

ONTARIO
CREATES
BUSINESS PLAN
2023-24



Revised January 30, 2023

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I. EXECUTIVE SUMMARY

Faced with the challenges of the past few years, Ontario's creative industries have been resilient and several sectors have made significant inroads to recovery to pre-pandemic economic outlooks. Ontario's creative companies continue to rise to the challenges presented and Ontario Creates has offered flexible support as they navigate the changing landscape.

In 2021-22 and 2022-23 to date, Ontario's creative industries were able to outperform expectations, making critically acclaimed content enjoyed at home in Canada and around the world:

- In 2021, Ontario registered a record \$2.88 billion in film and TV in production activity, with 232 domestic and foreign projects shot in the province.
- Toronto was named the #2 City to Live and Work as a filmmaker in 2022 by Movie Maker Magazine, a jump of 10 spots over 2021.
- A record 12 Film Fund-supported films were shown at TIFF 2022, and made-in-Ontario productions were screened at film festivals including Cannes and TIFF and received nominations and awards at TIFF and the Screen Actors Guild Awards among other accolades.
- Book Fund supported publisher Coach House Books received two nominations for the 2022 Giller Prize including the winner *The Sleeping Car Porter* by Suzette Mayr, and numerous books released by Ontario publishers were nominated for the 2022 Governor General's Literary Awards, with Owlkids' *The Sour Cherry Tree* winning the award for Young People's Literature.
- The Ontario Music Investment Fund (OMIF) supported the winner of the 2022 Polaris Prize, Pierre Kwenders via his label Arts & Crafts, and Ontario musicians earned critical acclaim at the Juno Awards, receiving more than 50% of the nominations and 18 wins (six of whom were supported by Ontario Creates).
- Ontario companies dominated the first ever Canadian Indie Game Awards, picking up nine wins including Best Console Game for *Chivalry 2* (Torn Banner Studios) and Best Mobile Game for *Grindstone* (Capybara Games).
- At the 2022 National Magazine Awards, the Magazine Grand Prix went to Ontario publication *Inuit Art Quarterly* and *The Walrus* was the top winner overall, taking home four Gold awards and one Silver.

Ontario Creates is proud of our 2021-22 results, and of how these have contributed to supporting the creative industries when they needed it most, including:

- A 31% improvement in tax credit processing times compared to the prior year, ensuring companies receive their payments faster and can re-invest in content and capitalize their operations;
- Securing 460,500 square feet of additional studio space to ensure sufficient capacity to host a busy film and television filming season in the province;
- Ensuring a virtual strategic presence internationally at 13 events including Cannes Film festival, Frankfurt Book Fair and MIPCOM, working collaboratively with our partners to maximize the impact of our investments;
- Hosting marquee collaboration events for our book, film/tv and music sectors that yielded 940 business connections and close to \$175,000 in direct deals;
- Achieving a Global Market Development ROI of \$224.88 for every dollar invested by Ontario Creates;

- Achieving nearly 185M total media impressions, including coverage associated with the Trillium Book Awards, and attracting over 4,400 net new subscribers to our social media channels, which has helped to amplify the accomplishments of our talented Ontario creators and build awareness of our programs and services among new industry entrants and underrepresented communities.

Throughout 2022-23, the agency has been focused on the development of a new Strategic Plan. In the Business Plan that follows, we are proud to share the emerging vision and mission we will work towards in the coming few years:

Our Vision: *Ontario's robust, sustainable, and inclusive creative industries deliver economic impact and globally successful content.*

Our Mission: *To help creative businesses prosper by increasing the growth, resilience, competitiveness and global reach of Ontario's creative economy.*

Our Values: Collaborative, Inclusive, Accountable, Responsive, Leading.

This Business Plan addresses how Ontario Creates will use its existing resources to support the expectations set out in the Minister's 2023-24 mandate letter and the initial actions of our new Strategic Plan. The Business Plan presents a status quo balanced budget with no request for increases to the agency's financial or human resources. Ontario Creates' 2023-24 expenditures are projected to be \$39.4 million before time-limited strategic initiatives. Revenue for 2023-24 is expected to be \$40.6 million (comprised of \$35.5 million in MTCS operational funding and \$5.1 million in self-generated revenue, including tax credit administration fees, interest, and other income).

As a result of careful fiscal management, Ontario Creates has accumulated a small amount of uncommitted cash reserves, providing the capacity to respond to emerging opportunities and industry development needs which cannot be addressed within the parameters of core funds. The agency has committed to a balanced budget each year, and has consistently performed better than planned, allowing an annual contribution to cash reserves.

In 2023-24, Ontario Creates is prepared to utilize approximately \$0.6 million of these reserve funds to activate a series of time-limited initiatives totalling \$1.775 million that will leverage and extend existing programs, as well as support activation of Year 1 of our new Strategic Plan, without creating unsustainable stakeholder expectations and with limited additional strain on human resources. These important initiatives will include extension of the Diversity Enhancement in all sector funds and the renewal of the AcceleratiON Black & Indigenous entrepreneurship program.

Ontario Creates has reviewed the government and ministry priorities of economic growth and competitiveness, COVID recovery, workforce development, red tape reduction, regional economic development, and infrastructure investment. In addition, consideration has been given to the priorities outlined in the agency's mandate letter, including collaboration and innovation, responsiveness, diversity and inclusion, training and entrepreneurship, tax credit modernization and performance measurement and reporting. Programs and services have been carefully designed to align with these themes and deliver corresponding results. The agency will continue to ensure that it is operating in an accountable and transparent manner and in compliance with all relevant directives, as part of its responsibility as a board-governed provincial agency.

Ontario Creates' core programs and services continue to deliver strong results for the Province and for the creative industries in Ontario. As the Business Plan will demonstrate, the agency's programs

and services have been focused on a series of priorities that are critical to ensuring a prosperous creative economy in Ontario. Specific agency priorities for the year ahead include:

- Capacity Building and Workforce Development
- Diversity and Inclusion / Accessibility
- Regional outreach
- Environmental Sustainability
- Customer Service / Business Process Improvements
- International Market Development
- Demonstrating our Impact

These themes are carried through both the core program and time-limited initiatives Ontario Creates proposes to undertake in 2023-24, as detailed in Appendix A.

As always, Ontario Creates will strive to provide flexible, efficient, customer-focused support to the Province's creative industries, especially as they navigate the challenges of recovery, rebuilding and transforming to meet the market changes accelerated by the pandemic. The sectors are working hard on collaborative initiatives and training opportunities to ensure that as they rebuild, they do so as more diverse, more sustainable and more resilient companies; initiatives that Ontario Creates looks forward to enabling. Through the initiatives outlined in this Business Plan, supported by the roadmap provided by our new strategic plan, we are confident that Ontario's creative industries are poised to rebuild and bring good jobs and economic prosperity to the province, thanks to our first-rate infrastructure, world-class talent, dynamic and competitive business environment, and supportive government policies.

II. MANDATE

The Ontario Media Development Corporation (operating as Ontario Creates) is an operational service agency of the Ontario Government. Ontario Media Development Corporation 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).

CORPORATE OBJECTS

As described in the Regulation, the objects of Ontario Creates 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.

GOVERNANCE AND MINISTRY RELATIONSHIPS

Ontario Creates is accountable to the Ministry of Tourism, Culture and Sport (MTCS) for the fulfillment of its mandate. The agency'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 jobs in Ontario's knowledge economy. As the key delivery mechanism for providing programs and activities to the province's creative media industries, Ontario Creates supports the Ministry's goal of encouraging expansion of Ontario's creative industries, stimulating job creation, economic growth, and innovation.

Initiatives in the Business Plan are outlined against our mandate letter. Details of how the agency's activities align with the mandate are provided in Section XV - Response to the Expectations Set Out in the Agency Mandate Letter.

Ontario Creates also maintains working relationships with the Ministry of Finance (MoF) and the Ministry of Economic Development, Job Creation and Trade (MEDJCT) in the delivery of programs and maintenance of stakeholder relationships. The agency is actively engaged in strengthening partnerships with other ministries as appropriate in order to best leverage opportunities for stakeholders and access resources that assist in fulfilling its mandate.

BOARD OF DIRECTORS

Ontario Creates is governed by a 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. The Board also has four Standing Committees (Governance, Audit, Strategic Planning, and Communications). Ontario Creates currently has a full Board with 17 members:

Diana Arajs	David Lubotta
Aaron Campbell (Chair)	Fraser MacKenzie
Michael Ceci	Yura Monestime
Tina Cole	Edith Myers
David Diamond	Roger Nair (Vice-Chair)
Aldo Di Felice	Rekha Shah
Philip Forte	Jody Sugrue
Vincent Georgie	Holly Thompson
Peter-Julian (PJ) Lee	

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 the agency's programs and staff. Staff are hired under Ontario's *Public Service of Ontario Act, 2006*. The current full-time staff complement is 78.

ANNUAL REPORT, AUDIT, AND INVESTMENTS

Ontario Creates 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 the agency's enacting regulation restricts the investments available to Ontario Creates. Within these parameters, the agency's investment strategy is developed in consultation with the Audit Committee of the Board and is approved by the Board of Directors. Ontario Creates 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 AND DIVERSITY

Ontario Creates actively supports all Ontario Accessibility legislation and directives including the *Accessibility for Ontarians with Disabilities Act (AODA)*. The agency's policies and multi-year accessibility plan are posted on the corporate website. As part of its Employee Engagement Committee activities, and in line with Strategic Plan commitments, the agency has developed a Diversity action plan and has struck a Diversity & Inclusion Task Force. Ontario Creates is committed to integrating diversity into all programs, policies, and services and to continuing to extend its services and programs to underrepresented groups. Proactive outreach to ensure that the agency's services are communicated and accessible to individuals and companies across Ontario will continue.

RESPECTFUL WORKPLACES

Ontario Creates is committed to fostering and sustaining a respectful workplace, described as follows:

- A respectful workplace is one that values diversity and inclusion, dignity, courteous conduct, fairness, positive communication and professional working relationships.
- A respectful workplace is inclusive, diverse, equitable, accessible and free from workplace harassment and discrimination including sexual harassment.

Since 2018, Ontario Creates has required that all program applicant organizations sign an affidavit to confirm that their organization has in place both guiding principles and a process for maintaining a respectful workplace. Ontario Creates expects that all funding recipients maintain the principles of a respectful workplace including taking every reasonable step to:

- Cultivate and sustain a respectful, positive, inclusive and supportive work culture;
- Provide a safe mechanism for staff to report incidents or allegations of inappropriate behaviour; and
- Take action to prevent, identify and eliminate workplace harassment and discrimination in a timely manner.

ACCOUNTABILITY

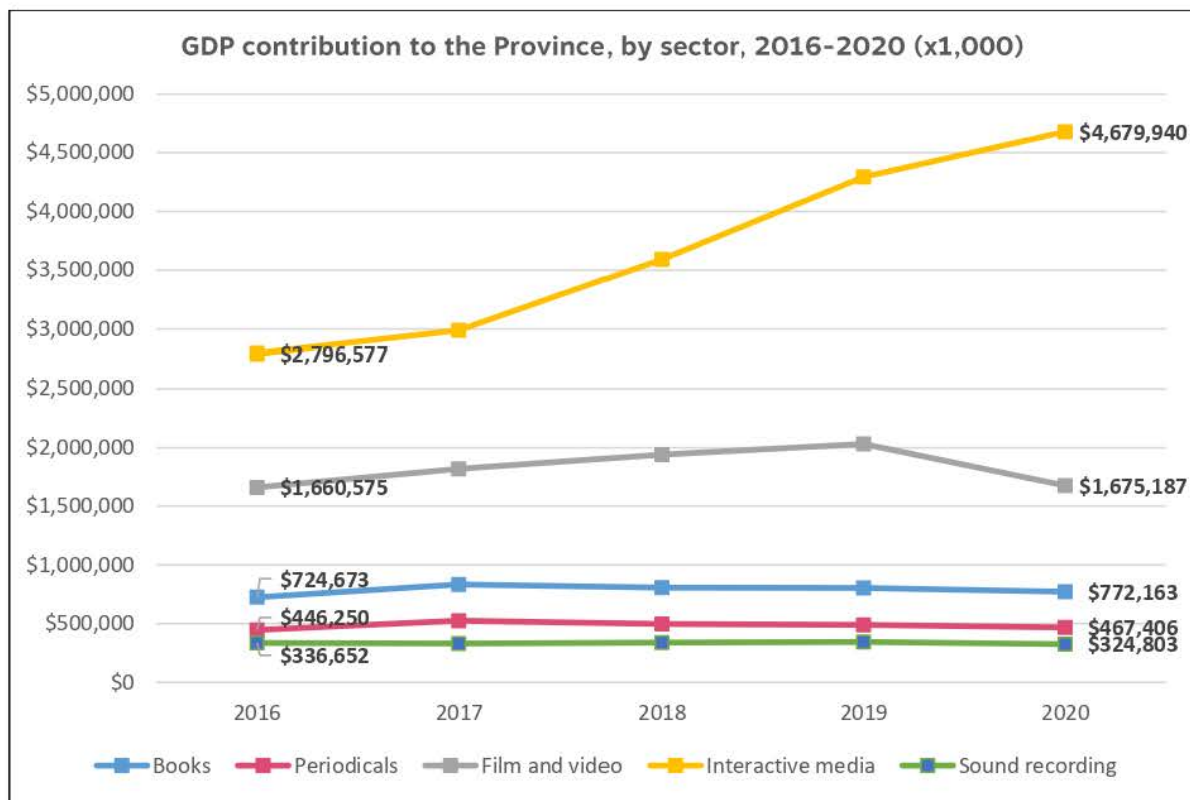
Ontario Creates' relationship and obligations to MTCS are laid out in a Memorandum of Understanding (MOU). The MOU is an internal document that is reviewed every five years and when there is a change of Minister or agency Chair. The MOU, as well as the agency's business plans and annual reports, are posted on the corporate website as required by the Agencies and Appointments Directive (AAD). In addition to these documents, Ontario Creates also posts the travel, meal and hospitality expenses of its Board of Directors (appointees), President and CEO, and 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 Ontario's Open Data Directive, an inventory of the agency's datasets has been posted on the website. The agency continues to proactively release datasets in a machine-readable format as per Ontario's Open Data directive. Ontario Creates complies with the *Occupational Health and Safety Act*, including maintaining a Joint Health & Safety Committee of staff and management.

III. ENVIRONMENTAL SCAN

THE CREATIVE INDUSTRIES IN ONTARIO

Ontario is home to the largest cultural sector in Canada, contributing approximately \$27 billion to the province’s GDP, which represents 3.3% of the province’s economic footprint. Moreover, Ontario accounts for the highest number of culture jobs in Canada with over 250,000 jobs.¹

As a result, Ontario is home to vibrant book publishing, magazine media, film and television, interactive digital media and music industries that receive support from Ontario Creates. These sectors contribute over \$7.9 billion to Ontario’s GDP, and accounted for over 59,000 jobs in 2020.² They are also an international success story - in 2020, these industries exported \$4.5 billion in products and services internationally.³ Collectively, these creative industries showcase the best that the province has to offer, and make Ontario a better place to live, work and invest.



Source: Statistics Canada. Table 36-10-0452-01- Culture and sport indicators by domain and sub-domain, by province and territory, product perspective (x 1,000)

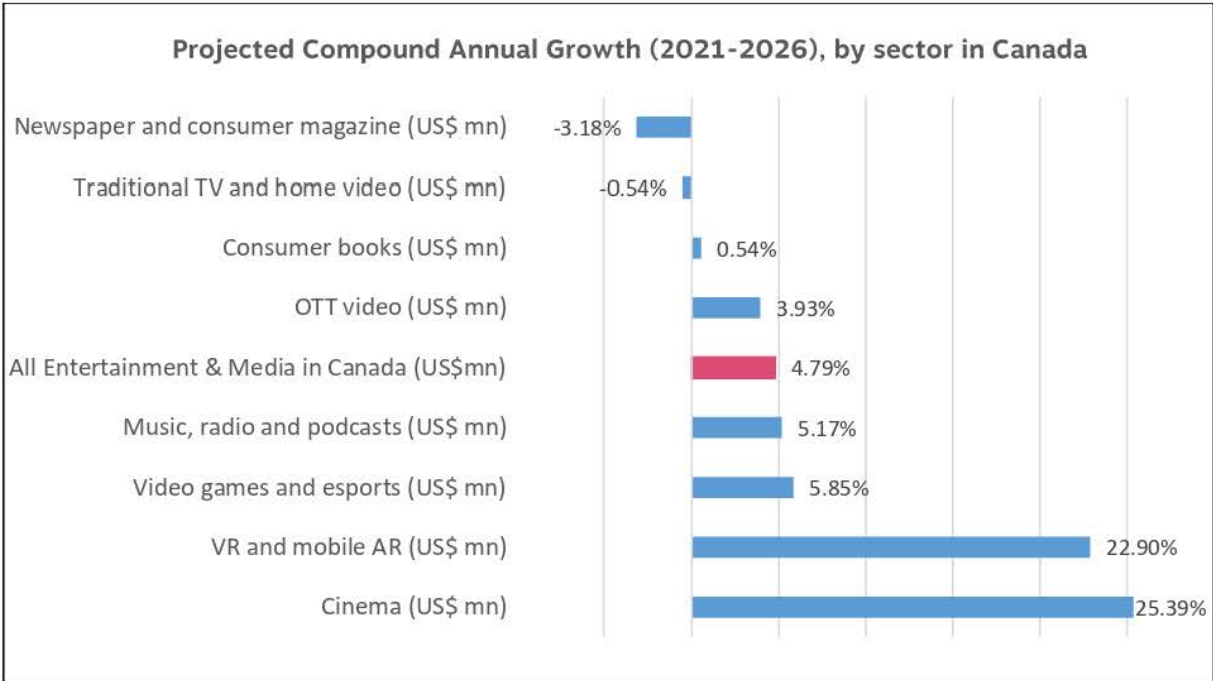
¹ Statistics Canada, Provincial and Territorial Culture Indicators, 2016 to 2020, Statistics Canada, “Table 1: Culture and sport gross domestic product (GDP) as a share of the total economy, 2020,” released June 2, 2022. Measures direct impact only, from the product perspective. Culture jobs are defined as the number of jobs that are related to the production of culture goods and/or services in that industry.

² Ontario Creates Analysis from StatsCan [2020 Culture Satellite Account Data]

³ Statistics Canada. Table 12-10-0116-01 International and inter-provincial trade of culture and sport products, by domain and sub-domain, provinces and territories (x 1,000,000), released October 4, 2022.

Much like the broader economy, each of these sectors has been significantly disrupted due to the impacts of the COVID-19 pandemic. The impacts were wide-ranging and experienced differently by each sector, but included: loss of revenue and employment, difficulties in accessing new markets, sunk costs, and the need to meet shifting consumer demand patterns. While initial economic recovery signals are encouraging as of Q4 2021, there remains a long road to full recovery ahead for many parts of Ontario’s creative industries.⁴

These industries also play an important role in rebuilding the economy after the COVID-19 pandemic. Data from PwC projects that overall entertainment and media spending in Canada is forecasted to grow from US\$55 billion in 2021 to US\$70 billion by 2026.⁵ In the post-pandemic environment of 2021-26, PwC’s forecasts highlight that the fastest growing segments are likely to be cinemas (25.39% CAGR), VR and AR (22.9% CAGR), video games and esports (5.85% CAGR), music (5.17% CAGR), and over-the-top (OTT) video (3.93% CAGR).⁶ The largest segments are expected to remain traditional TV and home video (despite a marginal decline from US\$7.8 billion to US\$7.6 billion from 2021 to 2026) and Videogames and esports (forecast to increase from US\$4.2 billion to US\$5.6 billion over the five-year period). The OTT video and Music, radio and podcasts segments (the latter of which includes live music) are the next largest segments, each forecast to exceed US\$3 billion by the end of the timeframe. PwC’s forecast for 2021-26 also highlights the growth potential in emerging digital concepts and assets with the ability to disrupt the entertainment and media industries, like the metaverse and NFTs.⁷



Source: PwC, *Global Entertainment and Media Outlook, 2022-2026: Canada*, June 2022.

⁴ Statistics Canada, National Culture Indicators, first quarter 2022, released July 8, 2022.

⁵ PwC, *Global Entertainment and Media Outlook, 2022-2026: Canada*, June 2022.

⁶ *ibid.*

⁷ *ibid.*

BOOKS

- Ontario's book publishing sector contributed \$772 million to Ontario's GDP and accounted for over 6,000 jobs in 2020.⁸ In that same year, the sector represented 64% of national wages, salaries and benefits, as well as 65% of total national operating revenues.⁹
- Sales data collected by BookNet Canada suggests that units sold in the Canadian marketplace declined by 2.7% in 2020, and that the impact was most acutely felt by Canadian-owned companies.¹⁰
- In 2020, Ontario exported over \$446 million worth of books abroad.¹¹
- PwC projects that print revenues will increase at a 0.3% CAGR over the period of 2021-2026, and that the revenues from e-books will rise faster (1.1%) over that same period.¹² Currently, print makes up the bulk of the Canadian market, representing 67.5% of total revenue in 2021.¹³

FILM AND TELEVISION

- Ontario is a major hub for film and television production. In 2021, Ontario's film and TV industry contributed a record-breaking \$2.88 billion to Ontario's economy, and created just over 48,000 high-value, full-time equivalent direct and spin-off jobs.¹⁴
- While a portion of this record-breaking output can be attributed to recovery from industry shut downs in 2020, the majority represents the impact of new growth in production due to Ontario's robust health and safety protocols, financial incentives, ongoing studio space expansion, diverse talent pool and attractiveness as a filming location.
- Ontario's production data highlights that domestic film and television production contributed \$965 million in 2021, while domestic television series contributed over \$707 million to Ontario's economy in expenditures.¹⁵
- Ontario remains an attractive market for foreign production, led by a strong television industry. Total foreign production levels in 2021 reached over \$1.9 billion.¹⁶
- PwC's projections forecast that the Canadian marketplace will continue to shift away from linear broadcast and the traditional pay TV markets towards streaming services. The OTT

⁸ Statistics Canada, *Table 36-10-0452-01, Culture and sport indicators by domain and sub-domain, by province and territory, product perspective (x 1,000)*, released June 2, 2022.

⁹ Statistics Canada, *Table 21-10-0200-01 Book publishers, summary statistics, every 2 years (dollars unless otherwise noted)*, CANSIM (database), released February 2, 2022.

¹⁰ Ed Nawotka, "Publishing in Canada 2021: Kate Edwards on Challenges in Publishing", *Publishers Weekly*, September 24, 2021.

¹¹ Statistics Canada, *Table 12-10-0116-01 International and inter-provincial trade of culture and sport products, by domain and sub-domain, provinces and territories (x 1,000,000)*, released October 4, 2022.

¹² PwC, *Global Entertainment and Media Outlook, 2022-2026: Canada*, June 2022.

¹³ *ibid.*

¹⁴ Ontario Creates, 2021 Production Statistics, 2022. Data represents expenditures of all productions using Ontario Creates-administered incentives and services. Data does not include television commercials, corporate videos, music videos, or broadcaster in-house production.

¹⁵ *ibid.*

¹⁶ *ibid.*

market is expected to grow at a consistent 3.9% CAGR through to 2026, as new services like MGM are expected to enter the marketplace.¹⁷

INTERACTIVE DIGITAL MEDIA (IDM)

- Ontario's interactive media industry generated \$4.7 billion in GDP, and just over 26,000 jobs in 2020.¹⁸
- According to data collected by the Entertainment Software Association of Canada (ESAC), the largest number of Canada's video game companies are located in Ontario (32%), followed by Quebec (31%) and British Columbia (17%).¹⁹
- Data collected by Interactive Ontario on the impact of the COVID-19 pandemic suggests that Ontario-based IDM companies saw a 38% decrease in monthly revenue, and on average, experienced unrecoverable and/or additional costs worth \$25,900.²⁰
- Total international exports of Ontario's interactive media exceeded \$1.25 billion in 2020.²¹
- According to PwC, sales in the Canadian gaming marketplace are largely driven by physical sales of game titles, which make up 41.3% of all sales in the market²². However, the sale of boxed physical copies declined by 10.2% in 2021.²³ There is reason for optimism, however, as a rise in social/casual gaming to the tune of 7.1% in 2021 offset some of the decline in physical sales.²⁴

MAGAZINES

- Ontario's magazine publishing sector contributed \$467 million to Ontario's GDP, and accounted for over 3,500 jobs in 2020.²⁵
- Ontario represents 62% of Canada's national periodical publishing industry revenues.²⁶
- Magazine publishers continue to grapple with a rapidly changing media ecosystem and shifts in their revenue models, with print media evolving to be more of a "luxury" product with higher levels of public trust in the face of unregulated social media platforms and a growing distrust of "fake news".²⁷ In digital media, revenue models are shifting in response to browsers removing third-party cookies, forcing publishers to enhance their first-party data strategies or create new strategic partnerships.²⁸

¹⁷ PwC, *Global Entertainment and Media Outlook, 2022-2026: Canada*, June 2022.

¹⁸ Statistics Canada, *Table 36-10-0452-01 – Culture and sport indicators by domain and sub-domain, by province and territory, product perspective*. Released June 2, 2022.

¹⁹ Entertainment Software Association of Canada, *The Canadian Video Game Industry 2021*, p. 11

²⁰ Interactive Ontario, *Measuring the Impact of COVID-19 on the IDM Industry*, p. 1-3

²¹ Statistics Canada, *Table 12-10-0116-01 International and inter-provincial trade of culture and sport products, by domain and sub-domain, provinces and territories (x 1,000,000)*, released October 4, 2022.

²² PwC, *Global Entertainment and Media Outlook, 2022-2026: Canada*, June 2022

²³ *ibid.*

²⁴ *ibid.*

²⁵ Statistics Canada, *Table 36-10-0452-01, Culture and sport indicators by domain and sub-domain, by province and territory, 2020, product perspective (x 1,000)*. (Accessed June 27, 2022)

²⁶ Statistics Canada, *Table 21-10-0053-01- Periodical publishers, summary statistics, every 2 years (dollars unless otherwise noted)*, CANSIM (database), released March 29, 2021.

²⁷ UPM & FIPP, *The Future of Media*, 2021, p. 12-15.

²⁸ *ibid.*

- Ontario magazines accounted for over \$17 million in exports in 2020.²⁹
- Projections from PwC demonstrate that the COVID-19 pandemic has exacerbated an existing decline in the consumer print magazine marketplace. Revenue from the magazine sector fell by 22.6% in 2020, and is projected to continue to shrink by 3.3% through to 2026.³⁰ While the consumer digital magazine sector is expected to grow at a 1.9% rate over this period, it is not sufficient to compensate for the decline in the print market.³¹

MUSIC

- The Ontario sound recording and music publishing sector contributed \$325 million to Ontario's GDP, and accounted for almost 3,000 jobs in 2020.³² This data does not include live music.
- Ontario's sound recording and distribution sector accounts for approximately 73% of total national industry revenues.³³ This data does not include music publishing or live music.
- Ontario's sound recording and music publishing sector exported close to \$242 million in 2020.³⁴
- According to PwC, digital music streaming increased 14.8% in 2021, and Canadian music consumers hit the 2 billion weekly streams in a single week benchmark for the first time in November 2021.³⁵
- According to the Canadian Live Music Association, live music was a key driver of the music industry in the pre-COVID environment, contributing more than \$3 billion to Canada's GDP and accounting for 72,000 employees.³⁶
- In particular, the live music sector has faced significant upheaval during COVID-19 with widespread venue closures. In 2020, the sector's revenues dropped by 46%.³⁷
- PwC is forecasting a level of recovery in the live music market, with revenues rising at a 16.5% CAGR by 2026, but they do not believe that revenues will reach pre-pandemic revenue levels by that point.³⁸

²⁹ Statistics Canada. *Table 12-10-0116-01 International and inter-provincial trade of culture and sport products, by domain and sub-domain, provinces and territories (x 1,000,000)*, released October 4, 2022.

³⁰ PwC, *Global Entertainment and Media Outlook, 2022-2026: Canada*, June 2022.

³¹ *ibid.*

³² Statistics Canada, *Table 36-10-0452-01, Culture and sport indicators by domain and sub-domain, by province and territory, product perspective (x 1,000)*, released May 27, 2021.

³³ Statistics Canada. *Table 21-10-0055-01- Sound recording and music publishing, summary statistics, every 2 years (dollars unless otherwise noted)*, CANSIM (database). (accessed: May 31, 2021)

³⁴ Statistics Canada. *Table 12-10-0116-01 International and inter-provincial trade of culture and sport products, by domain and sub-domain, provinces and territories (x 1,000,000)*, released October 4, 2022.

³⁵ PwC, *Global Entertainment and Media Outlook, 2022-2026: Canada*, June 2022.

³⁶ Canadian Live Music Association, *Written Submission for the 2022 Pre-Budget Consultations*, 2022, p. 1

³⁷ Canadian Live Music Association, *For The Love of Live Campaign*, Accessed October 4, 2022.

³⁸ *ibid.*

CREATIVE INDUSTRIES: CHALLENGES AND OPPORTUNITIES

- The effects of the COVID-19 pandemic, and subsequent economic fallout, continue to reverberate across the creative industries in different ways. While some sectors have almost fully recovered to pre-pandemic economic outlooks, others are still navigating long-term recovery issues.
 - For magazine and book publishers, supply chain issues including access to wood pulp, and increased non-recoverable shipping costs have proven to be disruptive and caused product delays.
 - While the live music industry has largely re-opened following widespread closures, the long-term impact of COVID-19 is significant. Research commissioned by the Canadian Independent Music Association suggests that industry revenues (including sound recording, music publishing and live music) for the independent sector will not recover to pre-COVID levels until at least 2023-24.³⁹
 - For the screen-based industries, the situation appears to be more positive, with recent data from Statistics Canada suggesting that both the film and television and interactive digital media sectors have largely recovered from COVID-19 related downturns.
- The federal government re-introduced Bill C-11, *An Act to Amend the Broadcasting Act*, in order to ensure that digital platforms contribute to the Canadian broadcasting system and the creation of Canadian content. While the bill has proven to be contentious in some areas, there is strong support from the arts, culture and heritage sectors for C-11⁴⁰. Participants at the National Culture Summit, hosted by Canadian Heritage in May 2022, highlighted the need for the regulation of digital platforms to preserve key revenues and Canadian cultural identity.⁴¹
- Concerns around diversity, equity and meaningful representation in both content and within the workforce remains a challenge, but also presents an important opportunity for the creative industries. While there have been highly-publicized commitments to increasing gender and racial parity in the sector, measuring real progress on these commitments has proven challenging. There have been several landmark studies released attempting to meet the need for more data to drive social change in the sector, including the Canadian Live Music Association's *Closing The Gap: Impact and Representation of Indigenous, Black and People of Colour Live Music Workers in Canada*, and the Black Screen Office's *Being Seen, Being Counted* and *Being Heard* reports that speak to the profitability and viability of Black content and offer tools for authentic and inclusive content creation. In addition, there are several industry-led initiatives offering accelerators and mentorship programs aiming to improve representation in a number of sectors, including the CBC-BIPOC TV & Film Showrunner Catalyst, Music Publishers Canada's Women in the Studio National Accelerator, and BIPOC of Publishing in Canada's Mentorship Program.

³⁹ Canadian Independent Music Association, "New Report Outlines Devastating Impact of COVID-19 On Canadian Independent Music Industry", December 2020, https://cimamusic.ca/news/recent-news/read_article/17882/new-report-outlines-devastating-impact-of-covid-19-on-canadian-independent-music-industry. Accessed October 4, 2022.

⁴⁰ Canadian Heritage, *National Culture Summit: The Future of Arts, Culture and Heritage in Canada – May 2,3 and 4, 2022 – Final Report*, p. 5.

⁴¹ *ibid.*

- Workforce and capacity development have become important considerations across the creative industries, particularly in a post-pandemic environment. Increased demand on Ontario as an attractive jurisdiction for film and television production means increased pressure for more skilled workers as well as studio space to meet the demand. In the interactive digital media industry, companies are struggling with several challenges, including a global talent shortage for mid-career and senior talent.⁴²
- The creative industries continue to face evolving marketplaces and changing revenue models. Industry consolidation remains a concern for book publishers globally (and in Canada). In November 2022, a U.S. court moved to block a proposed merger between Penguin Random House and Simon & Schuster due to concerns that the merger would negatively impact competition in the book marketplace.⁴³ There are also several high-profile mergers and acquisitions in the IDM space. The continued rise and increased market power of digital and social media platforms, including TikTok, which has become the top-grossing non-gaming app in the iOS App Store and Google Play⁴⁴, are changing the ways consumers discover and consume all forms of creative content, as well as the ways content companies can monetize it.
- Climate and sustainability concerns remain top of mind across all parts of the creative industries. Ontario Creates' Ontario Green Screen initiative launched its 2021-23 strategic plan to guide the development of a green plan for sustainable film and TV production in Ontario. Music Declares Emergency Canada continues to mobilize the music industry into climate activism, and held the first of its kind Canadian Climate Music Summit in Toronto in October 2022.⁴⁵
- Emerging technologies and applications like non-fungible tokens (NFTs), the metaverse, and artificial intelligence continue to be embraced in new and exciting ways. PwC highlights that early regulatory support for investment into these types of digital assets suggests that Web3 growth in Canada may outpace other markets in the near term.⁴⁶

FUNDING AND COMPETITIVE ENVIRONMENT

- In light of the impacts of the COVID-19 pandemic on the sector, the federal government rolled out an extensive suite of emergency financial supports for companies and individual creators in the sector. These included financial support directly to the music sector (and specific funding to the live music sector), audio-visual sector (including compensation for insurance issues), booksellers, arts and live event workers, the broadcasting sector as well as to non-profit organizations. These funds were largely a one-time injection of funds to assist with immediate pandemic-related challenges which have now been discontinued. The phasing out of these emergency funds may put additional pressure on industry recovery in the short to medium term.⁴⁷

⁴² Digital Media at the Crossroads, *The Digital Media Universe: Measuring the Revenues, the Audiences and the Future Prospects*, pg. 32

⁴³ Constance Grady, "The Planned Penguin Random House-Simon & Schuster merger has been struck down in court", *Vox*, November 1, 2022.

⁴⁴ Ashley King, "TikTok Remains Highest Grossing App with \$914.4MM In Quarterly Revenue", *Digital Music News*, October 2 2022, Accessed October 4, 2022

⁴⁵ Music Declares Emergency Canada website, Accessed October 4, 2022

⁴⁶ PwC, *Global Entertainment and Media Outlook, 2022-2026: Canada*, June 2022

⁴⁷ Government of Canada, "COVID-19 Support for culture, heritage and sport sectors", September 15, 2022, Accessed October 4, 2022.

- Funding agencies continue to explore new ways of collecting demographic data as part of their equity, diversity and inclusion action plans. Telefilm is collecting key self-reported demographic information about applicants in their Production, Theatrical Documentary, Talent to Watch and Development Programs with a voluntary questionnaire covering Indigenous identity, racial and ethnic identity, gender identity and expression, belonging to a 2SLGBTQIA+ community, disability status, and belonging to an Official Language Minority Community.⁴⁸ Canada Media Fund announced a new self-identification process called PERSONA-ID that collects demographic data from applicants, which is mandatory for individuals seeking to apply to a gender or diversity initiative, and voluntary for all other CMF applicants.⁴⁹

GENERAL ECONOMIC ENVIRONMENT

- The Fall Economic Statement forecasts a \$12.9 billion deficit for 2022-23 and a smaller deficit in each of the following two years (\$8.1 billion in 2023-24; \$0.7 billion in 2024-25).⁵⁰
- Ontario is projected to add 324,000 net jobs in 2022. The unemployment rate is projected to average 5.7% in 2022, below 8.0% in 2021 and just above the 5.6% pre-pandemic rate seen in 2019. Unemployment is then expected to rise to average 6.3% in 2023 and 2024, due to the growth of the labour force continuing to outpace employment growth, before moderating by 2025.⁵¹
- In Q2 2022, real GDP in Ontario increased 0.9%, after growing 1.1% in the prior quarter. Real GDP was 2.2% above the pre-pandemic level in 2019Q4, driven by an increase in household spending and exports.⁵² Overall, Ontario's real GDP is expected to increase by 3.7% in 2022 year-over-year and to rise by 3.1% in 2023. Economic growth should continue to moderate thereafter, with real GDP projected to rise 2.0% in 2024 and 1.9% in 2025.⁵³
- The Canadian dollar (CAD) has lowered in value in relation to the U.S. dollar (USD) in recent months, and is expected to trade in the \$0.75-\$0.76 range through Q4 2022.⁵⁴
- Forecasters expect recessions in the year ahead in many global economies including the UK, U.S. and Euro region, although the Canadian downturn is anticipated to be moderate by historical standards. Inflation pressures may have peaked but remain a key risk.⁵⁵ Inflation drives up the costs of projects Ontario Creates supports, affecting return on investment. Companies may opt to scale back activities, or they may need to spend more to undertake the same activities.

⁴⁸ Telefilm Canada, "Data collection and self-identification", Accessed October 4, 2022.

⁴⁹ Canada Media Fund, CMF Announces New Self-Identification Process, February 16, 2022, Accessed October 4, 2022.

⁵⁰ Ontario Ministry of Finance. (2022). *Ontario's Plan to Build: A Progress Update: 2022 Ontario Economic Outlook and Fiscal Review*. <https://budget.ontario.ca/2022/fallstatement/pdf/2022-fall-statement-en.pdf> (Accessed November 15, 2022).

⁵¹ *ibid.*

⁵² Ontario Ministry of Finance, "Q2 2022 Economic Accounts," <https://www.ontario.ca/page/ontario-economic-accounts> Accessed October 15, 2022.

⁵³ Ontario Ministry of Finance, "Chapter 2", *2022 Budget, 2022 Ontario Budget | Chapter 2*, Accessed October 15, 2022.

⁵⁴ RBC Economics, Macroeconomic Outlook, September 2022, <https://royal-bank-of-canada-2124.docs.contently.com/v/macro-september2022-pdf>. Accessed September 26, 2022.

⁵⁵ *ibid.*

ONTARIO DEMOGRAPHICS⁵⁶

- Ontario is home to over 14.2 million individuals, accounting for 38.5% of Canada's population. Ontario's population has grown 5.8% since the last census (2016).
- The majority of Ontarians (93.5%) report English as their first official language spoken.
- Ontario's English-French bilingualism rate is 10.8%, with 3.4% of the population listing French as their first official language spoken. Furthermore, 22.4% of the population reports more than one language spoken at home. In total, over 4 million Ontarians reported a non-official language as their mother tongue.
- Ontario's Indigenous population has grown by 10% since 2016, now totaling over 406,000 individuals. Over 19,000 Ontarians reported an Indigenous language being their mother tongue.
- While the majority of Ontarians (86.7%) live in population centres, 13.3% of Ontarians live in rural areas.
- Immigrants constitute 30% of Ontario's population, with recent immigrants (those that immigrated to Ontario between 2016 and 2021) representing 13.9% of the immigrant population in Ontario.

ONTARIO CREATES – INTERNAL

- The agency is at the start of a new Strategic planning cycle. A new five-year plan will be launched early in the new calendar year, which will take effect from April 1, 2023. The Plan is the result of extensive consultation with staff, board, experts and stakeholders, and outlines the success factors (strategic goals) and enablers that will guide the agency in the coming years.
- Several changes were made to the agency's organizational structure in 2022-23, including renaming the Industry Development Group to Industry Investment and Attraction, position realignments and changes to reporting structure aimed at streamlining decision-making processes. Two manager positions were added in the Tax Credits unit where none existed previously to address span-of-control and improve workflow.
- Ontario Creates continues to be focused on fostering diverse creative industries in Ontario, recognizing that supporting greater diversity both in content and in the talent pipeline will be a key driver in positioning Ontario's creative companies for continued economic success.
- Ontario Creates staff have been working in a hybrid work model since a gradual return to the office resumed in April 2022.
- The agency's five-year lease of its office premises expires in October 2023; work to review options has been underway throughout 2022-23 with Infrastructure Ontario.

⁵⁶ [Statistics Canada](#). 2021 Census of Population key indicators by geography: Ontario, accessed on November 10, 2022.

- A review of Ontario Creates' mandate, led by MTCS, is scheduled to take place in Q4 of the current fiscal year, with the final report expected in Q1 of 2023-24.

IV. STRATEGIC DIRECTIONS

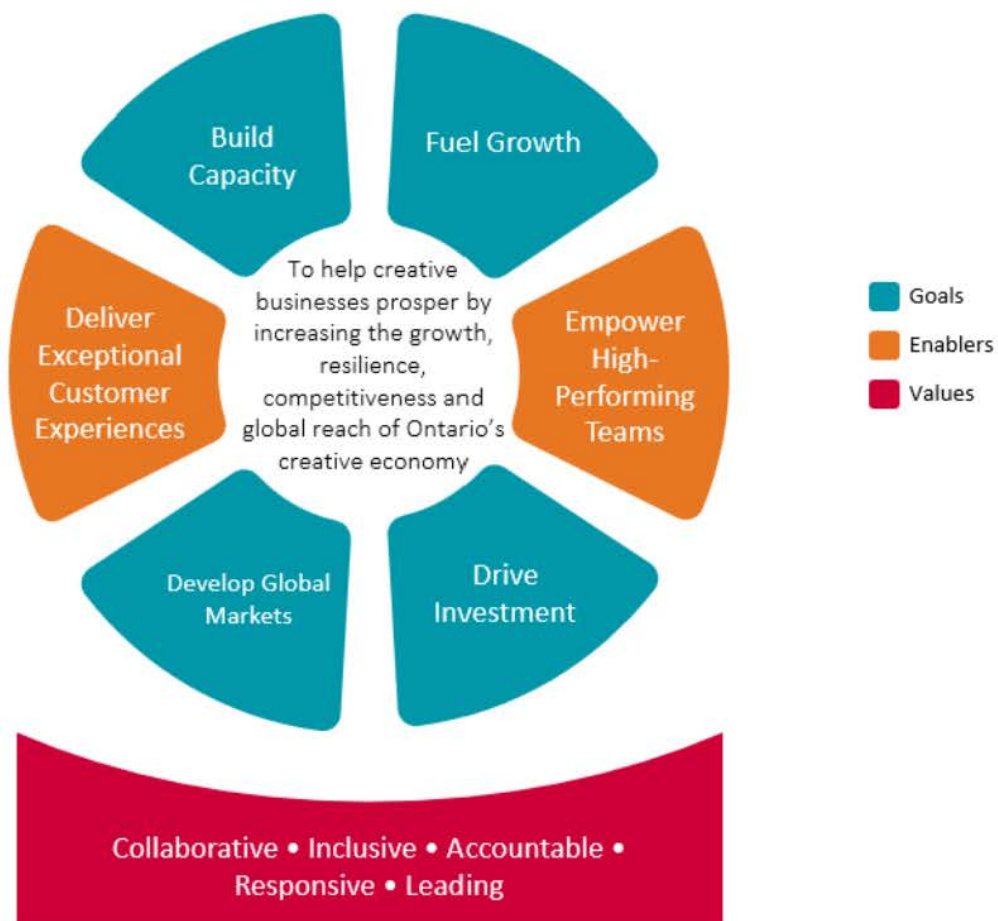
INTRODUCTION

Ontario Creates is pleased to share the framework of its new five-year Strategic Plan, currently in its final stages of development. The plan is intended to be bold and ambitious, while remaining grounded in order to ensure desired results can be achieved. The consultation undertaken to build this plan was by far Ontario Creates' most extensive engagement process, reaching over 700 stakeholders through a survey, focus groups and one-on-one interviews. Participants included program applicants (successful and unsuccessful), creative industry leaders, board, staff, Ministry representatives, academics and tech experts.

Ontario Creates will be seeking Ministry endorsement of the Plan with a view to launching it publicly ahead of its effective date of April 1, 2023. This section provides an overview of the anticipated new Strategic Framework for the agency. Section XIII of the Business Plan delves into the specific actions/initiatives anticipated to be undertaken in the first year of the Plan.

ONTARIO CREATES STRATEGIC FRAMEWORK

Ontario's robust, sustainable, and inclusive creative industries deliver economic impact and globally successful content



MISSION AND VISION

VISION

Ontario's robust, sustainable, and inclusive creative industries deliver economic impact and globally successful content.

MISSION

To help creative businesses prosper by increasing the growth, resilience, competitiveness, and global reach of Ontario's creative economy.

VALUES

Five core values underpin all aspects of Ontario Creates' operations, programming and decision-making. These attitudes and behaviours are encouraged across the organization and are fundamental to relationships with stakeholders and the agency's internal culture. The Ontario Creates' team demonstrates its commitment to these core values through its decisions, daily activities and interactions with partners, stakeholders, and each other.

- **Collaborative:** Work with each other and our partners to achieve the best possible outcomes.
- **Inclusive:** Ensure diversity, equity and accessibility in our programs and our workplace.
- **Accountable:** Deliver on our commitments with integrity, be open and transparent about our progress and hold ourselves responsible for our actions.
- **Responsive:** Open to new ideas and approaches and proactively adjust based on the industry environment.
- **Leading:** Be a best-in-class agency; advancing new ideas, innovation and change.

STRATEGIC GOALS AND ENABLERS

Ontario Creates 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 the agency can work to address through its strategic goals. Additionally, as Ontario Creates 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 internal enablers.

Strategic Goal #1: Build Capacity

For Ontario Creates, this means:

- Work collaboratively to ensure Ontario's creative industries are diverse, sustainable and positioned for growth, with a strong, skilled workforce and supporting infrastructure.

The ways in which Ontario Creates will achieve this include:

Through ongoing activities such as:

- Diversity evaluation criteria across all programs
- Diversity Enhancement
- AcceleratiON and other DEIB initiatives
- Ontario Green Screen
- Industry Development Support
- Production and scouting support
- Facilitating infrastructure expansion

- Demographic data collection
- Multi-year accessibility plan

And through new strategic initiatives including:

1. Establish and implement a workforce development strategy
2. Provide targeted support to diverse-led projects and businesses that demonstrate high potential for economic and cultural growth
3. Build on Ontario Green Screen leadership and expand sustainability strategy across the creative industries

Strategic Goal #2: Fuel Growth

For Ontario Creates, this means:

- Support the growth of Ontario's creative industry companies by investing in content creation, enabling business development, and facilitating collaboration within and across sectors, through modern, responsive and informed programs.

The ways in which Ontario Creates will achieve this include:

Through ongoing activities such as:

- Core investment funds
- Tax Credits
- Collaboration and partnership initiatives
- Research and business intelligence program and products
- Regional development initiatives
- Industry Advisory Committees

And through new strategic initiatives including:

1. Revise core investment programs to keep pace with evolving business opportunities and focus investment on high-impact support
2. Enhance communication and outreach to emerging companies and new entrants to the creative industries
3. Partner with government to simplify tax credit eligibility requirements
4. Establish a regional development plan

Strategic Goal #3: Drive Investment

For Ontario Creates, this means:

Generate investment in Ontario's creative economy by ensuring a diverse, sustainable, innovative, competitive, and world-class business landscape.

The ways in which Ontario Creates will achieve this include:

Through ongoing activities such as:

- Core investment programs and tax credits
- Inward Investment Attraction
- Program partnerships and collaboration initiatives
- Key Performance Indicators

And through new strategic initiatives including:

1. Seek out new private sector partnership/sponsorship opportunities to increase capacity in Ontario Creates' priority program areas
2. Explore innovative financing models to enhance investment in Ontario's creative industries
3. Grow the domestic and service screen production industry across all regions of Ontario
4. Partner with government to support modernization of tax credits through comprehensive redesign

Strategic Goal #4: Develop Global Markets

For Ontario Creates, this means:

- Strategically promote Ontario's content, companies and services to the world to open new markets, reach new audiences and generate export opportunities, business partnerships, and inward investment.

The ways in which Ontario Creates will achieve this include:

Through ongoing activities such as:

- Global market development programs
- Marketing programs
- International business development initiatives
- Communications activities
- Sponsorships

And through new strategic initiatives including:

1. Review and enhance programming and strategic initiatives in international markets
2. Simplify access to funds that support international development and growth of companies
3. Build the value proposition of the Ontario brand
4. Optimize brand partnerships

Enabler #1: Deliver Exceptional Customer Experiences

For Ontario Creates, this means:

- Ensure programs and services are modern, accessible, inclusive, responsive, transparent and timely and are well aligned with evolving industry needs.

The ways in which Ontario will achieve this include:

Through ongoing activities Such as:

- IT infrastructure upgrades and improvements
- Planned transition of IT applications (OAP, DLL, etc.) into the cloud
- Regular assessment of client feedback to support program and service improvements
- regular program review
- Industry Advisory Committees
- Accessibility Committee

And through new strategic initiatives including:

1. Review and improve accessibility of investment and tax credit programs
2. Implement an information technology roadmap to improve efficiency and stakeholder experience
3. Enhance performance measurement capacity and tools

Enabler #2: Empower High Performing Teams

For Ontario Creates, this means:

Foster a work environment and corporate culture that prioritizes the development and well-being staff and a sense of belonging. Leverage technology, policies and shared values to promote collaboration and optimize productivity and effectiveness.

The ways in which Ontario Creates will achieve this include:

Through ongoing activities such as:

- OPS Employee Experience Survey
- Employee Engagement Committee
- DEI Taskforce
- Performance management and learning and development plans
- Mentorship and career building opportunities

And through new strategic initiatives including:

1. Define Ontario Creates' culture and employee value proposition
2. Promote an equitable, inclusive, accessible, anti-racist and diverse workplace
3. Build a flexible, inclusive, and effective hybrid work model that aligns with OPS requirements

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

INTRODUCTION

Ontario Creates strives to deliver its programs, services 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 served by the agency. Ontario Creates is committed to ongoing analysis and continuous improvement in its undertakings. The agency has demonstrated its capacity to deliver meaningful, results-based initiatives to clients in all of the sectors it serves. Ontario Creates programs and services support a range of different objectives that can generally be categorized as: content creation, business development, international market development, broad industry development, and marketing/promotion.

Ontario Creates offers its programs, services and activities through four departments:

- 1. Industry Investment and Attraction:** Provides support for creative media companies to create and market content, undertake strategic business development activities, and access new markets and grow their businesses. The three units of the Industry Investment and Attraction Group are Industry Development (investment funding, international support and strategic initiatives), the Ontario Music Office (investment funding, international support and strategic initiatives), and the Film Commission (marketing, promotion, capacity-building and inward investment services). Collectively they encourage and support collaboration across and within sectors contributing to the economic growth of Ontario's creative industry businesses.

In 2021-22, 460,000 square feet of new studio space was secured for producers looking to shoot in Ontario.
- 2. Tax Credits and Financing Programs:** Co-administers five refundable tax credits⁵⁷ 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:** Provides the corporate planning and operating support to enable Ontario Creates to achieve its objectives, including strategic and business planning, business intelligence and statistics, financial services, information technology, performance results reporting, and corporate operations. The group supports MTCS and the industry through the collection and dissemination of industry statistics and follows federal policy developments (e.g., Canadian Radio-television and Telecommunications Commission, Canada Media Fund). Human resources (HR) support to the agency is provided by the Ministry of Public and Business Service Delivery (MPBSD) through its centralized HR Ontario service.

Online Research Library unique visitors increased 26% in 2021-22 over the year prior to reach more than 6,200.
- 4. CEO and Communications:** Encompasses the office of the President and CEO, Ontario Creates Board of Directors, and the Communications team, who are responsible for

⁵⁷ The 2015 Ontario Budget announced that the Ontario Sound Recording Tax Credit would 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.

supporting the agency in all its communications activities as outlined in the Communications Plan in Section XIV.

KEY AGENCY PRIORITIES

Ontario Creates Business Plan is aligned with government and ministry priorities of economic growth and competitiveness, COVID recovery, workforce development, red tape reduction, regional economic development, and infrastructure investment. The Plan also responds to the priorities outlined in the agency's mandate letter, including collaboration and innovation, responsiveness, diversity and inclusion, training and entrepreneurship, tax credit modernization and performance measurement and reporting. Programs and services have been designed in alignment with these themes and the agency ensures that it is operating in an accountable and transparent manner, in compliance with all relevant Directives, as part of its responsibility as a board-governed provincial agency.

Processing time across all credits was 35% faster in 2021-22 compared to 2020-21; and 61% faster compared to 2017-18.

Specific agency priorities for the year ahead include:

- Capacity Building and Workforce Development
- Diversity and Inclusion / Accessibility
- Regional outreach and development
- Sustainability
- Customer Service / Business Process Improvements
- International Market Development
- Demonstrate our Impact

These themes are carried through both core program and time-limited initiatives Ontario Creates proposes to undertake in 2023-24, as shown in Appendix A.

PROGRAMS, SERVICES AND ACTIVITIES

Ontario Creates offers programs, services and activities in support of its mandate outlined in the previous section. The agency's programs and services provide Ontario companies with the tools and support to remain competitive nationally and internationally, and to attract and retain both business and talent across the province. Ontario Creates programs and services are enabling Ontario's creative industries to make important contributions to Ontario's economy and its cultural vitality.

Ontario Creates investments supported more than 1,100 companies in 2021-22, inclusive of both grants awarded and tax credits issued.

WHAT WE FUND: KEY PRINCIPLES

Ontario Creates' programs include two main categories of funding: selective investment programs and tax credits. Most selective investment programs are juried by a panel of external jurors with senior industry knowledge, experience and expertise. Ontario Creates ensures that program juries are diverse, free from conflict of interest, and are regularly refreshed.

Ontario Creates invests in new activities, not core operations. The agency shares the risk with successful applicants; funding is limited to a percentage of the total project budget, with the company leveraging other public and private financing, and contributing its own resources in order to undertake the activity.

The decision criteria used to determine which applications are funded focuses on several factors, namely:

- Financial stability of company and its track record;
- Contribution the project will make to company growth and stability;
- Potential for revenue generation and success;
- Benefit to Ontario economy (based on labour spend; employment; leverage value);
- Innovation, quality and creativity of proposal; and
- Diversity of project and creative team.

Export Fund ROI reached \$224.88 in 2020-21, an increase of 130% over 2019-20.

Ontario Music Office's marquee collaboration event Business is Better with Music engaged hundreds of participants from almost 150 companies across Canada, generating more than \$150,000 in direct deals in 2021-22.

The tables below list core programs as well as planned time-limited initiatives. Appendix A provides additional detail on recent accomplishments and specific plans by department.

TABLE 1: SUMMARY OF CORE INVESTMENT PROGRAMS

Fund	Purpose	2023-24 Program Changes Details
Book Fund	Funding to Ontario-based, Canadian-owned publishers to increase financial viability and overall business growth through marketing activities or activities that create or improve companies' digital capacity. Up to \$150K per publisher annually, depending on type of project, based on sales revenue and submission and evaluation of project plans.	No substantial changes in 2023-24.
Film Fund	Provides support to Ontario producers for feature film projects ready for production or in the final stages of development. Fund has three components: 1) Development - interest-free loan up to \$25K for any stage of development; 2) Production - repayable advance up to \$400K on a last-in basis to complete financing; 3) Marketing and Distribution Support – grant of up to \$25K for audience development activities. Projects must be for public release (theatrical or digital), with length over 75 minutes. Minimum budget of \$1M for drama and \$600K for documentaries.	No substantial changes in 2023-24.

Magazine Fund	Funding to support new business development projects of Ontario-based, Canadian-owned magazine publishers, including projects that assist publishers in adapting and preparing to meet digital challenges in a fast-changing marketplace. Up to \$75K per publisher, depending on type of project.	No substantial changes in 2023-24.
Interactive Digital Media Fund	Financing support for Ontario-based, Canadian-owned companies to advance proprietary products IP into production; to create market-ready interactive digital media content/product. Support is also provided for concept definition; early stage activities for emerging companies, global market development; discoverability and commercialization, and industry development activities.	No substantial changes in 2023-24.
International Business Development	Strategic and financial support to create new international business opportunities provided through: Ontario Creates' Global Market Development Fund to offset costs of market attendance; collective market stand operations; and enhanced marketing and strategic presence to provide greater market access and visibility.	No substantial changes in 2023-24.
Industry Development Program	Targeted financial and strategic support to established trade and event organizations in the publishing and screen sectors for activities that provide new business growth and capacity building opportunities for Ontario's creative industry professionals.	No substantial changes in 2023-24; continue to prioritize applications related to diversity, workforce development, and high-impact B2B opportunities.
Ontario Music Investment Fund	The Ontario Music Investment Fund (OMIF) is aimed at strengthening and stimulating growth in Ontario's music companies and supporting this growing sector. Ontario Creates offers financial support to drive activity and investment and to support Ontario's music companies and organizations in expanding their economic and cultural footprints within Canada and around the world.	No substantial changes in 2023-24.
Business Intelligence Program	Funding support to incorporated not-for-profit industry organizations undertaking business intelligence initiatives aimed at gathering, formulating and disseminating business intelligence relevant to the growth of one or more content creating sectors in Ontario.	No substantial changes in 2023-24. Continue to prioritize applications related to diversity and workforce development.

TABLE 2: TAX CREDITS

Tax Credit	Purpose
Ontario Film and Television Tax Credit (OFTTC)	A refundable tax credit to eligible Ontario-based Canadian corporations of 35% of qualified Ontario labour expenditures for eligible film and television productions. An enhanced rate of 45% is available for productions that are eligible for the regional bonus, while a rate of 40% on the first \$240,000 of qualifying labour expenditure is available for eligible first-time producers.
Ontario Production Services Tax Credit (OPSTC)	A refundable tax credit to eligible Ontario-based Canadian and foreign-controlled corporations of 21.5% of qualified labour and non-labour 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% of qualified 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% of eligible Ontario expenditures for interactive digital media products created in Ontario (35% for fee-for-service).
Ontario Book Publishing Tax Credit (OBPTC)	A refundable tax credit to eligible Ontario-based Canadian corporations of 30% of eligible expenditures for eligible literary works by Canadian authors.

TABLE 3: FILM COMMISSION SERVICES

Location Library	An online listing service that provides industry professionals with access to 9,000 film-friendly locations from across the province.
Production Consulting Service	The Film Commission provides consultation advice to producers considering Ontario as a destination for production investment, and on-the-ground trouble shooting support for productions filming across Ontario. Consultation includes locations advice, location site tours, and building connections between producers and local vendors, suppliers and labour.

TABLE 4: TIME-LIMITED INITIATIVES

Program Area	Initiative	Notes
Music Office	AcceleratiON Black and Indigenous Entrepreneurship Fund (Music)	Continuation of this initiative for a third year.
Music Office	Diversity Enhancement (Music)	Continuation of this initiative for a third year.
Industry Development	Diversity Enhancement (Industry Development)	Continuation of this initiative in Film Fund, Book Fund, Magazine Fund, IDM Fund, and Industry Development Program.

*See XIII 2023-24 Implementation Plan section, p. 50, for further detail on initiatives.

AGENCY OPERATIONS

In addition to regular activities, key operational priorities in the year ahead will include a focus on office lease and space planning to reduce the agency's physical footprint. The agency's current five-year office space lease expires on October 31, 2023. In 2023-24, the agency will continue to work with Infrastructure Ontario to finalize space planning.

Further detail on planned operational activities is provided in Appendix A, in the Business Affairs and Research section.

VI. RESOURCES NEEDED TO MEET GOALS AND OBJECTIVES

- The programs and activities identified in this plan are based on status quo financial and human resources.
- Key financial resources include operating funds from MTCS of at least \$35.45 million per year in 2023-24, 2024-25, and 2025-26. The Plan also requires estimated self-generated revenues of \$5.2 million in 2023-24, \$5.2 million in 2024-25 and \$5.4 million in 2025-26. Total operating costs before time-limited strategic initiatives are estimated to be \$39.4 million in 2023-24, \$39.3 million in 2024-25 and \$39.4 million in 2025-26.
- The agency's budget reduction strategy has always been to mitigate the direct industry impact of cuts through timing adjustments, cost containment, program modifications, revenue increases, and program reductions while ensuring the long term financial and strategic sustainability of the agency's strategic and business planning. The budget for core programs and services is balanced and cash reserves are used to support time-limited initiatives which do not create long-term stakeholder expectations. As such, the agency has contained costs and operations are lean and efficient.
- As a new action identified in Ontario Creates' new Strategic Plan, the agency intends to explore partnerships with other entities to generate revenue, which supports the priority to pursue opportunities of this nature identified in the mandate letter (a government-wide commitment for all board-governed provincial agencies.)

VII. MITIGATING RISK: RISK IDENTIFICATION, ASSESSMENT AND MITIGATION STRATEGIES

Ontario Creates updates and submits a risk register to MTCS quarterly. The risk register evaluates current and future activities of the agency and environment with respect to related risk factors and their impacts. Ontario Creates has prepared comprehensive mitigation strategies for all of the risks that it has identified and as risks evolve or new risks emerge, Ontario Creates will endeavor to inform MTCS and act judiciously to minimize any negative consequences.

The full risk register as of Q2 2022-23 is shown in Appendix B.

VIII. HUMAN RESOURCES AND STAFFING

Staff at Ontario Creates are highly skilled in their respective service areas and have the highest levels of commitment both to public service and to the stakeholders they serve. Ontario Creates meets or exceeds all required controls and accountabilities as a public service agency and administrators of public funds. Ontario Creates places a great deal of emphasis on ensuring that all obligations under the Transfer Payment Accountability Directive (TPAD) and operating MOUs with MTCS are met.

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

In 2022-23, there were a number of organizational changes. The Industry Development Group was renamed Industry Investment and Attraction and the Manager roles within the unit were reclassified as Directors, eliminating one senior position. The flatter structure is aimed at improving the speed and effectiveness of information flow and decision-making. There were also structural changes and role realignments in Communications, CEO's Office and Tax Credits, that included the introduction of two new Manager positions to reduce span of control, optimize business processes, and address workload capacity challenges.

In an April 2022 survey of all OPS employees, Ontario Creates staff had a strong participation rate of 92% (as compared to 60% across the OPS) and a strong engagement index of 73.9 (as compared to 69.2 across the OPS). While the overall results were fairly positive, similar to elsewhere in the OPS, in many areas indicators showed a decline over the prior year's results.

An Employee Engagement Committee was established in 2018 which has developed a detailed action plan for engaging staff. The Committee's recent accomplishments included organizing a group volunteer activity, promoting greater awareness of OPS employee groups, and continuing a job shadowing program. This Committee will work closely with Management to address priorities stemming from the most recent Employee Engagement Survey as well as in support of Strategic Plan directions and actions.

Ontario Creates is continuously working to be a better organization and workplace. In 2022-23, members of the management team underwent 360 reviews in order to identify opportunities for improvement. The new Strategic Plan includes two internal enabling commitments: to deliver exceptional customer experiences, and to empower high-performing teams. This means that the agency will continue to ensure programs are responsive to stakeholder needs, will enhance use of technology, and will prioritize the growth, development and well-being of staff.

Ontario Creates is committed to working with staff in the year ahead to improve the workplace, including several initiatives outlined in new Strategic Plan commitments. In 2023-24, the agency intends to begin work on defining Ontario Creates' culture and employee value proposition, promoting an equitable inclusive, accessible, anti-racist and diverse place, and building a flexible, inclusive and effective hybrid work model. Specific actions scheduled for this year are outlined in Section XIII, Implementation Plan, but include expanding the employee mentorship program to include industry opportunities, and focusing on team building and effectiveness in a hybrid environment.

Below is the staff complement broken down by bargaining unit classification, and an FTE forecast:

FTE CAP

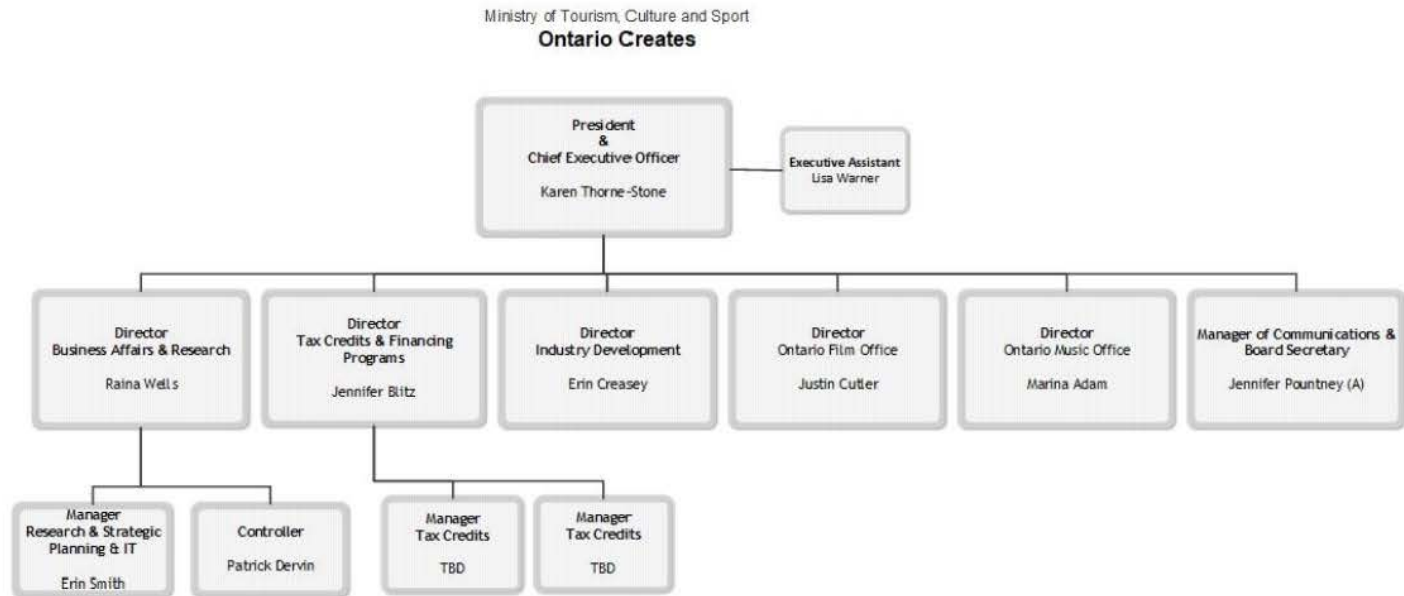
SMG/ITX	MCP	Excluded	OPSEU	AMAPCEO	TOTAL
3	8	0	62	5	78

FTE FORECAST

2024-25	2025-26
78	78

ORGANIZATIONAL CHART

As of November 16, 2022



IX. PERFORMANCE MEASURES

Performance measures for Ontario Creates provide regular feedback on whether agency programs and activities are meeting their objectives and provide some insight into the overall health of Ontario's creative industries. The agency's outcome and output-based performance measures are designed to align with MTCS' strategic objectives and Ontario Creates' strategic plan.

In 2023-24, as the agency launches its new 5-year Strategic Plan, existing KPIs will be assessed and realigned to the new strategic framework, and new outcome indicators will be developed. In addition, Ontario Creates will create a detailed data map and instructional manual to further standardize the results collection process, including review of data inputs on application forms. The Business Affairs and Research Group will also scope and procure business analytics software as a first step in improving data management, reporting and creating more compelling visualizations, to help tell better stories about the impact and outcomes of Ontario Creates programs and services.

The following table provides interim results as of September 30, 2022 (Q2) for key performance indicators. Measures in green are those the agency expects to retain in its new framework; those in yellow are those anticipated to be changed as part of the realignment to the new Strategic Plan; those in red are not expected to be carried forward. Targets have been provided for all green and yellow measures.

Note: In addition to the key performance indicators described below, Ontario Creates management 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 Ontario Creates 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.

Ontario Creates 2022-23 Q2 Performance Measures
as of September 30, 2022

Legend:

Green - a measure expected to continue unchanged

Yellow - a measure expected to be modified

Red - a measure expected to be phased out

Key Performance Indicator	2022-23 Quarterly Results		Targets		Past Years' Results			Notes
	Q1	Q2	2022-23	2023-24	2021-22 Actual	2020-21 Actual	2019-20 Actual	
Strategic Goal #1: STIMULATE ECONOMIC GROWTH AND EMPLOYMENT								
1. Estimated value of Tax Credits (millions)	\$140	\$127	\$600	\$680	\$723	\$690	\$621	
2. Leverage Value (additional amount of financing generated for each dollar invested by Ontario Creates)								
a) Investment through all Tax Credits	\$13.31	\$12.19	\$15.00	\$15.00	\$16.30	\$14.53	\$13.59	
b) Investment through Book Fund	-	\$0.62	\$0.65	\$0.65	\$0.73	\$0.65	\$0.60	
c) Investment through Film Fund (Production)	\$13.96	-	\$20.00	\$20.00	\$26.41	\$19.73	\$18.49	Note 8
d) Investment IDM Fund (Production)	\$2.82	-	\$3.00	\$3.00	\$3.46	\$2.75	\$2.17	
e) Investment through Magazine Fund	\$0.81	-	\$0.70	\$0.80	\$0.95	\$0.92	\$0.70	
f) Investment through Ontario Music Investment Fund (OMIF)	-	\$5.12	\$5.50	\$5.50	\$4.64	\$5.09	\$5.84	
g) Investment through Business Intelligence Program	\$1.45	-	\$1.25	\$2.25	\$2.14	\$1.31	\$0.91	
3. Return on Investment (sales earned for every dollar invested by Ontario Creates)								
a) Book Fund	-	-	\$2.00	\$4.50	Note 2	\$4.63	\$5.54	
b) Export Funding (Export Fund and IDM Fund: Global Market Development)	-	-	\$100.00	\$175.00	Note 2	\$224.88	\$95.63	Note 9
c) IDM Fund: Marketing Support	-	-	\$2.00	\$3.00	Note 2	\$2.52	\$3.22	
d) Magazine Fund	-	-	\$0.75	\$2.00	Note 2	\$3.91	\$0.52	

4. Ontario Music Investment Fund Economic Growth and Employment Indicators							
a) Increased gross revenue for OMIF-supported companies	Annual Result	\$45.00	\$45.00	N/A	(\$17.80)	(\$14.30)	Note 5, Note 10
b) Private sector investment and equity secured as a result of the OMIF support (millions)	Annual Result	\$12.75	\$12.75	N/A	\$17.20	\$11.58	Note 5
c) Jobs created and/or retained by OMIF-supported companies (FTEs)	Annual Result	500	500	N/A	306	478	Note 5
5. Other Economic Growth and Employment Indicators							
a) Weeks of work created and/or retained through IDM Fund and Film Fund projects	8,266	ONF	20,000	25,000	25,300	24,415	32,625
b) Job Creation Index (# of jobs per million dollars of Ontario Creates support)	Annual Result	N/A	N/A	Note 3	Note 3	Note 3	
c) Job Quality Index (average wage per job)	Annual Result	N/A	N/A	Note 3	Note 3	Note 3	
d) Economic ROI Index (GDP per dollar of Ontario Creates support)	Annual Result	N/A	N/A	Note 3	Note 3	Note 3	
e) Investment Leverage (private sector funding per dollar of Ontario Creates support)	Annual Result	N/A	N/A	Note 3	Note 3	Note 3	

Key Performance Indicator	2022-23 Quarterly Results		Targets		Past Years' Results			Notes
	Q1	Q2	2022-23 Target	2023-24 Target	2021-22 Actual	2020-21 Actual	2019-20 Actual	
Strategic Goal #2: PROMOTE THE INDUSTRIES								
1. Film and Television Production								
a) Number of film and television productions that shoot in Ontario	64	68	140	175	151	104	170	
Domestic	24	40	70	100	83	61	102	
Service	40	28	70	75	68	43	68	
b) Value of film and television productions that shoot in Ontario (millions)	\$696	\$608	\$1,500	\$2,000	\$1,793	\$1,246	\$1,638	
Domestic	\$185	\$209	\$375	\$600	\$520	\$370	\$674	
Service	\$511	\$398	\$1,125	\$1,400	\$1,273	\$876	\$964	
c) Number of actively scouting domestic and service productions accessing Ontario Creates scouting services	40	23	90	120	105	114	140	

2. Los Angeles Office								
a) Number of leads developed by L.A. Office	54	64	100	140	110	112	110	
b) Number of L.A. Office-assisted projects that shoot in Ontario	19	11	40	55	57	New Measure as of 21/22		Note 6
c) Value of L.A. Office-assisted projects that shoot in Ontario (millions)	\$327	\$221	\$800	\$1,100	\$1,000	\$969	\$654	
3. Social Media Influence								
a) Sysomos score	8/10	8/10	8/10	8/10	8/10	8/10	8/10	
b) Number of new subscribers to Ontario Creates social media channels	1,351	912	2,500	5,000	4,411	5,006	2,822	
4. Media Impressions								
a) Number of media impressions (millions)	2.2	8.7	50.0	50.0	48.3	110.3	71.7	
b) Number of Trillium Book Award media impressions (millions)	142.4	-	150.0	150.0	135.7	59.5	126.5	
c) Pick up on news releases (Trillium Book Award only)	149.0	-	500.0	500.0	574.0	471.0	New Measure as of 20/21	

Key Performance Indicator	2022-23 Quarterly Results		Targets		Past Years' Results			Notes
	Q1	Q2	2022-23 Target	2023-24 Target	2021-22 Actual	2020-21 Actual	2019-20 Actual	
Strategic Goal #3: ENCOURAGE COLLABORATION AND INNOVATION								
1. Industry Development Support (Industry Development Program, Sector Marketing Support, other Ontario Creates support to industry development)								
a) Number of industry development initiatives led or supported by Ontario Creates	68	7	60	80	67	58	76	
b) Number of business connections/leads made by participants at Ontario Creates-led or supported initiatives	40	200	6,500	12,000	11,274	6,424	14,214	Note 5
c) Number of business connections and/or leads made as a result of OMIF Music Industry Initiatives Support	Annual Result		6,000	6,000	N/A	N/A	N/A	
2. International Business Development								
a) Number of markets at which Ontario Creates has organized a strategic presence	5	3	8	10	13	6	7	
b) Number of foreign markets at which Ontario participants are supported through export activity support	24	27	150	130	117	129	181	

3. Collaboration Initiatives								
a) Number of Collaboration events led by Ontario Creates	0	2	4	4	2	3	5	
b) Number of business connections made through meetings at Collaboration events	0	1,050	700	1,000	940	1,210	1,050	
c) Number of deals/options arising from Collaboration events after 12 months	0	0	4	10	17	4	4	
d) Value (when applicable) of deals/options arising from Collaboration events after 12 months	\$0	\$0	\$15,000	\$75,000	\$173,750	\$22,500	\$13,750	
4. Business Intelligence								
a) Number of Business Intelligence projects released	0	1	8	8	11	6	10	
b) Number of Industry Profiles updated	0	0	8	8	7	11	8	
c) Number of unique views of Industry Profiles on corporate website	1,527	1,339	15,000	6,000	7,408	6,217	12,830	
d) Number of new documents added to the Online Research Library	0	19	60	60	46	33	141	
e) Number of unique visitors to the Online Research Library	2,917	1,557	5,000	10,000	6,262	4,975	2,142	
f) Number of Business Intelligence Bulletin unique views	45	77	1,000	1,000	780	1,234	1,551	

Key Performance Indicator	2022-23 Quarterly Results		Targets		Past Years' Results			Notes
	Q1	Q2	2022-23 Target	2023-24 Target	2021-22 Actual	2020-21 Actual	2019-20 Actual	
Strategic Enabler #1: ENSURE SERVICE AND OPERATIONAL EXCELLENCE								
1. Program Delivery								
a) Number of applications received (funds and tax credits)	893	627	2,200	2,400	2,345	2,248	2,588	Note 1
b) Average turnaround time across all tax credits (weeks)	20.8	20.6	25.0	20.0	16.5	25.3	35.1	
c) Average time tax credit files spend in analysis (weeks)	8.1	6.9	5.0	5.0	5.7	3.9	5.2	
d) Total number of tax credit products reviewed	447	680	2,700	2,700	1,928	3,611	2,947	
e) Program Delivery Effectiveness Index (avg. application time, weeks)	Annual Result		N/A	N/A	Note 3	Note 3	Note 3	
f) Program Delivery Effectiveness Index (avg. cost per application)	Annual Result		N/A	N/A	Note 3	Note 3	Note 3	

2. Service								
a) Number of service calls and emails	1,153	1,089	4,000	4,000	4,290	4,805	4,186	
b) Number of ministry inquiries	25	41	100	100	109	90	144	
c) Client satisfaction survey (approximately every 5 years)	Annual Result		N/A	N/A	N/A	N/A	N/A	Note 4
3. Risk-Related Performance Measures								
a) % of risks managed down since last quarter	-7%	0%	10%	10%			New for 21-22	
b) % of risks with Medium or Low Risk Rating (Rating of 10 or below)	86%	92%	80%	80%			New for 21-22	

Key Performance Indicator	2022-23 Quarterly Results		Targets		Past Years' Results			Notes
	Q1	Q2	2022-23 Target	2023-24 Target	2021-22 Actual	2020-21 Actual	2019-20 Actual	
Strategic Enabler #2: EMPOWER PEOPLE AND TEAMS								
1. Percentage of staff that have been at organization 5+ years	Annual Result		60%	60%	72.1%	62.5%	57.5%	
2. Percentage of staff with Performance Development and Learning Plans	Annual Result		95%	95%	Note 2	94.4%	100.0%	
3. Percentage of staff who engaged in 1+ professional development activities within the year	Annual Result		95%	95%	Note 2	94.4%	97.5%	
4. OPS Employee Survey (positive or negative variance between Ontario Creates and OPS results on Employee Engagement Survey - when issued)								
a) Engagement Index	Annual Result		+9.0	+8.0	N/A	+7.4	+9.6	
b) Inclusion Index	Annual Result		+5.0	+5.0	N/A	+4.6	+5.2	
c) Performance Barriers	Annual Result		+8.0	N/A	N/A	+13.3	+3.4	
d) Independence & Innovation	Annual Result		+1.0	+2.0	N/A	+1.0	+1.7	Note 7
e) Learning & Development	Annual Result		+10.0	N/A	N/A	+7.9	+9.1	
f) Leadership Practices	Annual Result		+10.0	+5.0	N/A	+11.0	+11.6	
g) Quality of Service	Annual Result		+8.0	N/A	N/A	+8.0	+14.2	Note 7
h) Organizational Communication	Annual Result		+14.0	N/A	N/A	+14.3	+19.0	
i) Survey Response Rate	Annual Result		+25.0	+30.0	N/A	+29.0	+29.8	

Key Performance Indicator	2022-23 Quarterly Results		Targets		Past Years' Results			Notes
	Q1	Q2	2022-23 Target	2023-24 Target	2021-22 Actual	2020-21 Actual	2019-20 Actual	
COVID-19 Tracking Measures								
Number of investment commitments that were modified to reflect new COVID-19 related priorities	Annual Result		N/A	N/A	129	391	New for 20-21	
Dollars committed to COVID-19 health and safety measures	Annual Result		N/A	N/A	\$989,619	New for 2021-22		

NOTES:

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

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

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

(2) Results not yet available.

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

(4) Ontario Creates Client Satisfaction Survey was issued in 2017-18. Surveys are issued approximately every five years.

(5) Results for 2019-20 are not comparable to previous years due to a reduction in funding beginning in 2019-20 (from a \$15M fund to \$7M) before year-end review of the program which was relaunched in 2020-21 as the Ontario Music Investment Fund with different program parameters from the former OMF. Results for 2019-20 are not comparable to 2020-21 and later due to the different program parameters introduced in 2020-21.

(6) Changed from previously used measure, which was proportion of newly Confirmed projects/Projects scouting in a given quarter.

(7) Some survey questions were revised in 2020 and as a result, measure is not directly comparable to previous years.

(8) 2021-22 Film Fund (Production) leverage values exclude COVID-19 top-ups.

(9) 2019-20 figure has been corrected. Previously published figure of \$125.12 erroneously excluded IDM Global Market Development data.

(10) Increased gross revenue in a negative position due to significant impacts of the pandemic, (including prolonged venue closures, tour postponements & cancellations, rising inflation, etc.) on live music in particular and ripple effects on the full music industry ecosystem.

Ontario Creates met or exceeded most 2021-22 performance targets, noting the following:

- Leverage value targets for all funds and tax credits were exceeded in 2021-22. Leverage value refers to the additional amount of spending generated for each dollar invested by Ontario Creates. Notably, Film Fund (Production) leverage value, at \$26.41, was 33% higher than in 2020-21, indicating that project budgets were larger than anticipated. For most funds and tax credits, leverage value not only surpassed this year's targets but also the two prior years of results (with the exception of OMIF, where leverage value came in slightly below 2020-21 levels).
- Film and television productions shot in Ontario significantly exceeded projections, in particular on the domestic side where both the number and value of production was more than four times expected levels, as pent-up production moved ahead following a period of restrictions. LA-Office-assisted productions also greatly outperformed expectations, with production value reaching \$1.0 billion. Projections were based on the assumption that recovery from COVID-19 would be slower.
- Ontario Creates total media impressions (other than Trillium Book Award) were just shy of the 50 million target, at 48.3M. However, Trillium Book Award media impressions were more than double 2020-21 levels, and comparable to 2019-20 results, at 135.7M. Social media engagement was strong, with over 4,400 new subscribers gained across the agency's various social media channels.
- Many of the goals under Strategic Goal #3 (Collaboration and Innovation) were met or exceeded, such as the number of industry development initiatives led or supported by Ontario Creates, and the number of business connections and leads made by participants. Foreign markets at which participants are supported through export marketing activity support fell short of the 150 target at 117, as travel continued to be restricted during this fiscal year. Similarly, two collaboration initiatives were undertaken, versus four events anticipated. The value of deals and options emerging from the collaboration events that did take place was particularly strong, however, with Business is Better with Music driving record results of \$173,750 in deals made as a result of collaboration activities.
- In the business intelligence area, 11 projects were released, more than the expected eight.
- Several targets were not achieved related to number of profiles updated, unique views of the profiles, new documents added to the Online Research Library, and views of the business intelligence bulletin. A lower staff complement in the Research unit over much of the fiscal year affected the unit's output.
- Average turn-around time across all tax credits was quicker than expected, at an average of 16.5 weeks against a target of 25.0 weeks.
- While the time a file spent actively in analysis inched up to 5.7 weeks, the amount of time files spent in queue before analysis began, shrank considerably by 10 1/2 weeks. Fewer products were reviewed this fiscal as certain streamlining activities initiated at the outset of the COVID-19 pandemic were phased out (1,928 products were reviewed, compared to an expected 2,700).

X. FINANCIAL BUDGET

This Business Plan represents a status quo budget with no increases for additional financial or human resources. Specifically:

- Ontario Creates' 2023-24 core expenditures for accounting purposes are projected to be \$39.4 million before time-limited strategic initiatives. If sufficient capacity is not available in the base budget, these initiatives will be funded from cash reserves.
- Ontario Creates' revenue for 2023-24 is expected to be \$40.6 million which includes operating funding from MTCS of \$35.5 million and \$5.1 million in self-generated revenue (tax credit administration fees, interest, and other income).
- Uncommitted cash reserves at the end of 2023-24 are projected to be \$3.718 million. Ontario Creates' fiduciary practice is to ensure that the reserve fund is sufficient to cover lease, legislated and severance obligations before considering allocations for strategic initiatives.

AGENCY:**DRAFT FINANCIAL FORECAST SUMMARY
FOR PLANNING PURPOSES**

ONTARIO CREATES (\$ Thousands)	2023-24	2024-25	2025-26
		<i>FORECAST</i>	
REVENUE			
MTCS Funding (Note 1)	35,450.3	35,450.3	35,450.3
Self-generated (Notes 2)	5,119.5	5,249.9	5,385.5
TOTAL REVENUE	40,569.8	40,700.2	40,835.8
EXPENDITURES			
Salaries & Benefits (Note 3)	8,242.6	8,317.6	8,393.3
Operations (Notes 4, 5)	2,319.7	2,350.7	2,364.1
Grants	26,762.0	26,762.0	26,762.0
Program Delivery (Note 6)	1,453.4	1,296.6	1,289.7
TIFF	1,115.0	1,115.0	1,115.0
Provision for Rescinded Grants	-500.0	-500.0	-500.0
TOTAL EXPENDITURES	39,392.6	39,341.8	39,424.1
Net Surplus before Other Items	1,177.2	1,358.4	1,411.7
Other Items:			
- Time-limited Strategic Initiatives (Note 7)	1,775.0	895.0	0.0
Net Surplus/(Deficit)	-597.8	463.4	1,411.7
Cash Reserves - beginning of year	4,315.7	3,717.9	4,181.3
Cash Reserves - end of year	3,717.9	4,181.3	5,593.1

Notes:

(1) 2023-24 MTCS revenue consists of \$28.45 million base allocation and \$7.0 million OMIF.

(2) Includes tax credit administration fees, interest, and other income. Tax credit fee revenue in FY24 and FY25 reflects recently approved changes to fee structure.

(3) Assumes 1% increase based on existing collective bargaining agreements.

(4) Includes occupancy, administration, marketing and communications costs, and annual 2% inflation on operations and information services

(5) Current premises lease expires on October 31, 2023. Forecasted premises lease cost is per Infrastructure Ontario's Real Estate Options Analysis document (\$957k for FY24 and \$976k for FY25).

(6) Program delivery includes costs to deliver OC Funds, Trillium Awards, and Ontario Film Office.

(7) Cash reserves will be used to fund time-limited initiatives as required.

XI. IT AND ELECTRONIC SERVICE DELIVERY PLAN

Ontario Creates provides and supports its own information technology services, including maintenance of the internal network and servers, email service, an internal database for operational purposes and three outward-facing databases that provide access to industry research, filming locations, and the agency's funding programs 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 agency staff and external users of Ontario Creates' Online Application Portal (OAP). The in-house model offers the agency much-needed flexibility to provide a high level of customization and responsiveness to client needs in a timely fashion.

CLIENT SERVICES

Ontario Creates is proud to be advanced in its efforts to provide electronic service delivery to clients, which supports the broader government's digital service plans. The agency's corporate website is its primary client interface. Ontario Creates clients access the OAP, the Digital Locations Library (DLL) and the Online Research Library (ORL) through the corporate website. It is also the agency's communications portal to provide information about its programs and services and to share news for and about stakeholders.

In 2021-22, the agency fielded over 3,550 Online Application Portal service calls and emails.

SECURITY AND SYSTEM MONITORING

The agency has robust security protocols in place. To ensure the ongoing operation of the agency IT infrastructure and the personal and confidential information it contains, agency staff conduct 24-hour system monitoring. This is carried out on a rotational basis by members of the IT team, who have undertaken security training and participate in the OPS-wide cybersecurity community of practice (CoP). Ontario Creates engages in an annual security audit carried out by the Ministry of Public and Business Service Delivery (MPBSD) to ensure that there are no major flaws in the system and that personal and confidential data is secure and all cybersecurity best practices are followed. The agency has a strong track record of promptly addressing any security vulnerabilities identified in annual audits, and there have been no major security breaches over the years. Spam and phishing attempts are identified shared broadly with staff to ensure there is awareness at all levels of the organization around cybersecurity risks and how to mitigate them.

ELECTRONIC SERVICE DELIVERY

Ontario Creates provides Electronic Service Delivery to clients through the OAP. It is mandatory for all applicants to the Industry Development, Ontario Music Investment Fund, Business Intelligence Program, and Tax Credit programs to submit their applications through the portal. All written communication regarding applications is done through the OAP. The OAP 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 are approved by management according to the business needs of the agency and the funds available.

The agency'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. An event module is now in place allowing for invitations to be sent out to OAP contacts and for registrations to easily be collected on site using QR codes during in-person events. Demographic data is also collected on a voluntary basis through the OAP. 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.

The ORL and DLL provide services to the agency's clients. 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, Film Commission, and IT areas, who work with the external vendor to implement them. Enhancements are implemented through the process described above.

RECENT ACCOMPLISHMENTS

Recent IT project and systems upgrades achievements include:

- A new corporate website was launched in 2020, designed to meet the requirements of the Accessibility for Ontarians with Disabilities Act. New tools to improve user experience for tax credit applicants were created and are available on the website, including an online tax credit estimate calculator and a tool to assist in determining whether a particular region qualifies as being inside or outside of the GTA for the purposes of the regional bonus.
- The IT Team finalized the exploration of processes available to issue electronic tax credit certificates with appropriate security features embedded. The project was completed and launched in December, 2021.
- IT Helpdesk Ticketing System for supporting Internal Users: the IT team has successfully procured the software, the project went through implementation and testing phases, with a launch in early October 2021.
- To support the Agency's return to the workplace in April 2022, IT developed remote and hybrid work policies regarding IT related questions such as how hardware will be utilized, when to retire desktops, and how to facilitate docking stations.
- Procurement of the IT solution for the Digital Signature Project is complete.
- Design and implementation of an information sharing module with the CRA, allowing agents from both organizations to access the same company documents for our respective areas of review. The project launched in May 2021, and has reduced duplication, streamlined review, and led to quicker audits. This pilot has now become a model that CRA plans to replicate with other provinces and CAVCO.

In 2022-23:

- Security and IT Infrastructure upgrades were completed. The firewall was upgraded and the corporate website was moved to an Azure server which enabled significant speed improvements in loading and browsing the website.
- The office phone system was upgraded to "soft phones," to permit calls to be made from desktops via an app or standalone software solution.
- The IT Team will continue supporting the Tax Credit unit's plans to bring the risk assessment scoring function (currently undertaken by MoF) in-house. The project is currently in an implementation phase.
- The IT Team will support the Research and Strategic Planning Group's efforts to enhance data collection around key business and creative roles among companies and productions supported by Ontario Creates. This project is currently nearing completion, pending finalization of the data collection form.
- With funding from the Ontario Onwards Acceleration Fund (OOAF), Ontario Creates will be beginning work on a series of features for the tax credit team and clients. Work will begin in 2022-23 and continue through 2023-24. Scope will include work on the tax credits dashboard and clock feature to provide an enhanced experience and additional useful information to stakeholders using the OAP. Analysis will be undertaken around automation for streamlining processing of tax credits, including opportunities to incorporate AI and

chatbots. IT will support scoping and implementation of a suite of technological changes to tax credits to reduce processing times for clients (electronic review package, service standard dashboard, AI chatbot, digital ID, use of AI to continuously improve risk scoring module).

2023-24 INFORMATION TECHNOLOGY PLAN

- The agency will be continuing work to transition client-facing applications (OAP, DLL, ORL) to the Cloud to assist in improving security, access to service, and flexibility.
- The IT Team will continue to fine-tune the CRM upgrade and will process ongoing enhancements to the database.
- The project to move the tax credit risk assessment scoring function in-house will be fully deployed.
- Work on a series of tax credit processing improvements which are being undertaken with funding from the Ontario Onwards Acceleration Fund (as noted above) will continue throughout 2023-24, including investigating automation opportunities, incorporation of AI and chatbots, and continuous improvements to risk scoring module.
- The IT team will continue to work on digitization of administrative processes such as invoice workflow and contracts.
- IT will participate in scoping and planning a project to launch a new, leading, Digital Locations Library (DLL) for Ontario's Film Office.
- Continue to support the Agency's remote and hybrid work policies.
- Maintain security and system monitoring, as described above.
- Provide support to BAR team in plans to finalize a new KPI framework; create data map and instructional manual; and review data inputs on applications forms.
- Provide support as required to BAR team regarding plans to scope and procure business analytics software to improve data management and reporting.

XII. LEVERAGING PARTNERSHIPS: INITIATIVES INVOLVING THIRD PARTIES

Ontario Creates works closely with a range of partners on targeted initiatives. Extending existing partnerships and developing new ones is a key strategic priority for the agency, as collaboration with both internal and external entities allows the agency to greatly extend its impact, often without the need to tap into additional resources. In line with expectations identified in the 2023-24 mandate letter to collaborate with others to drive efficient innovation across all lines of business, Ontario Creates continually seeks out appropriate partnerships with local, regional, federal and international private, non-profit and public entities that assist in furthering the agency's mandate and strategic goals.

The following initiatives demonstrate ways Ontario Creates maximizes the impact of Ontario's investments through collaboration with third parties:

TORONTO/ONTARIO FILM OFFICE IN L.A.

- The Toronto/Ontario Film Office in L.A. is a partnership between Ontario Creates and the City of Toronto Film, Television and Digital Media Office that 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.
- Ontario Creates is the managing partner of the Office.

ONTARIO GREEN SCREEN PROGRAM

- Ontario Creates is a partner with 27 stakeholder groups, including unions, industry trade organizations, associations, production service companies, producers, studios and municipal government partners, to fund and deliver the Ontario Green Screen program.
- Partners offer financial, strategic and tactical support to deliver program initiatives.
- Over 400 film workers have taken part in the Climate and Sustainable Film Production, and Carbon Calculating courses delivered by the initiative.
- In 2023-24, Ontario Green Screen will be launching a new five-year strategic plan following the completion of the inaugural two-year plan, and will begin working on implementation tactics.

TORONTO INTERNATIONAL FILM FESTIVAL, INC (TIFF)

- Ontario Creates is the mechanism by which MTCS provides annual funds 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 2021-22, \$815,000 funding was provided for this purpose. In 2021-22, the agency also provided \$300,000 in operating support to TIFF, \$120,000 to the TIFF Industry Office, which supports international sales opportunities for producers during the Festival, and \$20,000 via the Industry Development Program to TIFF's Film Circuit.

COCREATE

- Ontario Creates partners with Screen Australia, New Zealand Film Commission, British Film Institute, Irish Film Board, and Creative Scotland to deliver this co-production business development initiative in the feature film industry.

- Ontario Creates initiated and led this initiative to raise industry profiles and create opportunities for Ontario producers, and to raise the international profile of the agency, the industry, and the Province.
- The program commenced at Cannes 2017, with over 30 feature film producers conducting over 200 business meetings across English-language territories.
- After two years of virtual events, CoCreate returned in-person to the Cannes film festival in May 2022, with a focus on Ontario producer delegates from the Indigenous Screen Office and the Black Screen Office.

INTERNATIONAL CANADA STANDS

- Ontario Creates partners with Telefilm Canada and other provinces on branded 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.
- Ontario Creates is a major contributing partner to the Canadian presence at the following markets: Cannes International Film Festival, MIP-TV, MIPCOM, Sunnyside of the Doc, TIFF, and the Berlin Film Festival. Ontario Creates also maintains a partner presence at international markets such as South by South West (SXSW), Reeperbahn Festival and Conference, Kidscreen, Game Developers Conference and Gamescom.
- Ontario Creates 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. An example of this is Series Mania.

IDM FUND PARTNERSHIPS

- IDM Fund Futures Forward is a program designed to teach business, marketing, and pitching skills to up-and-coming digital-media creators and those transitioning to digital from traditional screen content. This program is delivered by leveraging the expertise and reach of partner organizations Women in Film and Television-Toronto, Hand Eye Society, Interactive Ontario, WebSeries Canada, and Afrotopolis Arts Collective, reducing the administrative burden on Ontario Creates of running the program, while increasing partner capacity.
- In 2022-23, the IDM Fund Futures program launched a grant program in partnership with the Canada Media Fund. Eligible Futures Forward training program graduates and companies owned by individuals from underrepresented communities are eligible to apply for early-stage development awards of up to \$20,000, with Ontario Creates and CMF funding half of each award. In August 2022, Ontario Creates partnered with the Trade Commissioner Services, provincial partner Creative BC and Medienboard Berlin-Brandenburg to deliver the Canada-Germany IDM Exchange. Taking place over three days in Berlin, Germany, the event created a B2B forum for interactive digital media companies looking for coproduction opportunities, as well as presentations on financial incentives and studio tours.
- In August 2022, Ontario Creates partnered with the Trade Commissioner Services on the delivery of strategic events at DevCom and the Game Developer’s Conference, and hosted a B2B networking opportunity in the Canada Pavilion.
- In September 2022, Ontario Creates partnered with Interactive Ontario to deliver the first-ever Ontario-branded sale on the game platform Steam, branded “Play the North.” The sale included over 200 games from Ontario developers.

ACCELERATION PROGRAM PARTNERSHIPS

- The AcceleratiON program has been developed to support, enhance capacity and enable the next generation of Black and Indigenous music industry professionals to create high quality content and retain IP ownership and control over their own narratives. Mentorship

and capacity-building elements of the program are delivered in partnership with organizations such as ADVANCE, the International Indigenous Music Summit, Canadian Music Week and Indie Week. This helps broaden the reach and impact of these organizations while reducing the administrative burden on Ontario Creates.

CANADIAN AUDIO-VISUAL CERTIFICATION OFFICE (CAVCO)

- Ontario Creates is exploring with CAVCO how information can be shared by the Federal administrator as a means of streamlining an applicant's need to input and validate information in the Ontario Creates application form.

DEPARTMENT OF CANADIAN HERITAGE/STATISTICS CANADA

- Since 2013-14, Ontario Creates has participated in the Culture Statistics Strategy, an initiative led by the federal Department of Canadian Heritage and a range of provincial, territorial, municipal and other partners. This partnership supports the release of key Statistics Canada culture data such as culture jobs, contribution to GDP, and trade of cultural products and services.

CANADA REVENUE AGENCY (CRA)

- Ontario Creates currently co-administers five refundable tax credits with the Canada Revenue Agency based on eligible expenditures for the film, television, interactive digital media, and book publishing industries.

BUSINESS IS BETTER WITH MUSIC PARTNERSHIPS

- Ontario Creates partnered with the Economic Club of Canada and Conscious Economics to continue the *Business is Better with Music* series of B2B events, to connect music stakeholders with representatives from corporate Canada. Additional partnerships resulting from these events included activations with Billy Bishop Airport, ArtHaus and the City of Toronto.

XIII. 2023-24 IMPLEMENTATION PLAN

The financial forecast summary and program and service descriptions included in this Business Plan are based on status quo financial and human resources. Ontario Creates' strategic plan concluded in 2021-22 and the creation of a new plan was delayed by a year in order to better understand the long-term impacts of COVID-19 to Ontario's creative industries. In 2022-23, Ontario Creates continued to be guided by the goals and activities of the agency's existing plan, while developing a new five-year plan to commence 2023-24.

2023-24 IMPLEMENTATION PLAN

The chart below maps out the specific activities that will be carried out in 2023-24 against the four strategic goals and two strategic enablers.

#	OBJECTIVE	2023-24 TACTICS
STRATEGIC GOAL #1: BUILD CAPACITY		
1	Establish and implement a workforce development strategy	<ul style="list-style-type: none"> a. Host a cross-sector workforce symposium to share recent research and articulate goals of a workforce strategy; b. Develop strategy, determine appropriate partners, staffing needs and costs c. Host a virtual job fair for Film sector
2	Provide targeted support to diverse-led projects and businesses that demonstrate high potential for economic and cultural growth	<ul style="list-style-type: none"> a. Maintain Diversity Enhancement across Industry Development and OMO programs <i>[Ongoing Years 1-2]</i> b. Maintain AcceleratiON program <i>[Ongoing Years 1-2]</i> c. Focus on Franco-Ontarian music stakeholder capacity and export growth; support domestic activation and export initiative d. Franco-Ontarian content market study e. Implement Multi-Year Accessibility Plan (currently in development) <i>[Ongoing Years 1-5]</i>
3	Build on Ontario Green Screen leadership and expand sustainability strategy across the creative industries	<ul style="list-style-type: none"> a. Activate first year of new 5-year strategic plan for OGS <i>[Ongoing Years 1+]</i> b. Begin to expand sustainability initiatives/support to the publishing sector (e.g., carbon calculator for publishing industry) <i>[Ongoing Years 1+]</i>
STRATEGIC GOAL #2: FUEL GROWTH		
1	Revise core investment programs to keep pace with evolving business opportunities and focus investment on high-impact support	<ul style="list-style-type: none"> a. Engage a consultant to review and assess screen content program structure and objectives against changing market environment to provide recommendations on how to better align and target high value opportunities b. Engage a consultant to review and assess music program structure and objectives against changing market environment to provide recommendations on how to better align and target high value opportunities
2	Enhance communication and outreach to emerging companies and new entrants to the creative industries	<ul style="list-style-type: none"> a. Ensure outreach and communications related to Ontario Creates' programs and services extends to emerging companies and new entrants (who may not

		yet be incorporated); partner with industry orgs to enhance outreach efforts <i>[Ongoing Years 1+]</i>
3	Partner with government to simplify tax credit eligibility requirements	<ul style="list-style-type: none"> a. Explore and implement changes to tax credits identified in 2022 Ontario Budget and 2022 Fall Economic Statement (extending eligibility to OFTTC for online-only productions, expanding eligible expenditures for OPSTC for location fees, review of untethering OCASE, and review of OFTTC regional bonus) b. Work with government and industry partners to identify additional changes to tax credit legislation and regulations to ensure efficiency, value and impact on achieving government priorities <i>[Ongoing Years 1-5]</i>
4	Establish a regional development plan	<ul style="list-style-type: none"> a. Launch regional production economic impact assessment tool b. As part of tax credit modernization plans, review OFTTC regional bonus to ensure it is providing effective and appropriate incentives and support for film and television productions in all regions of Ontario. c. Work with the government and economic development experts to determine regional development objectives for the creative industries and to explore ways to refine and target OC and other government supports most effectively <i>[Ongoing Years 1-5]</i>
STRATEGIC GOAL #3: DRIVE INVESTMENT		
1	Explore innovative financing models that reinvest in Ontario's creative industries	<ul style="list-style-type: none"> a. Internal research and data gathering exercise to compile existing research on alternative financing models; identify other jurisdictions that have implemented similar programs for the creative industries; conduct gap analysis for Ontario and determine stakeholder need
2	Grow the domestic and service screen production industry across all regions of Ontario	<ul style="list-style-type: none"> a. Lead and participate in domestic and foreign direct investment pitches to expand infrastructure for the film industry. (e.g. long term studio leases, VFX houses, studio space, green tech, equipment supply, etc.). <i>[Ongoing Years 1-5]</i> b. Scope and plan project to launch a new, leading, Digital Locations Library (DLL) for Ontario's Film Office
3	Seek out new private sector partnership/sponsorship opportunities to increase capacity in Ontario Creates' priority program areas	<i>[No actions in 2023-24; work begins in 2024-25]</i>
4	Partner with government to support modernization of tax credits through comprehensive redesign	<i>[No actions in 2023-24; work begins in 2024-25]</i>

STRATEGIC GOAL #4: DEVELOP GLOBAL MARKETS		
1	Review and enhance programming and strategic initiatives in international markets	a. Establish new multi-year international development plan; review and enhance programming and strategic initiatives in international markets that provide the most high-value opportunities for Ontario's creative industry businesses
2	Build the value proposition of the Ontario brand	a. Revise success stories production to focus on economic impact as a result of support from Ontario Creates. Design visual template/infographic to be shared across Communications products to better tell story of Ontario Creates' success
3	Optimize brand partnerships	a. Evaluate sponsorship and partnership opportunities to focus on highest value opportunities to build brand awareness of Ontario's creative industries and content <i>[Ongoing Years 1-5]</i> b. Renew JUNO Opening Night Awards sponsorship – collaborate with CARAS to amplify Ontario music industry presence at 2024 JUNO Awards (in Ontario)
4	Simplify access to funds that support international development and growth of companies	<i>[No actions in 2023-24; work begins in 2024-25]</i>
STRATEGIC ENABLER #1: DELIVER EXCEPTIONAL CUSTOMER EXPERIENCES		
1	Review and improve accessibility of investment and tax credit programs	a. Complete project to publish plain language version of tax credit regulations and legislation b. As part of program review and renewal, assess opportunities to standardize and streamline application requirements, where possible <i>[Ongoing Years 1+]</i> c. Assess communications and outreach efforts to ensure we reach all stakeholders across the province; continue to offer info-sessions virtually, and seek opportunities to connect with stakeholders outside of the GTA to provide more equitable access to Ontario Creates' staff and expertise. <i>[Ongoing Years 1-5]</i> d. Use demographic data to help inform outreach strategies to equity seeking groups in order to improve their success rates for Ontario Creates' investment programs <i>[Ongoing Years 1-5]</i>
2	Implement an information technology roadmap to improve efficiency and stakeholder experience	a. Scope and implement suite of technological changes to tax credits to reduce processing times for clients (electronic review package, service standard dashboard, AI chatbot, digital ID, use of AI to continuously improve risk scoring module)
3	Enhance performance measurement capacity and tools	a. Finalize new KPI framework; create data map and instructional manual; review data inputs on applications forms b. Scope and procure business analytics software to improve data management and reporting
STRATEGIC ENABLER #2: EMPOWER HIGH PERFORMING TEAMS		
1	Define Ontario Creates' culture and employee value proposition	a. Support staff learning and development goals; expand employee mentorship program to include industry opportunities; focus on team building and

		effectiveness in a hybrid work environment <i>[Ongoing Years 1-5]</i>
2	Promote an equitable, inclusive, accessible, anti-racist and diverse workplace	<ul style="list-style-type: none"> a. Create and/or review organizational policies, practices and processes against best practices in equity, diversity, inclusion, and accessibility (e.g., procurement practices, event planning, hiring and recruitment) <i>[Ongoing Years 1-3]</i> b. Implement new Multi-Year Accessibility Plan <i>[Ongoing Years 1-5]</i>
3	Build a flexible, inclusive, and effective hybrid work model that aligns with OPS requirements	<ul style="list-style-type: none"> a. Ensure staff are kept informed of changes to physical work space as a result of lease renewal; build ample time for consultation with staff; involve staff in decision-making processes where possible <i>[Ongoing Years 1-5]</i>

XIV. COMMUNICATIONS PLAN

As Ontario's Creative Industries continue to deal with the ongoing effects of the pandemic and the subsequent economic challenges, we will focus our communications for 2023-24 on 'strength in recovery.' Our plan will align with the Business Plan's goals of building capacity, expanding awareness and stimulating growth and investment. Strategies will include outreach to underrepresented and new entrants to the creative industries, showcasing the successes of diverse-owned companies, promoting Ontario's benefits as a business jurisdiction and key Ontario Creates programs and initiatives, and supporting the marketing efforts of Ontario companies and content.

GOAL

To build awareness about Ontario Creates programs, the opportunities in Ontario's film and television, interactive digital media, music, book, and magazine industries, and the province's successful companies and content through traditional and social media, events, and outreach.

OBJECTIVES

Stimulate industry growth and employment by demonstrating that Ontario offers a competitive, business-friendly environment where companies can thrive, good jobs can grow, and great content gets made.

In 2021-22, total media impressions approached 185M.

AUDIENCES

- **External:** Consumers, industry stakeholders, influencers and decision-makers in Ontario, across Canada and around the globe.
- **Internal:** MTCS and relevant government ministries, Ontario Creates Board of Directors, Industry Advisory Committee members, and Ontario Creates staff.
- **Media:** Trade and consumer journalists and editors; social media influencers and bloggers.

APPROACH

Build Capacity

- Enhance communication and outreach to underrepresented communities, emerging companies and new entrants to the creative industries.
- Ensure outreach and communications related to Ontario Creates' programs and services extends to emerging companies and new entrants (who may not yet be incorporated); partner with industry orgs to enhance outreach efforts.
- Focus on the agency's leadership initiatives such as Ontario Green Screen, DEIB programming, and streamlining of business services and supports.

In 2021-22, over 130,000 unique users visited the Ontario Creates website.

Fuel Growth

- Evaluate sponsorship and partnership opportunities to focus on highest value opportunities to build brand awareness of Ontario's creative industries and content.
- Renew JUNO Opening Night Awards sponsorship – collaborate with CARAS to amplify Ontario music industry presence at 2024 JUNO Awards (in Ontario).
- Support the development and implementation of a regional outreach strategy.

Develop Global Markets

- Identify key success indicators to articulate the value proposition of the Ontario brand.

- Revise success stories production to focus on economic impact as a result of support from Ontario Creates.
- Design visual template/infographic to be shared across Communications products to better tell story of Ontario Creates' success.

Deliver Exceptional Customer Experiences

- Assess communications and outreach efforts to ensure we reach all potential stakeholders across the province; continue to offer info-sessions virtually, enhance online resources, and seek opportunities to connect with stakeholders outside of the GTA to provide more equitable access to Ontario Creates' staff and expertise.
- Use demographic data to help inform outreach strategies to equity seeking groups in order to improve their success rates for Ontario Creates' investment programs.
- Review and refine format and content of Ontario Creates' website to ensure plain language and easy access to information and resources.

XV. 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 Ontario Creates to achieve its mandate in the year ahead. The agency's new Strategic Plan, currently being finalized, focuses resources on building foundational industry capacity, empowering growth, driving investment in Ontario, and promoting Ontario content while striving to be responsive, collaborative, accountable, and showing leadership and excellence. This plan strongly aligns with, and supports, the government's priorities and the expectations set out in the agency's 2023-24 mandate letter from the Minister of Tourism, Culture and Sport.

Ontario Creates will support government priorities to promote economic development, investment and jobs in Ontario's vibrant cultural media industry, specifically by:

- Promoting, enhancing and leveraging investment, jobs and content creation in Ontario's book publishing, film and television, interactive digital media, magazine publishing and music industries;
- Working with industry partners to boost the economy, create jobs for Ontarians, and demonstrate that Ontario is a place where companies from around the world can grow; and
- Supporting companies in becoming more diverse, resilient and sustainable.

Below are key priorities referenced in Ontario Creates' mandate letter, and supporting information on how we are helping the government to achieve these goals.

Key priorities:

1. Economic growth
2. Collaboration and innovation
3. Responsiveness
4. Diversity and inclusion, resiliency, competitiveness
5. Talent and investment attraction, training and entrepreneurship
6. Tax credit modernization
7. Performance measurement and reporting
8. Telling our stories

1. *Economic Growth: Fostering sustainable economic growth to deliver vibrant creative industries*

- Ontario Creates' core programs are designed to incent business development and job creation. Performance metrics are aligned with principles of economic growth.
- The Ontario Film Commission promotes Ontario as an investment destination, and the agency has a strategic presence at marquee international events, including brokering B2B meetings with international partners.
- In 2021-22, 460,500 square feet of new studio space was secured for producers looking to shoot in Ontario.
- In 2021, film and television domestic and service production spending reached \$2.88B.
- 11,274 business connections were made at industry development events led/supported by Ontario Creates.
- Companies supported by Global Market Development programs attended 117 foreign markets.
- 25,300 weeks of work were created/retained through IDM Fund and Film Fund.

- Each dollar invested in tax credits leveraged \$16.30 in additional spending.
- Export programs generated an ROI of \$224.88 (2020-21).

2. *Collaboration and innovation: Collaborating with others (other agencies, Ministry partners, stakeholders, communities) to drive innovation*

- Ontario Creates maintains and continually explores development of new partnerships with a wide range of industry players in the public and private sectors in order to support achieving the agency's objectives. Please see Section XII. Third Parties of this business plan for a description of current partnerships.

3. *Responsiveness: Adapting investment programs to support recovery and resilience*

- Ontario Creates regularly conducts program reviews and other research including client satisfaction surveys. Feedback is collected on an ongoing basis from Industry Advisory committee discussions and other mechanisms to ensure that programs are responsive to industry need.

4. *Diversity and inclusion, resiliency, competitiveness: Targeting funding to projects that increase equity, diversity and inclusion, improve applicant sustainability, and increase global competitiveness of the sectors*

- Diversity Enhancement; extension to music sector and publishing sectors.
- Access CMW mentorship initiative for Black and Indigenous talent.
- Demographic data collection.
- Action plan to promote diversity and equity across creative industries and within the agency.
- Each dollar invested in Film Fund (Production) projects leveraged \$26.41 in additional spending.
- 2023-24 will be the first year of Ontario Creates' new multi-year accessibility plan implementation which will include actions aimed at increasing funded organizations' capacity and offerings to promote greater inclusivity.

With respect to regional equity:

- Capacity-building with regional and municipal film offices.
- Targeted additions to Digital Locations Library.
- BIP supporting several regional industry development strategies.
- Online delivery of events programming allowing for greater reach in all activities.
- Regional bonus embedded in OFTTC allows for rate increase for domestic productions that shoot outside GTA.
- Development of an economic impact calculator to assist regional film offices with estimating the economic results of film and television production in their jurisdictions.

5. *Talent and investment attraction, training and entrepreneurship*

- AcceleratiON
- Access CMW mentorship initiative for Black and Indigenous talent
- Support for below-the-line mentorships on film sets in partnership with the Indigenous Screen Office.
- Targeted support for training and mentorships through the Industry Development Program, for film, television, interactive digital media, book and magazine publishers.

- Partnerships to promote employment pathways in the film and television sector for secondary, post-secondary and second career labour pools.
- In 2023-24, Ontario Creates will host a cross-sector workforce symposium to share recent research and articulate the goals of a workforce strategy. This will become a key input in strategy development, with appropriate partners, staffing needs and costs to be identified.

6. Tax credit modernization: Actively support cultural media tax credit modernization

- The April 2022 Provincial Budget announced several changes to tax credits as well as commitments to review further aspects of tax credits. Many of these changes were aligned with strategic and administrative priorities Ontario Creates has highlighted as options and opportunities in the past, to help ensure tax credits are responsive and simpler for users, as well as aligned with current market realities. Ontario Creates will explore and implement changes to tax credits identified in 2022 Ontario Budget and 2022 Fall Economic Statement (extending eligibility to OFTTC for online-only productions, expanding eligible expenditures for OPSTC for location fees, review of untethering OCASE, and review of OFTTC regional bonus) and will continue to work with government and industry partners to identify additional changes to tax credit legislation and regulations to ensure efficiency, value and impact on achieving government priorities.
- As part of tax credit modernization plans, Ontario Creates will establish a regional development plan, including participating as appropriate in the government's review of the OFTTC regional bonus to ensure it is providing effective and appropriate incentives and support for film and television productions in all regions of Ontario.

7. Performance measurement and reporting: Make use of data-informed strategies to assess and report on programming; enhance data collection, performance measures and reporting

- In 2023-24, Ontario Creates will finalize a new KPI framework to align to the new Strategic Plan. Business analytics software will also be scoped and procured, in consultation with the IT Team, in order to improve data management and reporting.

8. Telling our stories:

- Ontario Creates maintains an active and engaging social media presence and leverages traditional media as appropriate. Activities include promoting Ontario's award-winning content and companies through innovative showcasing approaches including creation of monthly playlists, Facebook Live events and more. In 2021-22, the agency gained over 4,400 net new social media subscribers across all channels. Media impressions for the Trillium Book Awards exceeded 135M from 574 story-pickups, and there were nearly 50M additional media impressions gained from activities other than Trillium.

As always, the agency will maintain the highest levels of accountability, fiscal management and good governance, and will continue to act in the best interests of Ontarians by being efficient, effective, and providing value for money to taxpayers. This includes ensuring a focus on the following:

- Competitiveness, sustainability and expenditure management,
- Transparency and accountability,
- Risk management,
- Workforce management,
- Diversity and inclusion,
- Data collection, and

- Digital delivery and customer service.

The agency is invested in continuous improvement across all services and operations. For example,

- Tax credit queue times significantly reduced in recent years.
- Digital delivery improvements: e-payments of tax credit admin fees; grant payments via e-transfer; electronic tax credit certificates.
- Data collection activities and reporting subject to ongoing enhancements.
- Processing time across all credits was 35% faster in 2021-22 compared to 2020-21
- As of Q4 2020-21, tax credit backlog was effectively eliminated.

The plans and projects detailed in this business plan and in our forthcoming strategic plan demonstrate our commitment to ensuring Ontario Creates' programs and activities are customer-focused and tailored to the needs of the sectors we support.

Ontario's screen, publishing, and music industries are a global success story. Collectively, these industries generate billions of dollars in economic activity and create tens of thousands of jobs, while supporting local economies. We are confident that with ongoing support from MTCS, Ontario Creates 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 this will ensure the province's creative industries continue to recover and become more resilient as they rebuild from the pandemic and contribute meaningfully to Ontario's economic success.

APPENDIX A: DETAIL OF AGENCY'S CURRENT AND FUTURE PROGRAMS AND ACTIVITIES

AGENCY PRIORITIES

The agency has the following key priorities for the year ahead. These themes have been developed to align with government and ministry priorities, and the programs, services and activities described below are linked to the following themes:

- Capacity Building and Workforce Development
- Diversity and Inclusion / Accessibility
- Regional outreach
- Environmental Sustainability
- Customer Service / Business Process Improvements
- International Market Development
- Demonstrating our Impact

INDUSTRY INVESTMENT AND ATTRACTION

In 2023-24, the following three initiatives will be undertaken across all Industry Investment and Attraction investment programs:

DIVERSITY ENHANCEMENT

- In 2023-24, the Diversity Enhancement will continue to be available for all investment programs for the second consecutive year in order to provide targeted support to diverse-led projects and businesses that demonstrate high potential for economic and cultural growth. The Diversity Enhancement began as a time-limited add-on to the Film Fund in 2017-18, providing an additional \$4.5 million over three fiscal years (ending in 2019-20) to films that meet the provincial definition of diversity, which encompasses: ancestry, culture, ethnicity, gender identity and expression, language, physical and intellectual ability, race, religion, sex, sexual orientation and socio-economic status. From 2018-19, Ontario Creates allocated \$250,000 of this funding to the Industry Development Program for initiatives across the book, film, television and magazine sectors. In recognition of the significant value and impact of dedicated funding for projects with a diversity component, Ontario Creates has continued to support the program at reduced funding levels using uncommitted cash reserves since 2020-21. The agency will continue to prioritize this activity through the allocation of uncommitted reserves to the extent possible in the year ahead. A strategy, and specific pitches, will be developed and tested in 2023-24 to replace the use of cash reserves with a more sustainable solution to support diversity initiatives going forward.

ACCESSIBILITY

- To assist companies and organizations in executing projects that are accessible and inclusive for people with disabilities, guidelines will continue to explicitly allow for incorporation of costs related to accessibility through a top-up or budget line item.
- Guidelines will be updated with a view to ensuring funded activities, particularly events, are accessible to all attendees/users.
- Consideration will also be given to ways to support greater accessibility in the application process, such as reviewing guidelines to ensure they are written in plain language.

APPLICATION PROCESS IMPROVEMENTS

- As part of program review and renewal, Ontario Creates will continue to assess opportunities to standardize and streamline application requirements where possible, in order to improve client service and reduce red tape.
- The agency will assess communications and outreach efforts to ensure we reach all stakeholders across the province; continue to offer information sessions virtually, and seek opportunities to connect with stakeholders outside of the GTA to provide more equitable access to Ontario Creates staff and expertise.
- We will ensure that outreach and communications related to Ontario Creates' programs and services extends to emerging companies and new entrants (who may not yet be incorporated); partner with industry orgs to enhance outreach efforts.
- Ontario Creates will use demographic data to help inform outreach strategies to equity seeking groups in order to improve their success rates for Ontario Creates' investment programs.
- We will implement recommendations from Ontario Creates' Government Transfer Payment Agreement Environmental Scan report, including modifying application requirements to appropriately assess and manage financial risk and introducing a standard review of financial statements across all investment programs.

FILM FUND

The Film Fund provides support to Ontario feature film projects that are ready for production, in development, or being released to a public audience.

PROGRAM OBJECTIVES:

- To increase investment and jobs in Ontario by Ontario-based feature film production companies.
- To assist in capitalizing Ontario-based feature film production companies.
- To increase the number of high quality, original feature films produced in Ontario by Ontario-based production companies.
- To increase awareness of funded films throughout the release cycle and to extend audience reach.

THE FUND HAS THREE COMPONENTS:

- **Development** – Provides funding in the form of an interest-free loan for development activities.
- **Production** – Provides funding in the form of a repayable advance on a last-in basis to complete the production financing of a feature film.
- **Marketing and Distribution Initiative (MDI)**– Provides targeted funding to Film Fund (Production) recipients for innovative domestic marketing and distribution strategies.

FILM FUND DIVERSITY ENHANCEMENT:

- The agency will continue to prioritize this activity through the allocation of uncommitted reserves to the extent possible in 2023-24.
- **PROGRAM RESULTS:** In 2021-22, every dollar invested by Ontario Creates through the Film Fund leveraged an additional \$26.41 in spending in the economy. The program also created nearly 20,000 weeks of work.
- Results for this program are measured by the number of jobs created and/or retained and by the leverage value of Ontario Creates' contribution to each project.

2023-24 PRIORITIES:

- Ontario Creates will continue to deliver the Film Fund and will top-up the core program with funds dedicated to diverse projects for another year by accessing the agency's cash reserves.
- Ontario Creates will engage a consultant to review and assess screen content program structure and objectives against changing market environment to provide recommendations on how to better align and target high value opportunities.

FILM FUND SUCCESSES: Many Film Fund-supported projects have achieved critical and commercial acclaim both at home and abroad:

- *See For Me*, produced by Wildling Pictures, returned its full recoupable budget of \$2.3M to investors prior to its commercial release, after completing 24 sales covering almost all major territories – sales revenues that ultimately exceeded the film's budget. Production on the film was shut down in mid-March 2020 in the initial stage of the pandemic, and, in addition to support from Ontario Creates' Film Fund, the production received funds from Ontario Creates' COVID top-up to support the additional health and safety costs required to complete the production. IFC released the film in the US to great critical and commercial success – to date the film has generated \$750K US in global box office.
- A record twelve Ontario Creates-supported features screened at the 2022 edition of the Toronto International Film Festival (TIFF). The films featured were: *Alice, Darling*; *Black Ice*; *Brother*; *Buffy Sainte-Marie: Carry It On*; *North of Normal*; *Rosie*; *Something You Said Last Night*; *So Much Tenderness*; *Stellar*; *The Colour of Ink*; *The Swearing Jar*; and *The Young Arsonists*. *Black Ice* won the People's Choice Award for Documentary and the Changemaker Award went to *Something You Said Last Night*. *Stellar* was selected as the opening night film for the 2022 imagineNATIVE Film Festival.
- Supported films appear in international festivals around the globe. *Crimes of the Future*, directed by David Cronenberg, was selected for competition at Cannes 2022. Film-Fund supported Canada-Swiss co-production *Something You Said Last Night* (JA Productions Inc) premiered at and won the Changemaker award at TIFF and is now on the international festival circuit beginning with the San Sebastian Film Festival. The film was shot on location in Orillia, and included a Trans Film Mentorship component.
- In 2022, the 17th annual Ontario Creates International Financing Forum successfully returned to an in person event with over 80 producers taking part from Ontario, Canada and across the globe.
- Many Ontario Creates supported productions received critical acclaim at the Canadian Screen Awards. These projects include: *Night Raiders*, *All My Puny Sorrows*, *The Retreat*, *Delia's Gone*, *Dino Dana: The Movie*, *Charlotte*, *See for Me*, *Captive*, *One of Ours*, *Borealis* and *The Face of Anonymous*. They cumulatively acquired 34 nominations across 25 categories, including Best Motion Picture; Original Screenplay, Adapted Screenplay, and Best Documentary Program. Six of the 9 wins went to *Night Raiders* in categories including, Original Screenplay, Performance by an Actress in a Leading Role, and Achievement in Costume design.
- Ontario Creates supported films at Hot Docs 2022 included *Beautiful Scars* directed by: Shane Belcourt, *Category: Woman* directed by Phyllis Ellis, and *Unloved: Huronia's Forgotten Children* directed by Barri Cohen. The opening night film was *Into the Weeds: Dewayne "Lee" Johnson vs. Monsanto Company* (dir. Jennifer Baichwal).
- **Diversity & Inclusion:** In 2021-22, the Film Fund Diversity Enhancement Film Fund Diversity Enhancement provided an additional \$1.43M to diverse films: 12 in Production and 29 in Development. 53% of Film Fund supported films received Diversity Enhancement, including 3 Indigenous projects & 14 from people of colour.
- In 2021-22, Ontario Creates partnered with the Indigenous Screen Office to support ongoing on-set mentorship and training initiatives for Indigenous crews, specifically on the sets of the film *Rosie* and *Café Daughter*, which were also supported by the Film Fund. The *Rosie* program included positions for a director-shadow, camera operator, and locations assistant, as well as positions in costumes and electric.

INTERACTIVE DIGITAL MEDIA FUND

The Interactive Digital Media Fund (IDM Fund) was designed to provide a range of programs and resources to provide financial, strategic, and research support to Ontario's cultural entrepreneurs and established trade and event organizations from the interactive industry.

PROGRAM OBJECTIVES:

- To support the creation and exploitation of interactive original content by Ontario companies.
- To provide opportunities for interactive digital media content producers to access existing and new markets, build capacity, and grow their companies.
- To provide support for established trade and event organizations for activities that stimulate the growth of Ontario's interactive industry.

THE FUND HAS SIX PROGRAM STREAMS:

- Concept Definition (Linear and Non-Linear Streams) – Provides support for early-stage activities that assist companies in moving towards the production of market-ready content projects.
- Production (Linear and Non-Linear Streams) – Provides support for the creation of a market-ready content project that will be released to end users.
- Discoverability & Commercialization – Provides support for marketing activities that will amplify the visibility and financial viability of Ontario Creates-funded interactive digital media projects when they are released/available for sale in the marketplace.
- Global Market Development – Provides Ontario companies with funding to participate in international activities that support company growth and produce measurable business and market development results.
- Industry Development – Provides support for business development activities and trade organization initiatives.
- IDM Fund Futures Forward – Provides training and support via a selective grant to emerging producers.

IDM FUND DIVERSITY ENHANCEMENT

- The agency will continue a Diversity Enhancement for the IDM Fund through an allocation from the IDM Fund. There is also potential to leverage Ontario Creates' allocation with a matching contribution from a partner organization.

PROGRAM RESULTS:

In 2021-22, the program created nearly 5,500 weeks of work and leveraged spending in the economy of almost 3.5x the amount invested by Ontario Creates.

A review of the IDM Fund completed in 2022 found that:

- Overall, projects supported by Ontario Creates achieved a 22% return on investment during the reference period (2015-20). For projects that had been commercially released when the survey was administered, the average ROI is 113%.
- For every \$1 in investment from Ontario Creates, recipients attributed \$2.74 of project revenue to Ontario Creates' investment, a 174% ROI

Results for this program are measured by the:

- Number of jobs created and/or retained.
- Leverage value of Ontario Creates' contribution to each project.
- Number of contacts/business leads made by participants.

2023-24 PRIORITIES:

- Ontario Creates will continue to deliver the IDM Fund and may introduce additional support for diverse teams and projects pending partnership support. To better support diverse projects and teams, the IDM Fund will continue to explore opportunities to mentor and provide training opportunities to emerging and mid-level content creators through the IDM Futures Forward program and new initiatives in partnership with trade organizations such as imagineNATIVE, Hand Eye Society, the Afrotopolis Art Collective, Interactive Ontario .
- Ontario Creates will undertake activities focused on the key goal of raising the profile of Ontario's interactive companies and content internationally, and increasing Ontario's competitiveness. This may include promotion activities, marketing projects and other targeted actions.
- Ontario Creates will engage a consultant to review and assess screen content program structure and objectives against changing market environment to provide recommendations on how to better align and target high value opportunities.

IDM FUND SUCCESSES: IDM Fund recipients have been recognized for their creativity and innovation in a variety of platforms:

- Ontario game studios dominated the first-ever Canadian Indie Game Awards, picking up nine wins, including Cococucumber's *Echo Generation* for Indie Game of the Year, Best Score/Soundtrack, Best Narrative; Alientrap Games' *Wytchwood* for Best Art Direction, Best Animation; Falling Squirrel and Creative Bytes Studios' *The Vale: Shadow of the Crown* for Best Audio Design, Best Technology/Innovation; Torn Banner Studios' *Chivalry 2* for Best Console Game; Capybara Games' *Grindstone* for Best Mobile Game.
- Ontario Creates, in partnership with Interactive Ontario, organized the first Games from Ontario sale on Steam to showcase and celebrate over 200 made-in-Ontario games.
- *The Vale: Shadow of the Crown* won a 2022 Canadian Screen Award for Best Video Game Narrative.
- Ontario Creates partnered with the Canada Media Fund to introduce an updated IDM Fund Futures investment program for 2023. Eligible emerging companies, and experienced companies with more than 51% of ownership from equity-deserving communities are eligible to apply for early-stage development support of up to \$20,000. Ontario Creates' program contribution signals the inclusion of targeted support in the IDM Fund.
- The game *Ember Knights* from Doom Turtle had a company record-breaking launch to Steam Early Access, with tremendous results including over 1,200 positive reviews.
- As a result of support from Global Market Development, Riyo Games was able to receive a significant investment from a major indie games publisher in the production of an upcoming new title; the game is about to go into production.
- Blue Ant Media's new plant-based educational series, *Floralogic*, featuring the strangest and quirkiest species from the plant and fungi kingdom, got off to a strong start with millions of views on YouTube, TikTok and Snapchat.
- **Diversity and Inclusion:** Sloppy Jones, a web series from Hop To It Productions, premiered at a number of festivals around the world and on OutTV. Exposure at festivals in the UK, US, New Zealand and Australia has successfully increased the global audience on OutTV. Notably, the festivals have given the show's creators a platform to promote women and diverse voices in media, as well to promote the benefits of working with Ontario companies. *Border2Border's Dating Unlocked* which helps hopeful romantics from the LGBTQ2S+ community find love in real life, premiered on OUTtv and picked-up multiple international webseries awards.

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 that 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.

PROGRAM OBJECTIVES:

- To provide opportunities for book publishers to build capacity, increase sales revenue, and grow their companies.

BOOK FUND DIVERSITY ENHANCEMENT:

- The agency will continue the Diversity Enhancement for the Book Fund through the allocation of uncommitted reserves to the extent possible in 2023-24.

PROGRAM RESULTS:

Support provided through the Book Fund is anticipated to assist publishing companies to expand their market share through new digital marketing initiatives, by creating online stores to reach global markets, and by forging relationships with booksellers through key incentives and promotions. These projects help Ontario publishers compete with large, multinational firms and help audiences discover Ontario books and authors. In 2020-21, the most recent year sales results are available, Book Fund recipients reported earning an average of \$4.63 for every dollar invested by Ontario Creates.

Results for this program are measured by the:

- Leverage value of Ontario Creates' contribution to each project.
- ROI which represents the value of sales generated by a project for every dollar invested by Ontario Creates.

2023-24 PRIORITIES:

- Ontario Creates will continue to deliver the Book Fund.
- Ontario Creates will continue to offer a Diversity Enhancement program stream and top-up to the core program with funds dedicated to diverse projects by accessing the agency's cash reserves. The Diversity Enhancement will support emerging companies as well as providing incentives for established companies to increase publishing activities featuring diverse content and to expand partnerships with diverse creators.
- Building on Ontario Green Screen's leadership in the film sector, as an initiative within its new Strategic Plan, Ontario Creates will expand its sustainability strategy across the creative industries. A first step in this direction will be to expand sustainability initiatives/support to the publishing sector (e.g., carbon calculator for publishing industry).

BOOK FUND SUCCESSES: In 2020-21, the most recent year for which this data is available, Book Fund recipients reported earning an average annual return of \$4.63 in sales for every dollar invested by Ontario Creates. Books published by Ontario-based, Canadian-owned publishers have received significant critical and commercial acclaim:

- The 2022 Scotiabank Giller Prize winner *The Sleeping Car Porter* by Suzette Mayr was published by Book Fund-supported Coach House Books. Coach House also published the short story collection *Lesser-Known Monsters of the 21st Century* by Kim Fu, one of the five shortlisted titles.
- 2022 marked the 35th anniversary of the Trillium Book Awards, recognizing excellence and fostering diversity of Ontario's writers and writing. 2020, 2021, and 2022 authors and their book publishers attended this special edition of the Awards. Winners were: Ann Shin, *The Last Exiles*; Robert Marinier, *Un conte de l'apocalypse*; Bardia Sinaee, *Intruder*; Chloé LaDuchesse, *Exosquelette*. The shortlist announcement reached more than 12 million Canadians through traditional and social media.
- Ontario publishers were well-represented among the finalists for the 2022 Governor General's Literary Awards, including *The Sour Cherry Tree* by Naseem Hrab and Nahid Kazemi (Owlkids Books), which won the award for Young People's Literature, Sheila Murray, *Finding Edward* (Cormorant Books), *Dream of No One but Myself* by David Bradford (Brick Books), *Persephone's Children: A Life in Fragments* by Rowan McCandless (Dundurn Press), *Lady Sunrise* by Marjorie Chan (Playwrights Canada Press), and many works in translation including *Dans la lugubre forêt nos corps seront suspendus*, translated by Benoit Laflamme (Les Éditions L'Interligne).
- With support from the Book Fund, ECW Press combined the business pivots they made during the first year of the pandemic with tried and tested marketing strategies. Continuing to engage directly with communities of readers online, they worked to connect their book consumers to retail and library partners. By embracing the best of both worlds, the company had their highest sales levels ever for both indie booksellers and libraries in Canada. In addition to a substantial increase in sales, the campaign resulted in 10 starred reviews across key library journals and traditional media outlets.
- **Diversity & Inclusion:** In 2023-24, 11 book publishers have a focus on DEIB projects. Les Éditions David is undertaking a project to promote their 14/18 collection, a new series aimed at a teenage audience, through a series of initiatives aimed at teachers, librarians and parents, with a focus on having the collection used in immersion classes in Canada and the United States. Annick Press is starting a multi-year project to expand access to, and sales for, children's books in Indigenous communities in Northern Canada. The Indigenous-led project will start by targeting 3 Northern Ontario communities: Atikokan, Sioux Lookout, and Rainy River. Invisible Publishing is engaging with booksellers who are owned by or predominantly employ members of equity-deserving communities, to collaborate on sales pitches to ensure that books are reaching readers, and will work these parties along with writers and institutions from equity-deserving communities to revamp their submissions process.

MAGAZINE FUND

The Magazine Fund provides support to 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.

PROGRAM OBJECTIVES:

- 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.

MAGAZINE FUND DIVERSITY ENHANCEMENT:

- The agency will continue the Diversity Enhancement for the Magazine Fund through the allocation of uncommitted reserves to the extent possible in 2023-24.

PROGRAM RESULTS:

Support provided through the Magazine Fund will continue to help Ontario magazine media companies expand business opportunities and mitigate the risks of exploring new content strategies and revenue diversification while maintaining traditional lines of business. It is anticipated that sales reported by fund recipients will continue to provide a return on the Ontario Creates investment. In 2021-22, each dollar invested in the Magazine Fund leveraged \$0.95 in additional spending.

Results for this program are measured by the:

- Leverage value of Ontario Creates' contribution to each project.
- ROI which represents the value of sales generated by a project for every dollar invested by Ontario Creates.

2023-24 PRIORITIES:

- Ontario Creates will continue to deliver the Magazine Fund.
- Ontario Creates will continue to offer a Diversity Enhancement program stream and top-up to the core program with funds dedicated to diverse projects by accessing the agency's cash reserves. The Diversity Enhancement will support emerging companies as well as providing incentives for established companies to increase publishing activities featuring diverse content and to expand partnerships with diverse creators.
- The agency will incorporate high-level program updates deemed appropriate based on state of magazine research project scheduled to be completed in Spring 2023.
- Application requirements will be streamlined to reduce red tape for applicants.

MAGAZINE FUND SUCCESSES: Ontario has the largest magazine industry in the country. Ontario magazine media are frequently recognized for their excellence in content, design and production:

- Ontario magazines were well represented at the 45th National Magazine Awards held in 2022, with *The Walrus* a top winner overall, taking home four Gold awards and one Silver, with *Toronto Life* taking home three awards – one Gold and two Silver. The Magazine Grand Prix, the most coveted editorial award, went to *Inuit Art Quarterly* and Nicholas Hune-Brown of *The Local* received the Editor Grand Prix.
- Among 2022 National Magazine Awards B2B Magazine winners, highlights include *Azure's* Gold Award for Best News Coverage and *Precedent Magazine's* Gold for Best Illustration.
- Two Ontario Creates supported publications were nominated for the 2022 Digital Publishing Awards, with *The Walrus* winning Gold in the Best Personal Essay category and *Azure* winning Silver in the same category.
- Annex Business Media hosts 50+ live events every year to support overall distribution of their many B2B magazine brands. As the pandemic made in-person gathering impossible, with support from Ontario Creates, Annex shifted its event business to incorporate virtual events across all 65+ of its publishing brands. The virtual events allowed the company to continue meeting the needs of both audience and advertisers, while generating revenue to keep the skilled events team employed and the company profitable. This innovation positioned virtual events to hold a place in Annex's event mix post-COVID.
- Exclaim! Media continued its successful pivot of both print and digital content delivery. Home delivery plus higher circulation through vending boxes and other public spaces reduced reliance on retail outlets, and the online content strategy created consistent audience communication which saw growth in e-newsletter subscribers and social media engagements, and online readership. These activities achieved a 44% growth in revenue for the company.
- **Diversity and Inclusion:** In 2022-23, Ontario Creates launched the Magazine Fund Diversity Enhancement Stream, designed to lower barriers to entry to the Fund for companies with ownership that is racially diverse, Francophone, or otherwise meets dimensions of the provincial definition of diversity. Four emerging companies received support through this new project stream.
- The Magazine Fund supports magazine media published for a diverse audience, including *Magnifissance*, which publishes articles in Chinese and English about artisans, musicians, designers, business-leaders, and other inspirational figures; *Efe Magazine*, a multicultural publication for the salon professional; and *ByBlacks.com*, and online publication serving the Black community in Canada, with topics ranging from Black entrepreneurship, education, race relations, Black history, fitness, parenting, food and more.

INTERNATIONAL BUSINESS DEVELOPMENT

Ontario Creates provides support for Ontario book publishers and film and television content producers to sustain a slate of export and international business development activities over the course of a year, including market event attendance and targeted sales trips, through Global Market Development funding. (Export activities for the music and interactive digital media sectors continue to be supported through the Ontario Music Investment Fund (OMIF) and the IDM Fund.)

Ontario Creates 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.

PROGRAM OBJECTIVES:

- To support Ontario companies to access the global marketplace, increase international sales levels, and attract investment in new projects.
- To provide Ontario companies with support for the commercial exploitation of cultural products.

PROGRAM RESULTS:

Support provided through the Global Market Development program will assist Ontario cultural industry entrepreneurs with forging critical relationships to help grow their revenues through international sales. In 2020-21, Export Fund recipients in the Book and Film/TV sectors reported earning international sales of over \$340 million, equivalent to \$287 for every dollar invested by Ontario Creates.

Results for this program are measured by the:

- ROI which represents the value of sales generated by a project for every dollar invested by Ontario Creates.
- Number of foreign markets attended by program participants.
- Number of markets at which Ontario Creates has organized a strategic presence.

In 2022-23, activities included:

- Attendance at key markets including Cannes Film Festival, Gamescom, Game Developers Conference, the Frankfurt Book Fair, the Banff World Media Festival, and many others.
- Ontario Creates participation in the cross-sector Canadian Heritage Virtual Pre-Mission to Australia and New Zealand.

2023-24 PRIORITIES:

- Ontario Creates will continue to deliver Global Market Development (formerly Export Fund) funding and international business development activities; and in recognizing the challenges companies have faced as a result of the pandemic, will continue to allow for expanded eligibility, inclusive of virtual export activities and marketing initiatives targeted to building international sales and business contacts.
- Staff will continue to work with the federal trade commissioner services and staff to augment and amplify export opportunities for Ontario creative businesses.
- Application requirements will be further streamlined and redesigned to reduce red tape for applicants.
- Identify key priorities and strategic opportunities for each sector.
- As part of a Strategic Plan initiative to review and enhance programming and strategic initiatives in international markets, Ontario Creates will establish a new multi-year international development plan, including reviewing and enhancing programming and strategic initiatives in international markets that provide the most high-value opportunities for Ontario's creative industry businesses.

INTERNATIONAL BUSINESS DEVELOPMENT SUCCESSES:

- In 2022-23, Ontario Creates Global Market Development programs awarded a total of \$1.5M in funding to 163 companies in the Film, TV, interactive, and book publishing sectors. As companies started to return to international travel, the programs continued to provide flexibility around attendance at virtual events and suitable marketing activities. International business events located in Canada were also eligible for support.
- A return on investment of \$224.88 for every dollar invested by Ontario Creates in the Film/TV Export Fund, Book Fund and IDM Global Market Development was achieved in 2020-21, the most recent year for which this data is available.
- Returning to in-person events, Ontario Creates led CoCreate at Cannes 2022, in partnership with Screen Australia, New Zealand Film Commission, British Film Institute, Screen Ireland, and Screen Scotland. The event included delegates from the Indigenous Screen Office and the Black Screen Office, along with a panel discussion around authentic representation of voices in international coproductions.
- In August 2022, Ontario Creates partnered with Creative BC, Medianboard Berlin-Brandenburg, and the Trade Commissioner Services to bring a delegation of 15 Ontario interactive companies to Berlin. The three-day IDM German-Canadian exchange included a series of presentations on projects and incentives, B2B meetings, and site and studio visits.

INDUSTRY DEVELOPMENT PROGRAM

Ontario Creates provides targeted financial and strategic support to Ontario's established trade and event organizations to offer initiatives, events and activities with long-term impacts on growth and sustainability in the book, magazine, film, television, and interactive digital media sectors. Industry Development activities for the IDM and music sectors are provided through the IDM Fund and the Ontario Music Investment Fund (OMIF) Music Industry Initiatives stream, respectively.

PROGRAM OBJECTIVES:

- To provide opportunities for business development that expands skills, business capacity, market share, sales, and innovation for Ontario entrepreneurs in the creative industries.

THE PROGRAM HAS TWO STREAMS:

- **Business Development** – support to organizations for B2B industry activities and business to consumer (B2C) audience development activities that offer opportunities for new business leads, sales and relationships.
- **Capacity Building** – support for strategic activities that address challenges and opportunities or environmental changes that contribute to either the capacity of the applicant organization or its stakeholder group.

INDUSTRY DEVELOPMENT PROGRAM DIVERSITY ENHANCEMENT:

- The agency will continue to prioritize this activity through the allocation of uncommitted reserves to the extent possible in 2023-24.

PROGRAM RESULTS:

In 2021-22, Ontario Creates supported or led 67 initiatives, creating over 11,000 business leads for Ontario creative industry entrepreneurs. These leads typically help create new partnerships that generate new projects and revenue growth for companies. The program also provided participants with opportunities for skills development, knowledge transfer and other guidance that will be valuable for growing competitive businesses.

Results for this program are measured by the:

- Number of initiatives supported.
- Number of contacts/business leads made by participants.

2023-24 PRIORITIES:

- In line with government priorities and identified corporate objectives, in 2023-24, the Industry Development Program will continue to target three priority areas. This three-fold lens will be applied on a project-by-project basis to ensure enhanced support for the following types of activities:
 - Skills development, mentorship and increased workforce capacity
 - Diversity and inclusion
 - Marketing and discoverability, including high impact B2B opportunities
- Ontario Creates will continue to deliver the Industry Development Program, and will top-up the core program with funds dedicated to diverse projects for another year by accessing the agency's cash reserves.
- Application requirements will be streamlined to reduce red tape for applicants.

INDUSTRY DEVELOPMENT SUCCESSES:

- In September 2022, Ontario Creates led the first-ever international edition of **From Page to Screen**, bringing together over 50 producers from Ontario and around-the-world during the Toronto International Film Festival. For the first time, a selection of titles was curated for a On-Stage Pitch to producers – including a sneak-peek at *The Sleeping Car Porter*, the book that would go on to win the 2022 Giller Prize.
- The National Screen Institute's EAVE On Demand Access program participants met virtually throughout the year and in-person in Edmonton, Alberta, October 30 to November 4, 2022. Ontario Creates supported the travel for the 16 Ontario participants in this program – that has the goal to empower Canada's BIPOC voices on the world stage. The program included substantial training on success in international markets, including how-to's on international co-productions, and made important connections for producers with potential business partners from around the world.
- **Diversity & Inclusion:** In 2021-22, the Diversity Enhancement provided assistance to support mentorship and training activities which included on-set mentorship for Indigenous filmmakers; 25 initiatives across sectors including the International Film Festival of South Asia Bright Lights program, the Ontario Book Publishers Organization's diverse intern program, the IDM Fund Future training programs (including one program targeted to Black content creators), the Inside Out Festival's International Financing Forum.
- The Industry Development Program supported a series of reports from the Black Screen Office entitled *Being Seen: Directives for creating authentic and inclusive content*, with chapters focused on various underrepresented communities: people of colour, people with disabilities, 2SLGBTQIA+, Black communities and a report specific to children's media. The project aims to provide guidelines and strategies to those in the film, TV and interactive digital media industries to help them commission and create more authentic content.
- Ontario Creates partnered with ADVANCE - Canada's Black Music Business collective, to offer a cross-sector anti-racism training initiative to Ontario companies. The first session in a three-part series was a 101 on Diversity, Equity and Inclusion with attendance from nearly 80 stakeholders across all sectors.

ONTARIO MUSIC INVESTMENT FUND

The Ontario Music Investment Fund (OMIF) was launched in 2020-21, replacing the Ontario Music Fund. The program is designed to provide targeted economic development and investment to the province's vibrant and diverse music industry.

PROGRAM OBJECTIVES:

- Support Ontario music companies with strong growth potential to maximize ROI; and
- Create more opportunities for emerging artists to record and perform in Ontario.

KEY PROGRAM GOALS:

- Focus resources on music companies with strong growth potential by:
 - Providing investment to high-potential companies to drive long-term growth;
 - Maximizing ROI and enhancing opportunities for emerging talent; and,
- Strengthen support at critical stages in the careers of artists.

PROGRAM STREAMS:

- There are three program streams, tailored for different parts of the industry:

Music Creation

Supporting businesses that take risks discovering and developing talent – particularly emerging artists – and bringing it to market through recording and production, marketing and promotion, touring and showcasing, and publishing.

- Eligible applicants include domestic and multinational record labels, and domestic music publishers.

Music Industry Initiatives

Supporting collective industry initiatives to undertake professional development/training and export activities, conduct industry analysis/data gathering and build regional capacity.

- Eligible applicants include music industry trade associations and music service organizations.
- Export/market development funding available for music managers.

Live Music

Supporting businesses and organizations that produce or promote live music events featuring Canadian artists including eligible music festivals and concert series.

- Eligible applicants include live music promoters and presenters.

PROGRAM RESULTS:

The OMIF was introduced in 2020-21 (formerly the Ontario Music Fund). Metrics for this program include:

- Number of jobs created and/or retained.
- Company growth (net revenue/income).
- Private investment and equity secured.
- Leverage value of Ontario Creates' contribution to each project.
- Number of contacts/business leads made by participants.

Key 2021-22 OMIF Results:

- Leverage value (amount of additional spending generated for every dollar invested by Ontario Creates): \$4.64

Industry Results after 7 Years of support from the Ontario Music Fund (OMF) (2013-14 to 2019-20):

- Almost 30 million units of recordings by OMF-supported companies sold worldwide.
- 15 million people attended OMF-supported live music events.
- 3,200 artists directly supported.
- 54,000 business leads and deals from export missions and B2B meetings.

2023-24 PRIORITIES:

- Ontario Creates will deliver the Ontario Music Investment Fund; and in recognizing the continuing challenges music companies (particularly in the live music sector) are facing as a result of the pandemic, will continue to offer limited flexibility for activities that are in line with overall program objectives.
- Ontario Creates will continue to offer a Diversity Enhancement / top-up to the core program with funds dedicated to diverse companies and projects by accessing the agency's cash reserves.
- The agency will continue AcceleratiON, the new Black & Indigenous music entrepreneurship initiative introduced as a time-limited activity in 2021-22. As an additional mentorship activity, and linked to the agency's workforce development priority, the "Access" series of events, including various networking and capacity-building initiatives will continue to be available for a wide range of conferences and professional development opportunities.
- Focus on Franco-Ontarian music stakeholder capacity and export growth; support domestic activation and export initiative: Activate a series of initiatives to support the development of Franco-Ontarian music companies, including research, events, missions to an export market.
- The agency will continue to explore ways to leverage innovative and non-traditional partnerships for the music sector including Business is Better with Music, a cross-sector initiative to maximize impact by creating targeted bespoke events, and exploring opportunities with sectors outside Ontario Creates mandate (e.g., performing arts, corporate Canada).
- Ontario JUNO Awards 2024: The JUNO Awards are expected to be held in person in an Ontario city in March 2024. Ontario Creates will partner with the Canadian Academy of Recording Arts and Sciences (CARAS) on an opening night awards celebration to amplify Ontario's music industry presence at the Awards.
- The agency will engage a consultant to review and assess music program structure and objectives against changing market environment to provide recommendations on how to better align and target high value opportunities.
- The team will ensure outreach and communications related to Ontario Creates' programs and services extends to emerging companies and new entrants and will partner with industry organizations as appropriate to enhance outreach efforts.

ONTARIO MUSIC OFFICE AND ONTARIO MUSIC INVESTMENT FUND SUCCESSES:

- Ontario based musicians/writers earned critical acclaim at the 2022 Juno Awards, receiving 18 awards. 6 of the 18 awardees were supported by Ontario Creates. Haviah Mighty had a historic night, as she became the first female artist to win the Rap Album/EP of The Year award, and Savannah Ré won traditional R&B/soul recording of the year for the second year in a row.
- For the first time in three years, the 2022 Polaris Music Prize Gala took place in person on September 19 at the Carlu. Ontario nominees included Charlotte Day Wilson, Ombigizi and Shad. OMIF supported the winner, Pierre Kwenders via his label Arts and Crafts.
- For the very first time, Ontario Creates presented the JUNO Opening Night Awards, a celebration featuring the presentation of 40+ JUNO Awards and five performances at the first live and in person JUNO week in three years. Ontario 2021 JUNO Award winner Julian Taylor (OMIF recipient) was the Ontario Creates “ambassador” in the media centre, interviewing Ontario winners with the video clips posted on our Instagram account. We posted over 18 videos and 26 stories to our profile resulting in positive gains.
- **Diversity and Inclusion:** In 2021-22, the \$500,000 Diversity Enhancement top up to OMIF supported a total of 89 music companies: 38 through the Music Creation stream, 15 in Music Industry Initiatives, 15 in Global Market Development and 21 in Live Music. Ontario Creates expanded the Access CMW mentorship initiative.
- The AcceleratiON program for Black and Indigenous Music Entrepreneurs provided 32 companies with \$300K in support to grow their businesses and build capacity in the Black and Indigenous music communities.
- The Access CMW activation at Canadian Music Week provided a safe space within the conference for networking and mentorship opportunities for emerging BIPOC music reps (the “Access CMW Lounge”, in addition to an exclusive “meet and greet” with CMW Social Justice Award recipient and rap music icon Chuck D for 24 participants.
- Ontario Creates supported industry organization CIMA in co-presenting industry Anti-Black Racism discussion series entitled *Breaking Down Racial Barriers: Next Steps*, to individuals and companies in the music industry.
- Ontario Creates had a strategic presence at New York Song Week (NYC) and Americana Fest (Nashville) supporting CIMA and Music Publishers Canada export missions. Ontario Creates hosted a cross-sector B2B event at the Canadian Consulate in NYC to connect Ontario record labels and music publishers with key decision makers in the NYC film and TV industry for synch licensing placements.

FILM COMMISSION

Ontario's Film Commission offers a suite of services to domestic and foreign film and television companies to attract production, post-production, animation and visual effects investment to Ontario. The Film Commission is a key point of contact for most of the film and television projects in Ontario. These services include the leading-edge Digital Locations Library website, complimentary scouting assistance to all productions considering Ontario as a location, familiarization tours, and facilitation and troubleshooting support to productions shooting in the province through the Production Liaison Service.

The Commission serves as the primary promotional body selling Ontario's advantages to the global film industry, through strategic B2B initiatives and international advertising campaigns. The Commission also collects statistics on this production activity. In 2020 and 2021 the Film Commission was pivotal in helping ensure a safe return to work for the production sector, working with partners to establish the *Ready to Roll* website and campaign.

The Film Commission also actively develops and facilitates capacity building initiatives to ensure the sector is prepared for future industry growth, specifically with regards to environmental sustainability, studio space expansion, regional equity and studio space expansion.

In addition:

- Ontario Creates, in partnership with the City of Toronto, maintains a full-time marketing presence in Los Angeles (LA), providing on-the-ground marketing to attract production to Ontario and support to Ontario's screen-based content creators. Ontario Creates is the managing partner of the Office. The LA Office continues to make a significant contribution to Ontario's foreign production activity. The LA Office also collects client experience intelligence from foreign service productions, which is used to improve the province's offering. In 2021-22, 110 leads were supported through the LA Office, of which 57 ended up shooting in Ontario, with total budgets valued at \$1.0 billion.
- Ontario Creates' award-winning Digital Locations Database image collection continues to grow. In 2022-23, the Film Commission completed a promotional photography project with over 200 incredible photographs from across the province for use in future ads, social posts and image packages for producers. As of the end of 2021-22, the database held approximately 9,100 portfolios, representing over 275,000 individual images. The database services 6000+ users, including property owners, local freelance production personnel, domestic and international producers and Ontario Creates staff, who use the database to create digital image packages that are used to both market the province and convince productions to shoot in Ontario. In 2021-22, there were over 20,000 visits to view location files on the Digital Locations Library.
- The Film Commission regularly organizes specialized marketing familiarization tours that target international feature film and television production executives, with the goal of promoting Ontario's production and post-production assets for the eventual investment in the province. The first Film and Television Production Familiarization Tour since 2019 ran from August 1-4th, 2022 and attracted seven decision-making executives from LA, representing leading production companies, including AMC, Lionsgate, FilmNation, Macro, Sony, Scott Free and HBO. The tour introduced and strengthened relationships between the LA executives and 105 Ontario based stakeholders and government officials. Ontario stakeholders represented the province well, with participants from North Bay to London, Ontario. The executives met with line producers, vendors, suppliers, regional/municipal film officers, unions, guilds and many more. They also had an opportunity to visit locations,

studios, virtual production stages, and Canada's largest backlot studio in Pickering, Ontario. The tour generated two immediate production leads valued at over \$50 million.

The Film Commission works closely with municipal, provincial and federal partners to create a fluid production experience across regional lines within Ontario. To support these efforts, the Film Commission hosts a weekly town hall call with over 40 regions and municipalities, the DGC Ontario's Location Caucus Representative and the LA Office Business Officer, to discuss filming guideline best practices, investment leads business trends and policy updates.

In 2021, Ontario recorded a historic high of \$2.88 billion in film and TV in production activity, with 394 domestic and foreign projects shot in the province. A portion of the 2021 increase can be attributed to COVID-19 recovery following the brief industry shut down in 2020. The rest of the increase represents new growth in production and is a testament to Ontario's robust health and safety protocols, impressive suite of financial incentives, ongoing studio space expansion, diverse talent pool, and an unmatched range of film-friendly locations. With the help of Film Commission Services, and thanks to growing availability of studio space, Ontario is well-positioned for continued growth. As demand grows, ensuring our labour force can keep up with demand will continue to be strategically important. As a proactive measure, in 2019-20, Ontario Creates formed a Workforce Development Committee, alongside regional and municipal representatives, unions and guilds. The representatives of this committee will continue to pursue activities to raise the profile of the vast range of desirable careers in film and television to ensure Ontario has trained crews to meet production demand across the province.

The Film Commission is a partner with 27 industry and government organizations on the Ontario Green Screen initiative, which was launched in 2020 to develop strategies for sustainable production that will save both environmental and monetary costs for productions and provide a value add to choosing the Ontario as a filming jurisdiction. In the short time since OGS was established, sustainability has become a key competitive factor driving where productions will land worldwide.

In 2023-24, Ontario Creates plans to continue its leadership role by facilitating meetings with industry partners around opportunities such as workforce development, studio development and sustainable production. The agency will also explore ways to expand our role as a centralized provider of production resources by offering enhanced listings and services. Taking a leadership role on both the workforce development and sustainable production fronts will further enhance Ontario's value proposition as a jurisdiction for filming.

PROGRAM RESULTS:

In 2021, film and television productions supported by the province contributed a historic high of \$2.88 billion to the economy and accounted for approximately 48,135 full-time direct and spin-off jobs.⁵⁸ Pent-up production that could not proceed during COVID shut downs contributed to this spike in activity, which continues to be strong. In August 2022, Ontario reached a milestone of 53 concurrent productions filming across the province in prep, principal photography or wrap stages. Global demand for film and television content has increased even more as a result of the pandemic and this suggests that 2023-24 and beyond will be strong years for production.

Results for the Film Commission are measured by the:

- Number and value of domestic and foreign film and television productions that shoot in Ontario.
- Number of actively scouting domestic and service productions accessing Ontario Creates location services.

⁵⁸ Ontario Creates, 2021 Film and Television Production Statistics.

- Number of leads developed by the LA Office.
- Proportion and value of LA Office-assisted projects that shoot in Ontario

2023-24 PRIORITIES:

- The Film Commission will continue to deliver high value service to stakeholders and to reinforce relationships with both new and existing international clients to maximize inward investment opportunities, using client experience intelligence to support continuous improvement.
- As part of its strategic goal of Driving Investment in Ontario, the agency will grow the domestic and service screen production industry across all regions of Ontario by leading and participating in domestic and foreign direct investment pitches to expand infrastructure for the film industry (e.g. long term studio leases, VFX houses, studio space, green tech, equipment supply, etc.)
- **Ontario as an Industry Leader:** The Film Commission will continue to lead industry committees and partnerships that contribute to capacity building for the sector:
 - **Ontario Green Screen Initiatives:** The Film Commission will continue to facilitate the Ontario Green Screen Initiative, working with 26 industry and regional partners. The initiative launched on September 10, 2020, along with its inaugural Carbon and Sustainable Production and Carbon Calculation training program which has now trained over 400 professionals. The Film Commission will activate the first year of the Ontario Green Screen's new five-year strategic plan and will continue to work with the Circular Innovation Council and other partners to deliver on plan tactics.
 - **Workforce Development:** In partnership with film and television industry members, regional and municipal representatives, unions and guilds, Ontario Creates will address labour force challenges through the development of a multi-faceted strategy that includes documenting the categories of work that exist and the particular career pathways for each type of film and television occupation; layered onto this mapping is information on regional job fairs, academic institutions that provide training, and second career opportunities available. Efforts will also include enhancing opportunities for, and awareness of, Ontario's on-screen talent in partnership with the Alliance of Canadian Cinema, Television and Radio Artists (ACTRA). Work will be done in cooperation with external parties, the support of the Business Affairs and Research Unit of Ontario Creates, and will include outreach to potential government partners including the Ministries of Labour, Training and Skills Development, Education, and Colleges and Universities. In 2023-24, Ontario Creates will host a virtual job fair for the film industry.
- **Regional development:** The Film Commission will launch a regional production economic impact assessment tool, to provide regions and municipalities access to an estimates generator that can be used to gain support for production activity locally.
- **Digital Locations Library:** Ontario Creates will scope and plan a multi-phase project to develop and launch a new, leading, Digital Locations Library for Ontario's Film Office. Updating the library is an important priority to ensure it remains competitive as a tool for prospective productions.

FILM COMMISSION SUCCESSES:

Made-in-Ontario film and television productions receive significant critical and commercial acclaim and have made a significant economic impact in Ontario:

- Netflix success with *The Umbrella Academy* (Season 2), contributed \$77 Million to the provincial economy. An analysis by Oxford Economics found that local wages and salaries accounted for the majority (59%) of production spending, with the remaining 41% (\$31.9 million) spent on local goods and services. From the procurement of props and costumes to transportation and accommodations, *The Umbrella Academy* supported more than 980 Ontario-based businesses. From Southwest Ontario to Sault St. Marie, the production spending boosted local economies across the province, generating a total contribution of \$111 million for Ontario's GDP. (Source: *Economic Impacts of The Umbrella Academy: Season Two in Ontario*, Oxford Economics, 2022.)
- Shot in Ontario productions are featured at many film festivals and frequently receive critical acclaim. In addition to 12 Film Fund supported projects, *The Handmaid's Tale* and *Women Talking* (dir. Sarah Polley) screened at TIFF 2022. *The Handmaid's Tale* was also nominated for two 2022 Screen Actors Guild (SAG) Awards (Outstanding performance by an ensemble in a drama series and Outstanding performance by a female actor in a drama series | Elisabeth Moss) while *Nightmare Alley* received a nomination for Outstanding performance by a female actor in a supporting role | Cate Blanchett.
- The Film Commission has brokered key relationships among investors, developers, studio operators and production planning executives pushing for soundstage growth all over the province, in Ottawa, Pickering, Hamilton, Mississauga and Toronto. In 2021-22, 460,500 sq ft of additional studio space was secured. The Commission's 2022 Fam Four generated two immediate production leads valued at over \$50 million.
- Toronto was named as the #2 City to Live and Work as a filmmaker in 2022 by *Movie Maker Magazine*, a jump of 10 spots over 2021.
- Ontario Green Screen achievements include:
 - To date, 400 training certificates have been issued to film workers through the Ontario Green Screen Climate and Sustainable Production and Carbon Calculation courses.
 - OGS is electrifying the industry through access to a new clean energy Grid Tie In Map on the Film Commission website. Regional Film Offices have identified 40 high impact locations (primarily basecamps) for this project to help productions reduce their dependency on diesel generators.
 - The industry has averted 64,987 KG of greenhouse gas emissions through Second Harvest, a food rescue program, promoted by OGS, that supports local agencies in need of meals. This program has rescued 33,400 meals for 81 local non-profit agencies since 2019.
 - 9.8 metric tons of set material was rescued and exchanged through the Partner in Project Green pilot program, valued at \$33,000 in material savings.

COLLABORATIVE INITIATIVES

Ontario Creates works with industry stakeholders to deliver cross-sector collaborative activities. These events encourage partnerships within and 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 is a B2B initiative that brings Ontario book publishers together with film, television, and interactive digital media producers for a series of one-on-one meetings. To date, the program has set up over 4,000 business meetings and brokered over 75 book options. In 2022-23, the program returned to an in person format, following two years of virtual delivery, and was a first ever international edition. Changes were also made to the timing in order to host the event during TIFF and take advantage of screen producers being in a buying mindset. Fifty producers and 20 book publishers participated.
- To date, over 100 films have been successfully financed through Ontario Creates' International Financing Forum including: *Alice*, *Darling*, *Night Raiders*, *Castle in the Ground*, *Maudie*, *Tokyo Story*, *Book of Negroes*, *Citizen Gangster*, *Midnight's Children*, *The Husband*, *The Whistleblower*, *Coriolanus*, *Born to Be Blue*, *Wadjda* and the Oscar-nominated *Incendies*.⁵⁹ In 2022, IFF successfully returned to an in person event with over 80 producers taking part from Ontario, Canada and across the globe.
- Creative Industries in Conversation (formerly known as the Discussion Series) is a year-round forum for conversation among leaders in media, culture and technology. The event has been rebranded in 2022, with a new visual identity launched. Three sessions are scheduled in 2022-23. One was delivered in person in Toronto while two will be virtual, with guests invited to attend from across the province. All panel discussions are made available by Ontario Creates as podcasts and transcripts.
- In 2023-24, Ontario Creates will host a cross-sector workforce symposium to share recent research and collect input to help articulate the goals of a workforce strategy.
- Ontario Creates will once again host an in-person Celebrate Ontario reception during TIFF 2023.
- Business is Better with Music, a cross-sector initiative to maximize impact by creating targeted bespoke events, and exploring opportunities with sectors outside Ontario Creates mandate (e.g., performing arts, corporate Canada) - was delivered in-person through a partnership with Conscious Economics (Economic Club of Canada) and the Canadian Live Music Association to connect music stakeholders with representatives from "Corporate Canada". The March 2022 edition had hundreds of participants from close to 150 companies across corporate and creative Canada.
- Ontario Creates facilitates a Content Exchange Day in alternate years. This event provides an opportunity for all sectors to meet, learn (through roundtables and speakers), and participate in one-on-one meetings to explore new business and format opportunities. The program design is modeled on the first phase of the Collaboration and Innovation Fund program which concluded in 2016-17. This event launched in 2017-18 and takes place every other year. The 2021-22 edition was put on hold for one year to allow for planning of an in-person event. The next event is expected to take place in April 2023.

⁵⁹ Ibid.

- Partnership with JUNOs – JUNO Talks series curated conversations around live music & technology.
- In addition, in 2023-24, Ontario Creates will continue to work with other MTCS agencies to identify ways to leverage one another's programs and communication strategies to strengthen the overall positioning of the province's cultural assets and impact on the quality of life and economic well-being of Ontarians.

TRILLIUM BOOK AWARD

The Industry Development Group delivers the Trillium Book Award/Prix Trillium to recognize Ontario's literary excellence and foster the promotion of Ontario-authored books. A jury of peers is coordinated and managed by Ontario Creates to select the short-listed titles and winners of four separate prizes.

Trillium Book Award winners in English-language and French-language receive \$20,000 each. Publishers of the winning books each receive \$2,500 towards book promotions. The winners of the Trillium Book Award for Poetry (English-language) and the Trillium Book Award for Poetry (French-language) receive \$10,000 each; their publishers receive \$2,000 each. The awards for Children's Literature (French-language) and Poetry (French-language) are awarded in alternate years.

The 2022 Trillium Book Awards marked the return of in-person celebrations. Virtual activations continued. Between the shortlist and the winner announcement, the agency's promotional work generated 149 stories, which in turn achieved more than 142.4 million impressions.

Electronic submissions were implemented for 2022-23. Jurors were provided with e-readers and electronic files for judging. Publishers were only be required to submit one hard copy of the book under consideration for the award. This change allows for a lower environmental footprint for the awards management process and reduces costs and complexity for publishers submitting titles.

FUNDING TO TORONTO INTERNATIONAL FILM FESTIVAL, INC.

In 2022-23, Ontario Creates provided \$300,000 in Operating Support to TIFF. In addition to these operational funds, Ontario Creates provided \$815,000 in support for the care and maintenance of the Province's film collection at the Film Reference Library. In 2022-23, the agency also provided \$120,000 to the TIFF Industry Office, which supports international sales opportunities for producers during the Festival and where Ontario Creates has a shared marketing stand with Telefilm Canada. The stand is used to promote Ontario as a leading production jurisdiction to international decision-makers and to provide a hub where Ontario stakeholders can schedule meetings with international delegates. The agency provided \$15,000 via the Industry Development Program to TIFF's Industry Networking Event series.

Ontario Creates also delivers various industry development initiatives during TIFF in order to leverage the presence of industry executives and producers from around the world converging in Ontario. In 2022, TIFF mounted its first fully in-person festival since the start of the pandemic. Ontario Creates' marquee industry development event, the IFF, was delivered in person after two years of virtual formats. The 17th annual IFF brought Ontario, Canadian and international film producers together with international financiers.

TAX CREDITS AND FINANCING PROGRAMS

Ontario's creative media tax credits are a major incentive for doing business in Ontario. Tax credits provide Ontario's content creators with predictable and stable 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.

Cultural media tax credits are used in many jurisdictions worldwide as a tool to incentivize production and deliver a range of economic benefits. A report on the economic impact of New York State's film tax credit estimates that the State, New York City, and other local jurisdictions received US \$2.1B in additional tax revenue from the film production tax credit and another US \$93.8 million from the post production tax credit across 2019 and 2020. It is estimated that collectively, the tax credits supported more than 57,000 jobs, over \$3.7B in earnings and \$10.3B in spending in each of the two years.⁶⁰

Global over-the-top players like Netflix, Amazon and Disney+ are contributing to a significant expansion in content production. Ontario is well-positioned to continue to capitalize on the worldwide expansion of the screen-based industries. Global competition for production dollars remains strong and jurisdictions around the world are implementing new and innovative tax incentives in order to grow these industries at home. Ontario must maintain its competitive advantage in order to take advantage of the opportunity that this brings.

Ontario Creates currently co-administers five refundable tax credits with the Canada Revenue Agency (CRA) based on eligible expenditures for the film, television, interactive digital media, and book publishing industries.⁶¹ Tax credit legislation falls under the responsibility of the Ministry of Finance (MoF). Ontario Creates works collaboratively with MoF and the Ministry of Tourism, Culture and Sport (MTCS) on issues related to tax credits.

- **Ontario Film and Television Tax Credit (OFTTC):** a refundable tax credit to eligible Ontario-based Canadian corporations of 35% of qualified Ontario labour expenditures for eligible film and television productions. An enhanced rate of 45% is available for productions that are eligible for the regional bonus, while a rate of 40% on the first \$240,000 of qualifying labour expenditure is available for eligible first-time producers.
- **Ontario Production Services Tax Credit (OPSTC):** a refundable tax credit to eligible Ontario-based Canadian and foreign-controlled corporations of 21.5% of qualified labour and non-labour 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% of qualified 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% of eligible Ontario expenditures for interactive digital media products created in Ontario (35% for fee-for-service).

⁶⁰ *Economic Impact of the Film Industry in New York State, 2019 & 2020*, Empire State Development, <https://esd.ny.gov/sites/default/files/Camoin-310-Report-2019-20-Film-Incentive-Impact-ESD-Final.pdf>, pp. 3-4.

⁶¹ In 2015, a sixth tax credit, the Ontario Sound Recording Tax Credit (OSRTC) was discontinued; however, Ontario Creates will continue to administer the credit until all eligible applications are processed.

- **Ontario Book Publishing Tax Credit (OBPTC):** a refundable tax credit to eligible Ontario-based Canadian corporations of 30% of eligible expenditures for eligible literary works by Canadian authors.

PROGRAM OBJECTIVES:

- To increase investment and jobs in Ontario and to incent content creation by Ontario-based film, television, interactive digital media, and book publishing companies.
- To assist in the capitalization of companies in order to help companies in Ontario grow their businesses, invest in the creation of new content, and to maintain and exploit their intellectual property assets.

PROGRAM RESULTS:

In 2021-22, support provided through tax credits leveraged product and production spending of nearly \$12 billion dollars (or \$16.30 for every dollar invested by Ontario) while encouraging the creation of domestic content and attracting significant international investment through foreign service production.

As a result of several process improvements and COVID-19 mitigation strategies, the Ontario Creates' Tax Credits and Financing Department saw significant year-over-year progress in reducing tax credit queues:

- In 2021-22, total processing time was 16.5 weeks, which was 35% faster than in the prior year. Such speedy processing times have not been seen since 2014-15.

Results for this program are measured by the:

- Leverage value of Ontario Creates' contribution to each project (the additional amount in financing generated for each dollar invested by Ontario Creates).
- Estimated value of tax credits.
- Number of products reviewed/certified.
- Average turnaround time (from receipt of application to issuing of certificate) across all tax credits.
- Average time tax credit files spend in analysis.

PRODUCTIVITY AND CUSTOMER SERVICE IMPROVEMENTS:

Focusing on productivity and processing time improvements has been of paramount importance in recent years, as Ontario Creates recognizes that high turnaround times for tax credit processing increases financing costs for producers, delays access to capital that would otherwise be reinvested in the creation of new intellectual property, threatens company sustainability, and erodes the value of the province's investment to cover interim financing costs. Shorter processing times better leverage Ontario Creates' investment and significantly improve access to capital for Ontario content companies. Examples of recent achievements in service excellence include:

- Significant reductions in total tax credit processing times. In 2021-22, the average total processing time across all tax credits was 35 per cent faster than the previous year, and 61% faster than 2017-18.
- Design and implementation of an information sharing module with the CRA, which allows agents from both organizations to access the same company documents for our respective areas of review. This solution reduces duplication of document submissions and streamlines the review process for files audited by CRA. This significantly simplifies and streamlines the process for applicants as CRA Team Leads are now able to access a special module on Ontario Creates' database that enables them to review certified files and

supporting documents without having to request these from the applicant. The project launched in May 2021, and has reduced duplication, streamlined review, and led to quicker audits, which in turn gets tax credit cheques issued to creative media companies much faster. This pilot has now become a model that CRA plans to replicate with other provinces and CAVCO.

- Electronic certificates were launched in December 2021 as part of our ongoing commitment to continuous business improvement and modernization of business processes.

KEY ACTIVITIES AND ACCOMPLISHMENTS IN 2022-23:

- The April 2022 Provincial Budget announced several changes to tax credits as well as commitments to review further aspects of tax credits. Many of these changes were aligned with strategic and administrative priorities Ontario Creates has highlighted as options and opportunities in the past, to help ensure tax credits are responsive and simpler for users, as well as aligned with current market realities:
 - Digital-only books published after 2019 will now be eligible for OBPTC. (passed into law in September 2022)
 - Clarification around eligibility of labour for employees who work remotely for OCASE and ODMTC
 - Proposed change to the OFTTC regulations to allow eligibility for online-only productions. (Confirmation of the intention to move ahead with this eligibility change, and additional details on how this change will move forward were provided in the 2022 Fall Economic Statement)
 - Proposed change to the OPSTC legislation to allow location fees as eligible expenditures (Legislation introduced and confirmation of this plan provided in the 2022 Fall Economic Statement)
 - Commitments to review regional bonus for OFTTC, and untethering OCASE from OFTTC/OPSTC.
- A project to bring the risk assessment scoring function (currently undertaken by MoF) in-house is underway and is currently in the discovery and analysis phase.
- The agency continues to chair monthly calls and an Annual General Meeting with MoF and CRA to address issues of administration of the tax credits.
- As the Tax Credit team moves to establish service standard targets, potential challenges are anticipated around an increase in irregular files which may require additional processing time and may have higher potential for disputes. As a mitigating strategy, Ontario Creates is committed to working with partners to recommend a privative clause which would formalize the review process in the event of a dispute.
- In 2022-23, the agency is continuing to act upon and implement the remaining recommendations of the 2020 MNP review of Ontario's cultural media tax credit certification programs and is pursuing further efforts to reduce processing times and find ways to make client interactions more streamlined.
- In 2021-22, Ontario Creates began to streamline the submission process for applicants by removing the requirement to submit physical media as part of tax credit applications. This also has the benefit of reducing storage space requirements and expenses for the agency. In 2022-23, the agency increased its efforts to not only allow, but actively encourage applicants to only send digital copies of material; uptake in the first year has been high.
- In 2022-23, the Tax Credits team worked closely with IT to implement many improvements to the OAP user interface to make the database as useful and efficient as possible for tax credit staff, with the ultimate aim of helping to speed processing time.
- In 2022-23, Ontario Creates conducted a review of tax credit administration fees. Changes have been recommended to the maximum and minimum administrative fee caps for certain credits, while the overall rates have been recommended to remain unchanged. The

changes are expected to be in effect from April 1, 2023, following implementation of a stakeholder communications plan.

- Ontario Creates reviewed materials required to demonstrate Canadian citizenship in tax credit applications to ensure that language is respectful and inclusive of Indigenous people. The Declaration of Citizenship and Residency Form of OBPTC has been revised further to this review.
- Tax Credits have been working to reformat our guidelines with the goal of making the guidelines more user friendly by reducing duplication of sections and providing consistent formatting and numbering across the various tax credit guidelines. As of the end of 2021-22, reformatted guidelines for OBPTC, OFTTC and OPSTC have been posted. Work continues in 2022-23 on reformatting the OCASE and OIDMTC guidelines.

2023-24 PRIORITIES:

- Complete project to publish plain language version of tax credit regulations and legislation as part of an ongoing focus on customer service improvements and accessibility.
- With support from Ontario Onwards Acceleration Funds received, scope and implement suite of technological changes to tax credits to reduce processing times for clients (electronic review package, service standard dashboard (feature allowing for improved visibility into process performance), AI chatbot, digital ID, use of AI to continuously improve risk scoring module).
- Explore and implement changes to tax credits identified in 2022 Ontario Budget and 2022 Fall Economic Statement (extending eligibility to OFTTC for online-only productions, expanding eligible expenditures for OPSTC for location fees, review of untethering OCASE; and review of OFTTC regional bonus)
- Continue to work with government and industry partners to identify additional changes to tax credit legislation and regulations to ensure efficiency, value and impact on achieving government priorities.
- As part of tax credit modernization plans, establish a regional development plan, including participating as appropriate in the government's review of the OFTTC regional bonus to ensure it is providing effective and appropriate incentives and support for film and television productions in all regions of Ontario.
- Ontario Creates continues to represent and advance Ontario's interests as an active member of the National Tax Credits Committee (NTCC). In 2017-18, a working group of the NTCC was formed and Ontario Creates began working with the Canadian Audio-Visual Certification Office (CAVCO) and other provinces to investigate information sharing and harmonization possibilities. This work is expected to continue into 2023-24. Upcoming activities are anticipated to include a joint study looking at key animation.
- In 2022-23, Ontario Creates will review tax credit processing streamlining mechanisms that have been in place since the outset of COVID-19 to determine whether these continue to be appropriate. Recommendations from the review would be incorporated as of 2023-24.
- Ontario Creates will continue with the onboarding/training process improvements recommended in the MNP report which aim to increase staff productivity. Examples include detailed procedures and work instructions, standardization of tools and templates, and improvement of training and onboarding programs.
- Ontario Creates is part of a three party working group (Ontario Creates, MoF and MTCS) looking at aspects of the MNP recommendations which require joint cooperation, which has led to renewed discussion regarding updating the MOU.
- Ontario Creates will be working with the Canada Revenue Agency (CRA) on an update to the Memorandum of Understanding which governs information exchange between the two organizations. This will also incorporate updates such as electronic certificates, and the information sharing module.

BUSINESS AFFAIRS AND RESEARCH

BUSINESS INTELLIGENCE PROGRAM

Ontario Creates offers financial support to incorporated not-for-profit industry organizations undertaking business intelligence initiatives relevant to the growth of one or more content-creating sectors in Ontario. Completed business intelligence projects are made publicly available on the agency's corporate website and on the Online Research Library.

PROGRAM OBJECTIVES:

- To support projects that provide information, data, and/or insights that Ontario's creative companies need to increase their capacity and effectiveness.
- To provide Ontario companies with competitive market advantages.
- To level the playing field between Ontario's creative companies and global multinationals that have the capacity to conduct their own market research and business intelligence.
- To provide Ontario Creates with valuable information about the industry to inform and improve programs and services offered by the agency.

PROGRAM RESULTS:

In 2023-24, the Business Intelligence Program (BIP) is anticipated to support five to ten new studies that will provide information and data to help Ontario creative industry companies remain competitive with larger scale multinational companies operating around the world. Business Intelligence studies are also anticipated to raise the profile of Ontario Creates and the Province as a trusted partner and a catalyst for information and research in the creative media industries. In 2021-22, nine BIP-funded projects were released, and ten new projects were approved, the latter of which leveraged \$2.14 in spending for every dollar invested by Ontario Creates. Results for this program are measured by the:

- Number of projects released.
- Leverage value of Ontario Creates' contribution to each project.

Additional program results will be developed to support Ontario Creates' new five-year Strategic Plan.

Ontario Creates has supported several projects aimed at profiling the demographic of creative industries and highlighting barriers and opportunities for equity-seeking groups, with completed reports made publicly available on the corporate website. Examples include *Women in View's On Screen 2021*, *Women in Music's Action Plan Framework for Women, Non-binary, Gender Fluid and Gender Diverse Individuals in Ontario's Music Sector*, and *Closing the Gap: Impact & Representation of Indigenous, Black, and People of Colour Live Music Workers in Canada*, conducted by the Canadian Live Music Association.

2023-24 PRIORITIES:

- Given the recent demand on this small program, in the next year the agency will continue to prioritize BIP applications that focus on workforce development, or diversity and inclusion in the creative industries.
- The agency will also ensure alignment with other Ontario Creates programs with respect to guideline format and interim and final reporting via the OAP.

ONTARIO CREATES INTERNAL AND COMMISSIONED RESEARCH

Where the agency identifies a particular knowledge gap or strategic growth opportunity which is not being addressed through the BIP, the agency will directly commission studies or conduct research internally. These Ontario Creates-led projects allow for forward-thinking, 'big picture' intelligence on emerging issues facing the sectors, and support the agency's programming, strategic planning and business planning activities. Current and upcoming projects include:

- Production Statistics Methodology Review: Ontario Creates is conducting a study in partnership with other members of the Association of Provincial and Territorial Funding Agencies (APTFA) to better understand how different Canadian jurisdictions capture and report on film and television production statistics. Following the completion of a first phase documenting current state, Phase 2 which is commissioning a third party to provide best practices in production statistics development that could be adopted by all partners is underway with an expected completion by Q42022-23. The project includes a component to develop a regional economic impact calculation tool that will be available for Ontario communities and shared for information with the APTFA partner jurisdictions.
- Strategic plan for the Agency: In 2022-23, Ontario Creates has been working on a 5-year strategic planning process for the agency, to be managed by the Business Affairs and Research team.
- Overview of the Canadian magazine industry will be procured and completed by Q42022-23.
- In 2023-24, Ontario Creates will commission a Franco-Ontarian content market study.
- In 2023-24, Ontario Creates will also conduct an internal research and data gathering exercise to compile existing research on alternative financing models; identify other jurisdictions that have implemented similar programs for the creative industries; and conduct gap analysis for Ontario to determine stakeholder need.

PARTNERSHIPS

Ontario Creates undertakes targeted research initiatives with third parties, allowing the agency to extend its in-house research capacity to generate high value business intelligence for stakeholders.

- Since 2013-14, Ontario Creates has participated in the Culture Statistics Strategy, an initiative led by the federal Department of Canadian Heritage and including provincial, territorial, municipal and other partners. This partnership supports the release of key Statistics Canada culture data such as culture jobs, contribution to GDP, and trade of cultural products and services.
- Ontario Creates meets monthly with peers in APFTA partner organizations as part of a newly formed Data Committee to share information and discuss opportunities for collaboration.
- In 2021-22, Ontario Creates was a funding partner on WIFT-T Alberta's study *Building Inclusive Networks in the Film & Television Industry*, and published *The Future of the Creative Workforce*, a report exploring GenZ interests in behind-the-scenes creative industry roles, in association with VICE Media Group.

ONLINE RESEARCH LIBRARY

The Online Research Library (ORL) is a resource created and maintained by Ontario Creates which contains domestic and international studies specific to the creative industries and serves as a valuable repository of research for industry stakeholders, academics and the agency's own 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. In 2019-20, the ORL was overhauled to improve user experience and functionality. The number of unique visitors has more than doubled since the update.

- As of October 2022, the ORL contains more than 900 research studies.
- In 2021-22, the ORL was visited by over 6,200 unique users.
- The studies in the ORL are also used to inform the development of the agency's semi-annual industry profiles which received over 6,000 unique views last year.

- By the end of 2022-23, a new social media sharing feature will be added to enable users to easily post links to ORL reports via Twitter and similar third-party sites. Additional improvements may include publicizing a tally of the total number of studies available on the Online Research Library which will assist with results tracking and promotion of the Library as a valuable resource.

BUSINESS INTELLIGENCE BULLETIN

Ontario Creates issues a quarterly business intelligence bulletin. The Bulletin offers a platform to inform interested industry stakeholders about Ontario Creates-funded research, industry profiles, events and third-party data releases and industry consultations. The bulletin is read by almost 800 people a year.

OPERATIONAL ACTIVITIES

Ontario Creates regularly pursues a number of operational activities to oversee the strategic direction of the agency and make business process improvements aimed at increasing efficiency, effectiveness and providing better client services.

2022-23 Accomplishments:

- Reviewed and updated all internal corporate policies.
- Reception desk made more accessible and welcoming to people with disabilities.
- Upgrades completed allowing for electronic signatures on transfer payment contracts and automated generation of contracts from the database.
- Completed project to move Trillium Book Award and Tax Credits supporting documentation to electronic submissions.
- Worked with MPBSD and MTCS to meet the requirements of the recently released Transfer Payment Consolidation Operational Directive and completed the first data extraction which will be done annually going forward.
- Demographic data collection: Undertook database design improvements and policy development, laying the groundwork for a roll out of invitations to participate to individuals in key business and creative roles.
- Multi-Year Accessibility Plan is slated to be published by calendar year-end 2022, following consultations with key stakeholder partners.
- Upgraded the office phone system to soft phones, to permit calls to be made from desktops via an app or standalone software solution.
- Conducted 360 reviews of the senior management team, to further develop leadership and managerial skills.

Operational activities in 2023-24 will include the following:

- **Transfer Payment Modernization:** As part of Ontario Creates' plan to modernize the transfer payments process, the agency will continue to implement improvements including transitioning to fully electronic business processes. Ontario Creates will also work with MTCS and MPBSD on meeting the requirements of Ontario's Transfer Payment Consolidation Operational Directive, including completing the annual data extraction required.
- **Open Data:** Identify, prepare, and maintain datasets in compliance with Ontario's Open Data Directive.
- **Demographic data collection:** Ontario Creates will continue its roll out of individual level demographic data collection on key business and creative roles; and begin analysis of the initial datasets while refining data collection processes based on what is learned through

the initial analysis.

- **Production Statistics:** The BAR team will work with Film Commission and Tax Credits to compile annual film and television production statistics, incorporating changes as appropriate from recommendations of the Production Statistics Methodology Review (Phase 2).
- **Strategic Planning:** Launch new five-year Strategic Plan for the Agency. Monitor implementation and coordinate annual agency business planning.
- **Lease renewal:** The Agency's 5-year lease of the office premises expires in October, 2023. In 2023-24, Ontario Creates will continue to work with Infrastructure Ontario (IO) to review options and finalize space planning for the new or upgraded premises. As part of a Strategic Plan initiative to build a flexible, inclusive and effective hybrid work model, Ontario Creates will ensure staff are kept informed of changes to physical work space as a result of lease renewal; build ample time for consultation with staff, and involve staff in decision-making processes where possible.
- **Multi-Year Accessibility Plan:** 2023-24 will be the first year of Ontario Creates' new multi-year accessibility plan implementation. Tasks will include broadening consultation to add specific actions to the plan framework.
- **Ontario Creates' culture and employee value proposition:** Ontario Creates will continue to support staff learning and development goals, including by expanding the employee mentorship program to include industry opportunities, and through a focus on team building and effectiveness in a hybrid environment.
- **Promote an equitable, inclusive, accessible, anti-racist and diverse workplace:** Ontario Creates will create and/or review policies, practices and processes against best practices in equity, diversity, inclusion and accessibility (as it relates to procurement practices, event planning, hiring and recruitment)
- **Workforce Development Strategy:** In 2023-24, led by the BAR team, Ontario Creates will host a cross-sector workforce symposium to share recent research and articulate the goals of a workforce strategy. This will become a key input in strategy development, with appropriate partners, staffing needs and costs to be identified.
- **Performance Measurement Enhancement:** In 2023-24, Ontario Creates will finalize a new KPI framework to align to the new Strategic Plan. Work will include creating a detailed data map and instructional manual describing precise data inputs on application forms and identifying data stewards. Business analytics software will also be scoped and procured, in consultation with the IT Team, in order to improve data management and reporting.

INDUSTRY ENGAGEMENT ACTIVITIES

Ontario Creates 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 Ontario Creates' five Industry Advisory Committees: Book, IDM, Magazine, Music, and Screen-based. Beginning in 2017-18, and at the request of industry representatives on these committees, Ontario Creates established and formalized cross-sector meetings of Industry Advisory Committee members.

The Advisory Committees are made up of stakeholders from creative industry companies and trade organizations who serve a term of up to three years. Each Committee nominates an Industry Co-Chair and the Ontario Creates CEO serves as the agency's Co-Chair. The Co-Chairs alternate the responsibility for chairing meetings.

The role of the Advisory Committees is threefold:

1. To provide high-level stakeholder input into Ontario Creates 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 Ontario Creates 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; and
3. To inform Ontario Creates of emerging stakeholder issues and priorities.

On occasion, subcommittees of the larger Advisory Committees are struck to provide input on specific Ontario Creates programs, documents, or objectives such as increasing diversity and inclusion. Ontario Creates recently ensured that organizations representing equity-seeking groups in the creative industries have representation on the Advisory Committees. In 2023-24, Ontario Creates proposes to strike an advisory committee of stakeholders focused on accessibility that would meet annually.

Staff members from all departments are active participants in Ontario Creates' 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 Ontario Creates programs and tax credits. These include information sessions and participation in industry panels.

ACT AS A CHAMPION FOR THE CREATIVE INDUSTRIES

Ontario Creates continues to work with industry stakeholders to identify relevant issues and assist them in communicating those issues to the appropriate levels of government.

- Ontario Creates recently made submissions to Ontario's Workforce Recovery Advisory Committee; Ontario's Women in the Economy Task Force; and *Spark Courage*, the Canada Media Fund's 2021 Industry Consultations.
- Ontario Creates intends to monitor, and contribute as appropriate to relevant federal and provincial consultations, such as activities stemming from the recently completed review of the *Copyright Act*, Broadcasting and Telecommunications Legislative Review and to follow the progress of Bill C-11, currently before the Senate.
- Through the Business Intelligence Bulletin, Ontario Creates is able to communicate with stakeholders about opportunities to contribute to policy consultations taking place at all levels of government.

STRATEGIC INITIATIVES

As a result of careful fiscal management, Ontario Creates has accumulated a small amount of uncommitted cash reserves, providing the capacity to respond to emerging opportunities and industry development needs which cannot be addressed within the parameters of core funds. The agency has committed to a balanced budget (effective deficit of zero) each year, and has consistently performed better than planned, allowing a small annual contribution to cash reserves.

Strategic initiatives leverage a portion of the agency's cash reserves to support timely opportunities that further enhance the impact of programs, to develop skills and partnerships, and to advance the strategic priorities of diversity, workforce development, partnership, discoverability, marketing and export, while ensuring a balanced budget for core program delivery.

In 2023-24, Ontario Creates is prepared to utilize up to \$1.775 million of these reserve funds to activate a series of time-limited initiatives that will leverage and extend existing programs without creating unsustainable stakeholder expectations and with limited additional strain on human resources.

The initiatives are as follows:

- **Diversity Enhancement (Industry Development):** In 2023-24, the Diversity Enhancement will continue to be available to all investment programs. The Diversity Enhancement began as a time-limited add-on to the Film Fund in 2017-18, providing an additional \$4.5 million over three fiscal years (ending in 2019-20) to films that meet the provincial definition of diversity, which encompasses: ancestry, culture, ethnicity, gender identity and expression, language, physical and intellectual ability, race, religion, sex, sexual orientation and socio-economic status. From 2018-19, Ontario Creates allocated \$250,000 of this funding to the Industry Development Program for initiatives across the book, film, television and magazine sectors. In recognition of the significant value and impact of dedicated funding for projects with a diversity component, Ontario Creates continued to support the program at reduced funding levels using uncommitted cash reserves from 2020-21. The agency will continue to prioritize this activity through the allocation of uncommitted reserves to the extent possible in the year ahead. A strategy, and specific pitches, will be developed and tested in 2023-24 to replace the use of cash reserves with a more sustainable solution to support diversity initiatives going forward.
- **Diversity Enhancement (Music):** Propose to continue the initiative for an additional year. In 2021-22, the Diversity Enhancement provided a "top up" to the OMIF to provide additional support to companies and organizations demonstrating tangible, measurable efforts to support and increase diversity in staffing (including executive positions), roster and mentorship/training/professional development activities.
- **AcceleratiON: Black and Indigenous Entrepreneurship Program (Music):** The agency will continue the new Black & Indigenous music entrepreneur initiative introduced as a time-limited activity in 2021-22. As an additional mentorship activity, and linked to the agency's workforce development priority, the Access CMW conference mentorship initiative will continue to be available for a wide range of conferences and professional development opportunities.

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#	Objective	Risk Statement	Risk Category	Existing Controls	Risk Assessment (Residual)	Risk Rating	Mitigation / Action Plan
1	Supporting the growth of Ontario's creative industries.	Ontario's creative industries are a success story, demonstrated by the continued growth of the sector. Increased demand on Ontario Creates' services without adequate resources may lead to slow customer service and dissatisfied stakeholders.	Delivery / Operational and Public Perception / Stakeholder	The agency engages in ongoing business process improvements in order to gain efficiencies. Temporary tax credit processing changes as a result of COVID, alongside other measures, have helped to reduce the queue of tax credit applications, eliminating the backlog and reducing processing time. Additional tax credit FTEs have also helped.	<p>Risk Likelihood: Almost Certain (5) – Demand for services increases every year.</p> <p>Risk Impact: Minor (2) – Dedicated staff continue to go above and beyond to meet service standards and implement business improvement processes. Elimination of the backlog and reduction to the tax credit queue have sped up tax credit process times and significantly improved customer satisfaction.</p>	10	Ontario Creates will continue to consider and implement business process improvements (including many of those recommended in the review of tax credit business processes). Staff will continue to work hard to deliver a high standard of customer service.
2	Ensuring programs and services are effective and responsive to the current business environment for the creative industries.	The creative industries are rapidly evolving as a result of new technologies, regulatory rules, and the ongoing impacts of COVID-19, including inflationary pressures, and an increase in remote/hybrid working models, which have exacerbated some long-term trends and accelerated the pace of change. In the wake of COVID-19 and amid a changing economic environment, industries are experiencing new and different risks than in the past, including labour force and infrastructure related challenges, supply chain disruptions and more. To	Delivery / Operational and Public Perception / Stakeholder	The agency supports business intelligence work and has regular dialogue with its Industry Advisory Committees to remain informed about the evolving industry. Program parameters are regularly reviewed and updated and the agency works with partners at MTCS and MoF to discuss changes that would modernize tax credit legislation and regulation. Regular surveys and feedback mechanisms are used to collect client input on programming.	<p>Risk Likelihood: Likely (4) – The creative industries are dynamic businesses that are continuously evolving.</p> <p>Risk Impact: Moderate (3) – Ontario Creates' programs and services are designed to be flexible and responsive to a changing industry, however, modernizing tax credit legislation is not</p>	12	Ontario Creates will continue to monitor and evolve programs as the environment changes and will continue to work with partners around implementing changes to the tax credits to better align them with the current technological and regulatory environment. The provincial government introduced several tax credit modernization mechanisms in the Spring

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#	Objective	Risk Statement	Risk Category	Existing Controls	Risk Assessment (Residual)	Risk Rating	Mitigation / Action Plan
		be most effective Ontario Creates' programs and services should align with changes in the environment. If not, there is a risk that programs may not adequately support industry needs, supported activities may not produce the greatest economic impact for the Province's investment, and projects may move to other jurisdictions. As in person activities resume, there may also be some risk of stakeholder dissatisfaction related to the shifting balance of hybrid vs. in person activities, due to increased access achieved through exclusively virtual activities during the pandemic.		In direct response to COVID-related pressures, the agency implemented flexibility on program delivery dates and eligible events, provided reimbursements for non-refundable costs and supported time-sensitive industry initiatives that respond to COVID-19 and stimulate recovery. In this period of continued uncertainty, flexibility will continue to be offered as required in response to situations that may be outside of funded organizations' control with regard to how public health guidelines evolve and how this may impact company activities.	within the agency's control.		2022 budget. The process currently underway to develop a new five-year Strategic Plan for the agency will also serve as an opportunity to reset and prioritize areas of support.
3	Film and television production: Contributing to the continued expansion of a business environment in Ontario that is advantageous to the growth of new employment, investment and production opportunities.	Due to COVID-19 health and safety measures that include regional lockdowns, there is a risk that public opinion about location film production may result in municipalities restricting or suspending their film permit programs. There is a risk of production delays and/or shut downs due to cast or crew illness which affects the volume of activity and associated levels of economic impact.	Public Perception / Stakeholder (reputation)	Ontario Creates is in regular dialogue with all of the regional film offices in order to understand their concerns and provide information about the latest health and safety protocols. The Ready to Roll (R2R) marketing campaign was developed to provide the latest information about filming to stakeholders across the Province.	Risk Likelihood: Unlikely (2) Risk Impact: Minor (2) – Number of productions affected would depend on the size of the region.	4	Ontario Creates will continue to monitor the situation and will communicate changes in restrictions and policies and health and safety protocols with the regional film offices as well as champion the excellent safety record that the sector has maintained throughout the pandemic.
4	Ontario Creates' Strategic Plan identifies inclusivity (value, celebrate and	Current events demonstrating the systemic roots of oppression have created a call for greater equity across all parts of society, and especially within the	Public Perception	Diversity of projects is embedded in program evaluation. Dedicated diversity programs, while temporary, have increased available funding in	Risk Likelihood: Possibly (3) – Ontario Creates has reserve funds available for the time being and has	6	Ontario Creates is working on data collection to better understand demographics of successful funding recipients.

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#	Objective	Risk Statement	Risk Category	Existing Controls	Risk Assessment (Residual)	Risk Rating	Mitigation / Action Plan
	support diversity) as a core value that embodies the attitudes and behaviours we promote and encourage across our organization and that are fundamental to our relationship with our stakeholders and our internal culture.	creative industries. As current diversity funding initiatives are non-permanent, being funded out of reserves, there is a risk that Ontario Creates may be perceived as not doing enough to address these issues and may be perceived as insufficiently equitable in its distribution of funding particularly if the agency is unable to continue these programs. In addition, with several other agencies, funding bodies and industry organizations launching dedicated programs and creating dedicated positions to address diversity and equity, there is a risk of the agency being perceived as insufficiently committed to diversity or insufficiently diverse in the composition of its workforce and decision-makers.		film, industry development and music more recently. In addition, a project to capture enhanced demographic data will provide additional information about the makeup of applicants and successful funding recipients. Ontario Creates has increased the diversity of its workforce in recent years.	identified diversity as a priority for use of these funds. Risk Impact: Minor (2) – Initiatives underway such as Demographic data collection, diversity enhancements and incorporation of diversity in evaluation criteria, should help to minimize impact of the risk.		Aggregate information will be shared back with the creative community at large.
5	Ontario Creates strives to offer service and operational excellence to its stakeholders, which includes fair and transparent decision-making on distribution of limited grant funding. Strategic Plan values include being collaborative, accountable and inclusive.	As grant funding is limited and demand exceeds available funds, an evaluation process is required to distribute funding. There is a risk that unsuccessful applicants or other stakeholders may take issue with decision criteria, processes or perceive that favouritism or bias affects funding decisions, which could impact confidence in the agency's trustworthiness and impartiality as a funder, and overall reputation.	Public Perception	Industry juries are the primary mechanism for funding decision-making in the sector-specific investment programs. Calls for jurors are widely circulated and committees are regularly refreshed. In the programs that do not use external juries, evaluation criteria, scoring and weighting are clearly outlined in program guidelines (as they are in sector fund guidelines). Scoring for each project and decision rationale are documented internally and a list of all successful funding recipients is published on the Ontario Creates	Risk Likelihood: Unlikely (2) – Peer jury model used in sector investment funding decisions is in place for most programs, and is considered best practice in reducing chance of bias/favouritism influencing decisions. Risk Impact: Moderate (3) – When similar agencies have contended with a charge of bias or favouritism, there have	6	Ontario Creates will continue to support staff anti-bias training, and continue to rely primarily on a peer jury model to support a fair and transparent decision-making system.

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#	Objective	Risk Statement	Risk Category	Existing Controls	Risk Assessment (Residual)	Risk Rating	Mitigation / Action Plan
				website in a timely fashion. Unsuccessful applicants are offered a meeting to review the results of their application's evaluation. Staff have had mandatory anti-bias training.	been moderate impacts to their reputation, and a requirement to have processes investigated by a third party.		
6	Good governance of the agency	The Board of Directors is now at full strength, however it does not include representation from all sectors – specifically, the book, magazine and IDM industries are not currently represented. This presents a risk that the Board may not have some of the specific skillsets and knowledge needed to provide effective governance and strategic direction to the Agency.	Governance/Accountability	Ontario Creates has provided the MTCS with a Board skills matrix identifying gaps and needs. New Board members receive an extensive briefing by senior staff.	Risk Likelihood: Possible (3) Risk Impact: Minor (2)	6	The Board skills matrix is a tool to keep the government informed of gaps in Board areas of expertise; this document is currently being updated.
7	Administering provincial tax credit programs and such other programs and initiatives as may be required by legislation.	A growing demand for judicial reviews and other legal proceedings between unsuccessful tax credit applicants and the government may require significant staff time, and depending on the court rulings, could have serious policy and financial implications for the government.	Financial and Policy	Ontario Creates ensures staff are well-trained and experts on tax credit eligibility requirements to avoid making incorrect eligibility decisions. The agency liaises with the Ministry legal department and Crown Law Office as required.	Risk Likelihood: Unlikely (2) – past judicial reviews have all decided in favour of Ontario Creates. Risk Impact: Very High (5) – The cost of losing a legal proceeding could range anywhere from \$10,000 to \$750,000 in legal fees and damages. If the court makes a ruling that expands eligible costs or products, the potential cost to the Province could be substantially more.	10	Ontario Creates has proposed adding a privative clause to tax credit legislation.

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#	Objective	Risk Statement	Risk Category	Existing Controls	Risk Assessment (Residual)	Risk Rating	Mitigation / Action Plan
8	Maintaining Ontario's competitiveness as a jurisdiction for the creative industries.	Changing federal telecommunications and culture policy, particularly stemming from the Broadcast and Telecommunication Legislative Review (BTLR) recommendations and Bill C-11 could create a disconnect between federal and provincial policies which may make Ontario a less desirable jurisdiction for content creating companies.	Policy	Ontario Creates regularly scans the environment and monitors policy discussions across Canada in order to assess any impacts that could reduce Ontario's competitiveness.	<p>Risk Likelihood: Possibly (3)</p> <p>Risk Impact: Moderate (3)</p>	9	The agency will continue to monitor and will communicate any potential policy misalignments that could jeopardize Ontario's competitive position with MTCS.
9	Film and television production: Contributing to the continued expansion of a business environment in Ontario that is advantageous to the growth of new employment, investment and production opportunities in Ontario.	The low vacancy of purpose-built studio space will impede the province from attracting high-end, big budget productions to the Province in the short-to medium- term, which will limit the province's potential for job creation and GDP growth. In addition, studio space shortages may make it more difficult for domestic production to compete for space. The continued low vacancy for studio space in Ontario suggests that there is still unmet demand, bringing high quality jobs and increased economic growth to the Province.	Delivery / Operational	Ontario Creates' Film Commission works to locate warehouses suitable for conversion to soundstage facilities, and brokers relationships between developers, operators, financiers and to catalyze studio space growth. The Film Commission also promotes RFPs on municipally owned land that is suitable for soundstage development to interested stakeholders. 2.6M is expected to be built by 2026, which should alleviate the demand, however much of this space will not come online until 2024, limiting growth in the short-term.	<p>Risk Likelihood: Unlikely (2)</p> <p>Risk Impact: Moderate (3)</p>	6	Ontario Creates is continuing to facilitate innovative opportunities to repurpose and redistribute existing studio space, as well as find other locations suitable for production to increase capacity.

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#	Objective	Risk Statement	Risk Category	Existing Controls	Risk Assessment (Residual)	Risk Rating	Mitigation / Action Plan
10	Ensuring that Ontario Creates is a workplace free from discrimination and harassment.	There have been instances where unhappy stakeholders who have been turned down for funding have been abusive to Ontario Creates' staff. There is a risk that this behaviour could escalate to discrimination or harassment, including physical threats. When processing times increase, or more client projects are turned down due to program oversubscription, there is a greater likelihood this could occur.	Delivery/Operational (Human Resources)	Ontario Creates' workplace and discrimination policy is reviewed at least annually, and updated when required. Staff are reminded that any form of harassment should be reported immediately to management who will handle such occurrences according to OPS policies and guidelines. All visitors to the office are required to sign in and an emergency button is located at reception in case of a threat. Staff are required to complete mandatory training about workplace discrimination and harassment, and anti-bias training has been provided.	Risk Likelihood: Unlikely (2) Risk Impact: Moderate (3)	6	Ontario Creates will continue to review and update policies and procedures around workplace discrimination and harassment regularly. A new toolkit of policy resources for staff is currently being finalized. Several staff members that deal regularly with clients have also received specialized customer de-escalation training via CAMH.
11	Ensuring Ontario Creates has measures in place to support recruitment, retention and engagement of highly qualified staff members.	Due to a high volume of job opportunities elsewhere in the OPS and industry, workforce demographics and other factors, Ontario Creates faces an HR risk related to recruitment and retention. Career development opportunities abound for staff, however retirements and departures of trained team members can present a challenge to Ontario Creates productivity and succession planning.	Delivery/Operational (Human Resources)	Ontario Creates offers competitive salaries and a positive work environment consistent with OPS policies and standards. Staff members have access to professional development opportunities and a hybrid environment allowing for work from home multiple days per week. An Employee Engagement Committee is working on an action plan to support continuous improvement in staff engagement, including novel initiatives such as the job shadowing program. Ontario Creates has also recently expanded and diversified its job posting strategy in order to help	Risk Likelihood: Possibly (3) Risk Impact: Moderate (3)	9	Ontario Creates and its Employee Engagement Committee will continue work on the Action Plan for existing staff, and continue to employ diversified strategies for recruitment to build awareness of the agency and associated job opportunities. Ontario Creates will utilize FORTE to plan for learning and development opportunities once it is rolled out to agencies.

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				attract a wider pool of qualified candidates to open postings.			
12	Maintaining highest levels of information and network security.	<p>Due to the significant amount of data and information held by Ontario Creates, incomplete, out-of-date, inaccurate or confidential information could be disclosed to the public including statistics or other personal or proprietary business information that could be harmful to individual companies, or the industries themselves and how they are perceived in the Province. Email scams and phishing attempts run the risk of causing financial harm to individual staff members and/or the organization if messages are not recognized as fraudulent.</p> <p>Due to the flexible work model in place, with staff working from home on a regular basis, there is potential for security issues (as employees will be connected through their own internet service providers; they are also transporting equipment (laptops) to and from home on a frequent basis). Additionally, certain processes, like connecting to network drives through VPN, may slow staff down.</p>	Delivery/Operational (Information / Privacy)	<p>Ontario Creates IT policies ensure the highest levels of network security. This includes annual security audits and regular updates to security infrastructure. Ontario Creates' Online Application Portal (OAP) is a state-of-the-art online program delivery system. The agency has in place clearly defined processes and protocols with regard to results tracking and reporting. Management approval is required prior to the release of statistical information. In addition, Ontario Creates has its own dedicated IT Team with someone on call at all times who can respond immediately to any breach of data or security.</p> <p>Spam alerts are regularly shared with staff via email, leading to increased awareness of potential threats and improved ability to recognize suspicious messages. OPS-level cybersecurity training opportunities are offered to staff where available. IT staff have undertaken security training, and are participating in the OPS-wide cybersecurity community of practice.</p> <p>Staff working from home are using Ontario Creates' devices with the enhanced security software installed. Network drive connection is through</p>	<p>Risk Likelihood: Unlikely (2)</p> <p>Risk Impact: Moderate (3)</p>	6	<p>Ontario Creates will continue to maintain the highest security standards for IT and network security. The release of statistical information will continue to require approval at the management level. IT staff will implement best practices from the OPS-wide cybersecurity CoP. Frequent spam alerts and cybersecurity training opportunities will continue to be shared with staff. The agency will continue to enhance security protocols and monitor network security.</p>

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#	Objective	Risk Statement	Risk Category	Existing Controls	Risk Assessment (Residual)	Risk Rating	Mitigation / Action Plan
				VPN or SharePoint in the cloud to ensure additional security. The agency's IT Team closely monitors the network and ensures the latest security protocols are being followed. Staff are alerted to spam emails and instructed to delete them. An Emergency Management and Business Continuity Plan, including an Information Technology Continuity of Operations Plan is in place.			
13	Maintaining IT infrastructure and information systems	Due to the vulnerability of the physical structures that house Ontario Creates' servers and other physical IT infrastructure such as servers, there is a risk that physical building integrity failures (such as flood or fire) could compromise Ontario Creates' IT infrastructure. As the building ages, this risk intensifies.	Delivery/Operational (Information / Privacy)	All agency data is backed up and can be restored, with limited interruption to online services while servers are rebooted or replaced and operating software and firewalls are reinstalled. The agency has moved most applications offsite including the Online Application Portal, Online Research Library and Digital Location Library. Network drives have been moved to the cloud and the agency is midway through a co-location project to move servers to a temperature-controlled secure facility offsite. The SOC report from our data storage location, Iron Mountain was reviewed in July 2021.	Risk Likelihood: Rare (1) Risk Impact: Moderate (3)	3	The agency is actively engaged in a plan to move applications to the cloud and servers to a secure offsite facility. When completed, this will completely mitigate any risks related to the physical integrity of the office. This project is anticipated to conclude in 2023.