



City of Tacoma
Planning and Development Services

**Agenda Item
D-2**

To: Planning Commission
From: Stephen Atkinson, Planning Services Division
Subject: **2015 Comprehensive Plan Update**
Meeting Date: April 15, 2015
Memo Date: April 9, 2015

At the next meeting on April 15, 2015, the Planning Commission will continue its discussion of the 2015 Comprehensive Plan update with a focus on the following items:

1. Considering the discussion of the Mixed-Use Centers in agenda item D-1, discuss the implications for and tie-in to the Draft Urban Form Element and land use designation update;
2. Review the draft outline and policy framework for the Economic Element.

To facilitate the Commission's discussion, the following materials are attached:

1. Draft table of the Urban Form Building Blocks.
2. Draft outline of the proposed Urban Form Element of the Comprehensive Plan, combining elements of the City's existing Growth Strategy, Generalized Land Use Element, Neighborhood Element, and Open Space, Habitat and Recreation Element.
3. Memorandum from Mark Goodman of Community Attributes, pertaining to the Growth Management Act requirements for drafting an economic development element and guidance on the policy framework.

If you have any questions, please contact me at (253) 591-5531 or satkinson@cityoftacoma.org.

Attachments (3)

c: Peter Huffman, Director

Attachment 1: Urban Form Building Blocks



CENTERS

Compact, mixed use urban areas targeted for growth will provide access to jobs, commercial services, transit connections and housing options.



CORRIDORS

Major city streets with growth potential that provide critical connections to centers, and links to transit, commercial services, jobs and housing options.



EMPLOYMENT AREAS

Diverse and growing areas of employment that host a variety of business sectors in different parts of the city.



TRANSIT STATION AREAS

Station areas along high frequency transit lines that connect people to important residential and employment destinations.



OPEN SPACE SYSTEM

A system of enhanced open space corridors that connect fish, wildlife and people to key natural features throughout the city.



SIGNATURE TRAILS

A citywide network of shared-use trails that connect people to nature, parks and major destinations or centers.



HISTORIC NEIGHBORHOOD PATTERN AREAS

Broad areas of the City with distinctive character and land use patterns that include centers and smaller concentrations of commercial activities and amenities that support the daily needs of the residents.

Attachment 2: Draft Urban Form Chapter Outline

Chapter 2: Urban Form

What is this chapter about?

The goals and policies in this chapter convey the City's intent to:

- Foster an equitable system of compact mixed-use and commercial centers across the city to increase access to community services and businesses and create more low-carbon complete healthy connected neighborhoods.
- Improve Tacoma's major corridors so that they become vibrant urban places and key transportation connections.
- Enhance Tacoma's public realm, integrate nature into the city and link people, places and wildlife through active transportation facilities, green infrastructure investments and habitat connections.
- Describe the city's overall development pattern and area character to inform and guide future investments and development.

Why is this important?

Tacoma's identity now and in the future is significantly shaped by the design and physical structure of the city and its neighborhoods. How people live and get around is partly determined by the location of services and other destinations and the arrangement and design of buildings, streets and other public spaces. Together these design characteristics help determine whether: (1) a community is walkable, (2) children have safe places to play, (3) people have places to gather and (4) businesses are easy to access.

Where housing and services are built, where street networks are connected and how all of this is designed provides a key opportunity to: (1) enable people to meet more of their daily needs locally, (2) strengthen neighborhoods, (3) improve equitable access to services and (4) support healthy, active living.

This chapter includes policies that support enhancing centers across the city as anchors to complete neighborhoods, providing Tacomans with convenient access to local services. Clustering destinations in centers makes access by transit, walking, wheelchair, and bicycle more practical and reduces the amount of driving needed to access services. Focusing growth and investments in centers and along connective corridors can also make good use of existing infrastructure capacity and encourage efficiency in new infrastructure investments.

Attachment 2: Draft Urban Form Chapter Outline

Citywide Design and Development

- **Urban Design Framework**
- **Growth and stability**
- **Compactness**
- **Equitable development**
- **All ages and abilities**
- **Energy and resource efficiency**
- **Integrate nature**
- **Leadership and innovation**

Centers

Centers are compact, walkable and pedestrian-oriented urban places. They are connected to transit and active transportation networks. They anchor complete neighborhoods with retail stores and businesses (grocery stores, restaurants, markets, shops, etc.) civic amenities (libraries, schools, community centers, places of worship, etc.), housing options, health clinics, daycare centers, employment centers, plazas and parks or other public gathering places.

Centers will be the primary areas for growth and change in Tacoma over the next 20 years. Focusing new growth in centers helps achieve goals of having more Tacomans live in complete neighborhoods, use public transit and active transportation – walking, biking and rolling – to commute to work and complete errands, and it will help mitigate and prepare for the effects of climate change. Clustering destinations and housing within compact, walkable centers makes access by transit, walking, wheelchair, and bicycle more practical and reduces the amount of driving needed to access services, reducing the impact on roadways, reducing congestion, and facilitating freight movement.

Centers range in scale from the Downtown Regional Growth Center to small convenience nodes, providing local access to services and allowing Tacomans across the City to live a healthy, active lifestyle. Neighborhood business districts and the commercial services they provide are the foundation of many centers, but centers, particularly larger centers, will also become a focus for public services, gathering places, and housing growth. In and around all centers, there will be change as areas urbanize and new services, shops and housing are developed.

General Policies

- **Role of centers**
- **Variety of centers**
- **Housing in centers**
- **Investments in centers**
- **Government services**
- **Arts and culture**

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- **Accessibility**
- **Center connections**
- **Green infrastructure in centers**

Downtown Tacoma Regional Growth Center

- **Intro**
- **Downtown Tacoma employment**
- **Downtown Tacoma housing**
- **Transportation hub**
- **Public Places**
- **Downtown Subareas**

See also Sub-area plans for South Downtown, North Downtown and Hilltop.

Tacoma Mall Regional Growth Center

- **Intro**
- **Role of center**
- **Housing**
- **Transportation**
- **Employment**
- **Public places**
- **Tacoma Mall Subareas**

Crossroads Mixed-Use Center

- **Intro**
- **Role of center**
- **Housing**
- **Transportation**
- **Employment**
- **Public Places**
- **Centers Designated:**
 - Westgate
 - 34th and Pacific
 - 72nd and Pacific
 - 72nd and Portland
 - James Center

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- Tacoma Central
- Lower Portland

Neighborhood Mixed-Use Center

- **Intro**
- **Role of center**
- **Housing**
- **Transportation**
- **Employment**
- **Public Places**
- **Centers Designated:**
 - Proctor
 - 6th Ave
 - Lincoln
 - McKinley
 - Narrows
 - South Tacoma Way

Convenience Nodes

- **Role of convenience nodes**
- **Housing**
- **Transportation**
- **Employment**
- **Public Places**

Corridors

- **Intro**
- **Integrated land use and mobility**
- **Design to be great places**
- **Green infrastructure**
- **Freight and service delivery**

Employment Areas

- **Intro:**

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- **Downtown Tacoma**
- **Manufacturing and Industrial Areas**
- **Commercial Areas**
- **Campus Institutions**

See also Economic Development Element.

Transit Station Areas

- **Intro**
- **Transit-oriented development.**
- **Community connections.**
- **Transit station area safety.**
- **Center stations.**
- **Employment.**
- **Destinations.**

Open Space System

- **Intro**
- **Integrated system**
- **Connect open space areas**
- **Open space connection tools**
- **Stewardship**
- **Multiple benefits**

See also Environment and Watershed Health Element, Public Facilities and Services

Signature Trails

- **Intro**
- **Prairie Line**
- **Dome to Defiance**
- **Water Flume Line**
- **Scott Pierson Trail**
- **Trail to the Mountain**
- **Pipeline Trail**
- **Levee Road Trail**

Attachment 2: Draft Urban Form Chapter Outline

- **NE Tacoma Trail (?)**

Historic Neighborhood Pattern Areas

- Intro
- General Policies
- Pattern Area A:
 - **Intro**
 - **Street, block and lot pattern**
 - **Trees and natural features**
 - **Active transportation**
 - **Residential infill**
 - **Public places**
 - **Special opportunities**

See also Historic Preservation Program, Neighborhood Council Action Strategies, and Design and Development.

Attachment 3: Draft Economic Framework



Community Attributes Inc.
1411 Fourth Ave. Suite 1401
Seattle, WA 98101

MEMORANDUM

Date: April 9, 2015

To: Stephen Atkinson, Planning and Development Services
Tacoma Planning Commission

From: Mark Goodman, Community Attributes

Re: Tacoma Economic Element Draft Framework Guidance

TOPIC OF DISCUSSION

Economic Element of the Comprehensive Plan

What are we trying to achieve with the Economic Element?

The comprehensive planning process provides cities an opportunity to create an overarching framework to coordinate their myriad of economic development efforts with land use planning and the Growth Management Act. Establishing long-term goals and policies through the Comprehensive Plan helps ensure that any plans related to economic development contain strategies or actions that are consistent with citywide policies related to land use, infrastructure and housing, to name a few. Additionally, the Economic Element can be used to track progress towards achieving City goals and also serve as a bridge between other plan elements.

GMA requirements for an Economic Element

An Economic Element establishes **local goals, policies, objectives, and provisions for economic growth and vitality and a high quality of life**. The element shall:

- a) A summary of the local economy
- b) A summary of the strengths and weaknesses of the local economy
- c) Identification of policies, programs, and projects to foster economic growth and development

Developing a framework for the Economic Element

The following memo provides details on the City's existing economic development plans and efforts as well as a proposed Economic Element framework to use for the 2015 Comprehensive Plan update. The framework is meant to provide a template for organizing goals and policies that will be developed through the comprehensive plan update effort. *Gathering feedback from the Planning Commission is an important initial step in developing goals and policies for the Economic Element.*

Developing a framework for the Economic Element

The memo is organized into the following sections:

- > Alignment with Existing Plans
- > Guiding Principles from Existing Plans
- > Proposed Economic Element Framework and Organizing Principles
- > Appendix – Details of existing plans

Attachment 3: Draft Economic Framework

ALIGNMENT WITH EXISTING PLANS

How has Tacoma approached economic development?

The City of Tacoma has initiated a variety of efforts related to economic development and adopted a number of these. The table below provides a general overview of the City's efforts to support or study economic development to date. Some are citywide plans, while others are neighborhood-specific. The goals and policies established for the Economic Element will need to provide high-level support of all of these efforts, regardless of scale, so that they are well coordinated and supported by the City's land use policy.

Recognition of on-going efforts

- > University of Washington campus (medical/biotech training efforts)
- > Arts in America Study
- > Vision 2025
- > Tacoma Means Business Campaign
- > Space Works
- > Go Local Tacoma
- > Many others...

It will be important to recognize on-going efforts underway throughout the City related to economic development.

Figure 1. Existing Economic Development Plans and Efforts, City of Tacoma

Economic Element Related Efforts	Description
Strategic Documents/Plans	
Tacoma 2025 (2015)	<i>City Council led vision</i>
Economic Development Plan (2001)	<i>Existing Comp Plan Element</i>
Economic Development Strategic Framework and Action Plan (not adopted)	<i>On-going effort</i>
Technical Reports	
Pierce County Buildable Lands Report (2014)	<i>Technical land capacity analysis</i>
City of Tacoma Market Demand Analysis (CBRE 2014)	<i>Real estate market analysis</i>
Mixed Use Center Profiles (2015)	<i>Data driven neighborhood profiles</i>
Market Data compilation for major corridors	<i>Data driven neighborhood profiles</i>
Educational Attainment Data	<i>Demographic analysis</i>
Existing Subarea Plans	
South Downtown Subarea Plan (2013)	<i>Comp Plan adopted subarea plan</i>
North Downtown Subarea Plan (2014)	<i>Comp Plan adopted subarea plan</i>
Hilltop Subarea Plan/ULI Presentation (2014)	<i>Comp Plan adopted subarea plan</i>
Thea Foss Waterway Design and Development Plan (2005)	<i>Comp Plan adopted subarea plan</i>
Business Attraction	
Tacoma Means Business	<i>Business marketing effort</i>

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GUIDING PRINCIPLES FROM EXISTING PLANS

The following is a summary of policies from the City's existing economic development plans, which are used as a starting point for generating the framework for the Economic Element.

Economic Development Plan (2001)

This plan currently serves as the City's Economic Element and is organized around five major policy areas, each with a number of associated actions. It fulfills the requirements of GMA, though progress towards the plans goals have not been actively tracked.

Key Elements

- > Economic conditions
- > Economic Vision
- > Policies and action items
 1. Land Use and Development
 2. Infrastructure and Services
 3. Workforce and Education
 4. Business Development
 5. Coordination
- > Appendix of existing policies related to or affecting Economic Development

Tacoma 2025 (2015)

Tacoma City Council recently led the creation of this vision plan, which is organized around seven major topic areas:

1. Health and Safety
2. Human and Social Needs
3. Economic Vibrancy and Employment
4. Education and Learning
5. Arts and Cultural Vitality
6. Natural and Built Environment
7. Government Performance

Three of these topics include goals and measures related to economic development. Economic Vibrancy and Employment has the most direct connection to economic development. Education and Learning has a goal and measure regarding positioning Tacoma's workforce for success. Arts and Cultural Vitality addresses a key industry that the City seeks to grow, which has implications for economic development, in terms of tourism and types of businesses the City hopes to attract. This ten year vision, created from extensive community feedback, will be important to incorporate into the Economic Element.

Economic Development Strategic Framework and Action Plan (ongoing)

The City's Community and Economic Development Department has created a strategic framework plan that is composed of elements to be achieved within five years along with action steps that are to be implemented within two years. This plan has greater specificity and emphasizes implementation on a shorter timeframe than the other plans. Though the Economic Element is a longer range plan, some of this plan's ideas, such as targeted infrastructure investments, entrepreneurship, adaptive building reuse and catalyst projects, could be supported through policy language.

Elements

1. Central City, Dome & Brewery Districts Revitalization
2. Small Business Development & Entrepreneurship Services
3. Waterfront Development

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4. Port of Tacoma & Industrial Districts
5. Business District & Neighborhood Revitalization
6. Workforce Development
7. Arts, Culture, Tourism & Hospitality Initiatives
8. Professional and Business Friendly Government

Action Plan

1. Business Attraction, Expansion & Retention
2. Small Business Development & Entrepreneurship Services
3. International Development & Relationships
4. Downtown Development & Revitalization
5. Neighborhood Revitalization

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PROPOSED ECONOMIC ELEMENT FRAMEWORK AND ORGANIZING PRINCIPLES

Integration of the Economic Element

The following diagram illustrates how the Economic Element will serve the City and integrate with other established economic development efforts in the City.

Figure 2. Integration of the Economic Element



Organizing Principles

Establishing organizing principles for the update Economic Element is a key first step. The following are key considerations when establishing organizing principles for this document:

- > Vision and Goals to be based on Tacoma 2025
- > Guiding questions
 - What do we have?
 - What do we know?
 - Who can be here?
- > Focus areas to be organized by the following structure:
 - Diversifying and Expanding Employment
 - People based policies
 - Business Retention, Expansion and Attraction
 - Employer based policies
 - Employment Centers
 - Place based policies
 - Key Industries
 - Employer, place and people based policies

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Focus Areas and Organization

The following core topics and subtopics are representative examples and will be refined through vetting with City staff and the Planning Commission. Below are definitions to help better understand the proposed framework organization.

Focus Area – Core topic to establish goals and policies around

Making the case – A description of the focus area and associated challenges and opportunities

Goal Statement – A specific goal for the Focus Area that is aligned with Tacoma 2025

Policies – A specific statement to implement the established goal

Proposed Framework

Focus Area I. Diversifying and Expanding Employment

Making the case for the Comp Plan

Goal Statement

Policies

- a. Educational attainment
- b. Housing and household prosperity
- c. Workforce development and training
- d. Quality of life

Focus Area II. Business Retention, Expansion and Attraction

Making the case for the Comp Plan

Goal Statement

- a. Large firms
- b. Small firms and entrepreneurs
- c. Local Firms
- d. The Port and International Development

Focus Area III. Employment Centers

Making the case for the Comp Plan

Goal Statement

- a. Policies for key neighborhoods
 - i. Downtown Tacoma
 - ii. Neighborhood Business Districts
 - iii. Regional growth centers
 - iv. Manufacturing Industrial Centers (MIC)
- b. Linking to land use
- c. Urban character (character is an essential component of the City)
- d. Prioritization of Infrastructure and facilities

Focus Area IV. Key Industries

Making the case for the Comp Plan

Goal Statement

- a. Bio-medical and Medical
 - i. Existing hospital campus/center
- b. Information Technology
 - i. Cyber Security
- c. Professional Services
 - i. Financial Services including Insurance
- d. Industrial
 - ii. Transportation, Logistics and International Trade
 - iii. Aerospace and Defense
 - iv. Craft industries and Arts (breweries, distilleries, furniture making)
 - v. Port properties and opportunities
- e. Tourism, Arts and Hospitality
- f. Major Civic and Institutional
 - i. University of Washington Tacoma

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APPENDIX – DETAILS OF EXISTING PLANS

The following is a more detailed summary of applicable plans and efforts developed by the City of Tacoma related to economic development.

Economic Development Plan (2001)

1. Land Use and Development
 - a. Action L-1: Ensure an adequate supply of developable land
 - b. Action L-2: Make efficient use of land through denser development patterns
 - c. Action L-3: Revitalize Downtown Tacoma
 - d. Action L-4: Integrate neighborhood planning with economic development planning
 - e. Action L-5: Implement a housing plan for each neighborhood business district and mixed-use center
 - f. Action L-6: Maintain the efficiency and quality of the building permitting process
2. Infrastructure and Services
 - a. Action I-1: Implement capital improvement plans that reflect economic development planning
 - b. Action I-2: Provide the best possible broadband access to businesses and residents at affordable prices
3. Workforce and Education
 - a. Action W-1: Work with educational institutions to provide training programs and curricula that best fit the needs of the workforce requirements
 - b. Action W-2: Support a business volunteer program
4. Business Development
 - a. Action B-1: Provide up-to-date information and continuous support to local businesses
 - b. Action B-2: Foster entrepreneurial development and business-to-business expansions
 - c. Action B-3: Attract high-quality amenity businesses
 - d. Action B-4: Promote business climate
 - e. Action B-5: Evaluate economic development programs for cost effectiveness
5. Coordination
 - a. Action C-1: Coordinate economic development with growth management planning
 - b. Action C-2: Take a leadership role in regional planning and economic development
 - c. Action C-3: Foster economic growth among Tacoma's cultural and ethnic communities
 - d. Action C-4: Focus resources on development of advanced technology industry
 - e. Action C-5: Take a leadership role in adopting advanced information technologies to improve services to residents
 - f. Action C-6: Leverage with private investments to expand broadband access to city businesses and residents
 - g. Action C-7: Establish broadband linkages to businesses in major Asian countries and other locations served by the Port of Tacoma

Economic Development Strategic Framework and Action Plan (2013)

Elements (5-year implementation timeframe)

1. Central City, Dome & Brewery Districts Revitalization
 - a. Prioritize infrastructure improvements associated with catalytic economic development and redevelopment projects
 - b. Proactively market the development and reuse of high impact/high value City-owned and privately-owned properties
2. Small Business Development & Entrepreneurship Services
 - a. Support entrepreneurship, incubators and small businesses with technical support

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- b. Partner with higher learning institutions such as UWT, Bates Technical College, UPS, PLU, TCC and others to provide technical training for start-up small businesses including retired military personnel seeking to launch businesses
3. Waterfront Development
 - a. Target infrastructure and capital investments
 - b. Partner with developers and property owners to revitalize and support commercial and recreational activities
4. Port of Tacoma & Industrial Districts
 - a. Strengthen relationship and communications with the Port and focus to recruit companies to vacant and undeveloped sites and create more jobs
 - b. Seek to expand the Innovation Partnership Zone (IPZ)
 - c. Focus on business retention and expansion of existing industrial firms in the South Tacoma area
5. Business District & Neighborhood Revitalization
 - a. Strengthen business district retail to its full potential, maximizing revenue impact and neighborhood livability
 - b. Create more walkable, vibrant, mixed-use environments to spur interaction and attract talent
 - c. Encourage and support adaptive reuse of existing buildings and infill development
6. Workforce Development
 - a. Strengthen the quality and competitiveness of Tacoma's workforce
 - b. Establish business development and training opportunities in partnership with Joint Base Lewis-McChord, higher learning institutions and neighborhood organizations focused on ethnic and economically challenged communities
7. Arts, Culture, Tourism & Hospitality Initiatives
 - a. Position Tacoma as a destination city
 - b. Partner with the Tacoma Regional Convention & Visitor Bureau, Tacoma-Pierce County Chamber of Commerce and other organizations to promote the arts, culture, venues and other events and attractions
8. Professional and Business Friendly Government
 - a. Foster a supportive business friendly environment
 - b. Expedited development review process and stream-lined regulatory review

Action Plan (2-year implementation timeframe)

1. Business Attraction, Expansion & Retention
 - a. Focus on attracting industry which positively impacts the City's tax base, creates jobs and positively impacts the budget
 - b. Focus on retaining and expanding industry which generates significant revenues and offer good paying jobs and essential services for the local community and minimize revenue leakage to neighboring communities
 - i. Auto dealers
 - ii. Industrial uses
 - iii. National retailers and restaurants
2. Small Business Development & Entrepreneurship Services
 - a. Launch a program which creates training and opportunities for local companies including minority-women-owned businesses to procure contracts with local, county, state, federal, military and other governmental agencies
 - b. Support existing incubators and programs including providing assistance with marketing and technical support
 - c. Collaborate with private lenders and SBA to host financing workshops

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- d. Collaborate with local partners to host workshops for entrepreneurs, retired military personnel and minority-women-owned businesses
- e. Support home-based and small tech-related businesses with round table meetings to encourage networking and advice on growing their businesses
3. International Development & Relationships
 - a. Maintain regular communications with Port staff to ascertain new and expanding industry and seek ways to leverage foreign investment in the City beyond the Port
 - b. The World Trade Center works with small and medium size businesses to promote import and export activity and works with foreign investors to attract foreign direct investment to Tacoma
 - c. The City currently has 12 sister cities. Staff will proactively seek ways to attract expansion of companies in sister city countries to Tacoma
4. Downtown Development & Revitalization
 - a. Market City's High Priority Sites for Sale/Lease, etc.
 - b. Promote development in the Dome and Brewery Districts (including medical facilities)
 - c. Market Downtown sites to developers and investors locally, regionally and nationally
 - d. Support revitalization of Foss Waterway Project
 - e. Explore potential to recruit a hotel for the Convention Center (priority site)
 - f. Explore the feasibility for a mixed-use catalytic project Downtown consisting of residential, retail, restaurant & theater uses
5. Neighborhood Revitalization (existing business districts include Sixth Avenue, 26th/Proctor, Old Town, Lincoln)
 - a. Support medical center expansion along the Martin Luther King District Neighborhood as well as mixed-use, artist live/work and workforce housing
 - b. Consider affordable live/work development as another option to fulfill affordable housing by creating housing for entrepreneurs and artists
 - c. Assist private owners of underutilized properties to either develop or recruit developers to support mixed-use, residential and commercial developments

Tacoma 2025 (2015)

Adopted as the City of Tacoma's Ten-Year Citywide Strategic Plan and Vision

3. Economic Vibrancy and Employment

A vibrant and diverse economy with good jobs for all Tacoma residents

- 3A: Increase the number and quality of jobs throughout Tacoma
- 3B: Diversify Tacoma's living wage business base
- 3C: Improve neighborhood business districts
- 3D: Strengthen downtown Tacoma as a business core and residential option

Accountability Measures

- Increase the number of jobs in Tacoma
- Increase the percentage of households that meet or exceed living wage standards or are economically self-sufficient
- Increase business sector diversity
- Increase the percentage of residents positively rating the quality of neighborhood business districts
- Increase district activity
- Increase the assessed value and decrease the vacancy rate of downtown property
- Increase the number of downtown workers and residents

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4. Education and Learning

Thriving residents with abundant opportunities for life-long learning

- 4A: Close the education achievement gaps
- 4B: Prepare people to succeed in Tacoma's workforce

Accountability Measures

- Increase kindergarten readiness
- Increase the percentage of third grade students meeting or exceeding reading proficiency
- Increase total high school graduation rates
- Increase post-secondary degrees
- Increase the percentage of graduates from local educational institutions (workforce training and universities) gaining employment

5. Arts and Cultural Vitality

A vibrant cultural sector that fosters a creative, cohesive community

- 5A: Increase participation in arts and culture
- 5B: Embrace Tacoma's diversity of people, places, and cultures
- 5C: Leverage and strengthen Tacoma's arts and cultural assets

Accountability Measures

- Increase the number of youth participating in arts and cultural events in Tacoma
- Increase attendance at arts and cultural events
- Increase the economic impact of creative and cultural events in Tacoma
- Increase percentage of all business activity represented by creative industries