

Ontario Media Development Corporation

2017-2018 Business Plan | Submitted January 2, 2017



We've got it going



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I. EXECUTIVE SUMMARY

The OMDC invests in Ontario's creative industries. The Agency serves as the central catalyst for the province's cultural media cluster. It is committed to delivering high impact support to drive growth and productivity and to build the capacity and competitiveness of Ontario's media industries. Through a targeted toolkit of tax credits, programs and services—for film and television, interactive digital media, book publishing, magazines and music—OMDC advances the Government's strategic objectives, which foster a sustainable and prosperous creative economy, support innovation, investment, and job creation that help Ontario's companies compete in the domestic and international marketplace, as well as enable Ontario to be a leader in the knowledge-based economy.

Specifically, support from the Government of Ontario enables OMDC to:

- Provide support through programs and stable tax credits to stimulate cultural industry activity and investment in the province, including the administration of Ontario's media tax credits;
- Invest in the creation of world-class, award-winning, original content;
- Facilitate collaboration across Ontario's creative industries to incent new ideas, new projects, and increased productivity;
- Encourage and share the risk of business innovation and digital transformation with content creator companies;
- Assist companies to enter new markets and forge critical relationships with international buyers to help them succeed in the global and online marketplaces;
- Support the development of new business models and the diversification of revenue streams;
- Promote and market Ontario's cultural media industries as world-class leaders;
- Stimulate inward investment, market Ontario to the screen production industry, and ensure a superior business experience through location scouting and facilitation services;
- Ensure effective industry development through partnerships, events and activities that stimulate the growth of strong and stable cultural media sectors; and
- Support data collection, and market trend analysis to ensure responsive, targeted and effective programs and investments in the cultural industries.

Supporting both emerging and established companies with a specialized toolkit of programs and services has enabled companies to mitigate risks, increase productivity, build scale, and achieve success that would not have been possible without OMDC's support. These investments by the Ontario Government have helped to ensure that Ontario companies continue to be global leaders and that Ontario maintains its position as a leading jurisdiction for providing innovative and effective support to a thriving world class Entertainment and Creative Cluster.

The cultural industries stand at the intersection between arts, business, and technology. As a result, the creative media sectors are strategically positioned to generate benefits in several different economic, cultural, and social areas. Here are a few additional examples of how OMDC plays a vital role in driving economic activity and job creation in Ontario:

- Aided by scouting and facilitation services through OMDC's **Film Commission** and **LA Office**, and in conjunction with OMDC's toolkit of programs and tax credits, Ontario's film and television

industry **contributed \$1.5 billion to the provincial economy** in 2015 – the fifth year in a row over the one-billion-dollar mark. Film and television production activity accounted for nearly 32,500 full-time direct and spin-off jobs in Ontario.¹

- Supported over **1,000 unique** creative media companies in Ontario.²
- Certified **1,949** Ontario book, film, television, and interactive digital media products with production budgets totaling \$6.4 billion. The estimated Ontario **tax credit** investment of \$352 million leveraged an additional **\$17 for every dollar** invested for the creation of cultural media content.³
- **Export Fund** support generated **\$ 365 million in sales** for Ontario companies; a return of **\$218 for every dollar** invested by OMDC.⁴
- Initiated **42,750 new business leads** for Ontario companies through **Industry Development** events supported by OMDC to facilitate partnerships and collaboration.⁵

OMDC will continue to build on these successes through its programs and activities.

Environmental Scan

OMDC maintains regular environmental scanning and monitoring of issues that are important to the creative media industries; including publishing comprehensive industry profiles of the six sectors supported by OMDC.

OMDC programs and activities are also informed and enriched by regular stakeholder engagement that enhances the Agency's ability to fulfill its mandate successfully. Formal stakeholder engagement takes place through OMDC's five Industry Advisory Committees that meet throughout the year.

Key trends and challenges facing Ontario's creative media industries and OMDC include some of the following:

External Cluster Developments and Trends

- Economic indicators predict moderate growth for Ontario.
- A competitive Canadian dollar is helping to boost exports and continues to attract strong levels of foreign service production for screen media to Ontario.
- Canadians continue to consume content across a growing number of digital and traditional platforms.
- A federal consultation, *Canadian Content in a Digital World*, may have significant impact on Canadian Content policies, laws and regulations.

Internal Developments and Trends

- Demand for OMDC programs and services continue to grow and exceed available resources.

¹ OMDC, 2015 Production Statistics.

² OMDC, Annual Results, 2015-16.

³ Ibid.

⁴ Ibid.

⁵ Ibid.

- The 2016 Ontario Budget including a reduction to OMDC's annual budget allocation.
- The Province is beginning the implementation of its first Culture Strategy and Arts Policy Framework which will have several implications for OMDC, including the administration of a new Ontario Books in Schools Fund.
- OMDC will embark on the implementation of a new five-year Strategic Plan.

Strategic Directions

OMDC's current strategic plan will conclude in 2016-17. A new plan is currently in development. The Agency looks forward to presenting a draft plan to the Ministry in the new year. It is anticipated that the Strategic Plan will be completed before the end of the current fiscal year for implementation beginning in 2017-18.

The following draft vision, mission and strategic goals have been developed and will be further refined with additional input from OMDC's Board of Directors, Senior Management Team, and the Ministry.

Draft Vision: An Ontario where our creative industries are globally leading and competitive; celebrate Ontario's cultural vitality; and drive economic growth and development in the Province.

Draft Mission: To be a catalyst for economic development in Ontario's creative industries through investment, promotion, and facilitation of innovation and collaboration both domestically and internationally.

Draft Strategic Goals

- Stimulate Economic Growth and Employment
- Promote the Industry
- Encourage Collaboration and Innovation

Draft Foundational Enablers

- Ensure Service and Operational Excellence
- Empower People and Teams

Programs and Activities

OMDC will continue to review, evaluate and adapt its programs and services to ensure that they are relevant, leading edge, and high impact as the market realities and business environment for the culture industries continues to change. To the extent possible, OMDC will continue to develop and lead innovative initiatives in order to facilitate new opportunities for Ontario's creative media companies and to better target government priorities. In addition, OMDC will work closely with the Ministry of Tourism, Culture and Sport (MTCS) and the Ministry of Finance (MoF) in order to implement Ontario's Culture Strategy including modernizing and improving the effectiveness of tax credits for Ontario companies.

OMDC will continue to offer its core programs and to Ontario's creative media industries that support content creation, marketing and business innovation, promotion, and industry development:

New programs and initiatives for 2017-18 include:

- **Ontario Books in Schools:** OMDC will pilot a new Books in Schools program. As part of the Ontario Culture Strategy's goal to inspire the next generation and help youth build careers in the

culture sector this program will support publishers in creating curriculum-linked learning resources and marketing efforts aimed at fostering the use of diverse Canadian content in schools.

- **Content Exchange Initiative:** Building on the insights gained through the Collaboration and Innovation pilot OMDC will launch a new initiative that will provide an opportunity for all sectors to meet, learn (through panels and/or other directed resources), and to participate in one-on-one meetings to explore new business and format opportunities.
- **Focus on Canada:** OMDC will explore support for initiatives tied to the Frankfurt Book Fair in 2020, where Canada has been selected as the Guest of Honour and at key the European music conference and market, Reeperbahn, where Canada will be they country of focus in 2017.
- **Time-Limited Strategic Initiatives:** OMDC will draw on reserve funds to implement a number of targeted initiatives in 2017-18 in addition to delivering the Agency's core programming.

Resources Needed to Meet Goals and Objectives

- The programs and services described in this Business Plan are based on the assumption that OMDC's provincial funding in 2017-18 will be \$44.7 M and that there will be no change to the Agency's 71 full time equivalent (FTE) positions.
- An additional \$250,000 has been provided by MTCS annually for the next three years for the Ontario Books in Schools program.
- Additional temporary FTE resources could be used to reduce the backlog and queue times for Tax Credit applications.
- In order to ensure that OMDC is successful in meeting its goals, the Agency will rely on continued collaboration and partnership with government partners including MTCS and the MoF.

Budget

This Business Plan represents a reduced budget with no requested increases for additional financial or human resources beyond what has already been announced by the Government. Specifically:

- OMDC's 2016-17 expenditures are anticipated to be \$50.2 million for accounting purposes, before adjusting for amortization and capital acquisitions. These expenditures include \$575,000 in planned time-limited initiatives, which will be funded from cash reserves.
- OMDC's annual allocation from the Government of Ontario for 2017-18 is expected to be \$44.7 million including program-specific allocations of \$10 million for an expanded IDM Fund, \$15 million for the Ontario Music Fund, and \$250,000 for the Ontario Books in Schools program.
- Uncommitted cash reserves at the end of 2017-18 are projected to be \$3.1 million. OMDC's fiduciary practice is to ensure that the reserve fund is sufficient to cover lease, legislated and severance obligations before considering allocations for programs and services.

- OMDC will utilize \$550,000 of the reserve funds in 2017-18 to implement a number of strategic initiatives.

Performance Measures

Performance measures for the Agency have been developed to provide regular feedback on whether the funds, programs, and other activities are meeting their objectives. OMDC expects to meet or exceed 2016-17 key performance targets by year-end, with the following exceptions:

- Though average application analysis time has been reduced, the aggregate turnaround time for tax credit certification continues to be high. The unplanned implementation of several complex changes to the Tax Credits, announced in the 2015 Budget, required the redirection of resources from processing applications to analysis and implementation planning with MTCS and MoF as well as requiring the department to respond to a significantly increased volume of applicant inquiries. A backlog of digital media tax credit files to be processed under the former regulations continue to be resource intensive for staff. Turnaround times will begin to return to 2014-15 levels once implementation is complete and impacted tax credit applications have been processed. The Agency is currently in the process of refining the existing risk assessment model to create additional efficiencies.
- It is anticipated that the value of film and television production in Ontario will again exceed expectations for the year. The competitive Canadian dollar has predictably attracted an increase in foreign service production. Domestic feature film production continues to be strong, which reflects positively on OMDC's work to stimulate industry growth and stability.

Risk Identification, Assessment and Mitigation Strategies

OMDC regularly updates and submits detailed quarterly risk assessment reports to the Ministry, with respect to risk factors, impact, and associated mitigation strategies.

High impact risks facing the Agency and the creative industries over the next three years include the following:

- A shortage of purpose built studio space, and growing concerns about a shortage of crew, are causing big budget, high impact film and television productions to move production to jurisdictions other than Ontario.
- Longer processing times for tax credits may delay payment to applicants and may jeopardize company stability and productivity which could impact OMDC's ability to achieve its mandate. To the extent possible, OMDC will allocate its resources to move applications through the queue and endeavour to manage applicant expectations to allow appropriate financial planning.
- OMDC's programs are oversubscribed and the inability to fund quality projects could represent a lost opportunity for the Province. In addition, sustained, or additional reductions to the Agency's budget could mean that some OMDC programs may have to be discontinued or funding provided to fewer applicants at lower amounts, also contributing to a lost economic opportunity for the Province. OMDC will continue efforts to demonstrate the value for money of Ontario's investment. The Agency will also continue to evolve and improve programs to ensure their effectiveness and to better target strategic priorities. In addition, OMDC will continue to implement

recommendations from a third-party business process review in order to find efficiencies within the Agency's current resources.

- In the event that OMDC's research function is modified or reduced, there is a risk that the Agency will lack the market intelligence and industry data required to adapt and design current and future state programs and services and to provide industry stakeholders and government partners with important data and trend information. OMDC will work with MTCS to explore the optimal use of resources to conduct and deliver research in 2017-18 and beyond. This will include exploring the best way to provide current data and information needed by the Agency to inform program design and trend analysis, while ensuring that there is no duplication of activities between the Ministry and the Agency.

Initiatives Involving Third Parties

OMDC works with third party public and private partners to deliver specific services and activities that support the creative media industries. These include:

- City of Toronto to operate the Toronto/Ontario Film Office in L.A.
- Toronto International Film Festival Group
- Federal and provincial and industry partners to promote Ontario's creative media industries at key international markets and events (e.g. Telefilm, CIMA)

Information Technology

OMDC provides and supports its own information technology services, including maintenance of the internal network and servers, e-mail and blackberry service, an internal database for operational purposes, and three outward-facing databases that provide access to industry research, filming locations, and OMDC's program and tax credit applications.

Key activities in the Agency's 2017-18 Information Technology Plan include the following:

- Further enhancements to the information technology infrastructure, including further virtualization of the server environment in order to improve operational efficiency and keep the infrastructure in peak operating condition.
- Requirements gathering for a refresh of the Online Application Portal (OAP) including an improvements the Agency's CRM system to allow for better management and integration with the OAP and accounting system (proposed implementation 2018-19).
- The IT team will undertake a refresh of the corporate website.

Communications Plan

OMDC promotes many activities, clients and their products, while integrating successful GDP and job growth into the stories, and through key messaging and imaging on multiple platforms. During the 2017-18 fiscal year, the Agency will also leverage visibility from the OMDC's 30th Trillium anniversary and the 150th anniversary of Canada and Ontario.

Conclusion

This Plan contains a slate of programs and services that represent a total operating budget of \$48.3 million in fiscal 2017-18. This represents a budget with no increase in either financial or human resources. The Government of Ontario's strong and continued investment in OMDC has enabled the Agency to support the development and distribution of content; to expand export activity; to ensure that Ontario companies and products feature prominently in international markets; and to establish new programs to encourage partnerships, collaboration, and innovation across sectors and across borders. Supporting high potential emerging and established companies as they develop new business models, has in turn allowed companies to mitigate risks, increase capacity and achieve success that would not have been possible without OMDC's support. These investments by the Government will ensure that the Province is well-positioned to be a global leader, providing innovative and effective support to a growing world-class Entertainment and Creative Cluster, which will anchor future economic growth and knowledge jobs in Ontario.

II. MANDATE

The Ontario Media Development Corporation is an operational service agency of the Ontario Government. OMDC was established on December 19, 2000 by Regulation 672/00 under subsection 32(5) of the Development Corporations Act. (Regulation 672/00 amended and replaced Regulation 270 which established the Ontario Film Development Corporation in 1986.)

Mandate Review: Findings and Recommendations

A review of OMDC's mandate has been completed. The results of the review were reported to Treasury Board and approved by Cabinet in the Summer of 2016. The Agency was briefed on the findings and recommendations in October.

The review found that OMDC's mandate to stimulate employment and investment in Ontario aligns with and continues to be relevant to the goals and priorities of the Government of Ontario and that OMDC continues to deliver on its mandate and contribute to economic growth. Subsequent to the review, the Agency has committed to work with the Ministry to review board structure; the articulation of the Agency's mandate including the creation of a statement of purpose; and, the best delivery methodology for research.

The following section describes the Agency's corporate objects as currently stated in its Regulations.

Corporate Objects

As described in the Regulation, the objects of the Corporation are to stimulate employment and investment in Ontario:

- a) by contributing to the continued expansion of a business environment in Ontario that is advantageous to the growth of the cultural media industry and to the growth of new employment, investment and production opportunities in Ontario;
- b) by facilitating and supporting innovation, invention and excellence in Ontario's cultural media industry by stimulating creative production, format innovation and new models of collaboration among sectors of the cultural media industry;
- c) by fostering and facilitating co-operation among entities within the cultural media industry and between the public and private sectors to stimulate synergies in product development and the creation of products with original Canadian content;
- d) by assisting in the promotion and marketing of Ontario's cultural media industry as a world-class leader;
- e) by administering provincial tax credit programs and such other programs and initiatives as may be required by legislation or a Minister of the Government of Ontario; and
- f) by acting as a catalyst for information, research and technological development in the cultural media industry provincially, nationally and internationally.

Mission and Vision Statements

OMDC's Board of Directors is currently engaged in a strategic planning process, as the Agency's current strategic plan concludes in 2016-17. Draft mission and vision statements have been developed in order to guide the Agency in fulfilling its mandate. Full details are provided in the Strategic Directions section beginning on page 22.

Governance and Ministry Relationships

OMDC's mandate directly aligns with the Ministry's vision to create a strong and stable culture sector and prosperous creative economy by helping Ontario's content producers to develop globally competitive media content that creates knowledge-based jobs and prosperity today and in the future. As the key delivery mechanism for providing programs and activities to the province's creative media industries, OMDC supports the Ministry's goal of encouraging expansion of the Entertainment and Creative Cluster (ECC) and stimulating job creation, economic growth, and innovation. For a detailed description of how the OMDC's mandate aligns with government priorities and the Agency's programs and activities, see Appendix A. OMDC is accountable to MTCS for the fulfillment of its mandate.

OMDC also maintains working relationships with the Ministry of Finance (MoF) and the Ministry of Economic Development and Growth (MEDG) in the delivery of programs and maintenance of stakeholder relationships.

Board of Directors

The Corporation is governed by its Board of Directors, consisting of not more than 17 members appointed by the Lieutenant Governor-in-Council (LGIC). The Board Chair and Vice-Chair are designated by the LGIC from among the appointed members. The Board of Directors meets regularly, typically six times a year. In August 2015, Kevin Shea's nine-year term as Chair of the Board of Directors concluded and Mark Sakamoto was named as the new Board Chair. The composition of OMDC's Board is currently 54 per cent women, meeting the 2019 target set by the Ontario Government. OMDC currently has 13 Board members:

Nyla Ahmad	Patrick Bourbonnais
Paul Bronfman	Adam Caplan
Susan de Cartier	Sharifa Khan
Gave Lindo	Sarah MacLachlan
Ildiko Marshall	Anita McOuat
Marguerite Pigott	Mark Sakamoto (Chair)
Blake Tohana	

President and Chief Executive Officer and Staff

The President and Chief Executive Officer (CEO) reports jointly to the Board of Directors and the Deputy Minister of Tourism, Culture and Sport. The CEO is responsible for the management of OMDC's programs and staff. Staff are hired under Ontario's Public Service of Ontario Act, 2006. The current full-time staff complement is 71.

Annual Report, Audit and Investments

The Corporation is required to deliver to the Minister an annual report on its affairs, including audited financial statements signed by the Chair of the Board of Directors and one other Director, and such other materials as the Minister may request. The audit is conducted annually by the Office of the Auditor General of Ontario.

Paragraph 8(3)(e) of OMDC's enabling regulation restricts the investments available to the Corporation. Within these parameters, OMDC's investment strategy is developed in consultation with the Audit

Committee of the Board and is approved by the Board of Directors. OMDC currently invests its funds in bankers' acceptances and bearer deposit notes of Schedule I or II banks at prevailing rates for periods as determined under the general direction of the Audit Committee.

Accessibility

OMDC actively supports all Ontario Accessibility legislation and directives including the Accessibility for Ontarians with Disabilities Act (AODA). The Agency is committed to the Government of Ontario's strategic goal of integrating diversity into all programs, policies, and services. The Agency is committed to continuing to extend its services and programs to ethno-cultural and other special interest/needs groups. Proactive outreach to ensure that OMDC's services are communicated and accessible to individuals and companies across Ontario will continue. OMDC's policies and multi-year accessibility plan are posted on the corporate website.

Accountability

OMDC's relationship and obligations to the Ministry are laid out in a Memorandum of Understanding (MOU). The MOU is an internal document that is reviewed every five years and when there is a change of Minister or Agency Chair. The MOU, as well as the Agency's business plans and annual reports are posted on OMDC's website as part of the Province's Open Government initiative. In addition to these documents, OMDC also posts the travel, meal and hospitality expenses of its Board of Directors (appointees) and President and CEO (staff at the Senior Management Group level 3 and above). Expenses are posted on the corporate website on a quarterly basis following appropriate approvals and reimbursement. Under the Province's Open Data Directive an inventory of the Agency's datasets has been posted on the website. OMDC will proactively release datasets in a machine readable format as per the directive.

III. ENVIRONMENTAL SCAN

The Creative Media Industries in Ontario

Ontario's Entertainment and Creative Cluster (ECC) includes any individuals or companies whose primary occupation is the creation, production and monetization of creative content.⁶ Historically, the ECC has been a key driver of economic growth for the province; even outpacing overall provincial growth during the period of 2005-2011.⁷ In fact, Ontario's Ministry of Finance estimates that since 2000, the ECC has generated over 48,000 net new jobs, a 30% job creation rate that doubles the 15% job creation rate for the overall economy.⁸

More recent estimates suggest that Ontario's ECC contributes over \$17 billion to the provincial economy, and has generated nearly 215,000 jobs.⁹ The wider culture cluster accounts for approximately 4% of Ontario's GDP, generating almost \$22 billion annually.¹⁰ This 'culture' cluster includes the ECC alongside other disciplines such as heritage & libraries, natural heritage, visual and applied arts, and more. In Ontario alone, the culture sector is responsible for generating approximately 280,000 jobs, which is 4.1% of the total jobs in Ontario.¹¹ As a result, Ontario is one of the world's highest revenue generating creative clusters.

Ontario is home to some of Canada's largest cultural industry sectors, including book publishing, film and television, interactive digital media, magazine media, and music. Beyond employment and GDP impact, these cultural media industries also provide direct investment into artists and creators. The firms that comprise these cultural industries tend to be primarily small and medium-sized enterprises (SMEs), and are represented in clusters across the province, from Kitchener-Waterloo to the Greater Toronto Area to Sudbury and beyond. As export becomes an increasingly important priority for the cultural sector, these SMEs act as a catalyst for the development of the knowledge-based, digital skills required for success in this new environment.

Here is a short overview of each of OMDC's six cultural media industry sectors:

Book Publishing:

The most recently available data suggests that the Canadian book publishing industry generated operating revenues of \$1.7 billion in 2014, with an operating profit margin of 11.7%.¹² Ontario accounted for the largest share of industry revenues at 66.7%, generating \$1.12 billion in 2014.¹³ The Province is home to over 60 independent book publishing companies, who are responsible for publishing the majority of the works created by Canadian authors.

⁶ Ontario Ministry of Tourism and Culture, *Ontario's Entertainment & Creative Cluster: A Framework for Growth*, p.3

⁷ Ontario Ministry of Finance (MoF), *Entertainment and Creative Cluster Statistics*, 2013

⁸ *ibid.*

⁹ Statistics Canada, *Provincial and Territorial Culture Satellite Account*, 2010

¹⁰ *ibid.*

¹¹ *ibid.*

¹² Statistics Canada, *Book Publishing Industry*, 2014

¹³ Statistics Canada, *Book publishers, summary statistics, every 2 years (dollars unless otherwise noted)*. Table 361-0088.

Film and Television

In 2013, Ontario's film, television and video production companies generated half (50%) of Canada's overall film and video production operating revenues, earning \$2.12 billion with an operating profit margin of 6.5%.¹⁴ According to data collected by OMDC for calendar year 2015, domestic and foreign film and television production supported by the province contributed 32,500 FTEs (direct and spinoff), while production volume reached an all-time high of \$1.52 billion.¹⁵

Interactive Digital Media

In 2010, Canadian interactive digital media products were responsible for \$3.3 billion in GDP, while the interactive digital media industry generated \$2.2 billion in GDP.¹⁶ Nationally, Canada's gaming industry ranks third behind the U.S. and Japan in terms of total production, with 90% of revenues derived from export sales.¹⁷ The last available data on the sector in Ontario, from the Canadian Interactive Industry Profile (CIIP), indicates that Ontario's interactive digital media industry generated over \$1 billion in revenues, and employed 17,000 individuals in 2011.¹⁸

Magazine Media

In 2013, the Canadian magazine industry generated total operating revenues of \$2.0 billion, with an operating profit margin of 8.0%.¹⁹ Provincially, Ontario's magazine industry accounted for more than half of the national operating revenues (56.7%), having generated \$1.13 billion.²⁰ The most recently available data on employment suggests that Ontario's magazine media industry employed over 8,500 people in 2010.²¹

Music

In 2013, Canada's sound recording and music publishing industry generated total operating revenues of \$799.7 million in 2013, with an operating profit margin of 10.7%.²² Ontario is home to Canada's largest music industry cluster, and accounts for 78.3% of national operating revenues.²³

Economy

At present, the financial and economic environment at both the provincial and federal level remains challenging. Economic projections from the Ministry of Finance suggest the provincial economy will continue to show modest real GDP growth of 2.2% annually between the years 2016-2019.²⁴ Over the period of 2016-19, this provincial growth is anticipated to continue to outpace the national growth rate, positioning Ontario as Canada's growth leader.²⁵ In fact, in the first quarter of 2016-17, Ontario posted higher real GDP growth than Canada, the U.S. and all other G7 countries.²⁶ Continued modest growth in

¹⁴ Statistics Canada, *Film, television and video production, 2013*.

¹⁵ OMDC Production Statistics, 2015

¹⁶ Statistics Canada, *Canadian Culture Satellite Account, 2010*.

¹⁷ Entertainment Software Association of Canada (ESAC), *Essential facts about the Videogame Industry 2015*, p.8

¹⁸ Canadian Interactive Alliance (CIAIC), *2012 Canadian Interactive Industry Profile*, October 2013. p.10.

¹⁹ Statistics Canada, *Periodical Publishing 2013, Periodical Publishers, summary statistics, every 2 years (dollars unless otherwise noted)*. Table 361-0032

²⁰ *ibid.*

²¹ Statistics Canada, *Provincial and Territorial Culture Satellite Account, 2010* [Note: These figures are from the industry perspective and are based on supplementary data provided by Statistics Canada].

²² Statistics Canada, *Sound recording and music publishing, 2013*

²³ *ibid.*

²⁴ MoF, *2016 Ontario Budget: Jobs for Today and Tomorrow – A Look at Ontario's Economy*, p. 213

²⁵ *ibid*

²⁶ MoF, *2016-17 First Quarter Finances*

Ontario's economy is being driven by a confluence of factors, including: economic growth in the United States (Ontario's largest trading partner), decreasing commodity prices, a low Canadian dollar and low interest rates.²⁷ In addition, economic indicators from the first half of 2016 demonstrate steady employment gains, with employment in the first six months of 2016 increasing by 85,100 jobs, compared to that same period in 2015.²⁸ This is consistent with the projection that Ontario's unemployment rate is anticipated to decline over the next four years, from 6.6% in 2016 to 6.1% in 2019, with the Province creating more than 300,000 net new jobs by the end of 2019.²⁹ Overall, while Ontario remains in a deficit situation (\$4.3 billion in 2016-17), the Ministry of Finance projections suggest that the government remains on track to balance the budget by 2017-18.³⁰ Revenue is projected to grow by an average annual rate of 4.6% through to 2018-19.³¹

One of the major impacts of the decline of the value of the Canadian dollar is an increase in the competitiveness of Ontario's exports. In 2014, the Province's international exports had their fastest gain since 2011, reaching growth of 7.1%.³² Coupled with business investment, exports are forecasted to be among the key drivers of Ontario's economic growth over the forecast period of 2016-2019, growing at a rate of 3.0% annually over the forecast period.³³ Therefore, a declining/weak Canadian dollar serves to boost the competitiveness of Ontario's exports, as well as increases Ontario's attractiveness to foreign-service productions for the screen sector. Foreign service growth will be limited by the availability of adequate purpose-built space and crew.

Consumer Trends

Consumer trends, both nationally and provincially, continue to illustrate that consumers no longer see a divide between digital and physical consumption. 2015 marked the first time that more Canadian households subscribed exclusively to mobile wireless services (20.4%) than to wireline telephone services (14.4%), while two-thirds of Canadians now own a smartphone.³⁴ The rapid increase in Canadians (18+) who own tablet devices continued in 2015, reaching a high of 49%.³⁵ Moreover, broadband internet is available in over 99% of Canadian households, while 96% of Canadian households can access a download speed of 5 Mbps (sufficient for streaming high-quality audio and video content).³⁶

Canadian content consumption habits are also in flux. Statistics show that Internet TV viewing among Canadians (18+) continues to grow, clocking in at 7 hours per week in 2015, compared to 5.1 hours in 2013.³⁷ Conversely, the share of Canadians watching 'traditional television' is continuing to decline, with Canadians (2+) watching 27.4 hours of traditional television per week during the 2013-14 broadcast year.³⁸ There is also evidence to suggest that there is a significant demographic disparity when it comes to traditional television viewing, with younger Canadians (18-34) watching significantly less traditional

²⁷ *ibid.*

²⁸ *ibid*

²⁹ MoF, *2016 Ontario Budget: Jobs for Today and Tomorrow – A Look at Ontario's Economy*

³⁰ MoF, *2016-17 First Quarter Finances*

³¹ MoF, *2016 Ontario Budget: Jobs for Today and Tomorrow – A Look at Ontario's Economy* p. 213

³² *Ibid*, p. 235

³³ *ibid*

³⁴ Canadian Radio-television and Telecommunications Commission (CRTC), *Communications Monitoring Report 2015*. p. 1 and pg.2

³⁵ CRTC, p.2

³⁶ CRTC, p.187

³⁷ CRTC, p.2

³⁸ CRTC, p.2

television than older Canadians (65+).³⁹ Specifically, younger Canadians (18-34) watch 20.6 hours of traditional television on a weekly basis, while older Canadians (65+) watched 41.8 hours per week on average.⁴⁰ Netflix, in particular, has seen rapid growth in the Canadian Anglophone market, and is now estimated to count 48% of Anglophones as subscribers.⁴¹ Similarly, as the sales of physical albums and downloads decline, the music industry is increasingly focused on the growth of revenues derived from streaming services. According to Nielsen's Music 360 Canada report, more than 70% of Canadian music listeners are using online streaming services, with particularly spectacular growth being driven by teens and millennial music fans.⁴²

However, traditional consumption patterns are proving to be resilient in other cases. For example, sales of vinyl records surged 30% in 2015⁴³, and print remains a dominant revenue segment for both book⁴⁴ and magazine media⁴⁵.

External issues facing Ontario's creative media industries:

Going Global: Exporting Ontario Content

Reaching global audiences also continues to be a priority for Ontario's creative media cluster. While there have been many international success stories for Canadian cultural content creators and companies, including *Orphan Black* and The Weeknd for example, exporting Ontario cultural content remains a key priority for Ontario's creative media industries. More importantly, these SMEs must also form relationships with decision-makers and obtain marketing support to reach international markets, often a difficult task for smaller companies and new entrants.

In the case of the video game industry, the Entertainment Software Association of Canada (ESAC) reports that 90% of (Canadian) company revenues come from export, with the key jurisdictions being the United States (44%), Europe (29%) and Asia/Pacific (23%).⁴⁶ In fact, the importance of the Asia/Pacific market for Canadian video games has risen sharply since 2013, when it only accounted for 4% of export revenues.⁴⁷

Export is also a clear priority for Ontario's music industry sector. Ernst & Young estimated that exports of Canadian music increased to US \$51.3 million in 2014, from \$47.7 million in 2013 and \$43.9 in 2012.⁴⁸ A recent report from the Canadian Independent Music Association (CIMA) highlights the importance of excelling in the export market, with 74.2% of all Canadian independent music firms indicating that they view the U.S. market as either 'very important' or 'important' to their current and future business development.⁴⁹ This CIMA report also suggests that as Canadian independent music businesses attempt

³⁹ CRTC, p.3

⁴⁰ CRTC, p.3

⁴¹ Canada Newswire (CNW), *The MTM's Most Recent Survey Results Find Over a Third of Online Canadians are Using Ad Blockers*. June 16, 2016

⁴² Nielsen, "'Views' from the top: Drake sets new record as streaming grows in Canada", May 5, 2016

⁴³ The Globe and Mail, "Vinyl revival: Canadian company reinvents the record pressing plant", February 4, 2016

⁴⁴ BookNet Canada, *The State of Digital Publishing in Canada 2015*, p.29

⁴⁵ Vividata, "Vividata releases 2016-Q1 study of Canadian consumers", July 26, 2016

⁴⁶ ESAC, *Canada's Video Game Industry in 2015*, p.55-56

⁴⁷ *ibid*, p.56.

⁴⁸ Ernst & Young, *Cultural times: The first global map of the cultural and creative industries*, p.55-58.

⁴⁹ Canadian Independent Music Association (CIMA). *Over the Border and into the Clubs: Canada's Independent Music Industry and the US Market*, p.15

to make strategic inroads into the U.S. market, they are faced with two major obstacles: the process and costs associated with obtaining a work permit, and the existing tax regulations (withholding taxes).⁵⁰

The market for screen-based industries is also increasingly global, both in terms of attracting inward investment via co-production activity and the need to cultivate Ontario as an attractive province for international film and television production activities. According to Telefilm, Canada's most common co-production partner was France, closely followed by the United Kingdom.⁵¹ In 2015, OMDC's production statistics show spending on foreign TV movies, mini-series and TV production grew by 96% and 46% respectively, while the number of foreign feature films increased by 87%.⁵²

As a result, the need to strengthen and facilitate export development activities for all creative clusters remains a key activity both for industry and OMDC. OMDC's International Business Development activities include delivering the OMDC Export Fund as well as delivering strategic initiatives in markets where a clear business opportunity has been identified. It also includes support for collaborative initiatives such as Canada Stand support at international markets.

Discoverability: Changing Consumption and Distribution Models

Content discoverability continues to pose a major challenge for Ontario's creative media industries. In a post-digital transformation age, Ontario media producers struggle to connect their content to audiences amidst an increasing abundance of screen-based, music, book and digital magazine offerings. In fact, only 38% of Canadians believe that finding new television content could be described as 'very easy' or 'easy', while 38% were neutral, and an additional 25% found it either 'difficult' or 'very difficult'.⁵³ This phenomenon is partially driven by the sheer amount of content being created in a digitized environment, but also by an abundance of new and relatively easily accessible platforms and devices to view content. For example, a recent survey by Media Technology Monitor (MTM) describes the array of methods Canadians are using to access screen-based content, including linear television (82%), online television (56%), over-the-top services like Netflix or Crave (40%), watching full-length television episodes on YouTube (19%), and video-on-demand services (18%).⁵⁴

The phenomenon of multi-platform consumption has also manifested itself across Ontario's other creative media industries as well. In magazine media, statistics on the Canadian market indicate that 41% of magazine readers use a combination of devices to access content, including mobile, desktop and print devices to access magazine content.⁵⁵ As digital magazine readership has grown to encompass over 5 million people in 2015, magazine media companies have explored new ways of distributing content and reaching audiences.⁵⁶ While print continues to be the dominant revenue stream for Canadian book publishers, there is a clear shift towards the production of ebooks, with 87% of Canadian publishers currently producing ebooks.⁵⁷ For Ontario book publishers, discoverability for their titles, both print and ebook, will pose a key challenge, particularly with a declining opportunities for shelf space in physical, retail stores.

⁵⁰ *ibid.*, p.25

⁵¹ Telefilm Canada, *Statistics on Coproduction* (2015).

⁵² OMDC, *Film and Television Production in the calendar years 2013-15 sorted by format*

⁵³ MTM, *Discoverability: How Canadians Find TV Content*, p.22

⁵⁴ *ibid.*, p.17

⁵⁵ Vividata, *2015 Q4 Readership and Product Database (January-December 2015 Fieldwork)*, April 14, 2016

⁵⁶ Magazines Canada, *Digital Magazine Media Fact Book 2015*, p. 115

⁵⁷ BookNet Canada, *The State of Digital Publishing in Canada 2015*, p.12

In both music and interactive digital media consumers have fully embraced the Internet as the key delivery vehicle for content. For example, 76% of Canadian YouTube users are using the service to access music, while globally, 82% of YouTube users utilize the service to access music.⁵⁸ While Canadian video game revenues are split between console (35%), mobile (31%) and PC/Mac (25%)⁵⁹, recent data suggests that mobile games and devices have become the most important gaming platform in Canada.⁶⁰ As the industry continues its rapid technological evolution, and particularly as new key segments emerge (like Augmented and Virtual Reality), Ontario video game companies must compete on a global stage in an increasingly competitive marketplace.

In many cases, the discoverability of Ontario-made cultural content is also compounded by the fact that some of the largest distribution channels for cultural products are global in scope, and have large market power. Examples of these channels can include: YouTube and Google, Steam, Kindle, Spotify, Apple Music, Microsoft, and more. As such, Ontario-based companies are interacting and competing with larger counterparts, and their relative lack of scale can make it difficult to command a large, international audience, access some platforms directly, or assert their market power with a global distributor.⁶¹ As such, gaining access to 'shelf space', an important success factor for enabling discovery, can be incredibly challenging to secure (e.g. the App Store increases by 1,000 new apps each day). Formatting the same IP across multiple platforms, all with different technical specifications and requirements is also a challenge for companies.

In some ways, this abundance of content and delivery mechanisms both provides unparalleled opportunities to share content with an increasingly interconnected and global audience, while simultaneously challenging content creators to find new ways to find, engage and retain audiences in a meaningful way.

Political and Regulatory Landscape

Over the past year, governments at both the provincial and federal level have moved to create or update their cultural policy toolkits, leading to a certain amount of uncertainty for Ontario's cultural industries. In July 2016, Ontario's Ministry of Tourism, Culture and Sport launched Ontario's first-ever Cultural Strategy, a document that outlines the province's goals and commitments to support the cultural sector over the next five years. Specifically of interest to Ontario's creative media industries, the Culture Strategy affirms that fueling the creative economy remains a key goal, and offered specific recommendations for the book publishing, music, interactive digital media and screen-based industries.⁶²

These include:

- Continue to support Ontario's status as a key North American centre for music production, performance via the Ontario Music Fund, and develop a vision for music tourism through the Ontario Live Music Strategy.⁶³
- Continuing to support the growth and development of Ontario's interactive digital media industry, with a specific focus on building a globally competitive and innovative industry.⁶⁴

⁵⁸ *ibid.*, p.10-11.

⁵⁹ Entertainment Software Association of Canada (ESAC), *Essential Facts about the Video Game Industry 2015*, p.8

⁶⁰ ESAC, *Mobile Games Surge – Mobile Devices Now Most Popular Gaming Platform in Canada*, September 12, 2016

⁶¹ OMDC, *The State of Content Distribution: Review of Content Distribution in the Cultural Media Industries*, p.51
<http://www.ibtimes.co.uk/apple-app-store-growing-by-over-1000-apps-per-day-1504801>

⁶² Ontario Ministry of Tourism, Culture and Sport, *The Ontario Culture Strategy: Telling our stories, growing our economy*. p. 22-25

⁶³ *ibid.*, p.24

⁶⁴ *ibid.*

- For the screen-based industries, the cultural strategy seeks to establish a public/private film and television industry-advisory panel to collaborate on priority issues facing the industry, and includes a commitment to modernizing the suite of screen-based tax credits.⁶⁵
- For the book publishing industry, the Culture Strategy includes a commitment to the establishment of a fund to support publishers in creating curriculum-linked learning resources to foster the use of diverse Canadian content in schools.⁶⁶

While there are no specific implementation details presently available, these goals are expected to be implemented over the next five years.

At the federal level, the Department of Canadian Heritage (DCH) unveiled a sweeping consultation called, “Canadian Content in a Digital World” in April 2016.⁶⁷ The consultation aims to re-examine the core structures of Canada’s cultural policy toolkit, including all relevant laws, institutions, policies and programs, with the ultimate goal of determining how to best support Canadian content in a digital age. This means that the following may potentially be in-scope for review: Broadcast Act, Income Tax Act, Canada Radio-television and Telecommunications Commission, CBC, National Film Board, Telefilm Canada, Canada Council for the Arts, foreign-investment policies, Canadian content regulations, Canada Book Fund, Canada Periodical Fund, Canada Music Fund, Canada Media Fund, tax credits for film and video production and export promotion funds. The consultation is currently in its second phase of collecting feedback from consumers and stakeholders, but the potential implications of this consultation may have far-reaching consequences for Ontario-based content creators and cultural industries.

Also at the federal level, the federal government will be proceeding with its legally mandated review of the *Copyright Modernization Act* in 2017.⁶⁸ As the core business of Ontario’s creative media industries is the creation, monetization and exploitation of intellectual property, this review may provide an opportunity for Ontario’s cultural industries to address some of the revisions made in 2012 that were viewed as problematic, particularly for the book, film and music industries. While the upcoming copyright review is of importance to all of Ontario’s creative industries, here is a short summary of the core issues identified by some stakeholders:

- Changes to the **fair dealing** provisions: According to Ontario’s book publishers the expansion of fair dealing provisions in the educational book sector has allowed for increased flexibility to use content without equivalent compensation for creators. Several academic institutions that would normally pay fees for using certain works under copyright now broadly interpret the fair dealing provisions to mean that some of these works can now be used for free under fair dealing provisions. Consequently, revenues in the Canadian educational book publishing sector have been negatively impacted⁶⁹. On the film side, documentary filmmakers were unable to secure any fair dealing exemption from technical protection mechanisms, and as such, have to incur high costs for licensing materials, which increases financing costs for film projects.⁷⁰

⁶⁵ *ibid.*

⁶⁶ *ibid.*, p.17

⁶⁷ Government of Canada, *Canadian Content in a Digital World Consultations*

⁶⁸ Government of Canada, Justice Laws Website, *Copyright Modernization Act* (S.C. 2012, c.20)

⁶⁹ Access Copyright, “Canada’s writers and publishers take a stand against damaging interpretations of fair dealing by the education sector” April 18, 2013.

⁷⁰ Documentary Organization of Canada, Submission to the Legislative Committee Studying Bill C-11, “Exemption for Documentary Filmmakers to Circumvent Technical Protection Mechanisms in Bill C-11”, February 2012.

- Issues with the **Copyright Board of Canada**: A high-profile issue for Canada's music industry is the effectiveness of the Copyright Board of Canada in adjudicating royalty rates and tariffs for the use of music by Internet-based streaming services. The chief concern is both the slow speed of rendering decisions, and the fact that decisions appear to circumvent market rate-based benchmarks negotiated by the industry.⁷¹

Digital Skills Development

As both technology and business models evolve at an increasingly rapid pace, there is an acute need for skilled workers to drive innovation and leverage new and emerging digital technologies effectively. However, it is often difficult for SMEs to recruit and retain skilled digital talent, given a lack of available resources (both financial and time) to attract and retain job-ready candidates.⁷² Moreover, a recent study from the Information and Telecommunications Council (ITC) suggests that due to the growth in digital jobs outpacing the overall economy by a rate of 4:1 in recent years, there will be an anticipated demand for 182,000 ICT workers in Canada by 2019, with an additional 36,000 workers required by 2020.⁷³ This same report highlights that several sectors will be impacted by this shortage, including the entertainment and video game sector, which will require an additional 1,400 workers in specialized creative and technical positions by 2017.⁷⁴

As a result, enabling Ontario's creative media industries to attract and retain high-quality talent that is equipped to navigate a fast-moving digital environment is a key priority, and contributes to Ontario's growth as a knowledge economy.

Gender, Diversity and Representation in Ontario's Creative Media Industries

Issues surrounding diversity and representativeness have emerged as high-profile issues for Canadian creative media industries, and Ontario is no exception. OMDC has provided funding to several research studies that examine issues in gender representation, including:

- Several studies on diversity and gender, including a profile of women working in Ontario's music industry (Women in Music Canada, 2015), and Women in View on Screen (2015).⁷⁵
- A study on the economic contributions of persons with disabilities in Ontario's screen-based industries, conducted by Lights, Camera, Access!⁷⁶
- Other OMDC-funded research studies that are currently in progress include a study on factors impacting female entrepreneurship in the information and communications technology (ICT) sector by OCAD University, as well as a Canadian Media Producers Association (CMPA) study examining policies and programs that have worked to improve female participation in non-creative roles in the screen-based industries.

Politically, issues of diversity and representation continue to spark concrete action from a wide variety of public bodies, including Telefilm's commitment to ensuring that its feature film portfolio will be "representative and diversified" by 2020⁷⁷ and an effort by the Canada Media Fund to examine potential

⁷¹ Music Canada, *Background: The Copyright Board's Tariff 8 Decision*, July 14, 2014

⁷² Information and Communications Technology Council (ITC), *Digital Talent: Road to 2020 and Beyond – A National Strategy to Develop Canada's Talent in a Global Digital Economy*. p.6

⁷³ *ibid.*, p.8

⁷⁴ *ibid.*, p.16

⁷⁵ OMDC, *Research funded by OMDC*

⁷⁶ *ibid*

⁷⁷ Telefilm Canada, "Telefilm Canada feature film portfolio to better reflect country's great asset – the diversity of its people", September 8, 2016

solutions to enacting gender parity in audiovisual content funding.⁷⁸ In addition to the organizations and events currently supported, OMDC is working towards an Agency strategy related to gender parity. Anecdotally, over half the productions funded through OMDC's Film Fund had women in a key role as writer, director or producer.⁷⁹

OMDC's Current Situation

The 2016 Provincial Budget, announced February 25, 2016, included an unexpected \$7.5 million budget reduction to OMDC as part of the Ministry's strategy to achieve its budget target. The reduction to OMDC's budget was in two parts: a one-time \$4 million reduction to the Agency's cash reserves and a \$3.5 million reduction to the Agency's annual base allocation.

An addendum to the 2016-17 Business Plan presented a revised budget which mitigated and minimized the direct industry impact of the reduction through a variety of strategies which included timing adjustments, cost containment, program modifications, revenue increases, and program reductions. It retained the logic of the Business Plan, where the budget for core programs and services was balanced, and the cash reserve was utilized only to support time-limited initiatives which would not create long-term stakeholder expectations. With the assumption of a second annual \$3.5 million reduction from the Agency's base allocation, OMDC's primary goal is again to minimize direct impact on our core programming and industry initiatives.

Ontario Culture Strategy

OMDC will help to support and implement Ontario's first-ever Culture Strategy: *Telling our stories, growing our economy*. The document identifies four goals and several supporting strategies as well as a set of principles intended to guide government support for culture. The development of a new strategic plan for the Agency presented an opportunity to align OMDC's strategic goals with those articulated in Ontario's Culture Strategy.

Labour

Aside from the excluded management positions, most of the employees at the Agency are members of the AMAPCEO or OPSEU public service unions. AMAPCEO's most recent collective agreement with the OPS was ratified in August 2014 and will expire in March 2018. OPSEU members ratified a collective agreement on October 30, 2015. This agreement will expire in December 2018.

Agency Mandate Letter

The 2016 Budget included a commitment for Ministers to issue annual mandate letters to all board governed provincial agencies. OMDC will work collaboratively with the Ministry to support and implement the expectations for priority actions and agency performance in the 2017-18 fiscal year.

Canadian Content in a Digital World

As part of ongoing efforts to provide a voice for the cultural media sectors to other levels of government, OMDC submitted comments to the Department of Canadian Heritage's consultation on Canadian content in a digital world. Through this process, the core structures of Canada's support for the cultural media industries, including laws, institutions, policies and programs, will be subject to review. Given the

⁷⁸ Canada Media Fund, "Gender parity in audiovisual content funding", April 27, 2016

⁷⁹ Toronto Star, "Women filmmakers in spotlight at TIFF", September 7, 2016

magnitude and reach of this consultation, the results (and potential changes) brought forward may have far-reaching implications for OMDC's stakeholders in the film, television, interactive digital media, book, magazine and music sectors. As the central catalyst for the province's cultural media cluster, OMDC's participation will include a written submission to the Department of Canadian Heritage on behalf of its stakeholder industries.

IV. STRATEGIC DIRECTIONS

Introduction

OMDC's current strategic plan will conclude in 2016-17 and a new plan is currently in development. A draft strategic framework will be presented to the Ministry in the new year. It is anticipated that the Strategic Plan will be completed before the end of the current fiscal year for implementation beginning in the Agency's 2017-18 fiscal year. The new five-year strategic plan will focus OMDC's resources on stimulating economic growth and employment, encouraging collaboration and innovation, and promoting Ontario's creative industries while striving to be flexible, collaborative, accountable, and inclusive. This plan strongly aligns with and supports the government's priorities and the goals articulated in the Ministry's new Culture Strategy. A detailed summary of the draft strategic framework is provided in this section.

In July 2016, MTCS released Ontario's first Culture Strategy which will contribute to guiding OMDC's work and investments in the creative economy over the next five years. The Culture Strategy contains four overarching goals, which include: promoting cultural engagement and inclusion, strengthening culture in communities across Ontario, fueling the creative economy, and promoting the value of the arts throughout government. The Agency is committed to supporting these goals and helping MTCS to increase opportunities for cultural participation across the province.

2012-13 Strategic Plan

The Agency's current strategic plan was developed in 2012-13. Building on the strategic planning work carried out by OMDC in 2007 and 2008, in 2011-12, the Agency conducted an independent strategic review of its ability to provide the maximum benefit for Ontario's creative media industries. The review resulted in a plan that confirmed OMDC's effectiveness in supporting Ontario creative media firms, and recommended ways for OMDC to improve its impact.

Over the past five years the Agency has made significant progress against the directions outlined in the Strategic Plan. OMDC launched the permanent Ontario Music Fund providing funding for lines of business, a significantly expanded IDM Fund, and introduced a pilot Collaboration and Innovation Fund. The Agency has reviewed and evaluated key programs and continues to update them annually in order to ensure they remain relevant and flexible. Partnering with the Ministry of Finance, a risk assessment model for tax credits was introduced which has resulted in reductions to processing time (with the exception of the digital media tax credit). The Agency remains committed to ongoing improvements in the delivery of all its programs and services.

In addition to these changes, OMDC also enhanced support for development activities by including development stream in the OMF and a Concept Definition Program in the expanded IDM Fund. The Agency continued to provide funding to support development projects through the Film Fund. Export activities were also a priority for the Agency. Various strategic initiatives such as the Ontario Authors Tour Support Program and a strategic initiative to assist the magazine sector access international opportunities helped Ontario companies to establish contact with foreign markets. Export activities are currently eligible in both the OMF and IDM Fund and the existing Export Fund continues to provide a robust return on investment for the book, film and television sectors.

The Agency determined that some strategies, such as the creation of a cluster partnership database were already being sufficiently met by external applications and so were not implemented. Other strategies, like examining loan guarantees continue to be explored. In addition to these activities, a new performance

measures framework was developed in partnership with MTCS to provide new ways to measure the impact and return on investment from programs and tax credits. The Agency is currently working on implementing the infrastructure changes required to collect new data points that are needed to report on these measures.

2017-18 Draft Strategic Framework

As the existing strategic plan comes to a close, the Agency has been working on developing new strategic directions. The Board of Directors along with OMDC Senior Management have reviewed and provided early stage feedback on the draft. An updated version of the strategic framework will be presented to the Ministry in the new year.

OMDC wants Ontario to be a globally leading jurisdiction, recognized for innovative local companies producing exceptional content as well as a competitive destination for investment and development.

Draft Vision: *An Ontario where our creative industries are globally leading and competitive; celebrate Ontario's cultural vitality; and drive economic growth and development in the Province.*

OMDC's role is to work collaboratively with private and public sector partners to drive economic development, including GDP and employment in Ontario's book publishing and magazine media, film and television, music, and interactive digital media industries.

Draft Mission: *To be a catalyst for economic development in Ontario's creative industries through investment, promotion, and facilitation of innovation and collaboration both domestically and internationally.*

Draft Values:

These five core values embody the attitudes and behaviours OMDC promotes and encourage across the organization and that are fundamental to relationships with stakeholders and the Agency's internal culture. OMDC's team demonstrates its commitment to these core values through its decisions, daily activities and interactions with partners, customers, and each other.

- **Flexible:** Open to new ideas and approaches and to proactively adjust based on our environment.
- **Smart Risk-Taking:** Take informed risks that support our vision and learn from our experiences and outcomes.
- **Collaborative:** Work with each other and our partners to achieve the best possible outcomes.
- **Accountable:** Deliver on our commitments and hold ourselves responsible for our actions.
- **Inclusive:** Value, celebrate and support diversity.

Draft Strategic Goals and Enablers

Currently OMDC is delivering a suite of programs and services including funding programs, tax credits and industry development. These programs have been impactful and will continue to remain a focus for the organization in the future. Despite this progress, there are still gaps in the industry that OMDC can work to address through its strategic goals. Additionally, as OMDC works to meet these strategic goals while maintaining the valuable programs and services currently delivered it will need to reinforce its strong foundation by focusing on its enablers.

Strategic Goal #1: Stimulate Economic Growth and Employment

OMDC's focus is on stimulating economic development through the creative industries. To support the continued growth of the sector OMDC needs to have an effective set of investment tools that support high potential companies to grow and compete in the global creative industry.

For OMDC, this means:

- Embrace new opportunities and tools to support content development in all sectors
- Invest in high potential companies to help them grow and compete domestically and internationally
- Deliver focused programs and services that add value and have impact

The Ways in Which OMDC Will Achieve This Include:

1. Champion the modernization of Ontario's tax credits and update program parameters
2. Enhance OMDC's role across the value chain into early stage development, marketing and distribution
3. Explore new sources of investment capital and/or financing models to support industry growth

Strategic Goal #2: Promote the Industry

In an increasingly globalized and competitive industry, awareness of the high-potential and achievements of Ontario-based creative companies will grow new markets, domestically and internationally. Additionally building Ontario's brand as a leading international jurisdiction for production and development will help bring financial investments and knowledge-based jobs to the sector.

For OMDC, this means:

- Build awareness, encourage development and attract investment into Ontario's creative industries
- Generate excitement about the achievements of Ontario's creative industries
- Support the promotion of Ontario's creative industries domestically and internationally

The Ways in Which OMDC Will Achieve This Include:

1. Promote Ontario as a place for creative industry investment and development
2. Amplify domestic and international exposure and opportunities for Ontario companies and content
3. Refresh OMDC's branding and communications to support marketing and strategic objectives

Strategic Goal #3: Encourage Collaboration & Innovation

The creative industries are in a constant state of change. For companies to compete in this environment they need to be at the forefront by developing innovative products, services, and business models. Collaboration and information sharing can help support and enable this type of innovation and OMDC, as a catalyst for industry development, can help encourage and connect organizations from across and outside of the sector.

For OMDC, this means:

- Build and foster collaborative relationships among the creative industries to encourage innovation
- Connect and facilitate relationships between creative industries and the broader public and private sectors
- Actively seek out opportunities to generate and share knowledge and ideas

The Ways in Which OMDC Will Achieve This Include:

1. Stimulate innovative cross-sector collaboration within the creative industries and with broader public sector partners

2. Optimize the impact of OMDC's programs through incorporating market intelligence and leveraging partnerships
3. Facilitate domestic and international business partnership opportunities for Ontario-based companies

Enabler #1: Ensure Service and Operational Excellence

For OMDC, this means:

- Ensure a respectful customer experience for everyone that interacts with OMDC
- Be informed by evidence to continuously improve the quality of programs and services
- Be fiscally responsible, accountable and transparent in our operations to ensure that public funds are invested effectively

The Ways in Which OMDC Will Achieve This Include:

1. Streamline internal processes and procedures
2. Assess current programs and initiatives in order to focus on higher value activities
3. Streamline reporting to focus on performance measurement and outcomes

Enabler #2: Empower People and Teams

For OMDC, this means:

- Actively ensure our culture reflects the diversity of Ontario and contributes to our vision, mission and values
- Be an employer of choice to recruit and retain the best people in an inclusive work environment
- Support our staff to be expert leaders through continuous professional development

The Ways in Which OMDC Will Achieve This Include:

1. Maintain focus on evolving OMDC's culture to align with our values
2. Attract and retain the best people and support them to achieve excellence

V. OVERVIEW OF AGENCY'S CURRENT AND FUTURE PROGRAMS AND ACTIVITIES

The Ontario Media Development Corporation strives to deliver its programs and initiatives effectively and efficiently and engages in partnerships with the public and private sectors to leverage resources and services for the benefit of the sectors we serve. OMDC is committed to ongoing analysis and continuous improvement in its undertakings. OMDC staff has demonstrated its capacity to deliver meaningful, results-based initiatives to clients in all of the sectors it serves.

OMDC works cooperatively with the Ministries of Finance (MOF); Government Services (MGS); Tourism, Culture and Sport (MTCS); and Economic Development and Growth (MEDG) on collaborative initiatives if and when they arise. OMDC will continue these relationships and will continue to brief MTCS prior to the launch of new initiatives and to share the Agency's market intelligence and data. OMDC also has regular intergovernmental contact with peer organizations through national organizations such as the Association of Provincial Funding Agencies, National Tax Credits Committee, Telefilm's International Business Development Group, the Association of Film Commissioners International, and FACTOR. OMDC also regularly meets with other MTCS Agencies in a roundtable to discuss common issues of Human Resources, Financial Services, Information Technology, and Communications.

OMDC offers its programs and activities through four departments:

1. **Industry Development Group:** Provides support for creative media companies to create and market content, undertake strategic business development activities, access new markets and grow their businesses. The three units of the Industry Development Group (IDG) include Industry Initiatives, the Ontario Music Office (investment funding, international support and strategic initiatives), and the Film Unit/Film Commission (marketing, promotion and inward investment services), and collectively they encourage and support collaboration across and within sectors and attract and facilitate production activities in Ontario. IDG is responsible for contract obligations, including deliverables and results collection and reporting. The Film Unit/Film Commission monitors and collects production statistics.
2. **Tax Credits and Financing Programs Group:** Co-administers six refundable tax credits with the Canada Revenue Agency (CRA). The Group provides input to MTCS and collects and monitors statistics related to tax credit activity that inform policy advice to government on the status of creative media industries and the effectiveness of the tax credits.
3. **Business Affairs and Research Group:** Provides the strategic direction and operating structure to enable the Corporation to achieve its objectives, including strategic and business planning, market intelligence and statistics, financial services, information technology, performance results reporting, and corporate operations. The Group supports the Ministry and industry through the collection and dissemination of industry statistics and raises awareness of industry issues to federal bodies (e.g., Canadian Radio-television and Telecommunications Commission, Canada Media Fund). Human resources (HR) support is provided by the MGS through its centralized HR Ontario service.
4. **CEO and Communications:** Encompasses the office of the President and CEO, OMDC Board of Directors, and the Communications staff, who are responsible for supporting the agency in all its Communications activities as outlined in the Communications Plan in Section XIII.

Programs and Activities

OMDC offers programs and activities in support of the corporate Agency mandate outlined in the previous section. OMDC's programs and services also broadly support the goals and strategies articulated in Ontario's Culture Strategy, providing Ontario companies with the tools and support to remain competitive nationally and internationally. With the Province's support, OMDC's programs and services are enabling Ontario's creative industries make important contributions to the Province's economy and cultural vitality. The programs and activities that follow are organized by department and by type of activity supported, however, it should be noted that all programs and activities address more than one of the Agency's strategic objectives and can support multiple different activities.

Industry Development Group

Collaboration and Innovation Fund Pilot

In response to the current environment faced by content creators OMDC piloted a new Collaboration and Innovation Fund (CIF). The intent of the pilot program was to promote next generation business evolution in Ontario's entertainment and creative cluster and to assist Ontario's cultural industry companies to meet the challenges and opportunities of the digital economy by supporting them as they explored new value propositions alongside current-state business models. The CIF was introduced alongside existing funds that are effective in supporting the industries and achieving the Agency's economic development objectives. The CIF supported projects that fit within OMDC's mandate but that were not able to be supported by the Agency's existing program parameters.

Eighty-two applications were received from across the eligible sectors. Types of projects included transmedia programming, online marketing, webcast/video/over-the-top/YouTube channel development, mobile apps, social networks, interactive books, data analytics, and podcasting. Twenty-six companies were selected to participate in Phase I representing 10 interactive digital media companies; six magazine publishers; five book publishers; and five film & television companies. As many of the projects awarded funding in 2015-16 represented new business approaches and/or involved new partnerships it is not certain yet how their outcomes and results will align with the type of results that OMDC traditionally tracks. Given that the timeline for project completion will be fall 2016, the fund was not offered in 2016-17.

The Agency is currently consulting with the 26 companies selected in the first phase of the pilot. OMDC will not offer the program in 2017-18; in part to allow sufficient time to evaluate the outcomes and results of the program and in part because the Agency does not currently have the financial or human resources to offer a scaled up version of this program. Instead, the Agency will incorporate learnings and feedback received to date from participants into existing programs, where appropriate. For example, participants reported positively on the choice they were given to partner or not; consequently the partnership option of the CIF will be included in existing core sector funds for book and magazine (and continues to be an option in the IDM Fund). The opportunity to meet with companies in different sectors to discuss specific projects was identified as a key benefit of the CIF and to this end OMDC is also exploring launching a Content Exchange Initiative that would build on the type of collaboration/networking opportunities that were provided by the CIF. See the Overview of Future Programs and Activities on page 44 for more information on this initiative.

Film Fund

The Film Fund provides support to Ontario feature film projects that are ready for production or in the final stages of development. The objectives of this program are to increase investment and jobs in Ontario by

Ontario-based feature film production companies; to assist in capitalizing Ontario-based feature film production companies; and to increase the number of high quality, original feature films produced in Ontario by Ontario-based production companies. Results for this program are measured by the number of jobs created and/or retained, and the leverage value of OMDC's contribution to each project. The Fund has two components:

- Development – Provides funding in the form of an interest-free loan of up to \$25,000 for the final development stage.
- Production – Provides funding in the form of a repayable advance of up to \$400,000 on a last-in basis to complete the production financing of a feature film.

Many Film Fund-supported projects have gained critical and commercial acclaim both at home and abroad.

- Matching last year's record, nine OMDC Film Fund-supported feature films screened at the 2016 Toronto International Film Festival.
- Film Fund supported films were also well-represented on the international festival circuit including *Mean Dreams*, and *Two Lovers and A Bear*, which screened in the Director's Fortnight at the 2016 Cannes Film Festival.
- *Room*, a Film Fund supported co-production with Ireland, garnered a significant amount of critical acclaim both at home and abroad, winning nine Canadian Screen Awards, as well as an Academy Award and a Golden Globe Award.
- OMDC support has been a key driver in the success of No Trace Camping, a company that spent \$30 million on production in Ontario between Fall 2014 and Fall 2015.⁸⁰ OMDC's support of three recent No Trace Camping films: *Goon: Last of the Enforcers*, *The F Word* and *Room*, has allowed No Trace Camping to build up the momentum required to seek out new areas in growth, including in television, and to continue producing world-class content.⁸¹

OMDC will continue to deliver the Film Fund in 2017-18. The Agency will undertake an evaluation of the Film Fund to explore options for maximizing support, such as the budget level of eligible films and overall impact of the Fund on the growth of Ontario film production companies. In order to increase awareness of the films throughout the release cycle and extend audience reach, OMDC will also refine and continue an initiative to provide targeted support for innovative distribution and marketing strategies on a time-limited basis.

Interactive Digital Media Fund

OMDC's Interactive Digital Media Fund (IDM Fund) was designed to provide Ontario interactive digital media content companies with access to the final piece of funding required to move their proprietary projects into production. In 2015-16, the government committed new funding of \$6 million, increasing to \$10 million, annually for an enhanced version of the fund commencing in 2016-17.

⁸⁰ OMDC Success Story: No Trace Camping, retrieved October 18, 2016 from http://www.omdc.on.ca/WGIGO/Success_Stories/Film_Success_Stories/OMDC_SUCCESS_STORY__NO_TRACE_CAMPING.htm

⁸¹ Ibid.

The objectives of this program are to support the creation and exploitation of original content by Ontario companies and to provide opportunities for interactive digital media content producers to build capacity and grow their companies. In 2015-16 the Fund introduced a Concept Definition program to provide support for early stage activities that assists companies in moving towards the production of market-ready content projects. Digital projects from publishers and co-productions were also eligible to apply. In 2016-17 the IDM Fund was expanded to provided support for production and concept definition; global market development; marketing support and industry development activities. Results for this program are measured by the number of jobs created and/or retained, and the leverage value of OMDC's contribution to each project.

OMDC's IDM Fund recipients have been recognized for their creativity and innovation in a variety of platforms:

- Big Viking Games secured \$21.75 million in financing, placing it among the top-20 venture funding deals in Canadian tech according to the Canadian Venture Capital Association. As a result, Big Viking will be expanding by adding 200 new employees in the coming months.⁸² In addition, Big Viking Games was named as one of the top 10 Best Workplaces in Canada by the Great Place to Work Institute.⁸³
- Toronto-based content company Secret Location has won multiple awards for its content over the past year. Notably, Secret Location won Webby Awards for *Highrise: Universe Within* (Online Film & Video/BEST Use of Interactive Video) and *Orchestra VR* (Online Film & Video/VR: Cinematic or Pre-Rendered), the inaugural Peabody-Facebook Futures of Media award for *Ebola Outbreak: A 360 Virtual Journey*, and several digital media awards at the 2016 Canadian Screen Awards.
- Support from the IDM Fund has been leveraged to create successful cross-sectoral projects. One notable example is Pop Sandbox's *Loud on Planet X*; a game that prominently features Canadian independent music during gameplay.⁸⁴ Furthermore, *Loose Strands* (Darned Sock Productions) is a critically acclaimed interactive children's book funded, and was the first book app to receive support from the IDM Fund.⁸⁵
- IDM Fund supported Capybara Games was named one of the world's top 10 most innovative companies in gaming by Fast Company Magazine.⁸⁶ Several of Capybara's games have received IDM Fund support and the company credits OMDC support with helping to enhance their art and content pipeline and improving their technological capabilities. Their growth, and their experience marketing an IDM Fund supported self-published title, has made publishers confident in their

⁸² The Globe and Mail, "Game maker Big Viking announces \$21-million financing for 2016", November 2, 2016

⁸³ Big Viking Games, "Big Viking Games Recognized by Great Place to Work Institute", retrieved October 18, 2016 from <https://www.bigvikinggames.com/bvgs-team-recognized-by-great-place-to-work/>

⁸⁴ Financial Post, "Pop Sandbox's Alex Jansen explains how Loud on Planet X merged Canada's indie rock and indie games scenes", retrieved on October 18, 2016 from <http://business.financialpost.com/fp-tech-desk/post-arcade/pop-sandboxs-alex-jansen-explains-how-loud-on-planet-x-merged-canadas-indie-rock-and-indie-games-scenes>

⁸⁵ OMDC Success Story: Darned Sock Productions, retrieved October 18, 2016 from http://www.omdc.on.ca/WGIGO/Success_Stories/Interactive_Success_Stories/OMDC_SUCCESS_STORY__DARNED SOCK_PRODUTIONS.htm

⁸⁶ Fast Company, The World's Top 10 Most Innovative Companies in Gaming, retrieved November 5, 2015 from <http://www.fastcompany.com/3026366/most-innovative-companies-2014/the-worlds-top-10-most-innovative-companies-in-gaming>.

ability to deliver quality original intellectual property which has resulted in funding and deals for their original IP games.⁸⁷

- OMDC's support has helped SHG Studios to follow and jump ahead of the market creating a growing number of knowledge-based jobs in Ontario. Support from the IDM Fund and the interactive digital media tax credit made it possible for SHG to take smart risks, leading to a positive ROI for the company.⁸⁸

Book Fund

The Book Fund provides funding for Ontario-based, Canadian-owned publishers to increase their financial viability and overall business growth by supporting marketing initiatives which profile the works of Canadian authors to both foreign and domestic markets. Applicants can also apply for activities that build on or leverage existing digital capacity that best suit their individual corporate goals. The objectives of this program are to provide opportunities for book publishers to build capacity, increase sales revenue, and grow their companies. Results for this program are measured by return on investment (ROI) which represents the value of sales generated by a project for every dollar invested by OMDC.

Over the last five years, Book Fund recipients reported earning an annual average of \$3.22 for every dollar invested by OMDC. Books published by Ontario-based, Canadian-owned publishers have received significant critical and commercial acclaim.

- The 2016 Scotiabank Giller Prize shortlist includes two books from independent, Ontario-based publishers: Catherine Leroux's *The Party Wall* (Biblioasis) and Zoe Whittall's *The Best Kind of People* (House of Anansi Press).
- Four of the 2016 Trillium Book Award winners were published by Ontario-based, Canadian-owned publishers: Biblioasis, Éditions Prise de Parole, and Éditions L'Interligne.
- *On the Shores of Darkness There is Light* by Cordelia Strube, published by ECW Press, won the 2016 Toronto Book Award.
- Leading Ontario publisher House of Anansi Press will be celebrating its 50th anniversary in 2017⁸⁹ and has published award-winning titles from authors like Margaret Atwood, Michael Ondaatje, and Lisa Moore. Notably, the OMDC Book Fund has allowed House of Anansi to bolster and expand their digital marketing efforts and expand their digital offerings.⁹⁰

OMDC will continue to deliver the Book Fund in 2017-18 and will increase the funding cap for the program to up to \$150,000 per publisher. Applicants will also have the ability to collaborate with a partner as per the CIF. Building on a successful trial program, OMDC will incorporate the Ontario Authors Tour Support Fund (OATS) into the Book Fund. Recognizing the changing marketplace for books, OATS

⁸⁷ Abridged from an email from Nathan Vella, President and Co-Founder, Copybara Games.

⁸⁸ Email to OMDC from Colin Ferguson, Managing Director, SHG Studios

⁸⁹ House of Anansi Press, "50 Years of Publishing Very Good Books", retrieved October 18, 2016 from <http://site.houseofanansi.com/50-years-of-publishing-very-good-books/>

⁹⁰ OMDC Success Story: House of Anansi Press, retrieved October 18, 2016 from http://www.omdc.on.ca/WGIGO/Success_Stories/Book_Success_Stories/OMDC_SUCCESS_STORY__HOUSE_OF_ANANSI_PRESS.htm

provides publishers with funding to support Ontario-published author appearances at key domestic and international literary festivals and events to garner media exposure and increase book sales.

Magazine Fund

The Magazine Fund provides funds of up to \$75,000 for Ontario magazine publishers proposing business development projects with clear objectives and measurable results, including circulation, newsstand and ad sales projects, magazine makeovers, the exploration and implementation of new content strategies, new magazine start-ups and digital enhancement activities for their businesses. The objectives of this program are to provide opportunities for magazine publishers to build capacity and grow their companies through increased competitiveness and sales to support the creation of content by Ontario companies. In 2017-18, a strategic initiative will be provided to give magazine companies more flexibility to attend international activities. Results for this program are measured by the leverage value of projects supported, and the ROI which represents the value of sales generated by a project for every dollar invested by OMDC.

- The 39th annual National Magazine Awards were held in June 2016, with several Ontario magazines earning acclaim. *The Walrus*, *Toronto Life*, and *Maclean's* earned spots among the top winners, while *Canadian Geographic* earned an honorable mention for Magazine of the Year.
- Ontario-based trade and business magazines also earned acclaim at the Canadian Business Media Awards, including *Marketing* for Magazine of the Year, and *Precedent* in the inaugural Best Media Brand category.
- Exclaim! is a good example of how a magazine can successfully leverage OMDC Magazine Fund support to successfully grow its digital presence. A nationally-distributed, general-interest music print magazine with a strong digital presence in mobile and web, Exclaim! leveraged Magazine Fund support to redesign its web and mobile presence, which is now the basis for half of its overall revenues.⁹¹
- Similarly, support from the Magazine Fund allowed 2 for Life Media Inc. the opportunity to expand their magazine media into the digital space, becoming the first Canadian magazine to launch an iPad app. Today, 2 for Life Media Inc.'s media properties have developed into a full-scale digital company with a digital magazine, a website and a suite of apps. They credit Magazine Fund support with allowing them to take the risks their business needed to grow.⁹²

OMDC will continue to deliver the Magazine Fund in 2017-18 and will include an option for applicants to collaborate with a partner as per the learnings of CIF. Guidelines will also highlight the option for applicants to use the Magazine Fund to undertake international activities.

Export Fund and International Business Development

The Export Fund provides up to \$15,000 for Ontario book publishers and film and television content producers to sustain a slate of activities over the course of a year, including market event attendance and targeted sales trips. The objectives of this program are to support Ontario companies to access the global

⁹¹ OMDC Success Story: Exclaim!, retrieved on October 18, 2016 from http://www.omdc.on.ca/WGIGO/Success_Stories/Magazine_Success_Stories/OMDC_SUCCESS_STORIES___Exclaim_.htm

⁹² OMDC Success Story: 2 For Life Media Inc., retrieved on October 18, 2016 from http://www.omdc.on.ca/WGIGO/Success_Stories/Magazine_Success_Stories/OMDC_SUCCESS_STORY__2_FOR_LIFE_MEDIA_INC_.htm

marketplace, increase international sales levels, attract investment in new projects, and to provide support for the commercial exploitation of cultural products. Results for the Export Fund are measured by ROI (which represents the amount of sales generated by a project for every dollar invested by OMDC), and the number of foreign markets attended by program participants.

OMDC also undertakes strategic international business development activities in the form of industry missions, support for pavilions/stands at international markets, and targeted business-to-business networking opportunities. Results for International Business Development are measured by the number of markets at which OMDC has organized a strategic presence.

- In 2015-16, the Export Fund supported 192 companies across the book, film, television, and interactive digital media industries to attend 258 international markets. The International Business Development program organized a strategic presence at 22 markets including the Cannes Film Festival, MIDEM, Frankfurt Book Fair, and Film Bazaar in India.
- In 2015-16 (the most recent year for which results are available), companies receiving Export Fund support generated \$365 million in sales; a return of \$218 for every dollar invested through OMDC.⁹³
- Support from the Export Fund has enabled Scythia Films to make inroads in global markets, which has resulted in the company bringing over \$25 million dollars of service production to Canada. Moreover, Scythia Films has co-produced with the U.S., Germany, Denmark and Ireland as a result of their focus on building international connections and expanding the market for their content.⁹⁴
- Take 5 Productions, the follow-up venture to Dufferin Gate Productions, has had an international outlook from its inception. Take 5 Productions is the team behind the historical production *Vikings*, a co-production with the United States, and they acknowledge support from OMDC's location services, tax credits and Export Fund as helping them to get to the next level. Take 5 Productions credits the Export Fund with helping to finance the critical international travels that allowed the company to raise financing and bring business back to Ontario.⁹⁵
- Ontario book publisher Robert Rose credits the Book Fund and Export Fund for allowing his company to have the flexibility to grow and innovate. In particular, OMDC's Export Fund has allowed Robert Rose to explore the growth potential for foreign markets like New York, London, Frankfurt and Chicago.⁹⁶

OMDC will continue to deliver the Export Funds and International Business Development program in 2017-18.

⁹³ OMDC, Annual Results, 2014-15.

⁹⁴ OMDC Success Story: Scythia Films, retrieved October 18, 2016 from http://www.omdc.on.ca/WGIGO/Success_Stories/Film_Success_Stories/OMDC_SUCCESS_STORY__SCYTHIA_FILMS.htm

⁹⁵ OMDC Success Story: Take 5 Productions, retrieved October 18, 2016 from http://www.omdc.on.ca/WGIGO/Success_Stories/Television_Success_Stories/OMDC_SUCCESS_STORY__TAKE_5_PRODUCTIONS.htm

⁹⁶ OMDC, Success Story: Robert Rose, retrieved on October 18, 2016 from http://www.omdc.on.ca/WGIGO/Success_Stories/Book_Success_Stories/OMDC_SUCCESS_STORY__ROBERT_ROSE.htm

Industry Development Program

OMDC provides targeted financial and strategic support to trade and event organizations for activities that provide opportunities for business development for Ontario entrepreneurs in the creative media industries. Results for this program are measured by the number of initiatives supported and by the number of contacts made by participants.

- Business-building initiatives supported by the Industry Development Program in 2016-17 included: the Television Animation Conference at the Ottawa International Animation Festival, Interactive Ontario's GameON Ventures Conference, the Canadian Independent Music Association's (CIMA) Export initiatives at SXSW, Reeperbahn (Germany), the Great Escape (UK), TIFF's Sales and Industry Centre, and the International Visitors Programme during the International Festival of Authors.
- In the prior year, OMDC supported 68 initiatives, creating 42,750 new business leads for creative media industry entrepreneurs.⁹⁷

OMDC will continue to deliver the Industry Development Program in 2017-18. A third-party evaluation of the Fund is underway and the findings of the evaluation will be used to consider updates to the program. Next year will serve as an opportunity to socialize any changes among OMDC's stakeholders with implementation in the following fiscal year.

Ontario Music Office

In its 2015 Budget, the Ontario government committed to the continuation of the Ontario Music Fund (OMF), at \$15 million per year. The program is aimed at strengthening Ontario's music companies, stimulating growth, and supporting the Province's music sector. Results measured for the OMF include jobs created/retained; company growth (net revenue/income); private investment and equity secured; and ROI (which represents the amount of sales generated by a project for every dollar invested by OMDC). The fund is delivered through four streams:

Ontario Music Fund: Music Company Development

The Music Company Development stream is intended to provide Ontario-based music companies with funding to support new or expanded business activities, including strategic business and market development, in the form of investments and undertakings.

Ontario Music Fund: Music Industry Development

The Music Industry Development stream is designed to strengthen and develop the support structures and systems that contribute to economic and cultural growth of the music industry in Ontario by supporting organizations engaging in strategic initiatives with long-term impacts on the growth and sustainability of Ontario's music industry.

Ontario Music Fund: Music Futures

The Music Futures stream is aimed at stimulating entrepreneurship and providing support to develop Ontario's diverse and emerging music industry, including artist entrepreneurs which have the potential to grow professionally if provided with business mentoring, skills development and working capital to expand their recording, touring or A&R (artist and repertoire) capacity.

⁹⁷ OMDC, Annual Results, 2015-16.

Ontario Music Fund: Live Music

The Live Music stream is intended to increase the number and quality of live music experiences enjoyed by residents in and visitors to Ontario at events, festivals and concerts featuring Canadian artists.

In its third year the Ontario Music Fund awarded 155 grants including support for the following initiatives and activities and award-winning content:

- Live music events and conferences such as the 2016 Polaris Music Prize and Gala, Canadian Music Week, Burlington Sound of Music Festival, NXNE, Beaches Jazz Festival and Folk Music Ontario.
- Four Ontario artists made the shortlist for the 2016 Polaris Music Prize this year (Basia Bulat, Jessy Lanza, PUP and U.S. Girls), while The Weeknd and Justin Bieber won 2016 Grammy Awards.
- Launch and marketing of new recordings from Ontario-based record labels (e.g., Dine Alone Records, Pirates Blend Records, MDM Recordings, Six Shooter Records, Wax Records).
- Support to artist entrepreneurs, like Ottawa-based A Tribe Called Red, who were able to leverage support from the OMF to build on momentum created by their Polaris Music Prize longlisted album *Nation II Nation*, and market their music internationally.⁹⁸
- Small World has successfully used OMF support to increase their ability to promote emerging Ontario artists in the world music genre, a niche genre that doesn't necessarily gain the same attention from the mainstream music media. Through the OMF, Small World has been able to make investments into marketing that allow the organization to present Ontario artists alongside international artists.⁹⁹

OMDC conducted consultations with the music industry in Fall 2015 to explore ways to streamline, modify and optimize the impact of the Ontario Music Fund in 2016-17 and beyond. Meetings for each of the four program streams took place, with discussions framed around increasing the impact of the OMF; program outreach, particularly to Franco-Ontarian and Aboriginal communities; identifying opportunities to support Ontario's musical diversity; and, achieving administrative efficiencies. With input from the consultation, several changes, including lowering Music Company Development caps; lowering the revenue threshold in Music Futures; realigning the Live Music deadlines to match with industry scheduling; and streamlining administration and guidelines language were made to the Fund with the support and approval of MTCS.

In February, 2016, the Culture Innovation Audit Service Team (Ontario Internal Audit Division) (CIAST) conducted an engagement concentrated on assessing OMDC's compliance with applicable Transfer Payment Accountability Directive (TPAD) requirements covering the first and second years of the OMF. As of their final draft report in June 2016, CIAST concluded that no major deviations from TPAD were noted, and that the OMDC is in compliance with the applicable TPAD requirements in the delivery of the OMF.

⁹⁸ OMDC Success Stories: A Tribe Called Red, retrieved October 18, 2016 from http://www.omdc.on.ca/WGIGO/Success_Stories/Music_Success_Stories/OMDC_SUCCESS_STORY__A_TRIBE_CALLED_RED.htm

⁹⁹ OMDC Success Story: Small World, retrieved October 18, 2016 from http://www.omdc.on.ca/WGIGO/Success_Stories/Music_Success_Stories/OMDC_SUCCESS_STORY__SMALL_WORLD.htm

Film Unit

The Film Unit serves as Ontario's Film Commission and offers services to attract film and television production as well as post-production, animation and visual effects activities to Ontario. These services include complimentary location scouting to all productions, both domestic and foreign, that are considering Ontario as a location, as well as marketing missions, familiarization tours, and facilitation and troubleshooting support to productions shooting in the province. The objectives of the Unit are to increase film and television production activity in Ontario by promoting the advantages of filming in the province. The Unit also collects statistics on this production activity. In the first three quarters of 2015-16, 174 domestic and services projects were provided with scouting assistance by the Film Unit.

- OMDC, in partnership with the City of Toronto, maintains a full-time marketing presence in Los Angeles, providing on-the-ground marketing to attract production to Ontario and support to Ontario's screen-based content creators. The L.A. Office continues to make a significant contribution to Ontario's foreign production activity. In 2015-16, 33 productions with an estimated value of \$695 million were assisted by the Office. This figure refers to those film and television productions that were "leads" initially generated by the L.A. Office. OMDC is the managing partner of the Office.¹⁰⁰
- The size of the image collection in the award-winning Digital Locations Database continues to increase. As of November 7, 2016, there were over 14,500 portfolios in the database, representing nearly 325,000 individual images. Users of the system are made up of local freelance production personnel, domestic and international producers and OMDC staff, who use the system to create marketing packages. In 2014-15, OMDC launched a mobile version of the Digital Location Database that has enabled scouts to use the database while out in the field. The database continues to be improved to better serve the needs of users.

The Film Office will continue to operate in 2017-18 delivering high value service to stakeholders and reinforcing relationships with both new and existing international clients to support the continued growth of domestic production and maximizing inward investment opportunities.

Collaboration Initiatives

OMDC works with industry stakeholders to deliver cross-sector collaborative activities. These events encourage partnerships across the creative media industries that will lead to innovation, productivity and growth in the sectors. They also help to break down the barriers between sectors and allow them to focus on common business opportunities.

Examples of these initiatives include:

- From Page to Screen, an event that brings Ontario book publishers together with film and television producers for a series of one-on-one meetings. During the past seven years, the program has set-up over 2,000 business meetings and brokered nearly 40 book options. In 2015-16, over 70 companies participated in more than 400 meetings.¹⁰¹ At a prior year's version of the event, *The Breadwinner* by Deborah Ellis, published by Groundwood Books, was optioned by

¹⁰⁰ OMDC, Annual Results, 2016-16.

¹⁰¹ Ibid.

Aircraft Pictures and is being financed via the OMDC Film Fund as a Canada/Ireland co-production with Angelina Jolie on board as Executive Producer.

- To date, over 70 of OMDC's International Financing Forum projects have been financed including: *Book of Negroes*, *Citizen Gangster*, *Midnight's Children*, *The Husband*, *The Whistleblower*, *Coriolanus*, *Animal Kingdom*, *My Foolish Heart*, *The Colony*, *Born to Be Blue*, *Wadja*, *Hector and the Search for Happiness*, and the Oscar-nominated *Incendies*.¹⁰²
- OMDC's annual conference, Digital Dialogue will be held in the Fourth Quarter of 2016-17. More than 200 stakeholders from Ontario's creative industries attended last year's conference, including financiers, venture capitalists, content creators and technology experts. Topics discussed at the conference included the changing broadcast landscape, leveraging investment, new pathways to monetization, and audience and community building. The successful Digital Dialogue Breakfast series will also be offered again in 2017-18.

OMDC will continue to focus efforts on collaboration initiatives in 2017-18. In addition to current activities, OMDC will explore a new content exchange initiative to promote cross sector learning and collaboration regarding new business and format opportunities. See the Overview of Future Programs and Activities on page 44 for more information on this initiative.

Trillium Book and Poetry Award/Prix Trillium

The Industry Development Group delivers the Trillium Book and Poetry Award/Prix Trillium recognizing literary excellence in Ontario. A jury of peers is coordinated and managed by OMDC to select the short-listed titles and winners of four separate prizes. The deadline for submissions for the 30th Annual Trillium Award/Prix Trillium will be in the Fourth Quarter of 2016-17 and the Award winners will be announced in the First Quarter of 2017-18.

- The 29th Annual Trillium Award received 372 submissions. The winners were announced at an industry ceremony on June 22, 2016. The Minister of Tourism, Culture and Sport, Eleanor McMahon, presented the following awards:
 - Trillium Book Award in English-language: Kevin Hardcastle, *Debris* (Bibliolasis)
 - Trillium Book Award in French-language: Véronique-Marie Kaye, *Marjorie Chalifoux* (Éditions Prise de parole)
 - English-language winner for the Trillium Book Award for Poetry: Soraya Peerbaye, *Tell: poems for a girlhood* (Pedlar Press)
 - Trillium Book Award for Poetry in French-language: David Ménard, *Neuvaines* (Les Éditions L'Interligne)

OMDC will continue to manage the Trillium Book Award in 2017-18 and as 2017 will be the 30th anniversary of the Awards, OMDC plans to undertake an enhanced program of Trillium activities to promote the award and the industry in fall 2016 and winter 2017 leading up to the Trillium Awards week in spring 2017.

¹⁰² OMDC, *OMDC Newsletter*, September 2015.

Funding to the Toronto International Film Festival Group

In 2016-17 OMDC provided \$300,000 in Operating Support to the Toronto International Film Festival (TIFF). In addition to these operational funds, OMDC is the mechanism by which the Government flows annual funds (\$815,000 in 2016-17) for the care and maintenance of the Province's film collection at the Film Reference Library. In 2016-17, the agency also provided \$150,000 to the TIFF Sales Office during the Festival and \$30,000 to TIFF's Film Circuit.

Tax Credits and Financing Programs Group

Ontario's cultural media tax credits are a major incentive for doing business in Ontario and a powerful asset in the race to maintain leadership in the creative media industries. Tax credits provide Ontario's content creators with predictable and reliable support which helps companies finance innovative new products, explore new business models, develop new revenue streams, and expand sales and distribution in the international marketplace.

OMDC currently co-administers six refundable tax credits with the Canada Revenue Agency (CRA) based on eligible expenditures for the film, television, interactive digital media, book publishing and music industries. In 2015, the government eliminated the Ontario Sound Recording Tax Credit (OSRTC); however, OMDC will continue to administer the credit until all eligible applications are phased out. Results for Tax Credits are measured by the number of products certified, leverage value, and application processing time.

- **Ontario Film and Television Tax Credit (OFTTC):** a refundable tax credit to eligible Ontario-based Canadian corporations of 35 per cent of qualified Ontario labour expenditures for eligible film and television productions.
- **Ontario Production Services Tax Credit (OPSTC):** a refundable tax credit to eligible Ontario-based Canadian and foreign-controlled corporations of 21.5 per cent of qualified Ontario expenditures for eligible film and television productions.
- **Ontario Computer Animation and Special Effects Tax Credit (OCASE):** a refundable tax credit to Ontario-based Canadian and foreign-controlled corporations of 18 per cent of qualifying Ontario labour expenditures for digital animation and digital visual effects created in Ontario for film and television productions.
- **Ontario Interactive Digital Media Tax Credit (OIDMTC):** a refundable tax credit to eligible Ontario-based Canadian and foreign-controlled corporations of 40 per cent of eligible Ontario expenditures for interactive digital media products created in Ontario (35 per cent for fee-for-service).
- **Ontario Book Publishing Tax Credit (OBPTC):** a refundable tax credit to eligible Ontario-based Canadian corporations of 30 per cent of eligible expenditures for eligible literary works created in Ontario.
- **Ontario Sound Recording Tax Credit (OSRTC):** a refundable tax credit to eligible Ontario-based Canadian corporations of 20 per cent of qualifying production and marketing expenditures for eligible sound recordings performed by an emerging Canadian artist or group. The 2015

Ontario Budget announced that the OSRTC will be phased out. A qualifying corporation may claim an OSRTC for eligible sound recordings that commenced before April 23, 2015. However, a tax credit can only be claimed on eligible expenditures incurred before May 1, 2016 and the qualifying corporation cannot receive an amount from the Ontario Music Fund in respect of the expenditures claimed under OSRTC.

As indicated in the Ministry's 2016 Mandate Letter, the Province has made a commitment to stable tax credits. Within that commitment to stability there are still opportunities to explore strategies to modernize tax credits so they are in line with current production, distribution and consumption trends. OMDC is currently working with Ministry partners to achieve some of these improvements such as exploring eligibility for over-the-top productions. The Agency also continues to work towards reducing the processing time for tax credit certification. Further assessment and refinement of the risk assessment model is currently underway and an improved risk assessment model (Risk Model 2.0) is expected to be complete in early 2017-18. The Agency is also reviewing options to increase tax credit administrative fees, with the goal of full administrative cost recovery in 2017-18. Ensuring Ontario's competitiveness as a top production jurisdiction by modernizing the suite of tax credits for screen-based productions has been identified in Ontario's Culture Strategy as a core part of the plan to make Ontario a culture leader at home and internationally.

Although OMDC works closely with industry stakeholders to ensure programs are as responsive and effective as possible, tax credit legislation falls under the responsibility of the Ministry of Finance. OMDC will continue to engage in proactive dialogue with the newly formed public/private film and television industry advisory panel along with MTCS and MoF to discuss the Province's cultural media tax credits including opportunities for improvement.

The implementation of changes to the tax credits that were announced in 2015 Budget are expected to continue to be resource intensive for the department through 2017-18. As a result, the aggregate turnaround times for the tax credits have temporarily increased while the Agency processes the backlog of applications created from grandfathering OPSTC and OCASE claims, administers the transitional grant, and completes processing OIDMTC applications that fall under the previous set of guidelines. It is anticipated that turnaround times will begin to return to 2014-15 levels once implementation is complete and affected tax credit applications have been processed. It is worth noting that though overall turnaround times have increased because of these issues, prior to the 2015 Budget, except for OIDMTC, the actual average processing time per application had been significantly reduced due to the implementation of the risk assessment model implemented with MoF as well as other internal policies and administrative efficiencies introduced by the department.

The 2016 Fall Economic Statement introduced an application deadline in order to streamline the administration of OIDMTC. This change is intended to help to reduce application processing times and ensure that applications relate to recently completed products. While this change will help address the growing queue for OIDMTC applications, additional staff resources for a limited period would be helpful to speed up processing and to clear backlog. Reducing turnaround time will better leverage the Province's investment and significantly improve access to capital for Ontario content companies.

Business Affairs and Research Group

In 2016-17, OMDC continued to provide research grants to eligible not-for-profit corporations to carry out research and market intelligence projects that added to the knowledge base of the creative media industries. The Agency also commissioned research to provide data and insight into the business

environment for the creative industries and to help inform program design. Other activities included collecting Ontario film and television production statistics; regular environmental scanning and monitoring of issues important to the creative media industries; adding documents to the Online Research Library; responding to MTCS data and requests for information for briefing and event notes; and, providing comprehensive industry profiles of the six sectors supported by OMDC.

Research Grants

Since 2009-10, OMDC has supported 80 projects through the research grant program (an average of 11 per year). OMDC funding of approximately \$2M during this same period was leveraged to deliver total project values of \$6.5M; on average, OMDC's investment represented only 28% of the funding for this research. The model is also efficient in terms of timeliness with projects being completed in less than nine months on average.

Most research projects supported by OMDC are jointly funded by a number of partners in industry, academia and government, leveraging an additional \$2.58 for every dollar invested by OMDC and thus enhancing the quality and value of the studies. OMDC's investment also generates spillover benefits in revenues, employment, and related service expenditures in the province. OMDC's investment is typically a small (28%) but crucial piece of funding that enables key research projects to proceed.

In 2016-17, OMDC continued to provide funding to industry research and market intelligence through the **Research Grants** program. Approximately 15 research grants are supported every year. In the first two quarters of 2016-17, the following seven studies that received a research grant were released and are available to the public through the OMDC website and Online Research Library:

- The Canadian Association for Music and the Arts (CAAMA) – ***UK and Ireland Music Market Reports: Export Opportunities for Canadian Companies*** on April 29, 2016. These two reports assist Canadian artists and companies looking to conduct business in two separate foreign markets. In addition to an overview of the state of the music markets, the reports provide detailed information about local record labels, distributors, booking agencies, media and other promotional contacts, venues and festivals, as well as best practices for touring in the UK and in Ireland.
- Creative Enterprise Initiative – ***The Creative Content Industry in Waterloo Region*** on May 11, 2016. The research found approximately 200 regional businesses and organizations involved in creative content. Recommendations are provided to assist the region in providing a climate for business growth in the area for creative content.
- Computer Animation Studios of Ontario (CASO) – ***Economic Profile of Ontario's Computer Animation and Visual Effects Industry in 2014*** on July 27, 2016. This study provides an overview of the state of the computer animation and visual effects industry in the province. The report provides insights on the total economic impact (both direct and induced), total number of jobs created by the sector, as well as presents case studies of competing labour market jurisdictions in New York, Los Angeles, Montreal, Vancouver and London (UK). The report draws out some key themes and challenges for the sector going forward.
- Canadian Media Producers Association (CMPA) – ***An International Comparative Study: How National Content is Defined in Canada and Selected Countries for the Purpose of Providing Access to Public Support*** on August 9, 2016. This study examines how Canada's definition of national content is used to access public support and how it compares to the definitions used in 10 other international jurisdictions.

- Lights, Camera, Access! – **ScreenAccessON: The Employment of People with Disabilities in Ontario's Screen-based Industries** on September 27, 2016. This report was commissioned to develop an employment profile of people with disabilities employed in Ontario's screen-based industries, including film & television production, broadcasting and digital media. Through an accessible online survey, interviews and a stakeholder roundtable, this report collected data on employment patterns, wages, as well as information on the challenges and opportunities facing persons with disabilities in the screen-based industries.
- Documentary Organization of Canada – **Charting a Course for Impact Producing in Canada: Trends, Best Practices and Future Directions** on October 12, 2016. This report examines skills development in relation to “impact producing”, an area of economic opportunity, in the documentary space. A toolkit about making documentaries with impact is provided as a companion to the research report.

OMDC-Commissioned Research

Where OMDC identifies a particular knowledge gap or strategic growth opportunity which is not being addressed through the Research Grant program, the Agency will directly commission research studies. These OMDC-led research projects allow for forward-thinking, ‘big picture’ research on emerging issues facing the sectors, and are also used to feed into the Agency’s programming, strategic planning and business planning processes. OMDC generally commissions two research reports per year at an average cost of \$78K and an average completion time of eight months.

OMDC is active in creating new knowledge that can be used for the Agency’s own planning and program design and that also assists Ontario’s creative cluster companies to evolve their business models. In 2016-17, the Agency commissioned a research study to examine the evolution of how market-ready content is distributed from the content creator to the end user. *The State of Content Distribution: Review of Content Distribution in the Cultural Media Industries* identifies six distribution models that are found across the book publishing, magazine publishing, interactive digital media, film and television and music industries. The report provides an intuitive and easy way to understand how these models work for each identified sector. The report also identifies common challenges with regards to Ontario creative cluster companies navigating these models: Scale and Market Power, Discoverability, Access to Information, and Access to Platforms.

OMDC is also working with Circum Network to complete an inventory of data points collected by the Agency via program applications and client reporting. It is anticipated that this inventory of data points will provide some unique aggregate long term data on industry trends and performance. The results will be used to help support corporate planning and program development.

Online Research Library

OMDC has continued to add content to the Online Research Library (ORL). The Library now contains almost 500 domestic and international research studies specific to the creative industries and serves as a valuable repository of research for industry stakeholders, academics and the Agency’s own research and planning needs.

The ORL is used by researchers, research institutions, and industry stakeholders who have indicated that this “one-stop shop” information source is an exceptionally valuable resource. The ORL had 1,995 unique visitors last year. The content of the studies is also used to inform the development of OMDC’s semi-annual industry profiles which receive 13,000 unique views per year.

Priorities in 2017-18

Following a review of the OMDC's mandate, OMDC will work with MTCS to explore the optimal use of resources to conduct and deliver research in 2017-18 and beyond. This will include exploring the best way to provide current data and information needed by the Agency to inform program design and trend analysis, while ensuring that there is no duplication of activities between the Ministry and the Agency.

Some priority areas for the Agency include extending internal research examining gender parity in Film Fund-supported projects to include an analysis of key roles across each of the creative industries and an assessment of roles occupied by gender for OMDC-supported companies and content. The Agency would also like to explore further analysis of the aggregate data uncovered in the data inventory project to examine some of the unique longitudinal trends and information discovered by the project. Maintaining and updating industry profiles and the ORL continue to be priorities for the department.

Operational and Strategic Planning Activities

A new Strategic Plan for the Agency is currently in progress. Next year will be a transition year as OMDC shifts to the new strategic framework and communicates the plan to industry and government stakeholders. Operational priorities include building on the Records Management Roadmap including implementation of an updated and robust records management framework; creating and implementing a database tool for more efficient gathering of performance measures data and reporting; responding to MTCS requests for data and information required for briefing and event notes; compiling annual film and television statistics; preparing and maintaining datasets in compliance with Ontario's Open Data Directive; and, where appropriate, acting as a champion for Ontario's creative industries by participating in calls for comments held by other levels of government.

Industry Engagement Activities

OMDC programs and activities are informed and enriched by regular stakeholder engagement that enhances the agency's ability to successfully fulfill its mandate. Formal stakeholder engagement takes place through OMDC's five Industry Advisory Committees: Book, IDM, Magazine, Music, and Screen-based. The Advisory Committees are made up of stakeholders nominated by the various industry trade organizations for a term of up to three years. Each Committee nominates an Industry Co-Chair and the OMDC CEO serves as the Agency's Co-Chair. The Co-Chairs alternate the responsibility for chairing meetings, which will occur three times a year. The role of the Advisory Committees is threefold:

1. To provide high-level stakeholder input into OMDC planning and program development and design;
2. To support two-way communication between the agency and its stakeholders, including the opportunity to make presentations to the OMDC Board of Directors where appropriate. Committee members are expected to represent the views of their sectors and to consult with their sector colleagues in advance of meetings;
3. To inform OMDC of emerging stakeholder issues and priorities.

On occasion, subcommittees of the larger Advisory Committees are struck to provide input on specific OMDC programs or documents.

Staff members from all departments are active participants in OMDC's Industry Advisory Committees and staff conduct ongoing consultation with industry and stakeholders on issues, services and program offerings. Staff also engage in outreach activities to improve understanding of the requirements and application processes for all OMDC programs and tax credits. These include information sessions and participation in industry panels.

Act as a Champion for the Cultural Media Industries

OMDC continues to work with industry stakeholders to identify relevant issues and assist them in communicating those issues to the appropriate levels of government. In the prior year OMDC participated in the development of the Province's Culture Strategy and Arts Policy Framework by providing input to the Ministry and by promoting the consultation with stakeholders. OMDC also participated in the Federal consultation on Canadian Content in a Digital World and provided the Canadian Audio-Visual Certification Office (CAVCO) with comments on their 2016 public notices regarding ineligible genres and triggers for the purposes of the federal tax credits.

Overview of Future Programs and Activities

Ontario Books in Schools

In 2017-18, OMDC will pilot a new Ontario Books in Schools program. As part of the Ontario Culture Strategy's goal to inspire the next generation and help youth build careers in the culture sector this program will support publishers in creating curriculum-linked learning resources aimed at fostering the use of diverse Canadian content in schools. Industry consultations on program parameters will take place in winter 2017 in cooperation with MTCS. Funding for this program (\$250,000 annually over three years) has been provided by MTCS.

Content Exchange Initiative

OMDC will launch a new collaboration initiative that will provide an opportunity for all sectors to meet, learn (through panels and/or other directed resources), and participate in one-on-one meetings to explore new business and format opportunities. Feedback from an informal survey of participants in the first phase of the Collaboration and Innovation pilot is being used to help inform program design.

Frankfurt Book Fair 2020: Canada Focus

Canada has been selected as the Guest of Honour at the Frankfurt Book Fair 2020 (14-18 October 2020). The Frankfurt Book Fair is the international hub of the publishing world and being its Guest of Honour will provide opportunities to showcase Ontario literature and Canadian culture.

Reeperbahn, Hamburg, 2017: Canada Focus

Canada has been selected as the country of focus at this key European music conference and market. OMDC will explore opportunities for specific initiatives at Reeperbahn.

Strategic Initiatives

OMDC's programs are oversubscribed and stretched to maximum capacity, yet there are many opportunities to further enhance the impact of programs, to develop skills and partnerships, and to advance the government's priorities of export, innovation, collaboration, skills development and competitive strength. In 2017-18, OMDC will utilize \$550,000 in reserve funds to activate a series of time-limited initiatives that will leverage and extend existing programs without creating unsustainable stakeholder expectations and with minimal strain on human resources. These initiatives are as follows:

Ontario Author Touring Support: Recognizing the changing marketplace for books, OATS provides publishers with funding to support Ontario-published author appearances at key domestic and international literary festivals and events to garner media exposure and increase book sales. In 2017-18, the program will be delivered through the Book Fund in order to streamline delivery and assist with the planning cycle for publishers.

Magazine Industry International Business Development: Building on the successful international growth strategy initiated in 2016-17, this initiative will be extended for a second year. Funding will be provided to give magazine companies more flexibility to attend international activities that best suit their niche needs and to build on the exposure the Ontario collective has had internationally to date. In 2017-18 the initiative will be delivered through the Magazine Fund in order to provide administrative efficiencies and assist magazine companies with their annual planning.

Domestic Feature Film Distribution and Marketing: Based on the success of this initiative in the current fiscal year, OMDC will provide funding to support innovative marketing and distribution strategies for Ontario films for an additional year. This initiative will further leverage the distributor's marketing investment, will increase audience awareness and box office sales, and will empower producers to be more active agents in the distribution of their films. In 2017-18 the initiative will also include an element of professional development in order to optimize the Agency's investment and ensure strong marketing plans.

Trillium 30th Anniversary: OMDC will continue to enhance activities in the lead up to the 30th anniversary of the Trillium Award, including public events celebrating past winners of the award.

Business Process Review: While OMDC's customer services have been consistently rated as outstanding by stakeholders, the agency recognizes that technological advancements can be utilized to achieve further service improvements and internal system efficiencies to optimize the use of valuable human resources. In 2017-18, OMDC will complete the second phase an electronic payment system for outgoing payments.

These initiatives will be further developed leading into the 2017-18 fiscal year and OMDC will also remain open to seizing other emerging opportunities to advance priority objectives as they arise. As each of these initiatives are time-limited in nature, the use of accumulated uncommitted cash reserves to fund the activities will allow OMDC to deliver the benefit of these targeted strategies to stakeholders without compromising the value and impact of core programs.

VI. RESOURCES NEEDED TO MEET GOALS AND OBJECTIVES

The financial forecast and program and service descriptions included in this Business Plan assume that the \$3.5 million reduction to the Agency's base budget in 2016-17 will not be restored and that the \$4.0 million one-time reduction in 2016-17 will not be repeated and that there will be no changes to the Agency's number of FTEs. The forecast also includes an additional \$250,000 for the next three years for the new Ontario Books in Schools Program.

The OMDC's 2016-17 Business Plan was finalized prior to the 2016 Provincial Budget which included a \$7.5 million budget reduction to OMDC as part of the Ministry's strategy to achieve its budget target (a one-time \$4 million reduction to the Agency's cash reserves and a \$3.5 million reduction to the Agency's annual base allocation). As such, the programs and strategic initiatives described in that Plan were based on the assumption of an annual budget that was higher than what was available to the Agency. An addendum to the 2016-17 Business Plan was prepared to describe the changes that needed to be made to the original Plan as a result of the budget reduction. This addendum also detailed the specific reductions and the prioritization approach taken by OMDC to offset cuts that occurred.

The primary goal of the Agency's budget reduction strategy was to minimize the direct industry impact of cuts, while ensuring the long term financial and strategic sustainability of the Agency's Plan. This plan left the Ontario Music Fund (OMF) and the Interactive Digital Media Fund (IDMF) intact, at \$15 million and \$10 million respectively and, to the extent possible, mitigated the impact of cuts to other programs and activities. Timing adjustments, cost containment, program modifications, revenue increases, and program reductions were used to mitigate direct industry impact, ensuring that the budget for core programs and services was balanced, and the cash reserve was utilized only to support time-limited initiatives which would not create long-term stakeholder expectations.

With the assumption of a second annual \$3.5 million reduction from the Agency's base allocation, OMDC's primary goal is again to minimize direct impact on our core programming and industry initiatives. Demand for OMDC programs continues to outpace resources. This is a sign of tremendous success for OMDC and an indicator that the creative media industries are prospering. As the size of Ontario's creative economy continues to grow, OMDC continues to experience an increase in program demand, which strains both human and financial resources. Last year, OMDC was able to support only 68 per cent of the applications to OMDC Funds and only provide approximately a third of the funding requested.¹⁰³ This means that many quality projects are not funded and in many cases were either not implemented at all, or moved to another jurisdiction at a loss to Ontario's economy. A sustained budget reduction of this size, or further reductions will hinder OMDC's ability to achieve its mandate

Tax Credit turnaround times remain high, largely as a result of the complexity of the digital media tax credit and the rigorous nature of analysis required. The implementation of changes to several different credits including grandfathering and a transitional grant plus the existing backlog of digital media tax credit files that require review under the old regulations are also a contributing factor to the high turnaround time. Previously announced changes to the digital media tax credit will simplify analysis and reduce queue time for this credit, improving queue times across the board; however, the current and continuing high turnaround time means that, at minimum, tax credit processing delays increase financing

¹⁰³NOTE: These figures include the following OMDC Funds: Book, Film, IDM, Magazine Funds, Export Fund, Industry Development Program, Research Grants and Ontario Music Fund. These figures do not include data from the Collaboration and Innovation Fund.

costs for producers and delay access to capital to be reinvested in creation of new intellectual property which threatens company sustainability and reduces the impact of Ontario's investments in the creative industries. While this Business Plan assumes no new resources, the permission for temporary FTEs for 12 – 15 months could directly address this problem and help the Agency quickly reduce queue times to a reasonable level by providing additional resources to clear out the backlog of ODMTC applications. This would provide considerable value to Ontario's creative industries.

VII. RISK IDENTIFICATION, ASSESSMENT AND MITIGATION STRATEGIES

OMDC regularly updates and submits quarterly risk assessment reports to the Ministry of Tourism, Culture and Sport. These assessments address current and future activities of the Agency with respect to related risks factors and their impact. OMDC has prepared comprehensive mitigation strategies for all the risks it has identified. As new risks emerge or change, OMDC will endeavor to inform MTCS and act judiciously to minimize any negative consequences.

Noteworthy risks facing the Agency and the creative industries over the next three years include the following:

A scarcity of purpose-built production space and crew resources may cause prospective film and television productions to move to other jurisdictions due to lack of resources in Ontario at a loss to Ontario's economy and jobs.

- **Description:** A shortage of purpose built studio space, and growing concerns about a shortage of crew, are causing big budget, high impact film and television productions to move productions to jurisdictions other than Ontario. Over the past 18 months the Film Commission has sourced 1.2M square ft. of warehouse space for short term leasing. This has proved adequate for some projects, but not for high-end television or feature film projects that require soundproofing. The shortage in stage space is largest impedance in attracting high-end production to the province.
- **Mitigation:** OMDC's Film Commission is currently looking for warehouses or other suitable locations for production that can take the place of purpose-built spaces to mitigate this risk in part; however, this is not a solution for all types of production. With space now at capacity, high-end television and feature film projects that require purpose built space may need to commit to other jurisdictions.

Sustained or further reduction of provincial government allocation in context of increased demand may prevent the Agency from delivering on its mandate and may jeopardize Ontario's position as a leading jurisdiction for the creative industries.

- **Description:** Demand for OMDC programs continues to exceed the available resources which means that many quality projects remain unfunded. In many cases these projects are not implemented at all or are moved to other jurisdictions at a loss to Ontario's economy. For example, OMDC was only able to fund 33 per cent of production applications to the Film Fund in 2015-16. This represents a potential loss of hundreds of jobs and millions of production dollars that are not spent in Ontario. In addition to a loss of results via unmet demand, the 2016 Provincial Budget included a \$7.5 million budget reduction to OMDC as part of the Government's strategy to achieve its budget target. The reduction to OMDC's budget was in two parts: a one-time \$4 million reduction to the Agency's cash reserves and a \$3.5 million reduction to the Agency's annual base allocation. Without adequate funding, some OMDC programs may have to be discontinued or fund fewer applicants at lower amounts. It may also result in reductions to administrative resources or staff cuts for the Agency.
- **Mitigation:** To offset a portion of the budget reduction, OMDC was able to decrease some administrative and operational costs in order to minimize the cuts on direct industry programs and

services. As noted in the 2015-16 and 2016-17 Business Plans, and as recommended by the Internal Auditor, OMDC will move toward a cost recovery model for Tax Credit Administration fees which will provide additional revenue for the Agency. In 2016-17, some reductions to OMDC's core programs and activities were made as a last resort, and only after identifying all other cost savings measures and additional sources of revenue. By realigning resources, the original 2016-17 Plan had included slight budget increases for several programs. These increases have been effectively reversed, and where necessary, additional funds were cut. Every effort was made to minimize these program cuts and to distribute them across a range of program areas including research, investment grants, and special events. This represents a lost opportunity for Ontario's creative media firms to advance and for the Province to benefit from the additional job creation and economic benefits that enhanced support would have delivered.

OMDC will continue efforts to demonstrate the value for money of Ontario's investment to both government and the public through new performance measures and our communications strategy. The Agency will also continue to evolve and improve programs to ensure their effectiveness and to better target strategic priorities. In addition, OMDC will continue to implement recommendations from a third-party business process review in order to find efficiencies within the Agency's current resources.

Increasing tax credit certification turnaround times may reduce the value and impact of the Province's investment via tax credits.

- **Description:** Longer processing time for Tax Credit applications may cause a corresponding delay in an applicant's ability to receive payment on federal Tax Credits as the corporate tax system is now harmonized with the CRA. This also creates a financial risk to clients by putting a strain on their cash flow and forcing them to turn to other sources of funding to manage that cash flow. Under this scenario, companies will have fewer funds to invest in projects and/or strategies for corporate growth, meaning that projects will be delayed or companies will need to borrow (and therefore incur higher borrowing costs) to complete projects and/or grow their companies. As well, companies will be further stretched due to cash flow pressures caused by funding gaps and increased borrowing costs and will be less able to re-invest and grow their companies.

The implementation of changes to the tax credits that were announced in the 2015 Budget are expected to continue to be resource intensive for the department through 2016-17. As a result, the aggregate turnaround times for the tax credits will temporarily increase from the 26.6-week average in 2014-15. It is anticipated that turnaround times will begin to return to 2014-15 levels once implementation is complete and affected tax credit applications have been processed.

- **Mitigation:** To the extent possible, the Tax Credits and Financing Programs Department will prioritize processing tax credit applications. We expect turnaround times will begin to return to 2014-15 levels once implementation of the changes is complete and impacted tax credit applications have been processed. An application deadline for ODMTC was introduced in the 2016 Fall Economic Statement. This change will help to reduce application processing times and ensure that applications relate to recently completed products.

In the event that OMDC's research function is modified or reduced, there is a risk that the Agency will lack the market intelligence and industry data in order to adapt and design current and future state programs and services and to provide industry stakeholders and government partners with important data and trend information.

- **Description:** OMDC's modest research program plays an important role in providing the Agency with up-to-date research and industry data on the creative media sectors. These investments support the work that OMDC does from informing the Agency's annual business planning, strategic directions and program design to providing content for OMDC's comprehensive industry profiles which are viewed over 13,000 times a year. It also allows OMDC to be responsive to Ministry enquiries and requests for data or environmental information. Without this capacity, OMDC may be less able to deliver on its mandate.

One of the goals of OMDC's research function is to stimulate development of the market intelligence required for Ontario's cultural media industry firms to successfully navigate a rapidly and constantly changing environment. As many of OMDC's stakeholders are small and medium sized enterprises (SMEs) with limited financial and human resources, they are often at a competitive disadvantage when it comes to their capacity to undertake research projects. Collectively, OMDC's Research Activities allow these SMEs to adjust to evolving business models and technological changes. Without this capacity, Ontario companies may be less able to navigate the changing environment which could lead to less competitive and prosperous companies hindering OMDC from delivering on its mandate.

- **Mitigation:** OMDC will work with MTCS to explore the optimal use of resources to conduct and deliver research in 2017-18 and beyond. This will include exploring the best way to provide current data and information needed by the Agency to inform program design and trend analysis, while ensuring that there is no duplication of activities between the Ministry and the Agency.

VIII. HUMAN RESOURCES AND STAFFING

Staff at the agency are highly skilled and competent in their respective service areas and have the highest levels of commitment both to public service and to the stakeholders they serve. OMDC also meets or exceeds all required controls and accountabilities as a public service agency and administrators of public funds. We place a great deal of emphasis on ensuring that our obligations under both the Transfer Payment Accountability Directive and our operating MOUs with the Ministry of Tourism, Culture and Sport are met.

All OMDC staff are members of the Ontario Public Service. Staff members who are represented by a union are compensated under the terms of their collective agreements.

Below is a list of the staff complement broken down by bargaining unit classification:

Staff Strength

(as of November 7, 2016)

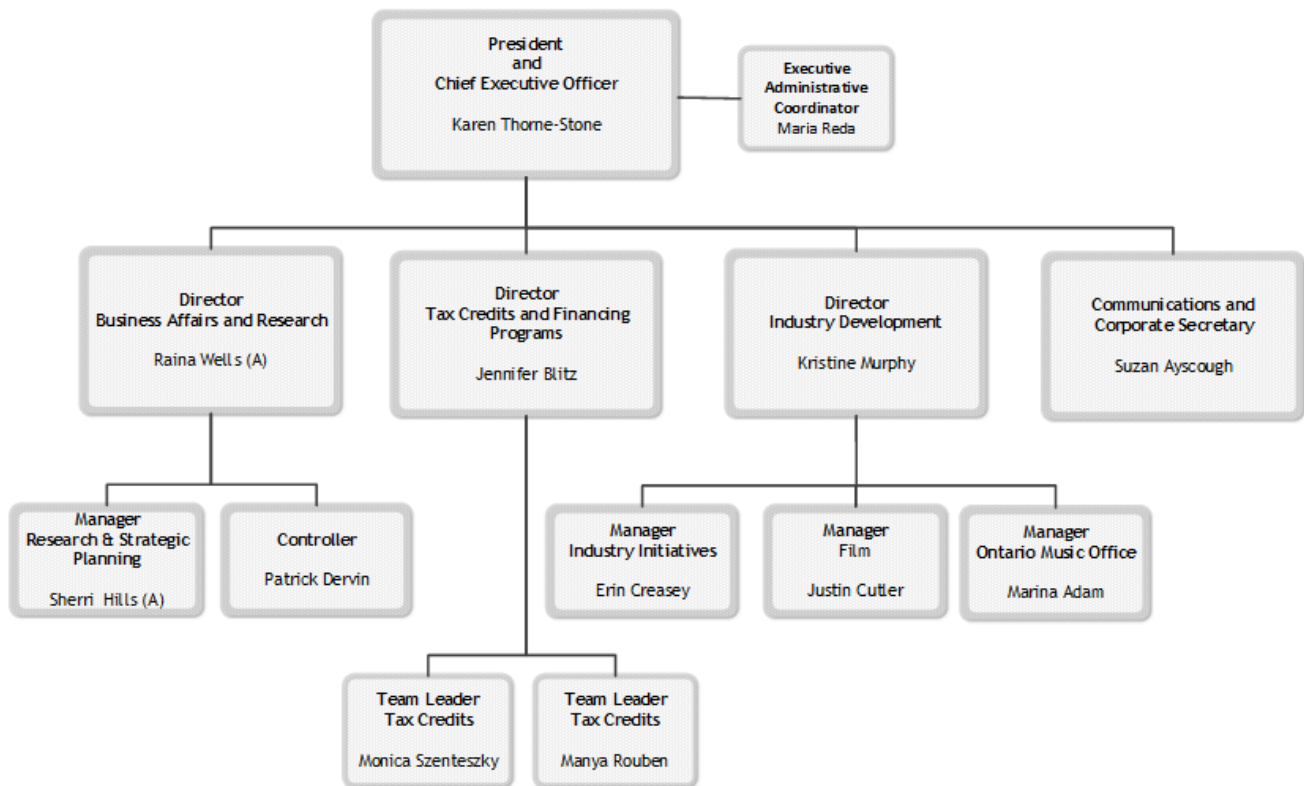
FTE Forecast

SMG/ITX	MCP	Excluded	OPSEU	AMAPCEO	TOTAL
3	6	0	55	7	71

ORGANIZATIONAL CHART

As of November 7, 2016

Ministry of Tourism, Culture and Sport Ontario Media Development Corporation



IX. PERFORMANCE MEASURES

2016-17 is a transitional year for OMDC's performance measures as the Agency continues to work towards implementing infrastructure changes required to collect data for a new performance measures framework developed with MTCS and PwC. The development of the new strategic plan has also provided an opportunity to review and realign the Agency's existing measures (including those from the MTCS/PwC project) to the new strategic framework. As this work is currently underway and a full list of key performance indicators mapped to each strategic goal will be provided to MTCS once the Strategic Plan has been finalized in the new year.

Performance measures for the Agency are developed to provide regular feedback on whether the funds, programs, and other activities are meeting their objectives and to provide some insight into the overall health of Ontario's creative industries.

These measures align with the Ministry's strategic objectives of fostering a sustainable and prosperous creative economy, supporting innovation, investment and job creation, helping Ontario's creative companies compete in the domestic and international marketplace, and helping Ontario become a leader in the knowledge-based economy.¹⁰⁴ In 2017-18 OMDC will continue to collaborate with its government partners to strengthen and grow Ontario's entertainment and creative cluster.¹⁰⁵

The following table provides interim results as of September 30, 2016 (Q1 and Q2) for key 2016-17 performance indicators. It also shows trend information by outlining comparable final results from 2015-16 and 2014-15, where applicable.

OMDC management also monitors performance measures that address operational efficiency and effectiveness as well as metrics in specific program areas. Monitoring these measures, while not reported in this Plan, contributes to the overall success of OMDC in achieving the agency's corporate goals and commitment to continuous improvement as well as ensuring the Agency's responsibilities under various accountability directives are met.

¹⁰⁴ Ontario Ministry of Tourism and Culture, *Results-based Plan Briefing Book 2014-15*, p. 4.

¹⁰⁵ Ibid, p. 7.

OMDC 2016-17 Performance Measures Report (as of September 30, 2016)

Key Performance Indicator	2016-17 Quarterly Results			Annual Results			Notes
	Q1	Q2	2016-17 Target	2015-16 Actual	2014-15 Actual	2013-14 Actual	
Goal #1: Drive Growth and Productivity in Ontario's creative media industries							
1. Average turnaround time across all six Tax Credits (weeks)	45.1	39.3	40	34.3	26.6	39.1	Note 1
2. Return on investment for the Magazine Fund	Note 3	Note 3	\$2.00	\$2.50	\$2.41	\$1.27	
3. Leverage value of OMDC investment through the Magazine Fund	Note 2	0.97	\$0.85	\$0.85	\$0.83	\$1.13	
4. Leverage value of OMDC investment through the Ontario Music Fund (OMF)	Note 4	\$4.16	\$4.00	\$5.05	\$3.72	\$5.86	
5. Increased company gross revenue as a results of the OMF (millions)	Note 3	Note 3	\$20.00	Note 2	\$23.16	\$19.70	
6. Increased company gross revenue as a results of the OMF (%)	Note 3	Note 3	5%	Note 2	3%	8%	Note 8
7. Private sector investment and equity secured as a result of the OMF support (millions)	Note 3	Note 3	\$5.00	Note 2	\$5.60	\$6.90	
8. Estimated value of Tax Credits (millions)	\$163	\$170	\$450	\$352	\$578	\$518	Note 1
9. Leverage value of OMDC investment through all six Tax Credits	\$23.17	\$16.26	\$10.00	\$17.08	\$9.63	\$8.40	
10. Economic ROI Index (GDP per dollar of OMDC support)	Note 7	Note 7	\$3.27	-	-	\$3.27	Note 7
11. Job Creation Index (# of jobs per million dollars of OMDC support)	Note 7	Note 7	64	-	-	64	Note 7
12. Job Quality Index (average wage per job)	Note 7	Note 7	\$52,928	-	-	\$52,928	Note 7
13. Investment Leverage (private sector funding per dollar of OMDC support)	Note 7	Note 7	\$1.58	-	-	\$1.58	Note 7

Key Performance Indicator	2016-17 Quarterly Results			Annual Results			Notes
	Q1	Q2	2016-17 Target	2015-16 Actual	2014-15 Actual	2013-14 Actual	
Goal #2: Enable Business Innovation and Collaboration							
1. Percentage of funded research studies that support business evolution	100%	60%	20%	65%	69%	46%	
2. Number of program evaluation studies and implementation plans completed	3	1	3	8	7	1	
3. Number of collaboration initiatives led by OMDC	1	3	15	20	13	12	
4. Contacts made by participants in OMDC-led initiatives	38	2	2,000	2,168	2,496	1,199	Note 10
5. Number of initiatives supported through the Industry Development Program	18	14	60	88	89	64	
6. Contacts made by participants in Industry Development Program initiatives	1,526	0	38,000	42,750	41,825	67,062	Note 10

Key Performance Indicator	2016-17 Quarterly Results			Annual Results			Notes
	Q1	Q2	2016-17 Target	2015-16 Actual	2014-15 Actual	2013-14 Actual	
Goal #3: Expand Access to Global Markets and Support Content Development							
1. Leverage value of OMDC investment in Film Fund production projects	Note 4	Note 4	\$25.00	\$23.41	\$29.18	\$25.29	
2. Leverage value of OMDC investment in IDM Fund projects	Note 5	Note 5	150	\$1.97	\$1.57	\$1.28	
3. Weeks of work created and/or retained through IDM Fund and Film Fund projects	Note 4	Note 4	16,000	22,676	16,095	13,537	
4. Jobs created and/or retained through Ontario Music Fund projects (FTEs)	Note 3	Note 3		Note 2	653	621	
5. Return on Investment from the OMDC Book Fund	Note 3	Note 3	\$3.00	\$3.00	\$2.96	\$3.80	
6. Return on Investment from the OMDC Export Fund	Note 3	Note 3	\$175.00	\$217.56	\$198.00	\$209.57	
7. Number of foreign markets at which Ontario participants are supported through the Export Fund	67	57	200	258	281	316	
8. Number of markets at which OMDC has organized a strategic presence as part of International Business Development activities	6	3	15	22	22	21	

Key Performance Indicator	2016-17 Quarterly Results			Annual Results			Notes
	Q1	Q2	2016-17 Target	2015-16 Actual	2014-15 Actual	2013-14 Actual	
9. Number of business connections and/or leads made as a result of Ontario Music Fund - Music Industry Development Support	Note 2	Note 2	5,000	Note 2	5,407	7,126	
10. Number of film and television productions that shoot in Ontario	40	45	125	128	132	207	
Domestic	28	23	-	83	98	168	
Service	12	22	-	45	34	39	
11. Value of film and television productions that shoot in Ontario (millions)	\$309	\$422	\$1,000	\$1,096	\$1,055	\$1,077	
Domestic	\$141	\$152	-	\$559	\$605	\$721	
Service	\$168	\$170	-	\$537	\$450	\$356	
12. Proportion of L.A. Office-assisted projects that shoot in Ontario.	31%	26%	20%	20%	17%	20%	
13. Value of L.A. Office-assisted projects that shoot in Ontario (millions)	\$235	\$178	\$460	\$742	\$460	\$289	
14. Social media influence (Klout score)	61.8	58.4	60	59.4	60.1	58.2	
15. Number of media impressions (millions)	11.8	7.4	2	2.7	9.8	47.8	
16. Number of Trillium Book Award media impressions (millions)	48.4	0	45	99.5	43.8	67.3	

Key Performance Indicator	2016-17 Quarterly Results			Annual Results			Notes
	Q1	Q2	2016-17 Target	2015-16 Actual	2014-15 Actual	2013-14 Actual	
Goal #4: Provide Strong Leadership to Advance Ontario's Creative Media Industries							
1. Number of communications products	101	22	300	379	284	363	
2. Number of complete industry research projects and partnerships	2	3	9	9	18	10	
3. Updated industry profiles posted on OMDC website.	2	0	12	5	4	3	
4. Number of outreach activities with other levels of government	3	1	5	8	1	4	
5. Program Delivery Effectiveness Index (avg. application time, weeks)	Note 2	Note 2	28.29	-	-	28.29	
6. Program Delivery Effectiveness Index (avg. cost per application)	Note 2	Note 2	\$869	-	-	\$869	

NOTES:

Return on Investment (ROI) represents the amount generated in sales for every dollar invested by OMDC.

Leverage value indicates the additional amount in financing generated for each dollar invested by OMDC.

(1) Target is relative to the number of Tax Credit applications certified.

(2) Results not available until Q4 2016-17.

(3) Results not available until Q4 2017-18.

(4) Results not available until Q2 2016-17.

(5) Results not available until Q3 2016-17.

(6) Q3 results are an estimate.

(7) Results not yet available, baseline results from survey, not directly comparable to future years

(8) 2013-14 figure updated

(9) Result to be confirmed

(10) 2016-17 Results not final

X. FINANCIAL BUDGET

AGENCY: ONTARIO MEDIA DEVELOPMENT CORPORATION (\$ Thousands)	FINANCIAL FORECAST SUMMARY		
	2017-18 <i>BUDGET</i>	2018-19 <i>FORECAST</i>	2019-20
REVENUE			
MTCS Funding	44,717.1	44,688.3	44,699.6
Self-generated (Note 1)	3,168.5	3,168.5	3,168.5
TOTAL REVENUE	47,885.6	47,856.8	47,868.1
EXPENDITURES			
Salaries & Benefits	7,030.4	7,108.5	7,187.5
Operations (Note 2)	2,130.2	2,154.7	2,179.7
Grants	36,731.5	36,731.5	36,731.5
OPSTC/OCASE Transitional Grant	-	-	-
Time-limited Strategic Initiatives	550.0	550.0	550.0
Program Delivery	1,993.5	1,862.2	1,769.5
TOTAL EXPENDITURES	48,435.6	48,406.8	48,418.1
Net Surplus/(Deficit)	(-550.0)	(-550.0)	(-550.0)

Notes:

(1) Includes tax credit administration fees, interest, and other income

(2) Includes occupancy, administration, marketing and communications costs

XI. INFORMATION TECHNOLOGY/ELECTRONIC SERVICE DELIVERY PLAN

OMDC provides and supports its own information technology services, including maintenance of the internal network and servers, e-mail and blackberry service, an internal database for operational purposes and three outward-facing databases that provide access to industry research, filming locations, and OMDC's Funding Program and Tax Credit applications. The Agency is responsible for all procurement and security related to this infrastructure.

Staff are responsible for infrastructure maintenance and operations as well as internal and external customer service support. They are also responsible for system monitoring and enhancements as well as answering all support inquiries from OMDC staff and external users of OMDC's Online Application Portal (OAP).

Client Services

OMDC's corporate website is its primary client interface. OMDC clients access the OAP and the Digital Locations Library (DLL) through the website. It is also the Agency's communications portal to provide information about our programs and services and to share news for and about stakeholders.

There are two outward-facing databases that provide services to OMDC clients: the Online Research Library and the Digital Locations Library. The content of both libraries is kept up to date by staff. There is a maintenance agreement in place for these databases that provides technical support for fixing issues and also provides a guaranteed rate for enhancements to the systems. Enhancement requests are developed by staff from the Research, Library, and IT areas, who work with the external vendor to implement them. Enhancements are approved by management according to the business needs of the agency and the funds available. A mobile version of OMDC's award-winning Digital Location Database was launched in 2014-15 which provides OMDC clients with a portable, innovative, and contemporary scouting tool for filming locations in the province.

Electronic Service Delivery

OMDC provides Electronic Service Delivery (ESD) to clients through the Online Application Portal (OAP). It is mandatory for all applicants to the Industry Initiatives, Ontario Music Fund, Research Grants, and Tax Credit programs to submit their applications through the portal. All written communication regarding applications is done through the OAP. The OAP tracks and sends reminders regarding milestones and deliverables and allows clients to track the status of their applications. Maintenance and technical support of the system are carried out by IT staff. Enhancements to the OAP are carried out by the same process as described above.

OMDC's internal corporate database allows staff to interact with the OAP for the administration of programs and also to manage the Agency's contacts and mailings. As with the other systems, maintenance and technical support of the system are carried out by internal staff and enhancements implemented through the process described above.

Security and System Monitoring

To ensure the ongoing operation of the agency IT infrastructure and the personal and confidential information it contains, OMDC staff do 24-hour system monitoring. This is carried out on a rotational basis by members of the IT team. OMDC engages in an annual security audit carried out by the Ministry of Government Services to ensure that there are no major flaws in the system and that the personal and confidential information is secure.

2016-17 Information Technology Project Update

- Enhancements were made to the Online Application Portal to capture changes to programs and tax credits.
- A new IP-based telephone system was implemented in 2016-17.
- Following the successful testing of SharePoint, the IT team is on track to integrate SharePoint across the Agency.
- OMDC's annual security audit was conducted at the beginning of 2016-17 and all identified security vulnerabilities have been resolved.
- OMDC implemented a cloud-based file backup and disaster recovery system to modernize the storage and recovery systems currently in place.
- Additional enhancements were made to the corporate database to improve efficiency and effectiveness.

2017-18 Information Technology Plan

- The Agency will complete the implementation of an electronic payment system for outgoing payments by the end of 2017-18.
- OMDC will continue to work to enhance the information technology infrastructure, including further virtualization of the server environment in order to improve operational efficiency and keep the infrastructure in peak operating condition. For 2017-18, this will include all outward facing client databases (OAP, Digital Location Library and ORL).
- OMDC will begin working towards a refresh of the Online Application Portal. Activities in 2017-18 will include requirements gathering, stakeholder consultation, and procurement. In addition to the refresh of the OAP, IT will also investigate solutions to improve the Agency's CRM system to allow for better management and integration with the OAP and accounting system.
- A refresh of OMDC's corporate website will be completed in 2017-18.

XII. INITIATIVES INVOLVING THIRD PARTIES

As an agency that administers grants and tax credits on behalf of the Government of Ontario, OMDC complies with all its responsibilities under the Transfer Payment Accountability Directive. For each program, OMDC defines expectations, establishes and implements agreements, monitors projects and takes corrective action where necessary, and reports on the results of our funding. Regular risk assessment and mitigation is done on each file by OMDC staff and referred to management when necessary. In order to improve our effectiveness and performance, OMDC works with public and private partners to deliver specific services and activities that support the creative media industries. These include:

Toronto/Ontario Film Office in L.A.

- The Toronto/Ontario Film Office in L.A. is a partnership between OMDC and the Toronto Film, Television and Digital Media Office. It maintains a full-time marketing presence in Los Angeles, providing on-the-ground marketing to attract production to Ontario and support to Ontario's screen-based content creators.
- The partnership, established in June 2003, has enabled the partners to pool their resources and provide a much more effective platform from which to promote the many benefits of filming in Toronto and Ontario.
- OMDC is the managing partner of the Office.

Toronto International Film Festival Group (TIFFG)

- OMDC is the mechanism by which the Government provides annual funds (\$815,000 in 2015-16) for the care and maintenance of the Province's film collection at the Film Reference Library (formerly Cinematheque Ontario) and TIFF Cinematheque's screening programs.
- In 2016-17, OMDC also provided \$300,000 in operating support to the Toronto International Film Festival (TIFF). The Agency also provided \$150,000 to the TIFF Sales Office during the Festival and \$30,000 to TIFF's Film Circuit through the Industry Development Program to support and promote the exhibition of Canadian films across Ontario.

Producers Lab Toronto

- OMDC partners with European Film Promotion (EFP) and the Toronto International Film Festival (TIFF) to deliver Producers Lab Toronto (PLT). This is a co-production business development initiative in the feature film industry. OMDC participates to create new business development opportunities for Ontario and Canadian producers, to raise their industry profiles, and to raise the international profile of the Agency, the industry and the Province. This program concluded in 2016-17.
- The Partnership allows OMDC to tap into a pool of Creative Europe – MEDIA program funding through EFP and to get direct access to the prestigious group of European funding and marketing organizations that EFP represents.

- OMDC is the Canadian managing partner for this initiative, and maintains accountability through a contract with Europe-based partner EFP that includes delegation of financial responsibilities and requirement for a final cost report.
- The seventh, and final, PLT was delivered at the 2016 Toronto International Film Festival. Producers from Europe, Canada, Australia, and New Zealand were chosen to exchange project ideas, funding information, and co-production deals on both sides of the Atlantic and Down Under.

International Canada Stands

- OMDC partners with Telefilm Canada and other provinces on Canada Stands in key international markets for the film and television sectors providing Ontario producers with access to business support, meeting space, presence on panels, and invitations to networking events.
- OMDC is a major contributing partner to the Canadian presence at the following markets: Cannes International Film Festival, MIP-TV, MIPCOM, Toronto International Film Festival, and the Berlin Film Festival. OMDC also maintains a partner presence at international markets such as SXSW, Midem, Reeperbahn Festival, Kidscreen, and the Game Developers Conference (GDC).
- OMDC also partners with Telefilm and other provinces on international activities that do not involve a stand presence but that provide a coordinated Canadian presence and opportunity for producers to do business. Examples include the India Mission, the Tokyo Film Festival, and the San Sebastian Film Festival in Spain.

XIII. IMPLEMENTATION PLAN

The financial forecast summary and program and service descriptions included in this Business Plan are based on a status quo financial and human resources. The Agency's new Strategic Plan will be finalized at the end of 2016-17 and OMDC will begin implementation of the Plan starting in 2017-18.

As part of the strategic planning process, the Agency is also developing a five year Action Plan which aligns with OMDC's strategic and business planning and the Ministry's priorities as communicated in the Ministry and Agency mandate letters, and that support the goals of the Ontario Culture Strategy.

In the current year, OMDC will continue to address opportunities for growth, increased productivity and innovation in Ontario and abroad through our specialized tool-kit of tax credits and programs and services for the creative media industries. The programs and activities described in the Plan will roll out throughout the year.

XIV. COMMUNICATIONS PLAN

Overview

The OMDC promotes many activities, its clients and their products, while integrating successful GDP and job growth into the stories, through key messaging and imaging on multiple platforms. During the 2017-18 fiscal year, the Agency will also leverage visibility from the OMDC's 30th Trillium anniversary and the 150th anniversary of Canada and Ontario.

Objectives and Strategies

Champion Ontario

- Align OMDC's messaging with that MTCS using the OMDC's positive role in the creative industries' burgeoning economic impact to communicate that story through key messaging, and ROI metrics, wherever possible.

Target Key Markets

- OMDC communications principally targets industry and investor audiences on a local, national and international level, year round. We also target consumer audiences through specific festivals and events that provide public opportunities to communicate creative success stories.

Brand Refresh

- It is vital to regularly refresh the OMDC's brand as the industries we represent continually evolve.
- Revisit the OMDC's visual identity and logo.

Enhance Media Relations

- OMDC will enhance media and social media relations to develop the creative industries' success stories on various industry and consumer platforms.
- Use stakeholder success stories and success story products' as news hooks.
- Leverage anniversary events as news hooks.
- Use positive OMDC reports as news hooks.
- Use especially compelling messages and images for OMDC's social media platforms.

Enhance Outreach to Bilingual and Diverse Communities

- Ensure OMDC materials always available in French and English.
- Develop tools to reach Ontario's multicultural communities.

Toolkit to Achieve Communications Objectives and Goals

Key Messages – Create and utilize key messaging that conveys positive economic impact of creative sector and complements the brand refresh, introducing more 'sound bytes' and infographics to tell the story

Media Relations – Leverage success stories—in key consumer and trade publications—to demonstrate how the OMDC facilitates and supports Ontario's creative industries. Use OMDC's major events' participation and announcements to promote the Agency's activities and vitality. Work with the OMDC's

Public Relations team, encouraging them to work directly with editors and journalists to cultivate positive coverage:

- **Social Media** – Engage stakeholders and consumers using OMDC’s Twitter, Facebook & YouTube platforms. Push positive OMDC news on all its sectors & push positive Ontario cultural news.

Publications – We will create a production schedule for all publications as well as marketing and promotional materials:

- **Year in Review** – The bilingual Year in Review will reflect the Agency’s 2017-18 brand refresh and messaging;
- **Annual Report** – The bilingual Annual Report will be printed and posted in English and French on OMDC’s website after it is tabled in the Provincial Legislature.

Marketing, Advertising & Promotional Materials

- **OMDC Website** - Communications will continue to ensure content is timely, newsworthy and on message, in both official languages. We will launch five multicultural language splash pages in the consumer portal.
- **Marketing** – OMDC will focus its marketing budget on attracting inward investment in Ontario as an ideal jurisdiction for film production and by encouraging economic growth and product exports in all areas, principally through trade magazines. The Agency will also maximize in-kind advertising that promotes all six OMDC sectors.
- **Promo reels** – Refresh OMDC’s 30-second and 60-second spots which highlight all six sectors in Ontario’s screen-based industries, books, magazines and interactive digital media. We will create a new promo reel for the film festival circuit and launch it at Celebrate Ontario during the Toronto International Film Festival. We will post these reels on the OMDC website and social media platforms, as well as seek opportunities to play them at domestic and international conferences and events.
- **Promotional Materials** - Communications will continue to work as a service department for the OMDC’s Industry Development, Ontario Film Commission, Tax Credits and Business Affairs & Research departments, producing ads, brochures and booklets, as required, working hand-in-hand with teams from these departments to ensure we’re ‘on message’ for important events and activities.
- **eNews** – We will revise the Agency’s eNews to ensure optimum relevance to a wide variety of stakeholders and readers.

Speaking Opportunities

Communications will work with OMDC spokespersons to provide speeches that underline key messaging, per sector, at industry and stakeholder events. These can range from brief opening remarks at events to more detailed presentations on the Agency’s mandate, programs, funds and services.

Events

Communications will support OMDC event initiatives and strategically generate news items at those events. This fiscal, we will also use anniversary events – the Trillium Book Award’s 30th and Canada/Ontario’s 150th—to leverage attention for Ontario’s successful creative industries.

Sponsorship

OMDC will sponsor events which provide maximum exposure to and/or for our stakeholders and which benefit Ontario's creative industries.

XV. A RESPONSE TO THE EXPECTATIONS SET OUT IN THE AGENCY MANDATE LETTER

This Business Plan details the goals, objectives, strategic direction, specific programs, activities, and initiatives that will enable OMDC to achieve its mandate in the year ahead. The Agency is presently working on a new five-year strategic plan that will focus OMDC's resources on stimulating economic growth and employment, encouraging collaboration and innovation, and promoting Ontario's creative industries while striving to be flexible, collaborative, accountable, and inclusive. This plan strongly aligns with and supports the government's priorities and the Ministry's new Culture Strategy, *Telling our stories, growing our economy*.

As set out in the Agency's mandate letter from the Minister of Tourism, Culture and Sport, OMDC will continue to support government priorities by:

- Driving innovation and growth through strategic investments, partnerships and programs;
- Promoting Ontario's entertainment and creative industries; and
- Working with industry stakeholders to create a competitive and productive sector to showcase Ontario talents and expertise.

OMDC endeavours to support all government initiatives that relate to the Agency's mandate, including initiatives that strengthen relationships with Indigenous communities and work toward reconciliation. OMDC will work with the Ministry to identify how the Agency can be most effective in advancing this priority in addition to others identified in the Culture Strategy. The Agency will continue to maintain the highest levels of accountability, working with the Ministry to review and enhance governance, fiscal management and sustainability, and accountability processes to reflect best practices and ensure compliance with Treasury Board/Management Board of Cabinet direction. OMDC will also maintain an effective system of internal controls and compliance with applicable requirements to promote transparency and accountability, managing operational, strategic, and financial risks to the delivery of business objectives.

Ontario's screen, publishing, and music industries are a global success story. Collectively and individually, these industries are strong and growing, and make important contributions to the Province's economy and cultural vitality. We are confident that with ongoing support from the Ministry, OMDC will be able to make strategic and timely investments that will position Ontario as a leader, as an attractive jurisdiction for domestic and foreign business activity, and that will ensure the province's creative industries complete successfully on the world stage.

APPENDIX A: OMDC MANDATE / CORPORATE OBJECTS MAP

2016-17 Activities	OMDC Mandate / Corporate objects							Government Priorities
	To stimulate employment & investment in Ontario	a) by contributing to the continued expansion of a business environment in Ontario that is advantageous to the growth of the cultural media industry and to the growth of new employment, investment and production opportunities in Ontario;	b) by facilitating and supporting innovation, invention and excellence in Ontario's cultural media industry by stimulating creative production, format innovation and new models of collaboration among sectors of the cultural media industry;	c) by fostering and facilitating co-operation among entities within the cultural media industry and between the public and private sectors to stimulate synergies in product development and the creation of products with original Canadian content;	d) by assisting in the promotion and marketing of Ontario's cultural media industry as a world-class leader;	e) by administering provincial tax credit programs and such other programs and initiatives as may be required by legislation or a Minister of the Government of Ontario;	f) by acting as a catalyst for information, research and technological development in the cultural media industry provincially, nationally and internationally.	OMDC activity alignment to recently articulated government priorities.
Content and Marketing Funds (includes review of funds)	✓	✓	✓	✓	✓			<ul style="list-style-type: none">- Economic Growth/Productivity- Job creation- Access to capital for entrepreneurs- Strengthening Ontario's competitive position- Fostering innovation and entrepreneurship- Promotion of strong and stable cultural sector- Modernizing support to cultural industries- Encourage industry collaboration
Export Fund	✓	✓			✓			<ul style="list-style-type: none">- Economic Growth/Productivity- Job creation- Access to capital for entrepreneurs- Strengthening Ontario's competitive position- Going Global / Export- Attracting foreign direct investment- Promotion of strong and stable cultural sector
Collaboration and Innovation Fund	✓	✓	✓	✓			✓	<ul style="list-style-type: none">- Access to capital for entrepreneurs- Fostering innovation and entrepreneurship- Promotion of strong and stable cultural sector- Modernizing support to cultural industries- Encourage industry collaboration
Ontario Music Fund	✓	✓	✓	✓	✓		✓	<ul style="list-style-type: none">- Economic Growth/Productivity- Job creation- Access to capital for entrepreneurs- Strengthening Ontario's competitive position- Going Global / Export- Fostering innovation and entrepreneurship- Promotion of strong and stable cultural sector- Modernizing support to cultural industries- Encourage industry collaboration
Industry Development Program	✓	✓	✓	✓	✓		✓	<ul style="list-style-type: none">- Economic Growth/Productivity

	OMDC Mandate / Corporate objects							Government Priorities
	To stimulate employment & investment in Ontario	a) by contributing to the continued expansion of a business environment in Ontario that is advantageous to the growth of the cultural media industry and to the growth of new employment, investment and production opportunities in Ontario;	b) by facilitating and supporting innovation, invention and excellence in Ontario's cultural media industry by stimulating creative production, format innovation and new models of collaboration among sectors of the cultural media industry;	c) by fostering and facilitating co-operation among entities within the cultural media industry and between the public and private sectors to stimulate synergies in product development and the creation of products with original Canadian content;	d) by assisting in the promotion and marketing of Ontario's cultural media industry as a world-class leader;	e) by administering provincial tax credit programs and such other programs and initiatives as may be required by legislation or a Minister of the Government of Ontario;	f) by acting as a catalyst for information, research and technological development in the cultural media industry provincially, nationally and internationally.	OMDC activity alignment to recently articulated government priorities.
2016-17 Activities								
(includes grants to Industry-led projects, OMDC-led initiatives such as From Page to Screen and Sector Marketing, etc.)								<ul style="list-style-type: none"> - Going Global / Export - Promotion of strong and stable cultural sector - Modernizing support to cultural industries - Encourage industry collaboration - Building up talent and skills
Tax Credits Programs (includes response to Tax Credit Queries and Requests for Information)	✓	✓	✓			✓		<ul style="list-style-type: none"> - Economic Growth/Productivity - Job creation - Access to capital for entrepreneurs - Strengthening Ontario's competitive position - Attracting foreign direct investment - Promotion of strong and stable cultural sector - Reducing red tape for business - Open for Business / Open Gov't Initiative
Film Unit; business attraction; locations database; scouting and other support	✓	✓		✓	✓			<ul style="list-style-type: none"> - Economic Growth/Productivity - Job creation - Strengthening Ontario's competitive position - Going Global / Export - Attracting foreign direct investment - Promotion of strong and stable cultural sector - Reducing red tape for business
International Business Development activities	✓	✓		✓	✓		✓	<ul style="list-style-type: none"> - Economic Growth/Productivity - Strengthening Ontario's competitive position - Going Global / Export - Attracting foreign direct investment - Promotion of strong and stable cultural sector - Encourage industry collaboration
OMDC-led initiatives	✓	✓	✓	✓	✓		✓	<ul style="list-style-type: none"> - Economic Growth/Productivity - Fostering innovation and entrepreneurship - Promotion of strong and stable cultural sector - Modernizing support to cultural industries - Encourage industry collaboration
Trillium Book Award	✓	✓			✓			<ul style="list-style-type: none"> - Strengthening Ontario's competitive position - Promotion of strong and stable cultural sector

2016-17 Activities	OMDC Mandate / Corporate objects							Government Priorities
	To stimulate employment & investment in Ontario	a) by contributing to the continued expansion of a business environment in Ontario that is advantageous to the growth of the cultural media industry and to the growth of new employment, investment and production opportunities in Ontario;	b) by facilitating and supporting innovation, invention and excellence in Ontario's cultural media industry by stimulating creative production, format innovation and new models of collaboration among sectors of the cultural media industry;	c) by fostering and facilitating co-operation among entities within the cultural media industry and between the public and private sectors to stimulate synergies in product development and the creation of products with original Canadian content;	d) by assisting in the promotion and marketing of Ontario's cultural media industry as a world-class leader;	e) by administering provincial tax credit programs and such other programs and initiatives as may be required by legislation or a Minister of the Government of Ontario;	f) by acting as a catalyst for information, research and technological development in the cultural media industry provincially, nationally and internationally.	OMDC activity alignment to recently articulated government priorities.
Digital Dialogue Conference and Breakfast Panel Sessions	✓	✓	✓	✓	✓		✓	<ul style="list-style-type: none"> - Economic Growth/Productivity - Strengthening Ontario's competitive position - Fostering innovation and entrepreneurship - Promotion of strong and stable cultural sector - Modernizing support to cultural industries - Encourage industry collaboration
Toronto International Film Festival	✓	✓			✓			<ul style="list-style-type: none"> - Strengthening Ontario's competitive position - Going Global / Export - Fostering innovation and entrepreneurship - Attracting foreign direct investment - Promotion of strong and stable cultural sector
Research and market intelligence (industry profiles, online research library; research grants to industry; OMDC-led research)	✓	✓	✓	✓			✓	<ul style="list-style-type: none"> - Economic Growth/Productivity - Strengthening Ontario's competitive position - Going Global / Export - Fostering innovation and entrepreneurship - Promotion of strong and stable cultural sector - Modernizing support to cultural industries - Encourage industry collaboration
Provide Tax Credit Data and Analysis to MoF and CRA (includes provision of feedback and input in to Tax Credit Legislation and implementation of changes to Tax Credit Legislation)	✓	✓	✓			✓		<ul style="list-style-type: none"> - Economic Growth/Productivity - Strengthening Ontario's competitive position - Attracting foreign direct investment - Promotion of strong and stable cultural sector - Modernizing support to cultural industries - Reducing red tape for business - Open for Business / Open Gov't Initiative
'Champion' activities: (eg. represent interests of Ontario cultural media industries in federal program consultations, CRTC, etc.)	✓	✓		✓				<ul style="list-style-type: none"> - Strengthening Ontario's competitive position - Fostering innovation and entrepreneurship - Promotion of strong and stable cultural sector - Modernizing support to cultural industries
Strategic and Business Planning Activities (includes ongoing Ministry Liaison Role)	✓	✓	✓	✓	✓	✓	✓	<ul style="list-style-type: none"> Support across programs/mandate to ensure: - Economic Growth/Productivity - Job creation - Access to capital for entrepreneurs - Strengthening Ontario's competitive position

2016-17 Activities	OMDC Mandate / Corporate objects							Government Priorities
	To stimulate employment & investment in Ontario	a) by contributing to the continued expansion of a business environment in Ontario that is advantageous to the growth of the cultural media industry and to the growth of new employment, investment and production opportunities in Ontario;	b) by facilitating and supporting innovation, invention and excellence in Ontario's cultural media industry by stimulating creative production, format innovation and new models of collaboration among sectors of the cultural media industry;	c) by fostering and facilitating co-operation among entities within the cultural media industry and between the public and private sectors to stimulate synergies in product development and the creation of products with original Canadian content;	d) by assisting in the promotion and marketing of Ontario's cultural media industry as a world-class leader;	e) by administering provincial tax credit programs and such other programs and initiatives as may be required by legislation or a Minister of the Government of Ontario;	f) by acting as a catalyst for information, research and technological development in the cultural media industry provincially, nationally and internationally.	OMDC activity alignment to recently articulated government priorities.
								<ul style="list-style-type: none"> - Going Global / Export - Fostering innovation and entrepreneurship - Attracting foreign direct investment - Promotion of strong and stable cultural sector - Modernizing support to cultural industries - Encourage industry collaboration - Reducing red tape for business - Open for Business / Open Gov't Initiative
Communications activities (includes Tax Credit Promotion, Marketing and Communications)	✓	✓	✓		✓	✓		Support across programs/activities to ensure: <ul style="list-style-type: none"> - Economic Growth/Productivity - Strengthening Ontario's competitive position - Going Global / Export - Attracting foreign direct investment - Promotion of strong and stable cultural sector - Encourage industry collaboration
Industry Advisory Committees	✓	✓	✓	✓			✓	Provides continuous feedback to ensure: <ul style="list-style-type: none"> - Economic Growth/Productivity - Job creation - Access to capital for entrepreneurs - Strengthening Ontario's competitive position - Going Global / Export - Fostering innovation and entrepreneurship - Promotion of strong and stable cultural sector - Modernizing support to cultural industries - Encourage industry collaboration - Reducing red tape for business - Open for Business / Open Gov't Initiative
In support of effective mandate delivery: Corporate operations, IT, communications, program delivery, customer service, business planning, strategic planning, advice to government, issues and risk management, results tracking and reporting, continuous improvement of programs and services								