased depression and anxiety, self-harm and suicide
- Increased screen time and lack of exposure to outdoors
- Substance abuse

Economic

- Poverty, homelessness and food insecurity
- High levels of youth joblessness
- Lack of affordability and quality child care

Safety

- Gangs and gun violence
- Cyberbullying and child luring

Social Development – Seniors

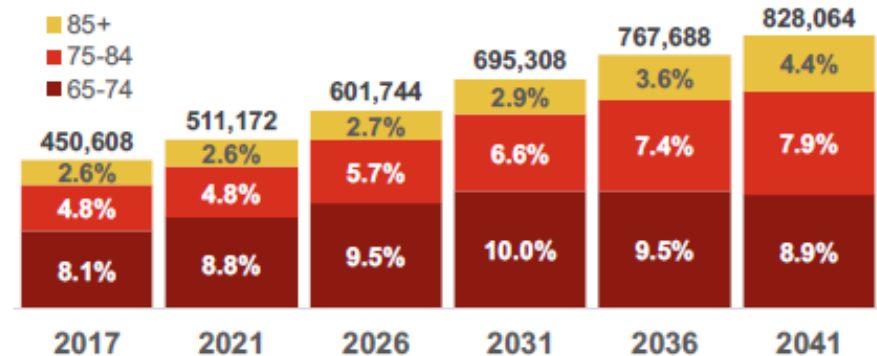
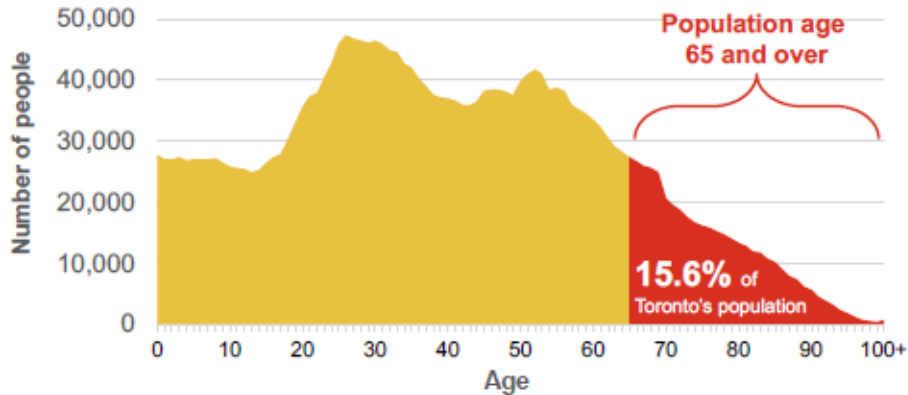
There is no single accepted definition of a senior in Toronto. Programs, services and initiatives for seniors within the City and other governments have different definitions reflecting different program requirements and target audiences. The City takes a **life course approach** to ageing, which recognizes that we all age differently, and that the experience of ageing varies from person to person depending on one's access to social and economic opportunities and the social determinants of health.



Toronto's senior population is large and forecasted to grow, driven by increased life expectancy and aging baby boomers

People aged 65+ make up **15.6%** of Toronto's population, outnumbering children for the first time.

Toronto's population age 65+ is projected to **increase by 84% by 2041**, representing 21.2% of the City's population.



- **Aging population**
- **Stress on the healthcare system** and lack of long term and home care
- Declining **mental health** and **social isolation**
- Lack of access to accessible and affordable **housing**
- **Economic** hardship
- **Working beyond traditional retirement age**

Key trends - Seniors

- **Safety** (physical and online)
- **Diversity** of Toronto's senior population
- Increasing **political influence** (as voters)
- **Difficulty accessing services** due to distributed provision
- Increased number of and needs of **caregivers**

Social Development - Seniors

Top concerns of Toronto Seniors

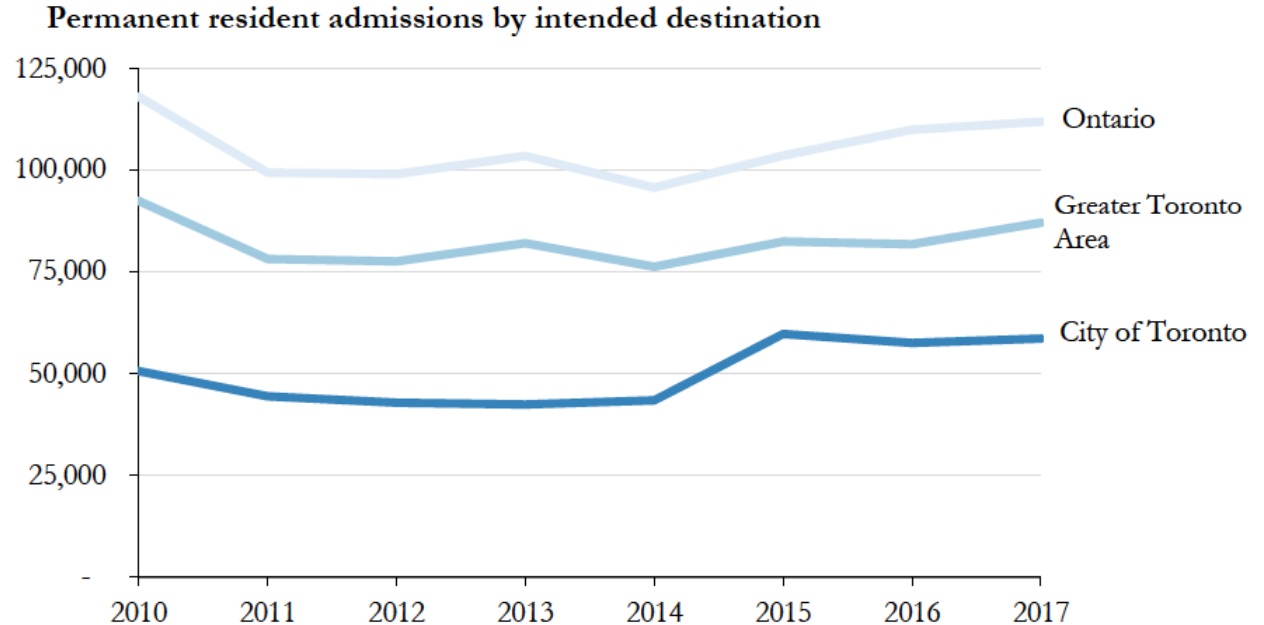
1. Health
2. Housing
3. Transportation
4. Employment and income
5. Access to information



TORONTO SENIORS STRATEGY 2.0

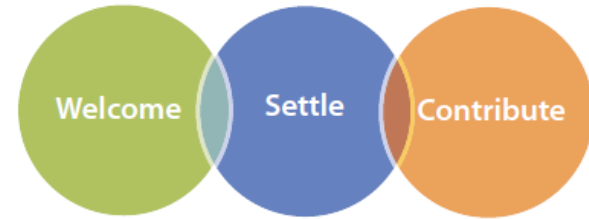
Toronto welcomes more newcomers than any other city in Canada – 60,000/year

- Toronto receives the highest numbers of arrivals in classes that have more **complex needs**, such as refugees and asylum claimants
- Estimates range between 10,000-250,000 **undocumented** in Toronto



- **Lower income** and **higher unemployment**
- Issues finding **housing**
- **Barriers to foreign credential recognition**
- **Shortage** of newcomer and refugee **services**
- Lack of access to **social capital** and **diverse networks**
- **Language** challenges

Key trends - Newcomers



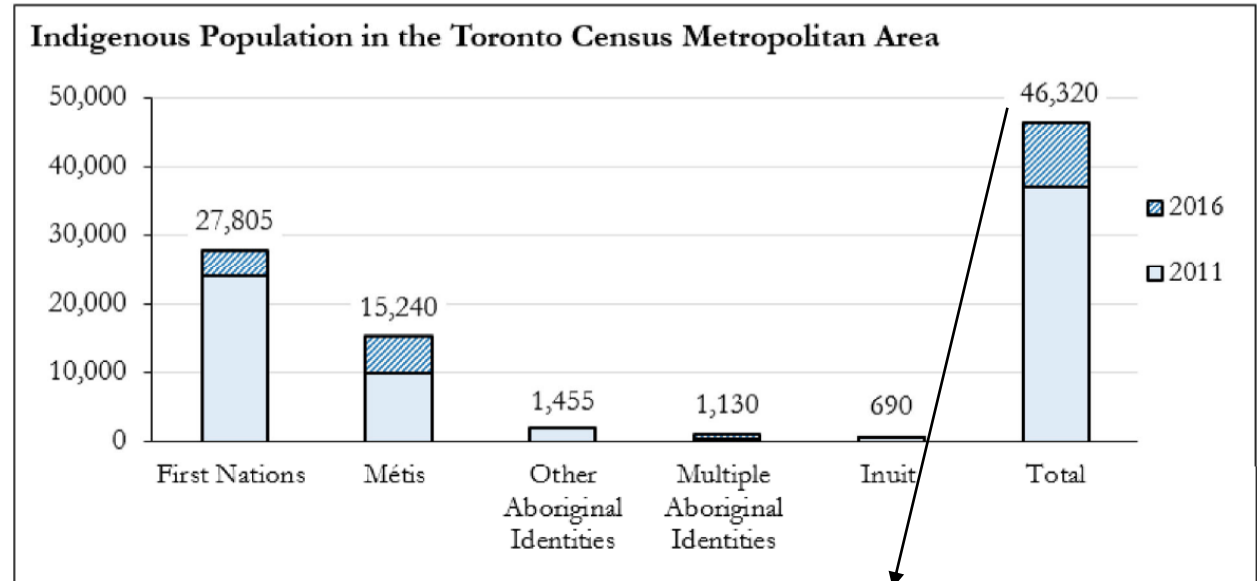
Toronto Newcomer Strategy

1. advancing labour market outcomes
2. promoting and supporting good health
3. improving access to municipal supports
4. supporting engagement and community capacity

Toronto has the largest Indigenous population in Ontario and the 4th largest in Canada

Census undercounts Toronto's Indigenous population

- Relies on fixed address and many Indigenous are move frequently or are homeless
- Reluctance amongst Indigenous peoples to fill out census

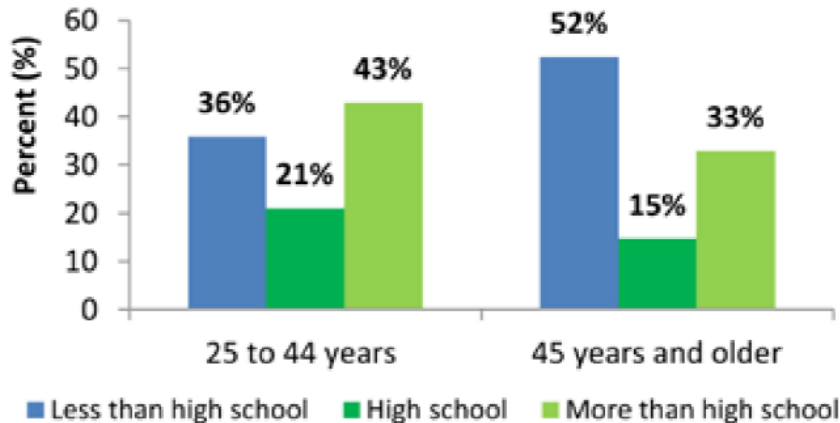


Our Health Counts Study where Indigenous organizations owned and controlled the data estimated **69,000**

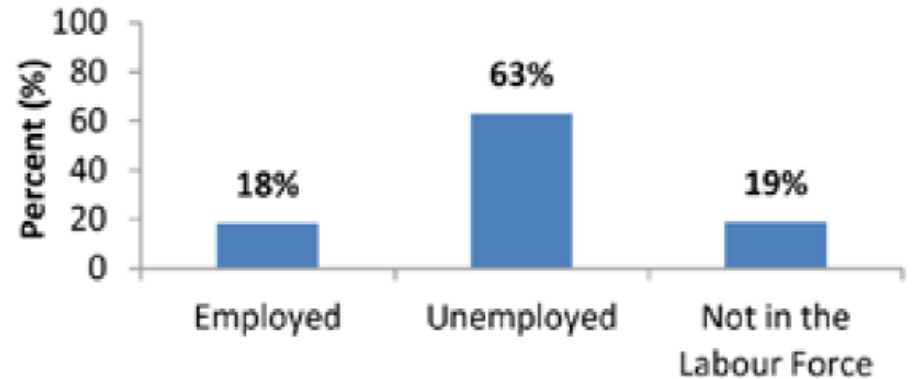
Indigenous Torontonians have lower levels of education and higher rates of unemployment

Indigenous high school completion rates are significantly lower than general population

Highest Level of Education



Indigenous unemployment rate in Toronto is **63%**, 9 times the unemployment rate for non-indigenous adults in Toronto (7%)



Social Development – Indigenous

- High levels of **poverty** and **unemployment**
- Poor **health** outcomes
- **Educational disparities**
- Disproportionately subject to **violence** (esp. women) and **incarceration**
- **Lack of trust** with police/criminal justice system
- **Discrimination**
- Inter-generational **trauma** / legacy of residential schools
- Loss of **culture, language** and **identity**
- **Truth and Reconciliation** calls to action

The Toronto Aboriginal Support Services Council identified the following priority issues:

- Absence of a **locus of control** on Indigenous issues within the City
- **Low level of trust** between the Indigenous community and the City of Toronto
- **Lack of an authentic relationship** between the City and the Indigenous community
- A perception that Indigenous priorities have a **low level of urgency**
- **Insufficient progress** made on Indigenous priorities



Social Development and equity: What is City of Toronto doing?



tool to identify and remove barriers and support best practices in planning, budgeting, development and evaluation of policies, services and programs

- **Hiring.** Developing an inclusive hiring framework
- **Training.** Indigenous cultural competency, confronting anti-Black racism, and disability awareness
- **Social procurement**
- **Data collection.** Diversity-related data to measure and evaluate the impact of diversity initiatives

Inequity, partnerships, technology, public space, and focus on results and impact were top themes

	Politics & Govt	Economy & Work	Housing	Transport	Education & Training	Health & Public Safety	Arts & Culture	Environ	Tech	Social Dev
Inequity	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Partnerships	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Technology	✓	✓		✓	✓	✓	✓	✓	✓	✓
Public Space		✓	✓			✓	✓	✓	✓	✓
Focus on results & impact	✓		✓		✓	✓	✓			✓

Environmental Scan Results

1. Environmental scan process
2. Key trends from 10 areas and cross cutting themes
3. Non-profit space and commercial markets



Non-profit Space

- Museums and Heritage sites
- Non-profits and Social Services
- Libraries

Key trends – Museums and Heritage Sites

- **Financial sustainability**
- **Cost and accessibility** / cultural inequity
- **Technology** to enhance visitor experience
- **Digitization of collections**
- **Makers** space/makers movement
- **Hybrid spaces**
- Contribution to **health and well-being**
- **Activism** and **advocacy** role
- **Crowd-sourcing** / **co-creating**
- **Repatriation**
- **Decolonization** & TRC
- **Environmental** Sustainability
- **Evaluation** and demonstrating **value**

Key trends – Non-profits and social services

- **Fiscal constraint**
- **Increasing need** due to continued government funding cuts
- Importance of **"decent work"** (e.g. compensation)
- **Workforce development and capacity** challenges
- **Emerging technologies**
- Continued growth in **social innovation and finance**
- **Social entrepreneurship/social business**
- **Shared platforms** and administrative **outsourcing**
- **Alignment of priorities** will all levels of **government**
- Movement to broaden the ability of registered charities to **engage in political activities**

Key trends - Libraries

- **Fiscal constraint.** Funding cuts + increasing cost of materials
- **Focus on inequity**
- **Emerging technologies / makers movement**
- **Community hubs** and **public spaces**
- Serving increasingly **diverse communities**
- **Intellectual freedom**
- Increasing **social justice and advocacy role**
- **Data sharing and stewardship**
- **Partnerships** and **collective impact**
- **Environmental sustainability**
- Demonstrating **impact**



Related Commercial Markets

- Publishing
- Entertainment and media
- Retail

Market Data



Definition and segmentation of market



Industry size and forecasted growth



Key trends and drivers



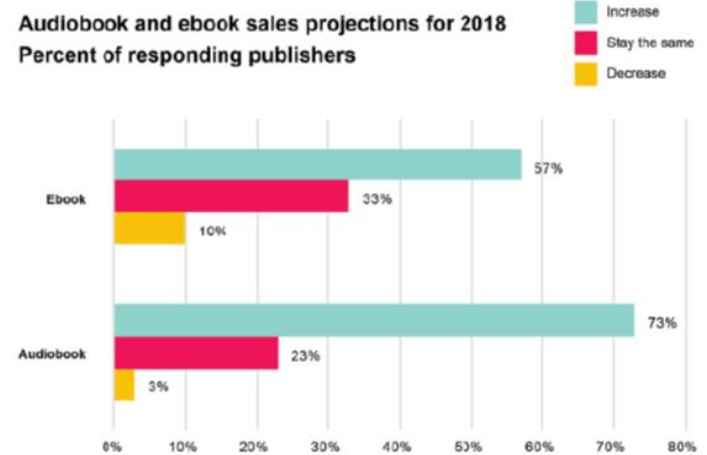
Consumer Profile. Spending, behaviours, preferences

Related Commercial Markets

- Publishing
- Entertainment and media
- Retail

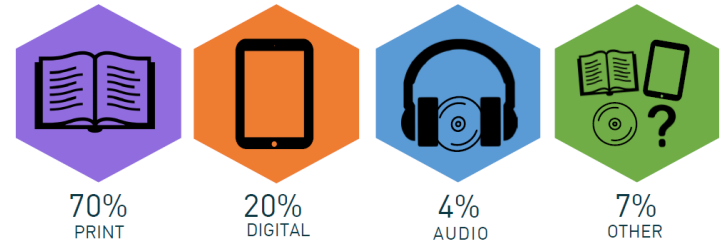
- Increasing but slow growth in sales
- Rise of ebooks and audiobooks
- Accessibility
- Increasing cost
- Gaps in format availability
- Self-publishing
- Membership / subscription models
- Technology (AR, enhanced)

Key trends –Publishing



Book Industry Projections

PROJECTION OF MOST DOMINANT FORMAT IN THE YEAR 2025



Canadian publishing consumer

- Reading was reported as a top 2 leisure activity for 21% of Canadians, in 4th behind spending time with family, watching TV, and browsing the Internet
- More than half (52%) of Canadians purchase books in person and 45% purchase online
- Paperbacks are the most purchased format (55% of sales), followed by hardcover (25%), e-book (17%), audiobook (2%) and other formats (2%)
- 80% of children aged 6-17 will always want to read print books even though e-books are available
- 9/10 Canadians aged 12+ read magazines. Food, entertainment and health/fitness were the most read categories

Related Commercial Markets

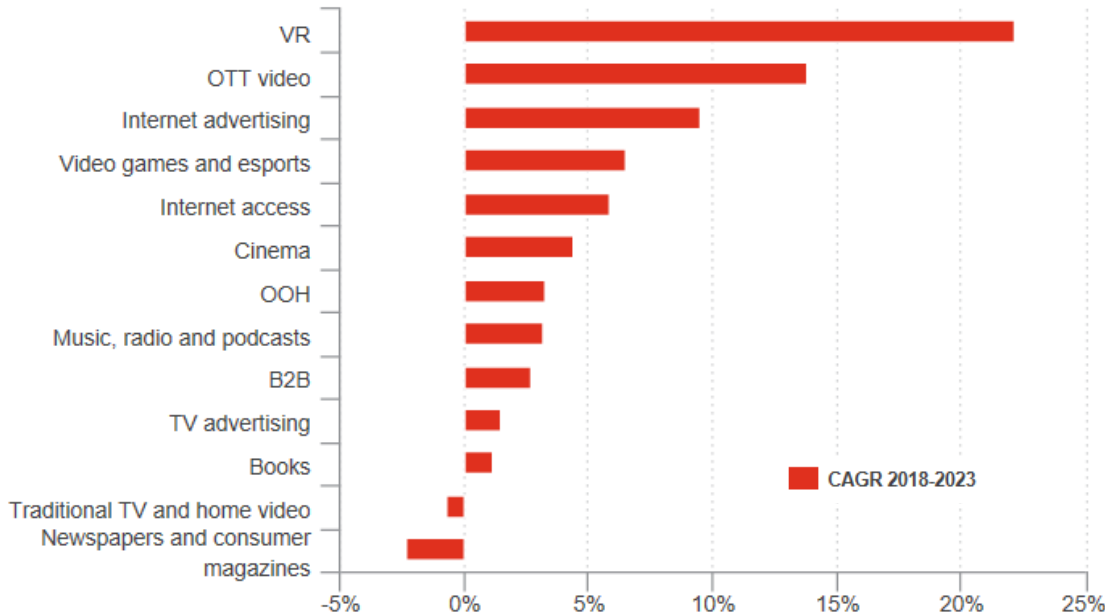
- Publishing

- Entertainment and media

- Retail

Virtual Reality (VR) and Over the top (OTT) video are forecasted to grow fastest

Global Media & Entertainment Segment Projected Growth (2018-2023)



Canada

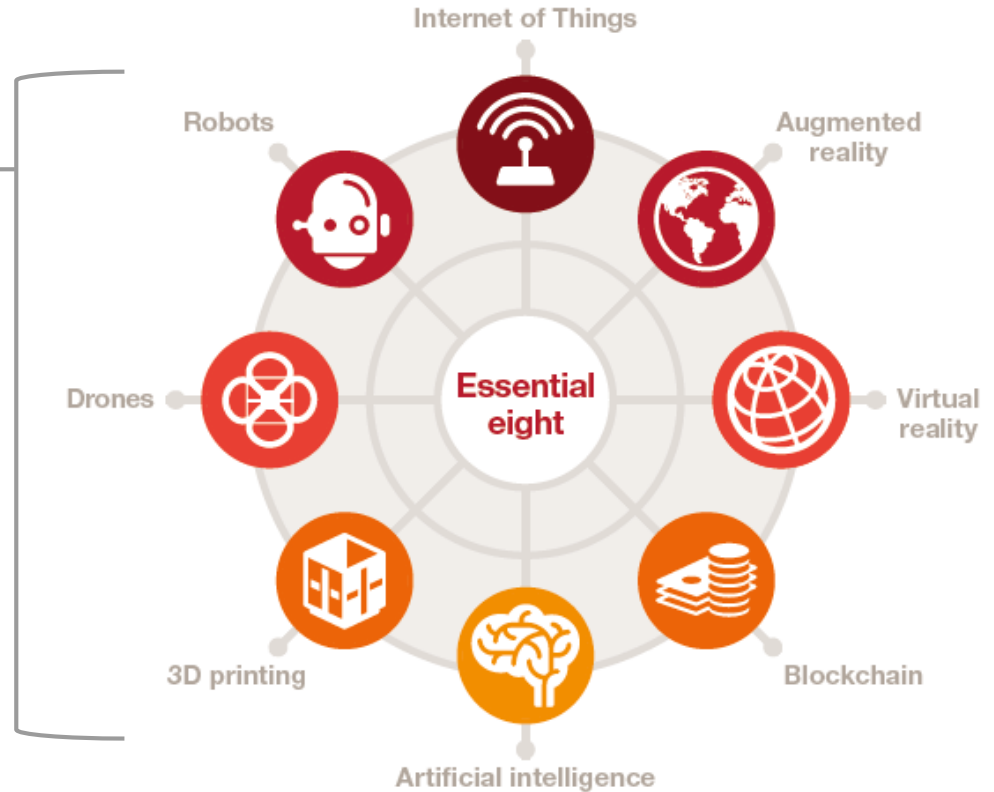
- **Video game and e-sports** market is expected to grow at a 3.5% CAGR and reach US \$2.4 billion by 2022
- Canadians are expected to spend \$723B on **AR and VR** products and services in 2017, increasing to \$7.1B by 2020

OTT video - accessed via an over-the-top (OTT)/streaming service (such as Netflix).

Sources: PwC, Ontario Creates, Entertainment Software Association of Canada, Department of Canadian Heritage

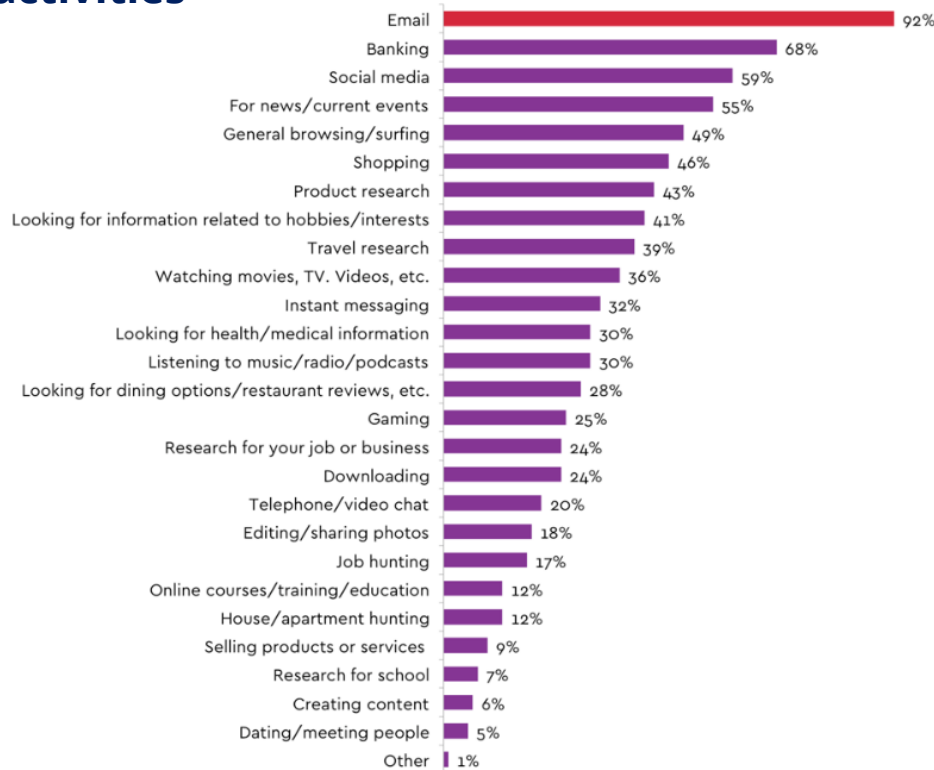
Key trends – Entertainment & Media

- Convergence
- Technological disruption
- Ubiquitous connectivity / mobile consumer
- Personalization
- Protecting consumer data and privacy
- Focus on membership

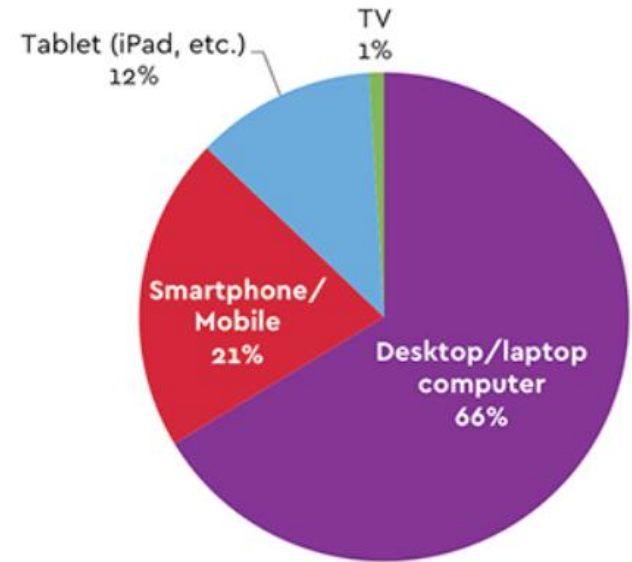


Canadian technology and media consumer

% of Canadians undertaking online activities



Device used most often to access the Internet



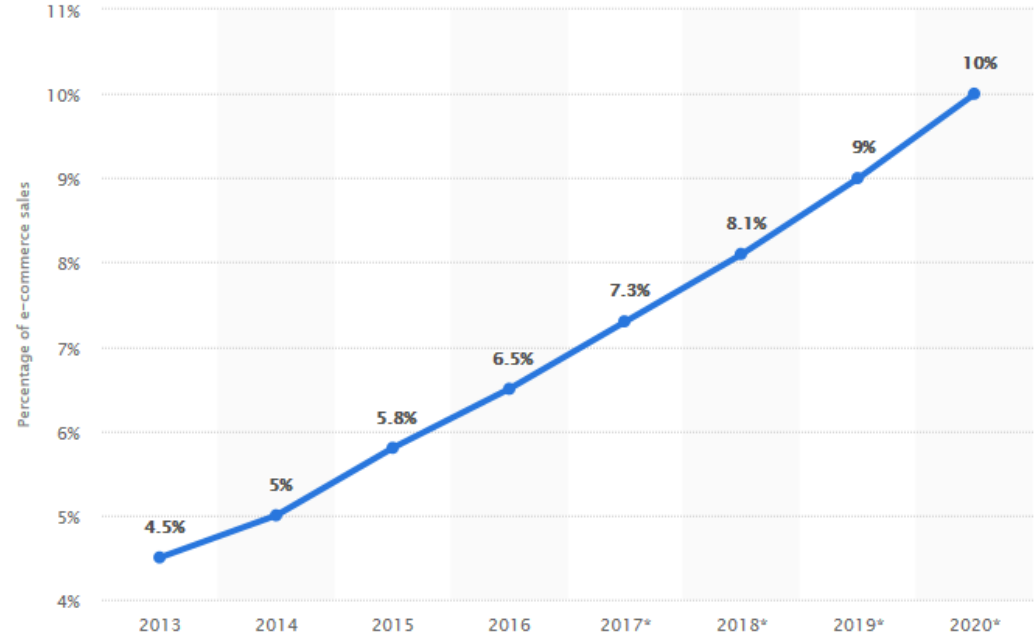
Related Commercial Markets

- Publishing
- Entertainment and media
- Retail

Online retail sales numbers in Canada are low but growing

- Majority of retail sales are still brick and mortar (close to 90%)
- E-commerce purchases made up 8% of all retail sales in 2018, as 19.8 million digital buyers across Canada complete nearly \$57 billion worth of purchases

E-commerce as % of Total Retail Sales in Canada



Key trends – Retail

1. Convergence
2. Technological disruption
3. Increasingly demanding and powerful consumers
4. Experiential retail
5. Hybridization/Omni-channel
6. Personalization
7. Protecting consumer data and privacy

Emerging trends

- Ultra-Personalization
- Automated commerce is the new e-commerce
- Unified commerce
- Fourth-party logistics (4PL)

Canadian retail consumer

- Average **156 shopping trips/year** and spend **\$8,645 annually** across fast-moving consumer goods channels*
- **Disposable income spend. 58%** on products, 42% on experiences
- Trending towards “**maximizing**” searching for the absolute best product and price, rather than “satisficing” settling for “good enough”
- **18%** of Canadians report feeling “**very uncomfortable**” making digital purchases

Canadian Retail Consumer Segmentation



The “Do It For Me” Generation

Millennials moving away from a DIY mentality.



The Mobile Maverick

Consumers using their smartphone to shop, from research to purchase.



The Digital Native

Young and tech-savvy, with high expectations for digital and e-commerce.



The Omnichannel Customer

Shoppers using multiple channels to engage with brands.



The Surgical Shopper

Customers focused on a quick, easy transaction.

* which include grocery, drug, mass merchandisers, and warehouse club stores

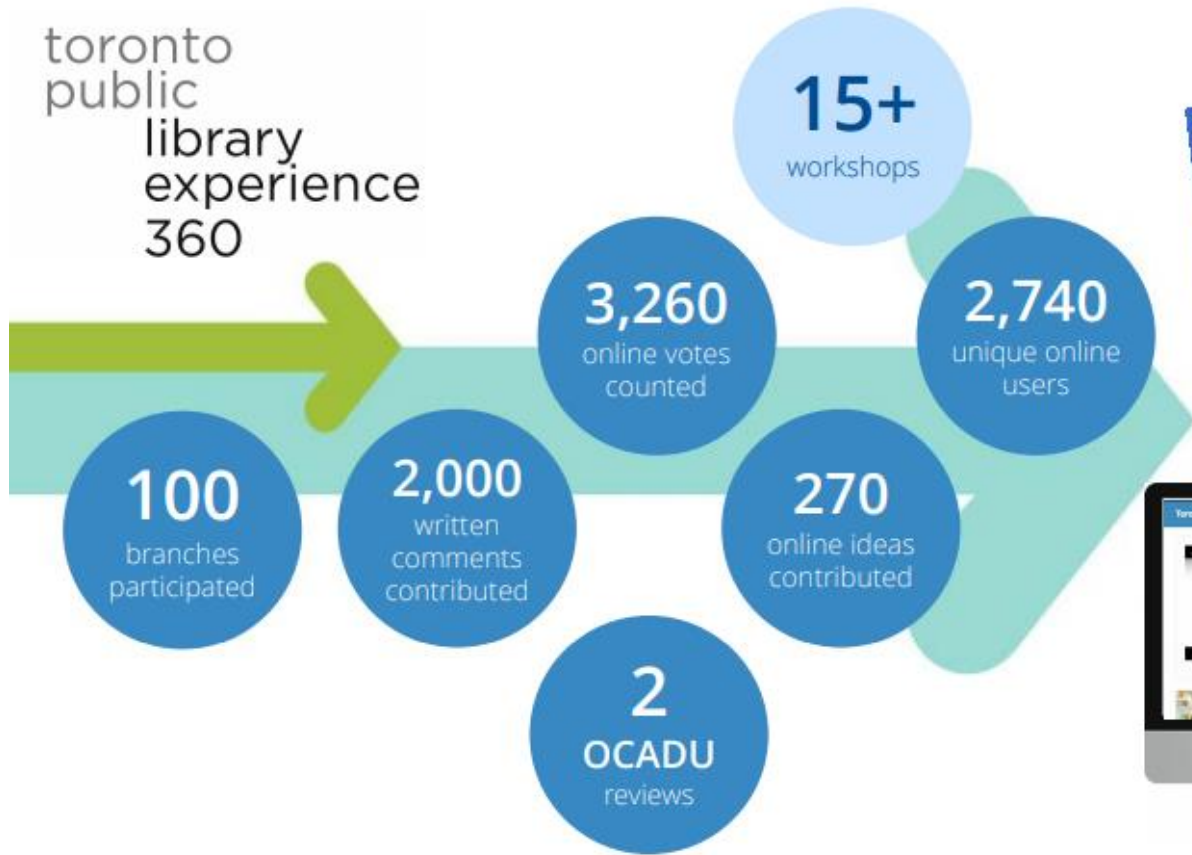
Sources: PwC, Deloitte, Nielsen, Retail Council of Canada



Building on recent consultations

TPL Experience 360 & Staff Town Halls

toronto
public
library
experience
360



TPL Experience 360 Consultation Results

- Provide a **welcoming and comfortable environment** for the community
- Deliver **excellent digital experiences**
- Focus on **fostering literacy** including digital, political, financial literacies
- Deliver **excellent customer service** and expand TPL services
- **Personalized services**
- Provide **inclusive and accessible facilities, services and programs**

Staff Town Halls

Over **400 staff members** across the city participated from February to April 2019.

Staff included:

- Customer-interfacing staff
- Support staff
- Library management



tpl: roundtable question #1

There is an increasing disparity among Torontonians (e.g. economic, social, etc.).

Based on your experience living and working in the city:

- Where can TPL add the most value in bridging divides and supporting residents?
- What are some ways we can better “activate” great things for our residents, in line with our mission and purpose of Read, Learn, Create, Connect?

discuss

Top Three Disparities

- 1. Vulnerable Customers + Social Work:** Staff believe TPL can be more effective in addressing the needs of vulnerable customers
- 2. Seniors + Technology:** Staff suggest TPL have a strategic focus for seniors and have identified a connection between vulnerable seniors and technology
- 3. Newcomers + Support:** Staff believe that we can better understand the challenges that newcomers face and provide support

Vulnerable Customer + Social Work

- **Strengthen external partnerships:** Partner with agencies that serve vulnerable populations
- **Foster connection with local communities:** Embed social workers in branches to better serve local communities
- **Offer more staff training** around resiliency, mental health, and homelessness
- **Raise profile of library's role in social services**

Seniors + Technology

- **Increase digital literacy for seniors:** Staff say seniors are at particular risk of being left behind in the digital divide
- **Strengthen external partnerships:** Partner with seniors homes and local community centers
- **Increase in social isolation:** Staff say seniors who are not mobile have difficulty accessing TPL programs and services

Newcomers + Support

- **Reduce financial barriers to access:** Staff say customers avoid using the library because of financial barriers from fines
- **Strengthen existing relationships:** Both social workers and library settlement workers can support staff and enhance staff perspective
- **Offer structured workshops and clinics:** Include workshops for employment and career counselling, ESL programs and conversation classes



Phase 1 Consultation Results

Public and Stakeholders

Consultation Plan

Phase 1: April / May

- Input will build on feedback from recent public and stakeholder consultations and inform draft focus areas

Phase 2: Summer / Fall 2019

- Validate and seek input from the public and stakeholders on draft focus areas
- Identify how library can play an impactful role across all focus areas

Phase 1 Consultation

Phase 1: April / May

To date, **over 2,900 people** have participated in the process including residents, stakeholders and community partners

- **Public survey of Toronto residents**
 - Consultation toolkits for use at library and community events
 - Branch-led focus groups in neighbourhoods across the city
 - Promotion on tpl.ca, in branches, wifi landing page and computer workstations
- **Survey of community partners**

Q1: What we heard

Question 1

Think about the next 5 years. What issues or challenges will you and/or your community be facing?

- **Fear of potential budget and funding cuts** to services in the city
- **Affordability and cost of living** as life in the city is becoming more expensive
- **Concern about the environment** (e.g. climate change) and the impact that it will have on the future
- **An aging population** and the challenges associated with the changing demographics



“

Cuts across the board (libraries, legal aid clinics, public health, environmental protection etc.) will be enormous challenges.

*Affordability. Housing, childcare, food, services. **This city is becoming an unaffordable city.** With higher prices, the library is the last free places in the city to enjoy.*

Clean air and water are important for me as a resident downtown and I am worried about the city's infrastructure to support clean and healthy urban environment.

Aging and all the issues that come with that: health issues, dealing with the loss of a spouse, mobility, and issues of assisted living.

”

Q1: What we heard cont'd

Question 1

Think about the next 5 years. What issues or challenges will you and/or your community be facing?

- **Increasing population density** and overcrowding in the city
- **City's infrastructure** in particular the state of traffic and congestion, overcrowding, lack of public transit and lack of available, affordable housing options
- Access to **public spaces** in particular community and library spaces



“

***High density in our neighbourhood** – lots of huge buildings being built and overuse of public services (TTC, libraries, etc.)*

***Huge population growth** due to condo building everywhere, leading to loss of community cohesiveness. Not to mention, overcrowding in much of our public spaces.*

*Living in Toronto is already unaffordable. Climate change and environmental degradation will also be significant. I live in Scarborough – where **efficient transit infrastructure and active mobility are an ongoing challenge**.*

*I think an important thing for our community will be the **availability of public spaces**. Specifically, spaces where you can feel welcome without having to pay for anything. These kinds of spaces are becoming fewer.*

”

Q2: What we heard

Question 2:

What could the library do to help you and/or your community?

- Offer **different types of program and services**, including programs for different types of literacies (e.g. digital, media and print literacy)
- Offer **population specific programing:**
 - **Children** (e.g. reading, arts & culture and education)
 - **Youth** (e.g. education like homework, arts & culture, career development and job skills, digital literacy)
 - **Seniors** (e.g. digital literacy, arts & culture, health & wellness)



“

Programming for kids 8 to 13 (there are lots of young kids and for teens, but not much for in-between).

Host more programs that spread awareness about today's issues, bring the community closer, and **increase the number of programs that educate people about using technology properly and safely.**

Provide **retraining services, skills education – especially in tech.** Places for kids to go after school – programming that gives them a fun way to learn.

More programs especially senior programs to share their experience on how to keep fit, travel experience and hobbies.

Create free programs that will **help kids and teens gain skills.**

”

Q2: What we heard cont'd

Question 2:

What could the library do to help you and/or your community?

- Provide **increased access to public space**
 - A space that **brings the community together**
 - A gathering place that **welcomes all diverse members of the community**
 - A space to **engage socially with others**
 - A **safe space for everyone**
 - A space to **access technology**

“

*A **space for reflection, inspiration, learning, safety.** A neutral (or positive) space to expand thinking on current events., the past, the future. **Supports on growing business ideas, experimenting with technology.** A place for kids to learn and have access to things they need to thrive.*

*Provide a **safe, enriching, and welcoming space that is unique in our city** as the one sheltered institutions that does not expect payment from patrons.*

*I feel that the library is a very **important space for families, especially during the colder months** when taking children outside is difficult.*

*Space – access to space for community use – interactive spaces for the diverse groups – learning exchanges – the **library is well positioned to be a leader in creating space for discussions and learning on tough issues.***

”

Survey of Community Partners

To date, **over 30 community partners** participated in the process.

The survey identified:

- Community partners' goals or priorities in the next five years
- How the Library can work with community partners to achieve positive impact in the community

Q1: What we heard

Question 1:

What are your organization's goals or priorities in the next five years?

Overarching themes:

- **Increase awareness** of programs and services offered
- **Expand reach and access** to community services
- **Strengthen partnerships and service planning**
- Provide **support and services to vulnerable populations**

Q2: What we heard

Question 2:

How can TPL work with your organization to achieve positive impact in the community?

Overarching themes:

- **Strengthen partnerships** (e.g. program and service integration with shared outcomes and impact)
- Provide access to **programming and community space**
- **Two way promotion** of TPL and community partners' programs and services



Questions

- Are you surprised with any of the findings?



Focus Areas for Phase 2 Consultations

Strategic Plan 2020 – 2024

What we heard

Environmental Scan	Staff	Public and Partners
Partnerships	Elimination of Fines	Affordability & Cost of Living
Increasing Inequity	Newcomers & Seniors	Aging Population
Affordability & Cost of Living	Effective Programming & Library Space	Library Space and Infrastructure
Changing Demographics	Changing Demographics	Population Density
Rapid Growth of Technology	Partnerships	Funding Cuts
Library Space	Technology	Responsive Programming

Draft Focus Areas for Phase 2 Consultation

1. Affordability & cost of living
2. Vulnerable populations (e.g. newcomers, seniors, low income families and youth) & growing inequity
3. Library as public space
4. Changing demographics (e.g. population growth)
5. Rapid growth and disruptive technology
6. Responsive programming
7. Partnerships



Moving Forward: Phase 2 Consultation

Phase 2: Summer / Fall 2019

- Validate and seek input from the public and stakeholders on draft focus areas
- Identify how library can play an impactful role across all focus areas



Workshop

Draft Focus Areas & Phase 2 Consultation

Workshop Format

Instructions

- You will be broken into two groups and assigned 3 to 4 of the 7 focus areas
- Assign a scribe
- Assign a reporter
- 20 mins to discuss
- 5 mins to report on proposed workshop questions



Workshop Questions

1. What unique value can the library add in these focus areas?
2. What information should the library gather in phase 2 consultations to ensure we are being responsive to changing community needs?

Next Steps: Phase 2 Consultations

1. Library Board receive the seven focus areas and proposed Phase 2 consultation plan *June 17
(Board Meeting)*
2. Staff develop consultation report on findings that will propose draft priorities for our new Strategic Plan *August*
3. Staff present consultation report and draft priorities for new Strategic Plan resulting from environmental scan and consultation *September 3
(Steering Committee Meeting)*

Questions answered through the Strategic Planning Process

1. How will the strategic plan have a robust and inclusive consultation strategy to empower the participation of residents and communities? *April*
2. What should the research process focus on? *April*
3. What is the current socio-economic state facing Torontonians? *May*
4. Where can the library add value? *May*
5. What are our strategic priorities that will bring this value to Torontonians? *September*
6. How will we demonstrate our value and impact? *November*
7. What actions should we prioritize from 2020 and beyond? *November*

Questions?

Contact Information:

Elizabeth Glass, Director, Policy, Planning and Performance Management
eglass@torontopubliclibrary.ca

Shawn Mitchell, Manager, Planning & Development
smitchell@torontopubliclibrary.ca

Andrea Spender, Senior Advisor, Policy & Strategy
aspender@torontopubliclibrary.ca

