



THE CREATIVE CONTENT INDUSTRY IN WATERLOO REGION

A survey of profit and non-profit organizations specifically engaged in digital media, marketing communications and cultural media content in Waterloo Region with actionable recommendations for support

Funding for this study was provided by Ontario Media Development Corporation. Any opinions, findings, conclusions or recommendations expressed in this material are those of the author and do not necessarily reflect the views of Ontario Media Development Corporation or the Government of Ontario. The Government of Ontario and its agencies are in no way bound by the recommendations contained in this document.



Acknowledgments

In addition to support from the Ontario Media Development Corporation, Creative Enterprise Initiative acknowledges the financial contributions to this report from the Regional Municipality of Waterloo, the City of Kitchener, the City of Waterloo, the City of Cambridge, the City of Stratford, Communitech, University of Waterloo Stratford Campus, Whitney Commercial Real Estate Services and Spear Street Capital.



Table of Contents

Introduction	1
Executive Summary.....	4
Methodology	6
Inventory	6
Interviews	6
Environmental Scan	7
Findings	9
The Interviews	9
Participant Organizations Described	9
Reflections on Community.....	13
Participant Challenges.....	16
Small Sample of Industry Sub-sector Comments.....	19
Recommendations for Support and Community Building	23
Recommendation #1 — The Creative Industries Agent	24
Recommendation #2 — Events.....	25
Recommendation #3 — A Place for Connections: "The Collision Centre".....	27
Recommendation #4 — Youth Survey.....	29
Recommendation #5 — Model User Initiative	29
Environmental Scan — Best Practices	30
Advanced CCI Strategic Initiatives — Austin, TX, USA	30
Early CCI Strategic Initiatives — Wellington NZ.....	34
Model Supporting Regional Innovation and Growth — Nesta Creative Credit Program	36
Creative Community Events — Maker Faire	37
Co-working Spaces — Citizen Space, San Francisco, CA, USA	38
Co-working Spaces — the Centre for Social Innovation, Toronto.....	38
Rebranding — Netherlands.....	39
Appendices	40
Interview Questions for Content Producers.....	41
List of Interviewees	42
Creative – Content Industry Support (Funding) Programs.....	43
List of Organizations for Event Collaboration	46
Inventory of Creative Industry Companies and Organizations	50
References	58
Researcher Profiles	61

Introduction

In October of 2014, the Waterloo Region Creative Content Industry Project (CCIP) was commissioned to provide an inventory, an assessment, and strategic recommendations for and from companies typically described as involved in the creative media industries. These are businesses **that produce “content”**: storytellers, designers, companies that work in both traditional and new media. Moreover, these are businesses that often evade full evaluation in economic assessments, but that are widely acknowledged to be key contributors to the economy, to the viability of many other industries, and to the Culture of Ontario.

Quantitative assessments of the size of creative industries are muddled in measurement difficulties and definitions^{1,2}. The most recent number accessible from the Federal government acknowledges culture activities as contributing 3.1% to national GDP (2010)³ valued at \$47.8 billion. **In Ontario, according to best estimates (2006), the creative industries GDP “is approaching 70% of the auto manufacturing sector and surpasses those of agriculture, forestry and mining sectors combined.”**⁴ Creative industries are attractive areas for development as they have shown resilience and even growth⁵ during recent economic upheavals⁶.

FAD Research has been engaged by a consortium of partners led by the Creative Enterprise Initiative (CEI). Also sharing a mandate for this undertaking are the Region of Waterloo, the cities of Kitchener, Waterloo, Cambridge, and Stratford, the regional innovation centre

¹ **There is no unique definition of the “creative economy.”** *Creative Economy Report 2010 Creative Economy: A Feasible Development Option*, United Nations Conference on Trade and Development, (UNCTAD), p.9

² A decided lack of data exists on the contributions of creative industries in GDP assessments. *Creative Economy Report*, UNCTAD, 2010, p.23

³ **This number, too, is potentially conflated as it includes “crafts,” not an activity generally included when fashioning creative industry policy.** <http://www.statcan.gc.ca/daily-quotidien/140910/dq140910b-eng.htm> Statistics Canada, Culture Satellite Account, 2010.

⁴ Ontario Ministry of Tourism, Culture and Sport, http://www.mtc.gov.on.ca/en/creative_cluster/cluster_report_growth.shtml

⁵ Whether viewed from a global or a national perspective, there is no doubt that the creative economy — however it is defined — is growing, and growing rapidly. Data for the broadest conceptualization of the creative economy show that in OECD countries the creative economy has been growing at an annual rate more than twice that of the service industries overall and more than four times that of manufacturing.

Creative Economy Report, UNCTAD, 2010 p.28, citing Howkins (2001), p. xvi

⁶ The firmness of the market for creative products is a sign that many people in the world are eager for culture, social events, entertainment, and leisure. They are devoting a higher share of their income to memorable life experiences associated with status, style, brands, and differentiation; this phenomenon, a symbol of the way of life in much of contemporary society, is rooted in the creative economy. Evidence suggests that even during the global recession people continued to go to cinemas and museums, listen to music, watch videos and TV shows, play video games, etc. Even in times of crisis, creative products continue to thrive as an integral part of our lives. This explains why some creative sectors appear more resilient to economic downturns and can contribute to a more sustainable and inclusive economic recovery. -- *Creative Economy Report 2010*, UNCTAD, p.xxv

Communitech, and the University of Waterloo Stratford Campus. Contributors include Spear Street Capital and Whitney Real Estate Services.

The term “Digital Media” (one this report avoids) is nebulous and sometimes invoked to **describe endeavours that are divorced from the “Media” aspect of communication**, entertainment, and storytelling. This report concerns itself with organizations that are more media related: those companies that are sometimes more closely associated with media and storytelling than they are with software and hardware. When considering the Creative Economy in the Waterloo Region, the companies of primary interest include those engaged in film and video, music, writing, graphic art and animation, marketing communications, and **“new” media** development; these latter include game developers, and app and web companies that concern themselves with entertainment and education.

We are concerned in this study with two main types of organizations:

1. Those that are recognized as traditional media (photography, print, television etc.) or cultural industries adapting to the changes shaped by digital technologies (sound recording companies, theatre companies, film/video makers).
2. Those native to the digital/Internet age involved in the creation, promotion, and **distribution of what is often referred to as “new media” and** which includes games companies, digital marketers, and mobile applications developers.

Currently, a case can be made that a content company is any company that creates elements of direct user experience (UX) for an audience. The lines between disciplines and undertakings are increasingly blurred...

The creative industries make a significant contribution to national economies and at the global level. However, the breadth of the concept and the varied perceptions about how to define and delimit the creative economy make it difficult to identify or agree upon reliable and comparable economic indicators that capture its economic, cultural, social and technological dimensions.⁷

⁷ Creative Economy Report 2010, UNCTAD, p.77

The changes fashioned by the advent of digital technologies are also indiscriminate. Disrupted business models, effects of the Internet on visibility, effects on commerce and distribution, increased competition, and skills challenges; these are just some of the issues affecting most every business today.

Waterloo Region is a well-known technology innovation cluster that possesses an array of resources, facilities and anchor institutions all of which contribute to the success it is today. Over the past few years, the need for a more coordinated, integrated regional approach to economic development and the need for a comprehensive regional economic development strategy was identified, resulting in both a Waterloo Region Economic Development Strategy (WREDS) and a newly formed Waterloo Region Economic Development Corporation (WREDC).

This study has been designed to provide insights to the economic development arms of the area municipalities as well as to the WREDC during its ongoing strategic implementation process⁸ on the needs of content producing companies. While each of the creative content industry sub-sectors (i.e. music, game developers, video producers) can be examined in isolation, they have enough commonalities that any recommended support initiatives can be designed to effectively cater to their mutual needs.

As affirmed by the companies themselves, what matters in defining the nature of creative content providers is less about distinct individual definitions and more about an understanding that they are part of a greater creative content industry. It is an industry whose well-being is inextricably linked to the cultural sector and, conceivably, most every enterprise in the broader economy⁹. This would include interactions with those companies engaged in patentable technologies that are so prevalent in the Waterloo Region.

Some of the pursuits of this study's interviewees are more those that are purely cultural industry endeavours, such as music performance or feature filmmaking. These are widely **recognized as being crucial contributors to the Province of Ontario's** arts and creative industries economy and are desirable components to any community culture aspiring to be a vibrant centre for innovation and modern industry. Other participants are those engaged in discovering and commercializing distinctly new forms of media applied to user experiences in entertainment, education, and marketing communications¹⁰.

It is the hope of this study that its recommendations will serve the entire group of creative content companies. FAD Research is confident that proposals can be made that, if implemented, will support the economic viability of content companies in the Waterloo Region and promote cohesion and continuing innovation in the creative industries.

⁸ Reviewed for this study were the Waterloo Regional Economic Development Strategy (WREDS), www.wreds.ca, and also the City of Waterloo Culture Plan: A Catalyst for Culture 2014–2024 Final Report.

⁹ In a recent variant of creative economy thinking, some argue that the cultural and creative industries not only drive growth through the creation of value, but have also become key elements of the *innovation system of the entire economy*. (sic), Creative Economy Report: 2013, UNESCO/UNDP, p.21

¹⁰ It is interesting that one of the areas that has been affected the most economy-wide in the shift to digital media is marketing and advertising communications. All organizations rely on it in a world where the biggest challenge is gaining visibility, yet when considering economic development policy, there is little sponsored research or consideration for it as a value-adding sub-sector.

Executive Summary

FAD Research and its associates were commissioned to conduct a survey of Waterloo Region's creative content companies by the Creative Enterprise Initiative (CEI) and their consortium partners. Surveyed enterprises predominately include small and medium-sized enterprises (SMEs) from the Video/Film/Animation, Music, Games, New Media, Marketing Communications, and Performing Arts sub-sectors.

This report includes a representative inventory of a small selection of companies, a survey of organization leaders conducted through face-to-face interviews, an environmental scan of global initiatives specifically directed at creative industries, a selective listing of programs available to creative content companies in Ontario, and recommendations for action to encourage business and to build community within regional creative content industries. Interviews gathered information from community leaders on subjects such as business challenges, the business community in the region, and suggestions for initiatives that may strengthen the local creative business sector.

The interviews focused on three main areas:

1. Events that promote interaction within and between industry sectors (business-to-business, trade associations, and government agencies). Events that encourage community engagement with educational institutions and the public (potential audience and community members).
2. Physical and virtual places for creative industries to congregate and potentially collaborate.
3. Marketing, communications, and promotion issues.

Recommendations brought forward in the interviews consist of the following five items:

1. **Media Agent** – Create a position to act as a single point of contact connecting the **region’s creative industries** to government, and opportunities such as education, promotion, networking and business development.
2. **Events** – Present a wide variety of events in relation to program information, professional and business skill development, funding announcements, networking opportunities and cultural events.
3. **Develop a branded physical space** for creative industry activity of all kinds, particularly events. Failing this, the development of a branded-events strategy targeted at the creative content industry in the Region.
4. **Undertake a Youth Survey** of the current population of young students and workers (ages 18 to 29) to discover their lifestyle requirements, and how these affect their propensity to stay in the Waterloo Region.
5. **Model User** - Encourage local government to promote the use of local company services whenever feasible.

Detailed information around the above actions can be found in section 4 – Recommendations for Support and Community Building.

The environmental scan sought to discover initiatives in comparable communities (in terms of size and proximity to a major media cluster) around the globe that are directed at creative industries. The intention here was to lend context to information gained from the interviews and to discover any innovative initiatives that might apply to the Waterloo Region. **The scan’s** findings are secondary to recommendations formulated as direct outcomes from the interviews. The scan’s observations are presented at the end of the report and are intended to inform future considerations for programming directed at creative enterprise.

Methodology

FAD Research allied with local research project manager Rawl Banton, who provided a select list of community contacts, as well as guidance on interviews, and liaison support with the various economic development groups in the Waterloo Region through the CEI. FAD Research also enlisted the assistance of business analyst Lindsay Ellis, MBA, to undertake the bulk of the environmental scan.

A recent report from UNESCO **supports CCIP's approach and** observes that more attention needs to be paid to creative industry knowledge gaps at the local level:

...there is a knowledge gap at the local level and basic evidence is conspicuous by its absence. Without such knowledge, everyone from policy-makers to project managers make decisions on the basis of incomplete information. In addition, political commitment and the willingness to invest will remain elusive.

Mapping the challenges, structure and functioning of the local economy is therefore important in order to subsequently measure the impact of policies. Evidence in this report¹¹ demonstrates how cultural and creative industry mapping exercises provided to local authorities are necessary for evidenced-based policy-making as they provide an overview of place-specific characteristics, human and institutional capacities, sector specific challenges, and opportunities across the value chain...¹².

Inventory

The first challenge for the CCIP team was mapping — creating an inventory of companies **engaged in “content” creation activities**. Previous to this study there was no list maintained of companies and organizations in creative content and cultural industry pursuits in the Region. The list currently contains almost 200 enterprises in a variety of sub-sectors. This list is one of the primary assets to be produced by the CCIP study, and it should be treated as a valuable resource to be expanded, reviewed, and maintained constantly for ongoing use as a communications tool.

Interviews

The inventory of companies was a work in progress throughout the course of the study. Oftentimes, companies selected for interview would suggest companies that we were unaware of, and these suggested candidates were subsequently vetted and scheduled for interviews themselves. Overall, however, the study provides a good cross-section of companies that were

¹¹ Taken from the Creative Economy Report: 2013 Special Edition, UNESCO/UNDP, 2013

¹² Ibid, 2013, p.157. This report offers procedural guidelines for strategic development starting on p.155.

interviewed. The final sampling contains considered reflection and actionable recommendations sufficient to suggest consensus. The obvious challenge is the Region's proximity to Toronto, a major media, technology, and business centre just to the east; however, another major roadblock is the geographic spread of the Region's content creating businesses. Outcomes from the interviews align well with both the Waterloo Region Economic Development Strategy¹³ (WREDS) **and the City of Waterloo's Culture Plan document.**

The goal of the interview questions (see Appendix) was to create profiles of **companies'** businesses and to gain the candid reflections and opinions of company leaders. With few exceptions, the individuals interviewed were identified as senior management, with most being CEOs of their respective organizations.

Interviews gathered information from community leaders, on subjects such as business challenges, the business community in the region, and suggestions for initiatives that may strengthen the local creative business sector.

It is emphasized here that this is a *qualitative study*. Questions may arise as to whether the opinions expressed represent peers across particular sub-sectors or across the creative industries sector as a whole in the Waterloo Region. To obtain quality interviews with opinion leaders in the community, FAD Research relied on both the expertise of project manager Rawl Banton, a producer operating in the Waterloo Region, and referrals from the interviewees themselves. Drawing **on twenty years of assessing producers' concerns**, FAD Research has confidence that issues identified by interviewees are typical and that recommendations made by interviewees are insightful.

Environmental Scan

The aim of the environmental scan was to identify initiatives for creative communities in other jurisdictions that might inform Waterloo Region's planning. Both primary and secondary research was conducted, as some of the interviews were with non-profit organizations best described as creative content industry development initiatives. In addition, a number of our corporate interviewees described local initiatives that they had organized or participated.

For the secondary research, Richard Florida's much cited *Rise of the Creative Class* was a starting point for context into cities around the globe that have strong creative economies. The expansive *UNESCO/UNDP Creative Economy Report 2013 Special Edition: Widening Local Development Pathways* was used as a reference document on how to implement creative programs at the municipal level and on what criteria should be investigated in developing these programs. Although the report was focused on emerging and developing economies, its resulting considerations are universal and applicable to all municipalities looking to grow their creative economies. Additionally this report referred to **UNCTAD 's (United Nations Conference**

¹³ www.wreds.ca

on Trade and Development) previous *The Creative Economy Report* of 2010. The report also looked at two EU documents related to growing the local creative economy and best practices guidelines: *The European Agenda for Culture: Work Plan for Culture 2011-2014* and *The Entrepreneurial Dimension of the Cultural and Creative Industries with Appendix*, which provided more examples of successful initiatives and considerations for developing the creative culture in a region (Working Group of EU Member States Experts, 2012). A number of other secondary sources were reviewed with special attention given to outcomes from the Waterloo Region Economic Development Strategy (WREDS) of 2013, the *City of Waterloo Culture Plan: A Catalyst for Culture 2014-2024 Final Report*, and *KEDS.11, Kitchener Economic Development Strategy 2011-2015: Kitchener's New Approach to Economic Development*.

The aforementioned reference documents were invaluable in lending strategic perspective and considering different municipalities and regional initiatives that were geared towards supporting development in creative enterprise. The focus was on strategic elements and initiatives that could support and nurture the needs of content companies based on the information collected through interviews. These initiatives had to be carried out at the municipal level, and they had to be able to operate without major financial investments or government/regulatory input. Municipal initiatives and case studies of best practices from the UNESCO and EU reports were researched to see what might best fit the needs of the Waterloo Region.

The places studied had to have developed a creative economy development strategy. In some cases the research looked into agencies, such as the EU or UNESCO, both of which have helped to develop regional creative economy development strategies. The goal was to find cities that were similar in population size to the Waterloo Region as well as being in close proximity to a large market. Therefore, cities such as New York, Paris, and London were not studied, as they are *the* major markets in their respective countries. Toronto is referenced only for a nearby example of co-working spaces, as well as for a perspective on budget allocations for spending on cultural initiatives.

Locations Studied

United States: numerous cities, including Austin TX, Durham NC, Ithaca, NY, Memphis, TN, Boston, MA; EU, including cities and best practices from Italy, Belgium, The Netherlands, Spain, France, Sweden, Finland, Germany, Austria, Ireland, and Portugal; UK, including Oxford and Manchester; Wellington NZ; Brisbane AU; UNESCO best practices from municipalities in Nigeria, Brazil, Argentina, Uruguay, Guatemala, Egypt, China, Niger, Nairobi, United Arab Emirates, Morocco, Algeria, Beirut, India, and Singapore. Reference is made to Hamilton and London Ontario for some additional Canadian perspective on expenditures towards initiatives on culture.

Findings

The Interviews

The interviews with participants are divided roughly into four main areas of discussion:

- 1. Descriptions of the interviewees’ businesses or organizations
- 2. Reflections on the Kitchener Waterloo region and community
- 3. A discussion of challenges
- 4. Suggestions for actions that would address business challenges and/or assist in fostering community

Participant Organizations Described

Interviews were conducted with leaders of creative undertakings that were predominately SMEs. There was a mixture of businesses varying in size from 1 to 100 employees, and there were discussions with non-profit cultural initiatives with as many as 150 to 200 members from throughout the Waterloo Region and beyond. An interview with the Executive Director of the 1000-employee Stratford Festival also took place.

Companies varied in age from decades-old to recent start-ups — from essentially local undertakings, to those with Fortune 500 clients, and audiences throughout the world. There was a good sampling of those enterprises dealing directly with technology as well as those dealing with the effects of technology; in other words, organizations that exist because of digital technologies, and also organizations whose traditional existence has been threatened through the ongoing introduction of these digital technologies.

There is also a mix of organizations that are strictly performing fee-for-service work, some that are creating original intellectual property and those that combine both approaches in their business models.

The following table shows a breakdown of the creative sub-sectors represented in the CCIP sample.

Organization Creative Affiliation	Number of Organizations
Film/Video/Graphics	12
Music and Audio	6
Marketing Communications	3
Game Developers	2
New Media	4
Theatre	2
Total	29

The preceding table would suggest that Waterloo Region is over-represented by Film/Video/Graphics companies. Categorizing, again, is a perilous undertaking. Within the **“Film/Video/Graphics” sub-category** there are three organizations best described as creative co-ops serving all manner of image makers; these groups rent equipment and put on community programming. Three of the organizations exclusively pursue feature film production. Of the remaining six companies, at least three of these might also be described as marketing communications firms, though their main product output is moving pictures (video and animation).

Categories are potentially misleading. FAD interviewed one company (currently categorized as **in the “Games” sub-sector**) that produces games (34 titles) and video, and builds hardware and custom mobile applications. It is important to understand that some attempts at traditional categorization are futile, and that this is a product of convergence brought on by digital technologies. In a real sense, and in the current Internet connected global economy, every company is a media company creating content at some level.

Categorizing creative/cultural industry companies in the digital age is not a new problem¹⁴ for those pre-occupied with attempting quantitative measures. The **“problem” has been identified** repeatedly in the development literature that was reviewed for this report, and industry definition has been a point of recurrent discussion in many of the reports FAD Research has participated in over the last 20 years. Clear-cut delineations, using tools such as the North American Industry Classification System (NAICS), are impossible to maintain, because some sub-sectors spring into existence in the digital world faster than the NAICS come under revision¹⁵, and a number of classification models are employed throughout the world, as indicated in the following table.

¹⁴ **“Defining ‘creative industries’, however, is a matter of considerable inconsistency and disagreement in the academic literature and in policymaking circles, especially in relation to the parallel concept of ‘cultural industries’. Sometimes a distinction is made between the creative and the cultural industries; sometimes the two terms are used interchangeably.”**, Creative Economy Report 2010, UNCTAD, p.4

¹⁵ As an example, in the Canadian NAICS (2012), there is no software-development category under which you could clearly put social media specialists or mobile applications developers.

Different classification systems for the cultural and creative industries¹⁶

DCMS Model			Americans for the Arts Model		
Advertising	Fashion	Software	Advertising	Film	Publishing
Architecture	Film and video	Television and radio	Architecture	Museums, zoos	Television and radio
Art and antiques market	Music	Video and computer games	Arts schools and services	Music	Visual arts
Crafts	Performing arts		Design	Performing arts	
	Publishing				

Concentric Circles Model		WIPO Copyright Model	
Core creative arts	Wider cultural industries	Core copyright industries	Partial copyright industries
Literature	Heritage services	Advertising	Architecture
Music	Publishing	Collecting societies	Clothing, footwear
Performing arts	Sound recording	Film and video	Design
Visual arts	Television and radio	Music	Fashion
	Video and computer games	Performing arts	Household goods
Other core cultural industries	Related industries	Publishing	Toys
Film	Advertising	Software	Interdependent copyright industries
Museums and libraries	Architecture	Television and radio	Blank recording material
	Design	Visual and graphic art	Consumer electronics
	Fashion		Musical instruments
			Paper
			Photocopiers, photographic equipment

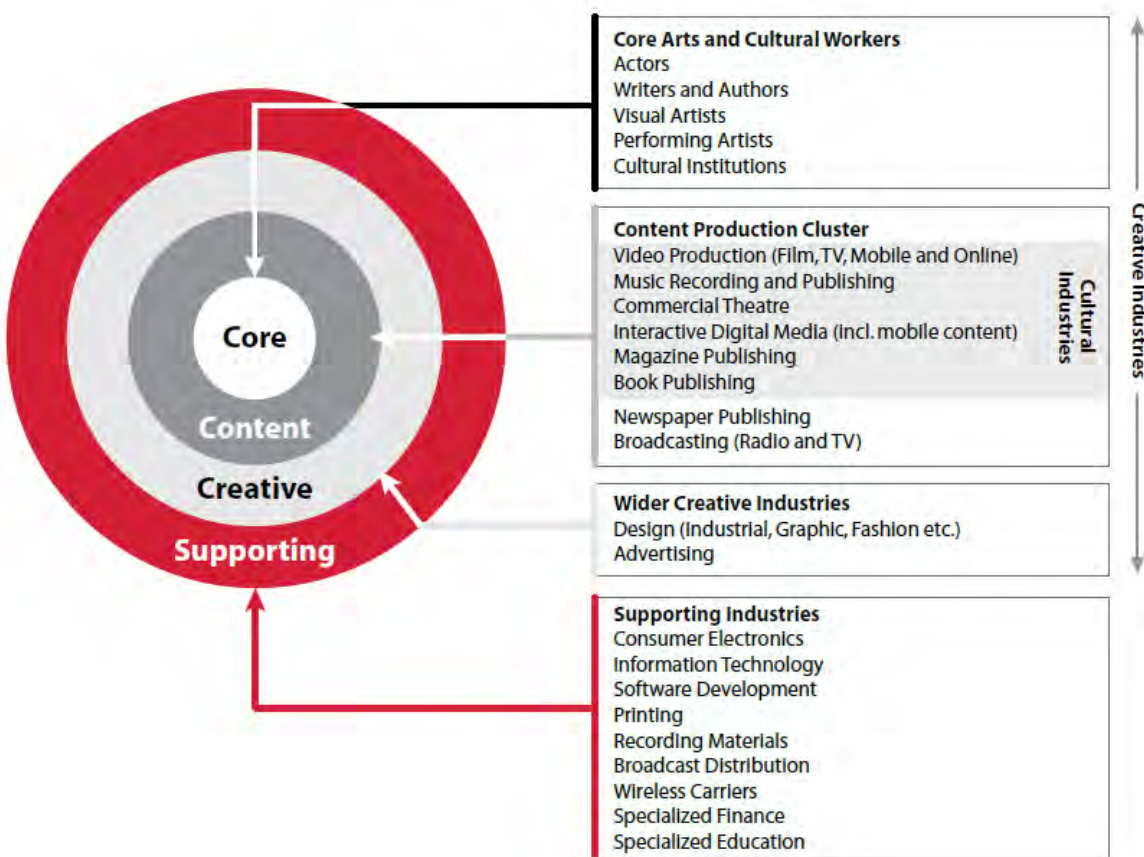
UNESCO Institute for Statistics Model		Symbolic Texts Model	
Industries in core cultural domains	Industries in expanded cultural domains	Core cultural industries	Peripheral cultural industries
Museums, galleries, libraries	Musical instruments	Advertising	Creative arts
Performing arts	Sound equipment	Film	
Festivals	Architecture	Internet	Borderline cultural industries
Visual arts, crafts	Advertising	Music	Consumer electronics
Design	Printing equipment	Publishing	Fashion
Publishing	Software	Television and radio	Software
Television, radio	Audiovisual hardware	Video and computer games	Sport
Film and video			
Photography			
Interactive media			

In this CCIP study, FAD Research relied on companies and organizations to self-identify as members of a creative content industry. It was also a conscious decision to interview businesses (principals) as opposed to individual practitioners. Some of these companies expressed to FAD Research an impression of being excluded from the apparent focus in the Waterloo Region on patentable technology interests.

¹⁶ Creative Economy Report: 2013 Special Edition, UNESCO/UNDP, 2013, p.22

Consequently, **it is in everyone's** best interest that all companies participate in the process of community building, because the creative industries are crucially intertwined with "pure" technology enterprise, as well as with the successful building of diverse urban environments deemed attractive for the nurturing of the "Creative Class" and knowledge-based industry.

The companies included in this study closely align with the model outlined in the Ontario government's "Broader Creative Cluster"¹⁷, as is pictured here:



¹⁷ "Ontario's Entertainment & Creative Cluster Report: A Framework for Growth", Ministry of Tourism and Culture, 2010, p.3

Reflections on Community

It was difficult not to be impressed with the enthusiasm that participants brought to the interviews for this study. Interviews with the 29 organizations (and 32 contributing individuals) were intended to be 30 minutes in length. We concluded with over 24 hours of recordings to review.

In many cases, participants indicated that they had grown up in the Waterloo Region. Many others indicated that they had come to the area during the time of their lives when they were attending post-secondary schools in the Waterloo Region and had chosen to stay on afterwards. Most of these participants were from other parts of Ontario, both urban and rural. A few of the contributors were originally from other parts of Canada, the U.S. and the U.K. Following are some of their observations.

"There is a leadership level recognition and vision of the value of innovation and collaboration in the KW community."

In some cases participants expressed a devotion to staying within the Region. One or two acknowledged that business necessities might cause them to have to open offices outside of the region but even one of these vowed that their corporate headquarters would always remain in Kitchener. Of those who would relocate, only one reluctantly cited as the reasons, "lifestyle" and gaining access to specialized graphics talent available in a larger centre.

The reasons for devotion to the Region **include family, the community's size (mostly expressed in terms of the ease of getting from one place to another), the convenience of being near but not *in* a major centre (expressed primarily in terms of cost of living and overheads), and the overall "can do" attitude in the community.** There were company leaders in our interviews who believed that the success of their businesses was in large part due to the character of their community.

"ROI refers to "Return On Involvement."

A number of interviewees are quite actively involved in the community. Several of their organizations are devoted to (and reliant on) community involvement. Several of the “for profit” businesses are proactively promoting their own networking initiatives and are intent on building business, capacity, and community. A couple of these companies mentioned that they had **become impatient waiting for a “Creative Hub” project to emerge** in Kitchener Waterloo, so they took it upon themselves to start something to serve their needs.

“It’s not about content, it’s about communication.”

One “communications” company, that calls itself a video production company — though it could easily answer to being a branding and strategy firm — has started its own creative-design collective and co-working initiative. This is an effort to bring together content specialists and designers to collaborate, while individuals can also maintain their own clients. They also intend to host programming for the members of the collective.

One company in the Region has played a leadership role in forming a nascent industry association of film/video individual practitioners and companies, called mpGO (**Media Producers Group of Ontario**¹⁸). This organization supports networking events and knowledge exchange, and it is actively engaged with Conestoga College.

Similarly, the 12 Angry Filmmakers, under the guidance of Duncan Finnigan and a collection of regional filmmakers, have engaged the community with workshops and industry events, as well as by producing, over a year-long period, 12 short films to showcase the diversity of talent that calls the region home.

One particularly innovative marketing technology company has participated in and organized its own well attended events intent on promoting Science, Technology, Engineering, and Mathematics (STEM) careers for women.

Several company leaders are working actively with regional schools by providing curriculum advice, mentoring/intern opportunities, and teaching courses. Some others only note that they cannot get the skills they need from local hires. Some of the companies had admittedly limited exposure to programs offered in local educational programs designed to serve respondents’ respective industries. These are companies seeking specialized graphic design skills and commercial video production skills, though it also includes companies designated under “**games**” and **new media**. Some feature-film, production companies expressed openness to contributions from anyone in the community with a passion for production.

¹⁸ <http://www.mpggo.org/>

***"When we graduated from university we went out and found a job.
These days, kids have to go out and create a job."***

The owner of **Bob's Guitar Service**, veteran musician Bob Egan, has designed a series of forward-thinking mentoring videos entitled, **"Making-It."** Directed specifically at young emerging artists aspiring to a career in music, these videos feature prominent musicians who have **"made-it"** and who are speaking to the realities of what it takes to succeed. He calls it, **"Reality Based Mentoring."** Part of a Music Accelerator Program, this project is being produced in conjunction with **the Province of Ontario's Cultural Development Fund**, CEI, City of Kitchener and The Jazz Room.

Four of our interviewed non-profit organizations (**Queen's Commons**, **ED Video**, **Felt Lab**, and **Communitech**) are community organizations that depend and thrive on community participation and engagement.

Queen's Commons and **ED Video** serve a range of film and video producers, both for-profit and non-profit, and each organization has participating memberships of between 100 and 200 participants.

The Felt Lab is an inspired initiative that serves as a research lab, and commercial ideation and development facility, that draws on multi-disciplinary community participation. Much of the activity focuses on innovation with existing technology to create improved user experiences and new products and services. The Felt Lab **might be considered a "crucible", or "anchor" initiative** for the emergent creative-content industries that are the subject of this study.

Communitech is decidedly focused on entrepreneurs developing products and patentable inventions using digital technology. **As the Region's "Technology Hub", they are less about content and digital media and more about software implementations, hardware, and processes development.** Three of our interviewed companies had received much appreciated start-up assistance from Communitech. Two of these commented that as they were more content-centric in their enterprise, they considered themselves somewhat **"outliers"** within that community.

The Executive Director of the Stratford Festival, a **cultural "anchor business" just outside of Waterloo Region**, expressed a desire to become more familiar with local digital media production resources. They are intent on and currently experimenting commercially with new formats and electronic platforms that include interactive presentations, digital marketing, and innovative productions targeted for digital distribution.

While community awareness and participation appears the rule in the Waterloo Region, and while many organizations are aware of other participants in their respective silos (i.e. film and video people know each other), there was an expressed desire for more community engagement. For some, this amounted to an intention to network within their own business sub-sector and creative silos. For many others there was recognition of the value of interdisciplinary intermingling. Most creative people acknowledge the value of new and diverse exposures to people and ideas in an accepting environment. Additionally, there was an identified need/desire to increase marketing and promotion for all companies in the Waterloo Region in order to **increase the entire innovation industry's visibility.**

Participant Challenges

Dating back to 1995, FAD Research has conducted a number of studies and national surveys with Canadian creative industry companies. Historically, primary challenges and concerns tend to fall under categories of the competitive climate, funding access, new business acquisition, and talent acquisition and retention. In this study there is also the concern for community building in an area that is known for technical innovation.

Numerous contributors to the CCIP discussion feel there is an intrinsic co-dependence between technical engineering and creative design. They put great stock in community.

Without exception interviewees were upbeat about opportunities for business, starting new initiatives, and making new connections. There is a consensus amongst all participants that the current marketplace is highly competitive. The prevalent assumption in the Waterloo Region is, demonstrably, that with every challenge presented there come corresponding opportunities. Some of the prevailing causes of the intensity of competition were cited:

- Low cost of entry into media production
- Increased market access
- Increased market demand for media (apps, games, moving pictures of every description)
- Proliferation of platforms and options for consumption amongst consumers

Many contributors noted low overheads and access to talent as competitive advantages of being located in the Region. Further, as every advantage has corresponding disadvantages, some organizations noted that being identifiably from Kitchener Waterloo presented recognition challenges with some clients (i.e. no existing brand for entertainment products). It was noted that clients from Toronto were reluctant to travel to Waterloo Region for business engagement.

Some companies expressed positive comments regarding location in terms of ready access to Toronto and a number of airports. Nearly every conversation that broached the subject of transportation bemoaned the lack of timely and efficient rail service between the Region and downtown Toronto.

While commenting on the challenges of serving the entire Waterloo Region and collaborating, one of the non-profit video/film co-ops noted there is limited communication between smaller centres. Some well-informed participants were unaware of local resources of the very kind they seek. These are resources offered by other companies that were interviewed.

Everyone interviewed for this study is in the business of managing change. Almost without exception these organizations embrace change — the one or two that do not are at least resigned to it.

A few interviewees felt that the successes of their companies and notable events and accomplishments are not promoted or recognized in the community. There is a sentiment that newsworthy items that are not identifiably **big "T," "Tech" related**, tend to be overlooked.

The "visibility" problem extends to acquiring new local business. As one participant described, there are Waterloo Region businesses with global clients doing communications for them, though when large local companies are looking for these services, they go elsewhere.

"This whole notion that you do music full-time is archaic."

Commentary on funding and access to various programs was a mixed bag. For some interviewees, **those in "big C," Cultural media** undertakings — notably video artists, musicians, audio people, and some filmmakers — attaining a fulltime income locally is out of reach. These people keep their day jobs.

Amongst those we interviewed, there is a mixed awareness of various funding programs [see appendix] that are available for content production projects in Ontario. The programs are all perceived as highly competitive. Some companies have participated, some have applied and failed to qualify, some view the application processes as too daunting, risky, or resource intensive, while others are quite uninformed or at a loss to know where to look for what is available. Several respondents expressed some frustration with government funding programs. This is a fairly typical array of attitudes amongst Canadian producers nationally, an opinion based on previous producer surveys and stakeholder interviews conducted by FAD Research over two decades.

Many content businesses have financed their growth purely on fee-for-service and royalty revenues. Some are now pursuing growth strategies that demand sourcing additional funding and are at various stages of acquiring this.

A final point that was mentioned revolved around perceived anti-competitive practices with non-profit organizations offering equipment rentals and services at price points, or with arrangements, that for-profit companies could not match.

Small Sample of Industry Sub-sector Comments

Music

"Kids don't go to see bands that much these days."

It was acknowledged in the interviews that there is presently no vital **music "scene" in the** downtowns of Kitchener Waterloo. This, like any community, is generally regarded as an organically developed occurrence when it does exist. There is no formula. In response to a question about what has changed in music since one respondent started his business (2002) he replied, **"Far more digital sales, far more streaming, far less money¹⁹."**

A number of additional factors were cited in the interviews:

- Global state of the music business²⁰
- Competition for audience attention versus other forms of entertainment (this comment was echoed by organizers of a local film festival as well)
- **Lack of...**
 - Local paying live music venues
 - Local awareness and promotion
 - Affordable parking facilities

There were a number of **comments about Kitchener's Music Work's** initiative. Commentators perceived barriers to success centering on a combination of, a) a lack of venues, b) local culture in the music community, and c) the willingness (or lack thereof) of the community-at-large to patronize local events and the aforementioned venues.

"People will pay \$200 bucks for a bad seat at a Fleetwood Mac concert at the A.C.C. but they won't come downtown and pay a \$5 cover to see three bands and have a nice night."

Video and Film

"The Internet is turning into television now."

Business is booming for many of these companies, which is likely a bi-product of video becoming the primary medium for communications across numerous platforms²¹. Quite simply, the demand for moving pictures is unprecedented. It was a pleasant surprise to find two companies with successes in creating feature films.

¹⁹ This same respondent, the owner of his own label, stated that one of his artists had earned a grand total of \$8.87 from 49,000 listens via a streaming service.

²⁰ Statistical data from the International Federation of the Phonographic Industry (IFPI) shows that the global market for music has shrunk from \$33.6 billion USD in 2005 to \$15 billion USD in 2013. <http://www.ifpi.org/global-statistics.php>

²¹ <http://www.infomart.com/infographic-rise-video-content-marketing/>

"Film and media arts are interdisciplinary by nature."

A number of film/video companies described hit and miss co-operation between production companies on shoot schedules and a couple of the municipalities in the Region. Three companies noted difficulties managing permit access, gaining information on regulations, and guideline communication. According to participants, it would be helpful to have an improved process, or some assistance, manoeuvring connections between filmmakers and local governments.

"Our biggest challenge is technology."

Some noted the lack of industry-ready talent emerging from schools and the difficulty in finding some specialized skills locally.

An additional challenge mentioned was the lack of a consistently available local studio to serve as a shooting space.

Marketing Communications, New Media, Games

A number of organizations believe that there are large opportunities for creative communications firms to win contracts from local businesses seeking product improvement by refining user experience and particularly by providing modern marketing services. When it comes to programs and funding options, there is a sentiment that Canadian entertainment and communications service companies are treated differently from other technology enterprises. Companies noted a regional difficulty finding specialized skills, particularly in the areas of graphic design and data analytics.

Non-Profit Film/Video Co-ops and the Felt Lab

"What we don't have is a makerspace that's not intimidating to non-technical people."

The primary challenge for these undertakings is facilitating community engagement. We interviewed Ed Video, the Commons Studio, and REAP/Felt Labs representatives. These community institutions have a mandate to create opportunities **for collaboration and "collision."** Ed Video noted a difficulty in attracting speakers from Toronto **who would be a local "draw."** The Felt Lab remarked that their location is a little remote and that it is hard to get to for some people who they are trying to bring together. At the same time, Felt Labs are seeking greater promotion to make them more visible to potential corporate innovation clients.

"Messy is good."

One participant noted that places most tolerant of diversity and chaos have the best chance of developing a culture of innovation. This supports the popular notion that there is no formula for creativity leading to innovation and that **"Chance favours the connected mind."**²² In other words, if there is an increased likelihood of a connection between diverse ideas addressing problems and skills to craft solutions, the result will be an increase in innovation.

Participant Suggestions and Comments

Interviewees agreed on three major areas of opportunity for improvement in community, business, and collaboration:

1. **Events**

- More interaction, both within and between all groups (including Technologists), is very desirable
- While there is sometimes a difficulty in getting people out to an event, the attempt to do so is eminently worthwhile if the event is relevant and promoted properly
- Events are deemed worthwhile if they provide key information for business (specifically around funding options and all manner of professional development), networking opportunities, and/or they are simply, **as one respondent put it, "more places for art to happen"**

2. **Place**

- There was a great deal of discussion around place(s) for events, networking, and collaboration, and, while most of the non-profits have access to some space, there was the repeated suggestion that more would be a good thing
- It was expressly stated in many cases that such space(s) should be centrally located **and highly accessible to encourage "collision" and interaction**

3. **Marketing, Communications, and Promotion**

- A majority of comments identified marketing and promotion to be key hallmarks of successful community enterprise for creative industries. Suggestions included everything from more local media coverage to Web sites, as well as social media initiatives that might promote events, jobs, local companies, and business opportunities.
- There is a feeling that current initiatives in this area **are "disjointed" and ineffective**

²² *"Where do good ideas come from?"*, Steven Johnson, TED talk, http://www.ted.com/playlists/20/where_do_ideas_come_from 2010.

Additional Recommendations

- Several organizations suggested that economic development initiatives should focus on **the Region's youth demographic (ages 18 to 29)** to determine its needs. The question for this demographic is, **"What do they need to** compel them to remain in the Region?"
- Make increased attempts to engage artists and young women within the technology sector
- Create a single access point (a person or an office) for information and assistance in accessing funding programs of *all* descriptions
- Designate a person as a film liaison in each municipality
- Send someone from the Region (possibly an IT person) to the Felt Lab, for example, one day a week
- Update skills in the community to attract business to the Region so businesses could engage with schools
- Aggressively pursue the transportation strategy that would improve rail links to Toronto
- Make creative design start-ups eligible for support that is similar to that given to tech start-ups and filmmakers
- Encourage and enable more passionate facilitators to urge engagement at creative industries — both artists and technologists
- Amend the existing Provincial digital media tax credit to include a different administrative track for companies with proven track record (assumed to accelerate reimbursement or to make the amounts predictable) and that there be allowances made for fast-growth businesses.

Note: Naturally this last recommendation is beyond the Waterloo **Region's control** as it is governed by Provincial legislation.

Recommendations for Support and Community Building

The following recommendations are a product of information gleaned from participant interviews. They are informed by the environmental scan and the development reports addressing creative enterprise produced by the UN and the European Union, as well as from planning agencies in the Waterloo Region itself. The recommendations also draw on FAD **Research's** experience in dealing with various R&D, funding, and community building initiatives designed to support creative-content producers. Implementation will rely on continued cooperation between the consortium partners of this report and on the creative industry participants who are intended as beneficiaries.

During the interviews, three major themes emerged, in no particular order, which led to recommendations for development activity:

1. **Events:** everyone interviewed agreed that events, and more of them, were a good thing to strive for. Events for networking, events for professional development, and events offering showcases for work or even pure entertainment were all desirable.
2. **Place:** there was a good deal of conversation around “place,” where events and collaboration activity could happen; these places were both physical and virtual.
3. **Marketing, Communications and Promotion:** the need for increased and better marketing and promotion underscored many of the interviewees concerns and more than a few of the recommendations.

Recommendation #1 – The Creative Industries Agent

One thing that became apparent in the interviews was that each of the creative industry sub-sectors had information deficits. Whether it was video/film producers seeking film permits or information about locations, theatre companies seeking marketing hires, or non-profits seeking collaboration and program information, there is a role to fill by someone in economic development as a connector and facilitator.

“You need a bee that’s visiting the flowers.”

Call this individual the “Media Agent” or the “Crop Scout²³” or the “Culture Vulture,” there is a role for someone to be the “go to” person in Waterloo Region for local companies seeking creative industry information. This would also be the person who would be the contact for businesses looking to do creative content business in the Region, as well as the primary resource for keeping economic development interests apprised of creative industry concerns.

The Media Agent will maintain and develop the contact list of companies to ensure an active association with content industry and cultural community events. The Media Agent will also be charged with collaborating with existing organizations/institutions (ie CEI, Communitech, University of Waterloo – both Waterloo and Stratford Campuses, Accelerator Centre, Chambers of Commerce, etc) to development of a strategy suited specifically for the Stratford - Waterloo Region – Guelph corridor in collaboration with existing organizations and economic development bodies, to address the following objectives:

- Bring together content creation clustering in progress, strengthening and deepening it.
- Encourage dialogue and cooperation between businesses, municipalities, universities, technology and research centres, cultural institutions, art spaces, artists, media.
- Increase the capacity of the sector, providing meeting places and investigating space for interest convergence
- Deepen the relation between creative content providers, municipalities and corporate activity.
- Attract young post-secondary students to the development of creative business.
- Inform and involve the community in that which concerns the development of the creative economy through advocacy (clarification on financing opportunities and incentives, promotion of events, disseminating information, preserving and orientating talent).
- Explore provincial/federal grant opportunities to secure/develop funds for cluster growth

²³ Crop Scouts are employed in agricultural communities as a way of keeping the community informed of new developments in farming techniques and markets.

Recommendation #2 – Events

Events are the primary enabler for informal “collisions” and for community building to occur and should be viewed as priorities for support by the Region. Events are a large component of what leads to community cohesion and opportunities for collaboration and partnership. Interviews revealed a universal desire to participate in events of all kinds. There is also significant initiative in the community to organize events. Aside from entertainment events, those events that are intended for information transfer, networking, or professional development need to be perceived as relevant to the constituents they intend to attract in order to gain significant audience. Events need to be relevant primarily, though not exclusively, to companies and practitioners engaged in the business of creative industry. There must be direct industry involvement to maintain relevance.

Events and activities are the foundation of industry development efforts to provide networking opportunities. Broad areas for consideration will include events that cater to members of particular industry sub-sectors, to broader interests across sub-sectors, and to those that have the potential to engage the broader industry and possibly even the community at large.

There should be programming of sufficient variety and frequency to ensure an array of sub-sectors is engaged. To ensure relevance, the nature of the programming should be coordinated by any event facilitators in close consultation with creative industry community leaders. Activities such as **product launches and individual company “pitches” should be minimized** unless they also address an area of broader interest to a community.

If the interviews are any guide, there is a real opportunity to provide a wide variety of event programming that would be deemed relevant. One topic of universal interest — which falls squarely to creative content companies involved with digital marketing — is just that: topical presentations related to marketing and promoting in a connected world.

These presentations are of potential interest to a vast array of organizations spanning government, businesses of all kinds, and even non-profits. The area of marketing and promotion was identified as a key challenge for everyone in the survey, and it is a universal concern for every organization in a connected world. Regular presentations could be made by local companies and thought leaders on effective uses of the Web, social media, crowdfunding, and content marketing, just to name a few.

Currently, it is believed there is enough leadership and critical mass in the creative-content sub-sectors of Marketing Communications and Film/Video/Animation to originate meaningful, engaging event programming. The Film/Video/Animation sub-sector already produces programming under the MPGO²⁴ banner that is reportedly well attended. There is also reason to believe that games and educational app developers, who are more content-centric in their focus, could develop a visible community in relatively short order as these developers have a

²⁴ Media Producers Group of Ontario. MPGO.org

compelling commercial need to source specialized talent. Game and educational app developers experience significant overlap in interest with apps development of a more purely technically nature. For instance, database specialists or platform specific developers who might be more at home at Communitech but who are producing elements of products that require skills more closely associated with content, such as animation, writers, audio, possibly user experience, could discover mutual opportunities through networking events.

Additionally, consideration should be made towards making contact with national and provincial trade associations and government agencies whose mandates support creative and cultural enterprise. This report is aware of a number of predominantly Toronto-based organizations that include funding groups and trade associations that would welcome the opportunity for information exchange with Waterloo Region stakeholders. Information on funding programs was identified in the interviews as an area where companies desired additional exposure and an event was organized during the work on this report. Participants included the Ontario Media Development Corporation (OMDC), the Canada Media Fund, the Bell Fund, and Interactive Ontario.

During the interviews, it was stated by one of the non-profits serving the Film/Video sub-sector **that they had difficulty attracting “name act” speakers from Toronto. We feel that this is likely a matter of promotion (and possibly the inability to provide even a small honorarium).**

FAD Research has created an initial list of industry collaborators (see Appendix), some of whom have already expressed an active interest in developing events in the Waterloo Region.

Local organizations have a role in providing events space during the early stages of enabling creative industries, particularly organizations such as Communitech, the REAP/Felt Lab, and, possibly, ED Video as these are community-minded non-profits with agendas that lend themselves to creative industries engagement. Alternatively, post-secondary facilities, gallery spaces, or library spaces may be suitable. Once again, in order to suitably engage sub-sector participants, emphasis should be on *industry-led*, adequately funded events that have a broad appeal.

Recommendation #3 — A Place for Connections: “The Collision Centre”

During the interviews, numerous references were made to how it would be desirable to have a physical space for creative industry to congregate, hold events, and interact with the community. During one of the interviews where discussion included the value of orchestrating **potential collaborations, one respondent coined the term, “The Collision Centre.”²⁵** This is envisioned as a physical space that would serve as a meeting place for events that have a focus on creative industries²⁶. This location would feature as full a roster of events as possible, which would include music industry nights, film/video events, technical showcases, student information and mentoring sessions, and even events that might involve the general public, just **as a gallery or “hackspace”²⁷ space might.**

The thinking behind the idea of providing meeting space originates from the notion that innovation and possibilities for creative collaboration are increased when there are more opportunities for connections to occur. The *Creative Economy Report 2013*²⁸ points out that the prerequisites for stimulus initiatives include attaining data about creative industry participants (the exercise we have started with this report and its accompanying database of companies), followed by providing networking opportunities and places for them to occur²⁹.

A physical space could have certain types of tenants who would be beneficial to the Collision Centre space. Co-working space, collaborative innovation space (such as that found at Communitech and particularly at the Felt Lab), and rental studio space for video/film shoots, would all be appropriate and welcome facilities for creative-industry work.

Real estate for this purpose would ideally be centrally located in the Waterloo Region, where it would give the most people the greatest access and afford the greatest possibility for **“collisions”** to occur between artists, technologists, and the community. The proposition to make space available for the development of creative industries aligns well with broad goals laid out in both the WREDS report and in the Waterloo Culture Plan including, potentially, lending new purpose to heritage building development.

This study **would suggest that “The Collision Centre” become a brand for any events directed specifically towards the creative-content community, where CEI or Waterloo Region municipalities are involved as sponsors, and it becomes the brand that promotes creative enterprise and interactions with community and business.**

²⁵ Credit goes to Bob Egan who originated the term during his interview with FAD Research.

²⁶ **Networking involves linking individuals and communities, both in places and across places. This is a prerequisite to the “scaling”** of economic activities, something that small-sized creative enterprises need in order to grow., *Creative Economy Report 2013*, UNESCO/UNDP, p.115.

²⁷ <http://en.wikipedia.org/wiki/Hackerspace>

²⁸ *Creative Economy Report 2013 UNESCO/UNDP*, p.115

²⁹ **In defining forms of networking support:** “The first of these is deceptively simple: finding buildings to serve as the core infrastructure where creative workers can meet, network, or be trained and can themselves practice, perform or exhibit.”, and later, **“Support for the growth of cultural activities** requires a range of spaces. Moreover, clustering such activities in one place or building creates a sense of community and stimulates peer-to-peer learning.”, *Ibid*, p. 115.

The key to success of a physical space relies on community participation. Community participation requires leadership and resources to promote and engage creative industry companies and creative practitioners in events. As noted through the interviews, leadership is abundant in the Waterloo Region and must come from the creative industry itself. FAD Research recommends that the primary focus of any facility dedicated to creative economy be about the *business* of creative industries. This is *not* to say it is to the exclusion of activities more closely identified with non-profit cultural activities; indeed, without these, part of the essence of the facility would be missing. Rather, it *is* to say that without consistent engagement from businesses with a commercial stake in creative enterprise, the facility becomes little more than a community centre with a fuzzy mandate.

Any facility-creation project will likely involve partnerships between levels of government and will come, ideally, from companies with a stake in creative enterprise and real estate development.

Key considerations are as follows:

- Achieving a central location to maximize accessibility
- Gaining continued creative community buy-in from creative enterprise in the Region
- Assuring adequate resources are committed in order that the facility can provide abundant programming and opportunities for networking

Recommendation #4 – Youth Survey

It was suggested during the interviews that in order to discover expectations and needs of the next generation of creative media and culture workers — indeed potential future inhabitants of the Waterloo Region — that a youth survey be made of individuals in the 18 to 29 age group.

It is recommended that this be a two contingent survey: one to determine the hopes and culture consumption patterns of current/future creative industry workers; another that would survey a broader vocational group of the same ages on culture consumption and lifestyle in the Waterloo Region.

"You're going to find it [innovation] in places where they aren't playing by the already established rules."

Recommendation #5 – Model User Initiative

Model user initiatives have been proposed as **ways to stimulate Ontario's digital-media economy since the mid-1990's and as recently as 2010 during Canada 3.0**³⁰. A Model User initiative is a recommendation that any municipal government agency seeking services, say in marketing communications or training videos, looks to attain *local* creative services first and foremost.

FAD recommends that municipal governments in the Region pursue this strategy, as there are some very capable companies in the Region.

Finally, FAD recommends that all partners in this study familiarize themselves fully with activities underway at Communitech Hub and the Felt Lab. These are both exemplary initiatives in innovation. The interviewee recommendation to send someone from municipal information systems personnel to the Felt Lab on a regular basis is well advised. The Felt Lab has a particularly insightful model for creative design and community engagement, which lends itself to creative industry participants.

³⁰ Stratford Institute for Digital Media declares need for model user strategy. 2010.
<https://www.ic.gc.ca/eic/site/028.nsf/eng/00253.html>

Environmental Scan — Best Practices

As previously described in the *Methodology* section, FAD Research set out to discover Creative Content Industry (CCI) initiatives that were interesting, innovative, and applicable to the **Waterloo Region's** stated intention to examine supports for the creative industries. These discoveries should not be considered exhaustive, but they were the product of an intensive search that was concurrently informed by the interview process.

Creative industries in the Waterloo Region are in what can be considered a nascent stage of community development. Some findings serve to inform our recommendations — others are intended only as food for thought for future initiatives.

Advanced CCI Strategic Initiatives — Austin, TX, USA

Austin is considered the leader when it comes to supporting and nurturing the creative economy. **As the creative economy is advanced, Austin's current strategic plan provides** initiatives that continue to enhance and build on the strong creative class foundation it has been able to grow. This study is aware that the City of Kitchener has looked to Austin in the past to **formulate its "Music Works" initiative.**

Current initiatives that are of interest include the following:

- Filming Incentives
- Creative Content Incentive
- Creative Ambassador Program

In 2005, Austin was investing \$5.58 per capita per year into cultural initiatives, just below the US National average of \$5.62³¹. The main sources of funds for its budget are derived through utility transfers, property tax, and sales tax. In the 2015 budget, Austin allocated a \$50.13MCDN operating budget for economic development³². Its Economic Development Department has an operating budget of \$15.2M, which includes Cultural Arts and Music and

³¹ "CreateAustin: Cultural Master Plan." *CreateAustin*. 01 01, 2009.

www.austintexas.gov/sites/default/files/files/Redevelopment/createaustin_cultural_master_plan.pdf, p.47

³² City of Austin. "Approved Budget Volume 1." *Austin Finance Online*. 11 13, 2014. https://assets.austintexas.gov/budget/14-15/downloads/fy15_approved_volume_1.pdf, p.359

Entertainment Division and it manages \$34.3M in programmatic funds³³. The City of Austin uses 11.7% of the Hotel Occupancy Tax (HOT) that generates \$8M annually to fund arts and cultural activity, specifically the Cultural Arts Fund³⁴. Private philanthropy and individual giving to the arts in Austin is low and does not rank in the Top 50 major U.S. cities in non-profit arts contributions per capita³⁵.

By comparison, in the 2014 budget, Toronto allocated \$71.1MCDN or 0.7% of the annual budget to economic development and culture³⁶. This is equal to \$22.25 per capita, and the City of Toronto has a Cultural Phase-In Plan to increase spending to \$25 per capita by the end of 2016³⁷. The funds come from property tax, provincial and federal funding, user fees, third party donations, BIA funding, the sign fund, and Section 37 funding³⁸. Section 37 is a program that allows real estate developers to pay a fee in order to have new developments approved that exceed height or density beyond existing zoning and policy allowances³⁹. The sign fund is a tax on third-party billboards and signs within the city, which is meant to go directly to arts funding⁴⁰.

By comparison, a nearby similar jurisdiction, Hamilton, allocated 5% or \$24.9M of its 2014 net operating budget to planning and economic development. Of that, \$6.04M went to economic development and \$7.35M went to tourism and culture⁴¹. In 2012, its spending on culture economic development and initiatives was equal to \$24.10 per capita⁴². Another similar, also nearby jurisdiction, London Ontario, invested \$60 per capita on culture in 2011 as part of its cultural prosperity plan⁴³.

³³Ibid, p. 359

³⁴ City of Austin. "Approved Budget Volume 1." *Austin Finance Online*. 11 13, 2014. https://assets.austintexas.gov/budget/14-15/downloads/fy15_approved_volume_1.pdf, p. 597

³⁵ "CreateAustin: Cultural Master Plan." *CreateAustin*. 01 01, 2009.

www.austintexas.gov/sites/default/files/files/Redevelopment/createaustin_cultural_master_plan.pdf, p.47

³⁶ <http://www1.toronto.ca/wps/portal/contentonly?vgnextoid=09428d5c19c52410VgnVCM10000071d60f89RCRD>

³⁷ Ibid.

³⁸ Ibid.

³⁹ Brutto, David. *Section 37*. 01 01, 2014. <http://www.section37.ca/>

⁴⁰ Knelman, Martin. "Toronto's billboard tax set to fund city arts and culture." *The Toronto Star*. 01 16, 2013.

http://www.thestar.com/entertainment/2013/01/16/torontos_billboard_tax_set_to_fund_city_arts_and_culture.html

⁴¹ City of Hamilton. "2014 Approved Operating & Capital Budgets." *City of Hamilton*. 01 01, 2014.

<http://www.hamilton.ca/NR/rdonlyres/E64A87D4-19B4-4EFA-B6B5-81F3354C69ED/0/2014FINALBOOK.pdf>, Appendix 3, p.3

⁴² Hill, Kelly. "Saskatoon's Investment in Culture, 2009 to 2012." *Hill Strategies Research Inc*. 07 30, 2014.

<http://www.hillstrategies.com/content/saskatoon%E2%80%99s-investment-culture-2009-2012-0>

⁴³ City of London. *London's Cultural Prosperity Plan and Profile*. 08 26, 2014. <https://www.london.ca/About-London/culture/Pages/London's-Cultural-Prosperity-Plan.aspx>

Filming Incentives⁴⁴

Initiatives related to filming are important to the Waterloo Region as it has a number of independent film production SMEs as well as commercial/ad agencies SMEs. Highlights of policies regarding filming in Austin include the following:

- No fees for right-of-way permits for filming
- No rental/reservation fees for filming on City property which makes city properties offered at cost
- Recycling programs for filmmakers
- Up to two free police officers, if the production meets the criteria to receive incentives
- Dedicated staff to help navigate any film issues
- No need for film permit to film on public property unless right-of-way is needed
- City of Austin must be thanked and logo must appear in credits

Based on these initiatives, a 2011 economic impact study estimated the total effect of the film and visual media industry in Austin at \$280USD million annually. The website *Moviemaker.com* voted Austin the number one place to film in 2013 (Rupprecht, 2013). These initiatives are in place for independent and large-budget film, television, and commercial production. Services, information, and a directory of service providers are available on the Austin Film Commission website⁴⁵.

Creative Content Incentive

The City of Austin offers incentives to qualifying film, television, video game, and visual effects projects equal to 0.50% of wages paid to local workers. Projects produced by an Austin-based company, or which significantly promote Austin, may be eligible for an additional 0.25% incentive for a total incentive of 0.75%.

⁴⁴ *Filming in Austin*. 01 01, 2014. <http://austintexas.gov/department/filming-austin>

⁴⁵ *Filming in Austin*. 01 01, 2014. <http://austintexas.gov/department/filming-austin>

A project must meet the following criteria to be eligible:

- Receive state of Texas film commission funding
- Have a **"Made in Austin"** logo and credit
- Pay all workers union rates or provided benefits similar to union – minimum wage \$11/hr and provide benefits

Other cities, such as Dallas, San Antonio, San Francisco, and Santa Barbara, as well as Sarasota County Florida, have similar incentive programs⁴⁶.

*Creative Ambassador Program*⁴⁷

This program is intended to open new avenues of dialogue and opportunity between Austin and markets worldwide, thereby **increasing the international presence of Austin's creative industries**. The program designates Austin artists who are traveling overseas in promotion of their own work as Creative Ambassadors for the City. Applications are due at least 60 days prior to travel. Artist categories include, but are not limited to the following: musicians, visual artists, filmmakers, and performing artists. Each quarter, two or three Creative Ambassadors are selected and the designation is in effect for one year.

Successful applicants are given \$500 for their travel expenses and are required to do the following:

- Attend a training session with city staff before travel
- Attend at least one meeting with a government, arts agency, or creative organization (to be identified by the city) as a representative of the city while in the destination
- Meet with national and international delegations visiting Austin, as needed
- Forward any press coverage related to the project/travel/ambassadorship to the city
- Submit a post-trip report to the city

⁴⁶ Ibid.

⁴⁷ *Creative Ambassadors*. 01 01, 2014. <http://austintexas.gov/department/creative-ambassadors>

Early CCI Strategic Initiatives — Wellington NZ

Currently Wellington, New Zealand, has an aggressive strategy for strengthening its creative economy and becoming a world recognized hub of creative industries and digital activities.

Wellington's region is of comparable population size too that of the Waterloo Region.

Interesting initiatives that could be employed include the following:

- Sister City
- Filming Initiatives
- Hosting Conferences/Events
- Local Recognition Provision
- Resource Organization

In 2013–2014, Wellington had an annual budget of \$152.8MCAD, and of this \$37.3MCAD was allocated for economic development activities. This equates to \$186CAD per resident per year. These activities included promoting Destination Wellington (attending international events, developing promotional materials to attract international talent to region), providing grants, and hosting events⁴⁸.

Sister City

A sister city is a formal, long-term relationship between two cities. This relationship is based on cultural, educational, and business links and can attract business, investment, and talent to a region. Wellington currently has four sister cities: Beijing China, Sakai, Japan, Sydney, Australia, and Xiamen, China. These relationships have been successful in developing business links and professional exchange programs⁴⁹.

⁴⁸ Wellington City Council. "Annual Report 13/15." *Wellington City Council*. 06 30, 2014. <http://ar2013.publications.wellington.govt.nz/>

⁴⁹ *Sister Cities*. 01 01, 2014. <http://wellington.govt.nz/about-wellington/international-relations/sister-cities>

Filming Initiatives

Wellington has a similar strategy to Austin. Film permits and location and logistics help are free. However, depending on the location and complexity of needs, location fees and other fees may apply. The film office provides location-scout recommendations, 24/7 support, and negotiation of reduced parking rates in downtown or paid parking areas. Its logistic support includes closing roads, controlling traffic lights, rerouting public transportation, or changing street markings⁵⁰.

Hosting Conferences/Events

In its efforts to promote collaboration and access by global experts to it, Wellington has an **aggressive plan to bid for international conferences that will enhance Wellington's digital reputation**. Also, Wellington plans to support local events that will contribute **to Wellington's aim** of being a recognized digital creative capital⁵¹.

Local Recognition Provision

Wellington is currently developing a local recognition provision. Without suggesting that Wellington organizations should compromise on quality, it is developing policies that allow for recognition of location provision. **Wellington is reviewing its council's procurement policies to ensure that they do not disadvantage Wellington businesses that could provide the service**. It is **exploring opportunities of a "buy Wellington made"** program to promote the digital product and services Wellington businesses offer.

Resource Organization

Wellington has a number of incubators and hubs, which, in most respects, appear to operate much as they do here in the Waterloo Region. What is notable from afar is that they appear to have a coordinated marketing initiative or, at very least, an ecological map of services available in the entire region⁵². As far as we are aware, this interactive infographic is something that is sadly lacking anywhere in Canada.

⁵⁰ <http://www.filmwellington.co.nz/page/home.aspx>

⁵¹ WGTN 2040. "Wellington Digital Strategy." *WGTN 2040*. 01 01, 2014. <http://www.wgtn2040.govt.nz/making-it-happen/digital-strategy>

⁵² <http://creativehq.co.nz/ecosystem/>

Model Supporting Regional Innovation and Growth — Nesta Creative Credit Program

Nesta is a UK based independent charity that works to increase the innovative capacity of the UK. The charity created the Creative Credit Program as a business-to-business voucher mechanism in order to encourage SMEs to innovate in partnership with creative-service providers. It ran the pilot project in Manchester UK, which offered SMEs creative credits of £4000 plus an SME-contribution of £1000. This total of £5000 was used to purchase creative services from local creative businesses. To be eligible, SMEs had to have their head office in the region, have fewer than 250 employees or revenue under £46 million, and be incorporated. Each company that submitted an application also had to create an online profile in the creative-credit portal to be eligible. The profile page displayed all local businesses that had applied and allowed for those awarded the credit to learn of new potential partners in the region, on whom to spend their credits. Of the 672 SMEs who applied, 300 created their online portals and 150 received the £4000 creative credits awarded based on a random-lottery selection process. There was no indication of the overall administration costs associated with setting up the online portal or running the competition. In its report on the program, entitled *A Guide to Creative Credits*⁵³, there is an outline on how to set up the program in your region.

In a follow-up report, Nesta reported that the program created genuine new relationships between SMEs and creative business, and it noted that the award increased the likelihood that firms would work with a creative business with which they had not had a previous relationship on an innovative project⁵⁴. Cities in Europe, such as Strasbourg, Salzburg, and Sligo, as well as Basque County, have set up creative credit programs.

One additional benefit to implementing a Creative Credit Program described here is that it creates an incentive for companies to keep their business contact information up-to-date. An up-to-date contact list is the primary resource and communications tool for any organization inclined to support community and economic development. It is not recommended that a Creative Credit Program be adopted for the Waterloo Region at this time; however, if the Region wishes to take a highly proactive route to stimulating local creative-industry activity, it is believed that such a program is worth further study.

⁵³"A Guide to Creative Credits." *Nesta*. 03 05, 2011. <http://www.nesta.org.uk/publications/guide-creative-credits>

⁵⁴"*Creative Credits: A randomized controlled industrial policy experiment*", 2013, <http://www.nesta.org.uk/publications/creative-credits-randomized-controlled-industrial-policy-experiment>

Creative Community Events — Maker Faire

Maker Faire was established by Maker Media, publisher of Make Magazine, as a festival of invention, creativity, and resourcefulness in celebration of the Maker/DIY (do-it-yourself) movement. Maker Faire brings together tech enthusiasts, artists, educators, engineers, students, and commercial exhibitors to show the community what they have made and to share what they have learned. The inaugural Maker Faire was in San Francisco in 2006 and featured a concurrent Craft Faire in an adjacent location for those who wanted to sell goods they had made.

Maker Faire showcases the work of all kinds and ages of makers; anyone who wants to share accomplishments with an appreciative audience. Each Faire features talks, demonstrations, presentations, performances, and attractions/interactive displays⁵⁵. The two flagship Maker Faires are in NYC and San Francisco.

Detroit hosts a large, “Featured” Faire. It is produced at the Henry Ford Museum, in collaboration with Maker Faire over two July days in Dearborn. This event was attended by FAD Research in 2013, it is set on the grounds of one of the **World’s foremost museums** of industrial innovation, and it was attended by over 20,000 people.

Maker Faire provides information and support for communities that want to put together a Mini Maker Faire for their community. The Canadian cities of Calgary, Ottawa, Toronto, Montreal, Vancouver, Vancouver Island, Prince George, and Waterloo (held in 2013, cancelled in 2014) have all hosted Mini Maker Faires⁵⁶. Mini Maker Faires allow a way to develop new audiences and markets for participants and to bring together intermediaries or consumers with aspirant market entrants.

⁵⁵ Make. *How to Make a Maker Faire*. 01 01, 2014. <http://makerfaire.com/mini/> (accessed 11 18, 2014)

⁵⁶ Ibid.

Co-working Spaces — Citizen Space, San Francisco, CA, USA

Co-working Spaces are office spaces where freelancers and SMEs can become members and rent desk space by the month/year. Generally, there are also spaces for non-members to drop in and rent desk space by the hour/day, and most of which offer Wi-Fi, a kitchen space, meeting rooms, and event space. The bonus of being a member of a co-working space is that it builds community and offers collaboration and mentorship.

The idea of co-working came in 2005 to Brad Neuberg, founder of Citizen Space, San Francisco. He felt that working at home or in coffee shops can be isolating, and he wanted to create a space that could offer the community and structure that comes with having an office or base to go to each day. Co-working spaces either target an industry or are open to all. Citizen Space offers events, classes, workshops, snacks, and tea/coffee for those who still want a coffee shop feel⁵⁷.

Co-working Spaces — the Centre for Social Innovation, Toronto

Opened in Toronto in 2004, The Centre for Social Innovation (CSI) is a nearby example of a successfully run co-working space⁵⁸. The CSI is a co-working space that focuses on social enterprises in order to create a community and act as a launch pad for new ideas. Its members must have a social mission and range from non-profits, for-profits, artists, activists, and entrepreneurs. The goal was not just to have a place where space is shared, but to have a space where ideas, strategies, and experience are shared. By March 2007, the CSI had been home to over 180 social innovators in a variety of sectors.

The CSI expanded to a network of three locations in Toronto from its original building near Bathurst and Bloor to include the CSI annex building in 2010 and the Regent Park location in 2012. An innovative New York City realty firm, RXR Realty, approached the CSI to launch a NYC space based on the same principles. The NYC location was opened in 2013⁵⁹.

⁵⁷ Citizen Space. *Citizen Space*. 01 01, 2014. <http://citizenspace.us/>

⁵⁸ Centre for Social Innovation. *Centre for Social Innovation*. 01 01, 2014. <http://socialinnovation.ca/>

⁵⁹ Centre for Social Innovation. *Centre for Social Innovation NYC*. 01 01, 2014. <http://nyc.socialinnovation.org/>

Rebranding — Netherlands

The Netherlands wanted to raise international awareness and brand itself as a hub for knowledge-intensive and internationally collaborating businesses and talent. To do this, Holland created the Paint the World Orange contest, which was an open call competition aimed at generating new concepts and projects for the rebranding of its international reputation⁶⁰. A jury was set up, and the top five ideas were selected and had an additional few months to finalize their pitch. A live-pitch session was held to select the winning idea. The winner received €500,000 as a production budget to carry out the idea.

⁶⁰ European Agenda for Culture. "Good Practice Report on The Cultural and Creative Sectors' Export and Internationalisation Support Strategies." *Open Method of Coordination (OMC) Working Group on Cultural and Creative Sectors' Export and Internationalisation Support Strategies*. 01 01, 2014. http://ec.europa.eu/culture/library/reports/eac-omc-report-ccs-strategies_en.pdf, p.28

Appendices

Interview Questions for Content Producers

Following are the key questions asked of the content creation companies in the Waterloo Region interviewed for this report. Approximately 30 minutes was spent with each of the participants.

- What is your business?
- Who are your customers?
- Do you consider yourself a content creation company?
- When were you founded? How large is your company?
- How has your business changed since you started out?
- How did you come to be located in the Waterloo Region?
- How do you develop new business? Do you have any partnerships?
- What are your plans for growth?
- Are you a member of any local, national or international professional organizations?
- Are you currently engaged in any local initiatives? Do you attend local networking events? Would you if they were particularly relevant to your organization?
- What are your biggest challenges? (e.g. new business acquisition, talent and retention, funding/finance, competition)
- What would you like to see in terms of local support?

List of Interviewees

FAD Research wishes to thank all the participants in the Creative Content Industry Project:

Arc Media	Waterloo	Jon Lucas	Partner/Producer
Black Fawn Films	Cambridge	Chad Archibald	Producer
Bob's Guitar	Kitchener	Bob Egan	Proprietor
Busted Flat Records	Kitchener	Mark Logan	Owner
C To C Productions	Kitchener	Carol Ann Whalen	Founder
C to C Productions	Kitchener	Rob Currie	Founder
Deep Realities Inc.	Waterloo	Jennifer Janik	CEO
Deep Realities Inc.	Waterloo	Rob Soosaar	VP, Business Development
Drayton Entertainment	Cambridge	Alex Mustakas	Artistic Director & CEO
Ed Video	Guelph	Angus McLennan	Production Director
Finscot Films	Waterloo	Duncan Finnigan	Founder
George Briggs Media	Kitchener	Alex Marshall	Founder and CEO
High Rise Studios	Conestogo	Mathew Ninaber	Director and Producer
Industry Corp	Kitchener	Andrew Matlock	President and CEO
InfiniDy	Kitchener	Rashid Khan	Founder and CEO
InfiniDy	Kitchener	Cai Xun	Founder
Innertainment Media	Kitchener	Cory Kittel	Partner
Mad Hatter Technology	Kitchener	Melanie Witzell	Agency Director
Memory Tree Studio	Kitchener	Gary Cain	Partner/Producer
Quarry Integrated Communications	St. Jacobs	Allan Quarry	Executive Chairman
Queen Street Commons	Kitchener	Martin DeGroot	Executive Director
REAP/Felt Labs	St. Jacobs	Dave Goodwin	Founder
REAP/Felt Labs	St. Jacobs	Diane Williamson	Administrator
Rosco Films	Elmira	Ken Ogasawara	President
Skylight Productions	Kitchener	Nelson Dunk	Founder
SM Recording	St. Jacobs	Steve Morris	Owner
Small Dog Studio	Kitchener	Ian Graham	Founder
Stratford Festival	Stratford	Anita Gaffney	Executive Director
The Sound Distillery	Kitchener	Will Muir	Partner/Producer
Communtech	Kitchener	Saj Jamall	Marketing Director
Individual	Waterloo	Marta Borowska	Digital Maven
Bruzen Vi Gada	Kitchener	Erica Robinson	Writer/Filmmaker

Creative – Content Industry Support (Funding) Programs

<p>Bell Fund http://bellfund.ca/</p>	<p>The Bell Fund has invested in the production of digital media and new media projects associated with television productions since 1997.</p> <p>The Bell Fund’s mandate is to advance the Canadian broadcasting system. The Bell Fund...</p> <ul style="list-style-type: none"> • encourages and funds the creation of excellent Canadian digital media • stimulates partnerships and sustainable businesses in the broadcast, distribution and digital/new media sectors • funds, undertakes, or publishes research and shares knowledge • enhances the national and international position of industry stakeholders.
<p>Canada Council for the Arts http://www.canadacouncil.ca/</p>	<p>The Canada Council for the Arts is Canada’s national, arm’s-length arts funding agency. The main areas of activity are:</p> <p><i>Grants:</i> The organization provide funding to individual professional artists and arts organizations through a peer assessment process.</p>
<p>Canada Media Fund (CMF) http://www.cmf-fmc.ca</p>	<p>The CMF is a not-for-profit corporation that delivers \$368 million in funding annually to support the Canadian television and digital media industries through two streams of funding.</p> <p>Through the Convergent Stream, the CMF supports the creation of convergent television and digital media content for consumption by Canadians anytime, anywhere.</p> <p>Through the Experimental Stream, the CMF encourages the development of innovative, interactive digital media content and software applications.</p>
<p>City of Kitchener Community Grants Tier 2 http://www.kitchener.ca</p>	<p>The purpose of Tier 2 grants is to provide funding for:</p> <ul style="list-style-type: none"> • operating support to enable the provision of the basic service of the organization • project support • special event support • equipment support

<p>KW Awesome http://www.kwawesome.org/</p>	<p>KW Awesome distributes a series of monthly \$1,000 grants to projects and their creators. The Foundation provides these grants with no strings attached and claims no ownership over the projects it supports. It is, in the words of one of the trustees, a micro-genius grant for flashes of micro-brilliance.</p>
<p>Ontario Arts Council http://www.arts.on.ca</p>	<p>The Ontario Arts Council is an arm's-length agency of the Ontario Ministry of Tourism, Culture and Sport. OAC's grants and services to professional, Ontario-based artists and arts organizations support arts education, Aboriginal arts, community arts, crafts, dance, Franco-Ontarian arts, literature, media arts, multidisciplinary arts, music, theatre, touring, and visual arts.</p>
<p>OMDC http://www.omdc.on.ca/</p>	<p>Through consultation with stakeholders, OMDC has created a range of programs to provide Ontario's cultural entrepreneurs from the book and magazine publishing, film and television production, sound recording and interactive digital media content production industries with the opportunity to grow their businesses. Program strands include:</p> <ul style="list-style-type: none"> • Business Initiatives provide a range of Business to Business (B2B) events, within and across sectors, and international borders, to foster collaboration, encourage innovation, build business, share best practices and provide networking opportunities. • Content and Marketing Funds - OMDC's Book Fund, Film Fund, Interactive Digital Media Fund and Magazine Fund provide financial and strategic support to assist in the creation of new content, and marketing projects that accelerate the growth of Ontario companies. • Industry Development Program provides support to Ontario's cultural entrepreneurs by partnering with established trade and event organizations to offer initiatives, events and activities that stimulate the growth of the cultural media industries. • OMDC Export Fund - OMDC's Export Fund - Book, Export Fund - Film and Television, and Export Fund - Interactive Digital Media enable Ontario companies to pursue export development activities including market event attendance and targeted sales trips. • OMDC Research Grants provide financial support directly to incorporated not-for-profit industry organizations undertaking research initiatives that support or complement the mandate of OMDC.

<p>Region of Waterloo Arts Fund http://www.artsfund.ca/</p>	<p>The mission of the Region of Waterloo Arts Fund (Arts Fund) is to contribute to the vibrancy of the arts and cultural sector in Waterloo Region. It does this by promoting, encouraging and providing support to arts organizations and individual artists. The goal is to benefit the citizens of the Region of Waterloo. Areas that the Arts Fund will support includes all performing (theatre/dance/music/opera), visual and literary arts as well as film, video, new media, etc. The 14-member board is responsible for allocating funding provided by Regional Council on an annual basis.</p>
--	--

List of Organizations for Event Collaboration

<p>National Screen Institute (NSI) http://www.nsi-canada.ca/</p>	<p>The National Screen Institute – Canada (NSI) is a charitable, not-for-profit organization with headquarters in Winnipeg. NSI is Canada’s national film, television and digital media training school for writers, directors and producers. NSI believes that the best way to learn is by doing. Our market-driven courses have led to employment and successful careers for graduates by giving them a competitive edge. According to our 2013 alumni survey, 87% of respondents are working in the film and TV industry.</p>
<p>ACTRA http://www.actratoronto.com/</p>	<p>ACTRA Toronto is the largest branch of ACTRA (the Alliance of Canadian Cinema, Television and Radio Artists), the union representing performers in the film, radio, television and new media industries.</p>
<p>Bell Fund http://bellfund.ca/</p>	<p>The Bell Fund has invested in the production of digital media and new media projects associated with television productions since 1997.</p> <p>The Bell Fund’s mandate is to advance the Canadian broadcasting system. The Bell Fund:</p> <ul style="list-style-type: none"> • encourage and funds the creation of excellent Canadian digital media • stimulate partnerships and sustainable businesses in the broadcast, distribution and digital/new media sectors • fund, undertake or publish research and sharing knowledge • enhance the national and international position of industry stakeholders.
<p>Canada Council for the Arts http://www.canadacouncil.ca/</p>	<p>The Canada Council for the Arts is Canada’s national, arm’s-length arts funding agency. The main areas of activity are:</p> <p><i>Grants:</i> The organization provide funding to individual professional artists and arts organizations through a peer assessment process.</p>
<p>Canada Media Fund (CMF) http://www.cmf-fmc.ca</p>	<p>The CMF is a not-for-profit corporation that delivers \$368 million in funding annually to support the Canadian television and digital media industries through two streams of funding.</p> <p>Through the Convergent Stream, the CMF supports the creation of convergent television and digital media content for consumption by Canadians anytime, anywhere.</p> <p>Through the Experimental Stream, the CMF encourages the development of innovative, interactive digital media content and software applications.</p>

<p>Canadian Film Centre (CFC) http://www.cfccreates.com</p>	<p>The Canadian Film Centre (CFC) is a leader in mentoring content creators and entrepreneurs in the entertainment and digital media landscapes.</p> <p>By promoting the development of new ideas, production and best practices in film, television, digital media, music and acting, CFC is uniquely positioned within Canada’s vital and diverse screen entertainment industry.</p> <p>Founded by iconic Canadian filmmaker Norman Jewison as a film school in 1988, we have become an essential hub for ideas and innovation within the global entertainment sphere.</p>
<p>Canadian Marketing Association (CMA) http://www.the-cma.org/</p>	<p>The Canadian Marketing Association (CMA) is the only marketing association in Canada that embraces Canada’s major business sectors and all marketing disciplines, channels and technologies. Its programs help shape the future of marketing in Canada by building talented marketers and exceptional business leaders and by demonstrating marketing’s strategic role as a key driver of business success.</p>
<p>Canadian Media Production Association (CMPA) http://www.cmpa.ca/</p>	<p>The Canadian Media Production Association (CMPA) is Canada's leading trade association for independent producers. CMPA represents more than 350 companies engaged in the production and distribution of English-language television programs, feature films and digital media. The CMPA works on behalf of members to promote and stimulate the Canadian production industry. The CMPA goal is to ensure the continued success of Canada's independent production sector and a future for Canadian content.</p>
<p>Immersive Technology Alliance (ITA) http://www.ita3d.com/</p>	<p>The Immersive Technology Alliance (ITA) reason for being is to make immersive technology successful. ITA markets of interest include augmented reality, virtual reality, stereoscopic 3D, and everything in-between.</p> <p>The alliance's membership is comprised of technology makers, content makers (e.g. game developers and film makers), standards groups, specialized consultants, and academic partners.</p>
<p>Interactive Ontario (IO) http://www.interactiveontario.com/</p>	<p>Interactive Ontario (IO) is a not-for-profit industry trade organization committed to the growth of the Ontario interactive digital content industry. To this end IO is an industry advocate within Ontario and nationally as a founding member of the Canadian Interactive Alliance /Alliance Interactive Canadienne (CIAIC).</p> <p>IO represents over 290 interactive digital media companies covering a range of sectors including: e-Learning, video/online games, mobile, television, and social media. IO also works with many interactive digital media stakeholders including those working in marketing, law, accounting services, research and academia.</p>

<p>Ontario Arts Council http://www.arts.on.ca</p>	<p>The Ontario Arts Council is an arm's-length agency of the Ontario Ministry of Tourism, Culture and Sport. OAC's grants and services to professional, Ontario-based artists and arts organizations support arts education, Aboriginal arts, community arts, crafts, dance, Franco-Ontarian arts, literature, media arts, multidisciplinary arts, music, theatre, touring, and visual arts.</p>
<p>OMDC http://www.omdc.on.ca/</p>	<p>Through consultation with stakeholders, OMDC has created a range of programs to provide Ontario's cultural entrepreneurs from the book and magazine publishing, film and television production, sound recording and interactive digital media content production industries with the opportunity to grow their businesses. Program strands include:</p> <ul style="list-style-type: none"> • Business Initiatives provide a range of Business to Business (B2B) events, within and across sectors, and international borders, to foster collaboration, encourage innovation, build business, share best practices and provide networking opportunities. • Content and Marketing Funds - OMDC's Book Fund, Film Fund, Interactive Digital Media Fund and Magazine Fund provide financial and strategic support to assist in the creation of new content, and marketing projects that accelerate the growth of Ontario companies. • Industry Development Program provides support to Ontario's cultural entrepreneurs by partnering with established trade and event organizations to offer initiatives, events and activities that stimulate the growth of the cultural media industries. • OMDC Export Fund - OMDC's Export Fund - Book, Export Fund - Film & Television, and Export Fund - Interactive Digital Media enable Ontario companies to pursue export development activities including market event attendance and targeted sales trips. • OMDC Research Grants provide financial support directly to incorporated not-for-profit industry organizations undertaking research initiatives that support or complement the mandate of OMDC.

<p>The International Game Developers Association (IGDA) http://www.igda.org/</p>	<p>The International Game Developers Association (IGDA) is the largest non-profit Membership organization in the world serving all individuals who create games.</p> <p>As an international organization, they are a global network of collaborative projects and communities comprised of individuals from all fields of game development – from programmers and producers to writers, artists, QA and localization.</p> <p>They bring together developers at key industry conferences, in over 90 chapters and in Special Interest Groups (SIGs) to improve their lives and their craft. The IGDA advocates on behalf of our membership to ensure quality of life, perpetuation of our craft and preparing the next generation of developers.</p>
<p>Toronto International Film Festival (TIFF) http://tiff.net/</p>	<p>TIFF is dedicated to presenting the best of international and Canadian cinema to film lovers. The TIFF vision is to lead the world in creative and cultural discovery through the moving image.</p> <p>What began as a ten-day film festival has grown to embrace programming 365 days a year. TIFF offers screenings, lectures, discussions, festivals, workshops, industry support and the chance to meet filmmakers from Canada and around the world.</p>

Inventory of Creative Industry Companies and Organizations

The following inventory of creative industry organizations in Waterloo Region and surrounding area was compiled to assemble information about two types of existing organizations:

1. Those that are recognized as traditional media or cultural industries adapting to the changes shaped by digital technologies.
2. Those native to the digital/Internet age involved in the creation, promotion, and **distribution of what is often referred to as “new media” and which includes games** companies, digital marketers, and mobile applications developers.

The inventory list is by no means exhaustive, and should be considered phase 1. Developing a comprehensive and likely ever-evolving list that includes those located throughout the Guelph - Waterloo Region - Stratford corridor will take some time. Additional work will be spent adding to the inventory list and to keeping it up to date.

CREATIVE CLUSTER CONTENT WATERLOO REGION 2015	City	Software	Gaming	Social Media	Music	Theatre	Film/ Video	Advertising	Publishing	Digital Dist'n	URL
Video Production (film, TV, mobile, online)											
Arc Media	Waterloo						X				http://www.arc-media.ca/
Authority FX	Kitchener						X			X	http://www.authorityfx.com/
Barndoor Creative	Kitchener						X				http://barndoorcreative.ca/
BigDNet	Kitchener						X				http://bigdnet.com/
Black Fawn Films	Cambridge						X				http://www.blackfawnfilms.com/
Blue Lizard Productions Inc.	Cambridge						X				www.bluelizardproductions.com
Boom Digital Media Group	Kitchener		X								http://www.boomdmg.com/
Bruzen Vi Gada Productions	Kitchener						X				www.bruzenvigada.com
Busy Brain Media	Kitchener						X				http://www.busybrainmedia.com/
C to C Productions	Kitchener						X				http://ctocproductions.com/
Dragongem Productions	Kitchener						X				http://www.dragongemproductions.com/
Esteem Media Productions Inc.	Kitchener						X				http://www.esteemmediaproductions.com/
Finscot	Waterloo						X				http://www.finscot.com/
George Briggs	Kitchener						X				http://georgebriggs.ca/
Hey Cadet Films, Inc.	Kitchener						X				http://www.heycadet.com/
High Rise Studios	Kitchener						X				http://www.highrisestudio.ca/
Huckleberry Films	Kitchener						X				http://huckleberryfilms.ca/
Innertainment Media	Kitchener						X				innertainment.ca
Lunarch Studios	Waterloo		X								http://lunarchstudios.com/
Media House Moving Images	Cambridge						X				http://www.mediahouse.on.ca/
Memory Tree Studio	Kitchener						X				http://www.memorytree.ca/
MetaMedia Productions	Waterloo						X				http://www.metamedia.ca/
Rosco Films	Elmira						X				http://roscofilms.com/
Skylight Productions	Kitchener						X				skylightproductions.ca

	City	Software	Gaming	Social Media	Music	Theatre	Film/ Video	Advertising	Publishing	Digital Dist'n	URL
Music Recording and Publishing											
Busted Flat Records	Kitchener				X						http://www.bustedflatrecords.com/
Fauxtown Records	KW, Cambridge				X						https://www.facebook.com/fauxtowntownrecords
SM Recording					X						http://smrecording.ca/
Small Dog Studio	Kitchener				X						http://smalldogstudio.com/
Music Recording and Publishing											
Studio A	Kitchener				X						http://studio-a-recording.com/
The Sound Distillery	Kitchener				X						http://www.thesounddistillery.com/
Commercial Theatre											
Drayton Entertainment (incl. Dunfield Theatre)	Cambridge					X					www.draytonentertainment.com
Stratford Festival	Stratford				X	X					http://www.stratfordfestival.ca/
Interactive Digital Media (incl. mobile content)											
Deep Realities	St Jacobs	X								X	http://deeprealities.ca/
Digital Wizards (Neq Media)	Cambridge	X	X							X	http://www.digitalwiz.com/
EA Mobile	Kitchener		X							X	http://www.ea.com/ca/
Industry Corp	Kitchener	X	X							X	http://www.industrycorp.ca/
InfiniDy	Kitchener	X	X							X	http://www.infinidy.ca/
Redblox Games	Kitchener		X							X	http://www.redbloxgames.com/
Magazine Publishing											
Exchange Magazine	Waterloo								X		www.exchangemagazine.com
Grand Magazine	Kitchener								X		www.grandmagazine.ca
Velvet Rope	Waterloo								X		http://www.velvetropemagazine.com

	City	Software	Gaming	Social Media	Music	Theatre	Film /Video	Advertising	Publishing	Digital Dist'n	URL
Newspaper Publishing											
Kitchener Post	Kitchener								X		www.kitchenerpost.ca
SnapD KW	Kitchener								X		https://kitchenerwaterloo.snapd.com/#/
The Cambridge Citizen	Cambridge								X		www.cambridgecitizen.ca
The Music Times	Waterloo								X		www.themusictimes.info
The New Quarterly	Waterloo								X		www.tnq.ca
The Record	Kitchener								X		www.therecord.com
The Waterloo Chronicle	Waterloo								X		www.waterloochronicle.ca
Web Design/E-Learning/Solutions											
Axonify Inc.	Waterloo										http://www.axonify.com/
Bolt Made	Waterloo	X						X			http://www.boltmade.com/
BWired	Kitchener	X						X			http://bwired.ca/
Clean Slate Studios	Waterloo										http://cleanslatestudios.ca/
ClevrU	Waterloo										https://www.clevru.com/
Conceptual Pathways Inc.	Stratford	X						X			http://www.conceptual.ca/
Danipa	Kitchener										http://www.danipa.com/
Digital North Media Inc.	Waterloo							X			http://digitalnorth.ca/
Digital Shift Corporation	Kitchener							X			www.kitchenerwaterloowebsitesdesign.com
eSolutions	Waterloo							X			http://www.esolutionsgroup.ca/
Halfull Design Solutions	Kitchener							X			http://www.halfulldesign.com/
Hyper Text Digital Publishing	Stratford										http://www.hypertextdigital.com/
Jet Web Design	Stratford										http://www.jetwebdesign.ca/
Kik Interactive	Waterloo			X							http://kik.com/
Montana Publishing	Waterloo										http://www.montanapublishing.com/
Norbsoft Canada	Waterloo	X									http://www.norbsoft.com/
Painted Pixels	Waterloo							X			http://www.paintedpixelstudio.com/

	City	Software	Gaming	Social Media	Music	Theatre	Film/ Video	Advertising	Publishing	Digital Dist'n	URL
Web Design/E-Learning/Solutions											
Pixweaver Inc.	Waterloo							X			http://www.pixweaver.com/
QT Web Designs	Kitchener										http://qtweb.ca/
REM Web Solutions	Kitchener										http://www.remwebsolutions.com/
Skiva Multimedia	Kitchener							X			http://www.skivamultimedia.ca/
Stryve Group	Kitchener							X			http://stryvegroup.com/
Stylex Media Design Inc.	Kitchener										http://stylex.ca/
The Incognito Group	Waterloo		X								http://www.theincognitogroup.com/
Tilted Pixel Inc.	Waterloo										http://www.tiltedpixel.com/
Two Blonde Chicks Inc.	Kitchener							X			http://www.twoblondchicks.ca/
Waxworks	Kitchener							X		X	http://www.waxworks.com/
Vidyard	Kitchener							X			http://www.vidyard.com/
Z Factor	Waterloo										http://www.zfactor.com/
Broadcasting (Radio and TV)											
570 News	Kitchener										www.570news.com
CBC Radio 89.1FM	Kitchener										www.cbc.ca/news/canada/kitchener-waterloo
CTV Southwestern Ontario	Kitchener										http://kitchener.ctvnews.ca/
New Art Radio CKWR 98.5FM	Kitchener										www.ckwr.com/new-art-radio
Rogers	Kitchener										www.rogerstv.com
Cultural Institutions/Organizations											
A Day & Night Festival	Cambridge				X						https://www.facebook.com/adayandanight
ActOUT KW	KW										www.actoutkw.com
Animate the Trail	Kitchener				X						https://twitter.com/AnimateTheTrail
Beckett School Inc.	Waterloo				X						www.beckettschool.com

	City	Software	Gaming	Social Media	Music	Theatre	Film/ Video	Advertising		Digital Dist'n	URL
Cultural Institutions/Organizations											
Black Walnut Folk Club	Kitchener				X						www.blackwalnut.wordpress.com
Cambridge Centre for the Arts	Cambridge				X		X				www.cambridgecentreforthearts.ca
Cambridge Libraries & Galleries (Ideaxchange)	Cambridge				X	X	X				www.ideasexchange.ca
Cambridge Symphony Orchestra	Cambridge				X						www.cambridgeorchestra.ca
Centre In The Square	Kitchener				X						www.centreinthesquare.com
Chestnut Hall Camerata	KW				X						www.chestnuthallmusic.com/camerata/main.html
Chestnut Hall Music	KW				X						www.chestnuthallmusic.com
CREATRegion	Kitchener										www.twitter.com/createregionon
DaCapo Chamber Choir	Waterloo				X						www.dacapochamberchoir.ca
Galt Kiltie Band	Cambridge			X							www.galtkiltieband.com/index.php
Grand Harmony Chorus	Waterloo			X							http://www.grandharmonychorus.com
Grand Mastering	Waterloo										www.grandmastering.com/index.html
Grand Philharmonic Choir	Kitchener				X						www.grandphilchoir.com
Grand River Baroque Festival	Ayr				X						www.grbf.ca
Grand River Jazz Society	Waterloo				X						www.grandriverjazzsociety.org/home.html
Green Light Arts	Kitchener					X					www.greenlight-arts.com
Inter-Mennonite Children's Choir	Kitchener				X						mennosingers.com/imcc
Kitchener Blues Community Inc.	Kitchener				X						www.kitchenerbluesfestival.com
Kitchener Waterloo Art Gallery	Kitchener						X				www.kwag.ca
Kitchener Waterloo Little Theatre	Waterloo					X					http://kwlt.org/
Kitchener Waterloo Symphony	Kitchener				X						www.kwsymphony.ca
KOI Con and KOI Festival	Kitchener				X						www.koimusicfestival.com
Kultrun World Music Festival	Kitchener				X						www.nerudaarts.ca/festivals/kultrun
K-W Kiwanis Music Festival	Waterloo				X						www.kwkiwanismusicfestival.org
KW Multicultural Festival	Kitchener				X	X					www.kwmc.on.ca

	City	Software	Gaming	Social Media	Music	Theatre	Film/ Video	Advertising	Publishing	Digital Dist'n	URL
Cultural Institutions/Organizations											
K-W Musical Productions	Kitchener					X					www.kwmp.ca
Kwartz Lab	Kitchener										www.kwartzlab.ca
Lost & Found Theatre	Kitchener					X					www.lostandfoundtheatre.com
Maxwell's Music House	Waterloo				X						www.maxwellsmusichouse.ca
Menno Singers	Kitchener				X						www.mennosingers.com
Menno Youth Singers	Kitchener				X						www.mennosingers.com
MT Space	Kitchener					X					www.mtspace.ca
New Hamburg Live!	New Hamburg				X						www.newhamburglive.ca
Nota Bene Baroque	Waterloo				X						www.notabenebaroque.ca
NUMUS	Waterloo				X						www.numus.on.ca
Old Chestnuts Song Circle	Kitchener				X						www.mgl.ca/~jhcole/ocscnews.html
Open Ears Festival	Kitchener				X						www.openears.ca
Pat the Dog	Kitchener					X					www.patthedog.org
Rainbow Chorus Waterloo Wellington					X						www.rainbowchorus.ca
Schneider Male Chorus	Cambridge				X						www.schneidermalechorus.ca
Southwestern Ontario Suzuki Institute	Waterloo				X						https://suzukiassociation.org
Stratford Symphony Orchestra	Stratford				X						www.stratfordsymphonyorchestra.ca
The Boathouse	Kitchener				X						www.boathousevictoriapark.com
The Button Factory	Waterloo				X	X	X				www.buttonfactoryarts.ca
The Cambridge Symphony Orchestra	Cambridge				X						www.cambridgeorchestra.ca
The Gilbert & Sullivan Society - W'loo Reg Branch	Waterloo				X	X					http://gswaterloo.ca
The Grand River Folk Community	Kit, Wat, St Jac				X						http://www.grandriverfolk.org/
The Jazz Room	Waterloo				X						www.kwjazzroom.com
The Kitchener-Waterloo Chamber Music Society	Waterloo				X						www.k-wcms.com
The Kitchener-Waterloo Community Orchestra	Waterloo				X						www.kwco.org

	City	Software	Gaming	Social Media	Music	Theatre	Film/ Video	Advertising	Publishing	Digital Dist'n	URL
Cultural Institutions/Organizations											
The Mill Race Folk Society	Cambridge				X						http://www.millracefolksociety.com/
The Registry Theatre	Kitchener				X	X					www.registrytheatre.com
The Renaissance Singers	Waterloo				X						http://www.renaissancesingers.ca/
The School of Rock	Kitchener				X						https://kw.schoolofrock.com/
The Shot	Kitchener				X						http://singfortheshot.com
The Waterloo Chamber Players	Waterloo				X						http://waterloochamberplayers.com/
The Waterloo Concert Band	Waterloo				X						www.waterlooband.com
THEMUSEUM	Kitchener				X	X					www.themuseum.ca
UpTown Waterloo Jazz Festival	Waterloo				X						http://waterloochamberplayers.com/
Waterloo Region Arts Awards	Waterloo				X	X	X				www.artsawardswaterlooregion.ca
Waterloo Regional Police Male Chorus	Cambridge				X						www.wrps.on.ca/volunteers/male-chorus
Wellington Winds Inc.	Elmira				X						www.wellingtonwinds.ca/contact
Design/Advertising/Marketing/Communications											
Arrowsmith Corporation	Kitchener							X			http://www.arrowsmithcorp.com/
Brighthouse Branding Group	Waterloo							X			www.bighthouse.ca
Cineplex Digital Solutions	Waterloo							X			cineplexdigitalsolutions.com
Crankworks Creative Inc.	Kitchener							X			http://crankworks.ca/
ENVionX	Waterloo							X			http://www.envionx.com/
Eyelight Inc.	Waterloo							X			http://www.eyelight.com/
Hagon Design Inc.	Kitchener							X			http://www.hagondesign.com/
Isabel Avery And Company Inc.	Kitchener							X			http://isabelavery.co/
Mad Hatter	Kitchener							X			http://www.madhattertech.ca/
Quarry Integrated	St. Jacobs							X			http://www.quarry.com/
Peacock Blue Communications	Cambridge							X			peacockblue.ca

References

Partial listing:

- Austin Film Commission. *Austin Film Commission*. 01 01, 2014. <http://www.austintexas.org/film-commission/> (accessed 11 18, 2014).
- Brutto, David. *Section 37*. 01 01, 2014. <http://www.section37.ca/> (accessed 12 10, 2014).
- Centre for Social Innovation . *Centre for Social Innovation NYC*. 01 01, 2014. <http://nyc.socialinnovation.org/> (accessed 12 10, 2014).
- Centre for Social Innovation. *Centre for Social Innovation*. 01 01, 2014. <http://socialinnovation.ca/> (accessed 12 10, 2014).
- Citizen Space. *Citizen Space*. 01 01, 2014. <http://citizenspace.us/> (accessed 11 18, 2014).
- City of Austin. "Approved Budget Volume 1." *Austin Finance Online*. 11 13, 2014. https://assets.austintexas.gov/budget/14-15/downloads/fy15_approved_volume_1.pdf (accessed 12 10, 2014).
- . "Austing Finance Online." *City of Austin*. 01 01, 2014. https://austintexas.gov/financeonline/finance/financial_docs.cfm?ws=1&pg=1 (accessed 12 10, 2014).
- . "CreateAustin: Cultural Master Plan." *CreateAustin*. 01 01, 2009. http://www.austintexas.gov/sites/default/files/files/Redevelopment/createaustin_cultural_master_plan.pdf (accessed 12 02, 2014).
- . *Creative Ambassadors*. 01 01, 2014. <http://austintexas.gov/department/creative-ambassadors> (accessed 11 18, 2014).
- . "Creative Content Incentive Guidelines." *City of Austin*. 01 01, 2014. http://austintexas.gov/sites/default/files/files/EGRSO/Creative_Content_Incentive_Guidelines__2_.pdf (accessed 11 18, 2014).
- . *Filming in Austin*. 01 01, 2014. <http://austintexas.gov/department/filming-austin> (accessed 11 18, 2014).
- . "Proposed Budget Highlights Fiscal Year 2014 - 2015 ." *City of Austin*. 09 10, 2014. <https://assets.austintexas.gov/budget/14-15/downloads/FY15BudgetHighlightsAustin.pdf> (accessed 12 10, 2014).
- City of Hamilton. "2014 Approved Operating & Capital Budgets." *City of Hamilton*. 01 01, 2014. <http://www.hamilton.ca/NR/rdonlyres/E64A87D4-19B4-4EFA-B6B5-81F3354C69ED/0/2014FINALBOOK.pdf> (accessed 12 14, 2014).
- City of London. *London's Cultural Prosperity Plan and Profile*. 08 26, 2014. <https://www.london.ca/About-London/culture/Pages/London's-Cultural-Prosperity-Plan.aspx> (accessed 12 14, 2014).
- City of Toronto. *Economic Development and Culture*. 01 30, 2014. <http://www1.toronto.ca/wps/portal/contentonly?vgnextoid=09428d5c19c52410VgnVCM10000071d60f89RCRD> (accessed 12 10, 2014).
- City of **Waterloo, Waterloo's Culture Plan: A Catalyst for Culture 2014-2024**, <http://www.waterloo.ca/en/living/cultureplanning.asp>
- . "Economic Development and Culture 2014 Operating Budget Overview." *City of Toronto*. 01 30, 2014. <http://www1.toronto.ca/City%20of%20Toronto/Strategic%20Communications/City%20Budget/2014/PDFs/CA%20perating%20Analyst%20Notes/2014%20Operating%20Public%20Book%20EDC%20May%2030%202014%20V1%20Final.pdf> (accessed 12 10, 2014).

- . "Toronto 2014 Budget." *City of Toronto*. 01 31, 2014.
<http://www1.toronto.ca/City%20Of%20Toronto/Strategic%20Communications/City%20Budget/2014/Images-PDFs/Where%20the%20money%20goes%20council%20approved.pdf> (accessed 12 10, 2014).
- Economic Growth and Redevelopment Services Office. "Cultural Arts Funding Program." *City of Austin*. 01 01, 2014.
http://www.austintexas.gov/sites/default/files/files/Redevelopment/CoreFunding/fy14_core_guidelines_v02.pdf (accessed 12 2014).
- EU. "The entrepreneurial dimension of the cultural and creative industries." *EU Bookstore*. 01 01, 2010.
<http://bookshop.europa.eu/en/the-entrepreneurial-dimension-of-the-cultural-and-creative-industries-pbNC0213130/> (accessed 11 18, 2014).
- European Agenda for Culture. "Good Practice Report on The Cultural and Creative Sectors' Export and Internationalisation Support Strategies." *Open Method of Coordination (OMC) Working Group on Cultural and Creative Sectors' Export and Internationalisation Support Strategies*. 01 01, 2014.
http://ec.europa.eu/culture/library/reports/eac-omc-report-ccs-strategies_en.pdf (accessed 11 18, 2014).
- Film Wellington. *Benefits of Filming in Wellington*. 01 01, 2014. <http://www.filmwellington.co.nz/page/benefits-of-filming-in-wellington.aspx> (accessed 11 18, 2014).
- Florida, Richard. "*The Rise of the Creative Class - Revisited: Revised and Expanded*", 2014.
- Government of Ontario, *Ontario's Entertainment & Creative Cluster: A Framework for Growth*, Ministry of Culture and Tourism, 2010.
- Hill, Kelly. "Saskatoon's Investment in Culture, 2009 to 2012." *Hill Strategies Research Inc*. 07 30, 2014.
<http://www.hillstrategies.com/content/saskatoon%E2%80%99s-investment-culture-2009-2012-0> (accessed 12 14, 2014).
- KEDS.11, *Kitchener Economic Development Strategy 2011-2015: Kitchener's New Approach to Economic Development*, 2011. www.kitchener.ca/en/businessinkitchener/resources/KEDS2011.pdf
- Knelman, Martin. "Toronto's billboard tax set to fund city arts and culture." *The Toronto Star*. 01 16, 2013.
http://www.thestar.com/entertainment/2013/01/16/torontos_billboard_tax_set_to_fund_city_arts_and_culture.html (accessed 12 10, 2014).
- Make. *How to Make a Maker Faire*. 01 01, 2014. <http://makerfaire.com/mini/> (accessed 11 18, 2014).
- . *Maker Faire*. 01 01, 2014. <http://makerfaire.com/> (accessed 11 18, 2014).
- Maker Faire. *Maker Faires Around the World*. 11 24, 2014. <http://makerfaire.com/map/> (accessed 12 2, 2014).
- Maker Faire Waterloo. *Maker Faire Waterloo*. 09 12, 2014. <http://makerfairewaterloo.com/> (accessed 11 18, 2014).
- Nesta. "A Guide to Creative Credits." *Nesta*. 03 05, 2011. <http://www.nesta.org.uk/publications/guide-creative-credits> (accessed 11 18, 2014).
- . "Creative Credits: A randomized controlled industrial policy experiment." *Nesta*. 06 17, 2013.
<http://www.nesta.org.uk/publications/creative-credits-randomized-controlled-industrial-policy-experiment> (accessed 11 18, 2014).
- Nesta. "*Creative Credits: A randomized controlled industrial policy experiment*",
<http://www.nesta.org.uk/publications/creative-credits-randomized-controlled-industrial-policy-experiment> (accessed 11 18, 2014).
- Rupprecht, Kyle. *Top 10 Cities to Be a Moviemaker: 2013*. 03 5, 2013.
<http://www.moviemaker.com/archives/news/top-10-cities-moviemaker-2013/> (accessed 11 18, 2014).
- UNCTAD. "*Creative Economy Report 2010: Creative Economy: A Feasible Development Option*",
unctad.org/en/Docs/ditctab20103_en.pdf (accessed 12 01, 2014).

UNESCO/UNDP. "Creative Economy Report 2013 Special Edition Widening Local Development Pathways." *UNESCO*. 01 01, 2013. <http://www.unesco.org/culture/pdf/creative-economy-report-2013.pdf> (accessed 11 18, 2014).

WREDS, Waterloo Region Economic Development Plan, www.wreds.ca/portfolio/proposed-actions/

Wellington City Council. "Annual Report 13/15." *Wellington City Council*. 06 30, 2014. <http://ar2013.publications.wellington.govt.nz/> (accessed 12 02, 2014).

—. *Sister Cities*. 01 01, 2014. <http://wellington.govt.nz/about-wellington/international-relations/sister-cities> (accessed 11 18, 2014).

Wellington Regional Strategy. "Wellington Regional Strategy (WRS) Implementation Plan." *Wellington Regional Strategy*. 02 01, 2013. <http://www.wrs.govt.nz/wellington-regional-strategy-2012/> (accessed 11 18, 2014).

WGTV 2040. "Wellington Digital Strategy." *WGTV 2040*. 01 01, 2014. <http://www.wgtn2040.govt.nz/making-it-happen/digital-strategy> (accessed 11 18, 2014).

Working Group of EU Member States Experts. "European Agenda for Culture Work Plan for Culture 2011-2014." *Government of Catalonia*. 04 01, 2012. [http://www20.gencat.cat/docs/msi-cultura/Relacions%20Internacionals/Noticies/Documents/Arxiu/120427%20CCI%20Policy%20Handbook%20\(FINAL\).pdf](http://www20.gencat.cat/docs/msi-cultura/Relacions%20Internacionals/Noticies/Documents/Arxiu/120427%20CCI%20Policy%20Handbook%20(FINAL).pdf) (accessed 11 18, 2014).

Researcher Profiles

FAD Research Inc.

FAD Research is a special projects media consultancy that in the past 20 years has participated in numerous policy projects for three levels of Canadian government institutions, as well as in many other projects for trade associations and businesses grappling with the changes wrought by the advent of digital media. These projects include economic-development assessments, regulatory reviews, tax credit policy, social research, and dozens of projects related to market research, digital marketing, and new product developments.

FAD Research is owned and operated by Sam Punnett, who has worked in the Ontario media industry for over 25 years. **The vast majority of this time has been spent in digital or “new” media**, while coming from a background in traditional media where he worked both in commercial broadcast production and the music industry. His achievements include employment as a games developer; the founding of a Toronto-based Internet marketing and strategy firm, where he led the research practice; the creation of the first national inventories of new media companies; the creation of a national awards show for the Canadian new-media industry (now the Digi Awards); and serving on the committee that created the award for the U.S.-based **Emmy’s for Interactive Media**.

Sam was a founder, director, and principal facilitator **of Ryerson University’s Comedy Lab** innovation program. **Sam was also an active adviser to Toronto’s “ThingTank Lab,” an ideation and maker facility dealing in the “Internet-of-things.”** He also served as a director of one of the original Canadian associations of new-media producers, as well as Secretary for the Liberty Village New Media Centre. He has been engaged as an analyst for many of the economic assistance programs created in Canada since the mid-1990s (The BellFund and various OMDC and federal programs, including the Canada Media Fund), and he is a sought-after commentator on change created by the adoption of digital technologies.

Rawl Banton, MBET

Rawl Banton is a consultant and practitioner in the digital-media sector. His expertise as a consultant is in media production, strategy, and business development. Rawl **has over 15 years'** experience working in various industries, including radio, film and television, web, mobile, and immersive environments, and he was on the team that started the Canadian Innovation Exchange.

Production residences at the Canadian Film Centre Media Lab and the Banff New Media Institute complement **Rawl's experience in consulting and original** intellectual property creation. Further, **Rawl's Master of Business, Entrepreneurship and Technology (MBET) degree**, and consultant certificate from the University of Waterloo provides him with a unique balance of practical experience and formal training in media research, development, and commercialization.

As a practitioner, **Rawl's projects are at the intersection of technology and media and have been** experienced by varying audiences at events such as the Banff Summer Arts Festival, opening night at nextMEDIA FDC, The Power Plant (PowerBall 9: Revolutions), and as a special guest of the Consul General of Canada in San Francisco, for The Great Canadian Whiteout at the Game Developers Conference.

Lindsay Ellis, MBA

Lindsay is a Ryerson MBA graduate with a background in Chemistry and Film. She was awarded a Corus Young Filmmakers Grant and produced a short that aired on Treehouse. She has served as a project manager at Rogers Media and has also worked as the Marketing and Communication Manager at a new 3D post-production house, 3reedom Digital. While completing her MBA, she was one of ten people selected to participate in the inaugural RTA School of Bite Comedy Lab, an innovation project of Ryerson University designed to discover the future of media. The transmedia Comedy Lab focused on developing new projects and creating prototypes, business plans, and sizzle reels.

Lindsay was chosen to be the Project Manager and oversaw all the production of all of the five projects. She served as a Social Ventures Intern working with Vicki Saunders on Ryerson's recent Ashoka ChangemakerU Status at the DMZ incubator. Since completing her MBA, she has worked on a freelance basis, researching and writing strategy documents for a variety of clients. Lindsay has solid research and writing skills that make her well suited to analyst roles.

Michael O'Brien, MA

Michael O'Brien is an accomplished writer and editor who is a former technical writer with Cisco Systems and English instructor at the University of New Mexico.