Mississauga Creative Industries Strategy

A Report for the

Culture Division of the City of Mississauga

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Introduction

Following an RFP process, in July 2015, the consulting team of Miller, Parkinson, Keeble and McIver were retained by the Corporation of the City of Mississauga ("the City") to develop a Creative Industries Strategy.

The RFP noted that the Province of Ontario has identified the Creative Industries cluster as one of the fastest growing sectors of the economy, and that neighbouring communities to Mississauga have identified the sector as vital to their economies and growth. Creative Industries (CIs) were defined, for the purposes of the strategy, as the screen based industries of film and television; digital media; music; and publishing.

As envisaged by the RFP, the strategic plan will allow Mississauga to assess its current position within the Creative Industries, address growth opportunities and implement a forward-thinking approach to being a leader in the sector. In particular, the plan will help identify programs and services required to establish a relevant and competitive presence in this sector, and identify financial and human resources required in delivering these services efficiently and effectively.

The agreed-on multi-phase work plan for the assignment called for:

- Stage 1 – extensive consultations, research and analysis on the presence, needs and opportunities of creative industries in Mississauga and elsewhere, as well as the instruments, projects, policies and plans used by the City and other municipalities in support;
- Stage 2 – creation of an environmental assessment and preliminary recommendations; and
- Stage 3 – drafting and finalization of the strategic plan.

This document represents the final recommended strategic plan.

Executive Summary: Mississauga Creative Industries Strategy

The Opportunity in the Creative Industries

Over the last two decades, there has been an increasing public policy focus at Canadian federal, provincial and municipal levels on the creative industries as engines of economic growth.

The role of government in supporting creative industries (CIs) has both an economic and cultural rationale. Governments around the world provide grants, tax incentives and regulatory support for creative products and companies. These help mitigate the risk inherent in the production of creative works, and support both industry with its economic and employment benefits, and culture with its lifestyle benefits. In most cases, governments also seek to bring new firms and growth to their jurisdiction.

This policy focus is not without challenges. CIs in Canada are typically small and medium-sized enterprises (SMEs) that operate in a high-risk business environment. Moreover, shifts in consumption for CI products (identified here as music, publishing, television and film, radio, and interactive digital media (IDM)) have led to the emergence of new products, such as online games and applications and new business models such as online distribution and exhibition.

Creative industries are poised for growth. PricewaterhouseCoopers has predicted that global spending for media and entertainment will grow at a compound annual growth rate of 5.1% for the next 5 years reaching $2.23 trillion in 2019, compared with $1.74 trillion in 2014[1]. In Canada, internet advertising reached $3.8 billion in 2014 (from $560 million in 2005), passing television at $3.4 billion, and on its way to an estimated $4.2 billion in 2015.

Going forward, environmental factors suggest:

- Canadian film and TV production will win by maximizing export and niche production; foreign location shooting will remain strong, aided by a low Canadian dollar;
- Digital media content will exploit international market growth;
- Music should continue to rebound, with live performances key to revenue growth;
- Publishing should remain relatively stable, with digital revenues offsetting sales and advertising revenue declines on physical platforms.

Tools used by Cities to Support Creative Industries

Today, the core needs of creative industries are focused on talent. CIs rely far less on physical infrastructure than they did in the past. However, all can benefit from the kind of supportive physical environment that is a city's core concern, whether that means a venue for concert

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[1] PricewaterhouseCoopers LLP, *Global Entertainment and Media Outlook 2015-2019*.
http://www.pwc.com/gx/en/industries/entertainment-media/outlook.html

performances, a building suitable as a temporary studio, a street suitable for location shooting, or even a "hub" where talented individuals and firms can interact.

Tools used by cities to support Creative Industries can be divided into four broad categories:

1. Creation of a living/working environment that appeals to creatives;
2. Support of creative clusters or hubs;
3. Targeted tax incentives, grants or services for specific creative industry sectors, companies or institutions; and
4. Promotion, education, skills training, networking and other programs designed to build talent or general awareness.

Many successful creative cities emphasize combined effort between the municipal authority, other levels of government, the industry and private sector investors.

Inspiring Work and Living Spaces

Creative industry companies and people are portable; creatives go where good working and living environments are to be found. That emphasizes all the city planning basics: a mix of neighbourhoods, solid transit, convenient shopping and vibrant entertainment options.

In some cases, City governments have launched policies and programs to make it easier for creative industries to flourish. Berlin and London are examples of cities that began to identify themselves as homes for the creative industries in 2004/5 and worked with those industries to incent growth.

Creative Clusters

Creative people want to be part of an environment that feeds the creative aspect of their personalities. A big part of that is being with other creative people.

The policy of supporting Creative Clusters – geographic concentrations of interconnected Creative Industries and related suppliers and services – became central when the Province of Ontario's Ministry of Tourism and Culture adopted it in 2006.

Its application at the City level is the encouragement, designation, or creation of specific areas and "hubs" for creatives to work in. Some successful examples of such hubs including CIs include:

- Toronto - Ryerson's DMZ, formerly Digital Media Zone, and now considered to be one of the foremost start-up incubators in North America, if not the world;
- London, UK's The Trampery. Four sites across London for music and film as well as technology, featuring co-working spaces, events, matchmaking for collaboration, meeting rooms, and Incubator programs.

Targeted Incentives

The use of targeted incentives can be specific to creative industries, but can also target areas, or types and sizes of enterprise typical of creative industries. The measures used depend on the needs identified and the powers available to a city. They include:

1. Relief from property taxes &/or tax credits;

2. Supporting regeneration with the inclusion of creative and cultural organisations or spaces as part of the strategy or as the main driver for the regeneration project;

3. Capital &/or operating investment in venues, design centres etc;

4. Procurement practices that prioritize local CIs;

5. Use of city facilities or buildings on preferential terms; and

6. Business start-up finance in loans or grants, either directly funded or public private partnerships with investors.

Building Talent and Awareness

Governments take pride in the achievements of their citizens when these individuals achieve international recognition. However, without earlier stage support at the local level, such achievements are impossible. Unfortunately, cities often are unaware of the development journey in the cultural industries until recognized by a major national or international award.

This general lack of awareness is usually echoed in a lack of support. It can, however, be redressed through a combination of municipal marketing, advisory and support measures, leveraging provincial and national support programs. Areas include:

1. Marketing – Creative Cities promote their creative community through e-bulletins, websites and press releases to develop public awareness of local talent and of the City's commitment to it. The key to success is to ensure authenticity on the basis of grassroots creative activity and City support. A successful Creative Hub or Network is often the nucleus of such marketing.

2. Business start-up advisory services – Cities provide this across all industries to develop business skills and knowledge. The key is to provide specific knowledge of the creative industries, their business models, IP issues, markets, and risk management techniques, which is often lacking in general programs.

3. Film Location Offices – City Film Location Offices pro-actively market their cities to local, national and international productions, broker interest to secure the work and then connect the production to local crew, production companies, talent, home or site owners and service providers.

4. Creative Networks – Creative Cities bring together the creative community, hosting their workspaces or meeting spaces, and support their co-trading, skills sharing and peer mentoring, often with a network manager. A Creative Network also provides the opportunity for city officers to know their creative community and work together.

5. Skills Initiatives and Entry to Industry – Creative Cities also invest in skills development for CIs, e.g. partial salary support for creative apprenticeships and internships, hosting international exchanges, and leadership training programs.

All of these measures contribute to talent retention (a key issue for Mississauga) and enhance a city's attractiveness to business head offices and employers seeking to locate where there is a local nexus of talent, and where external talent can be attracted. Some of these practices may be appropriate for Mississauga.

Barriers and Assets

Mississauga's Strengths and Weaknesses as a Creative Industry Magnet

Mississauga's primary strengths were identified in consultations as:

- Proximity to Toronto, the airport and Kitchener/Waterloo;
- Lower cost real estate than Toronto; and
- A lifestyle that appeals to families.

Mississauga weaknesses included:

- Proximity to Toronto (pulls talent downtown; most creative companies are there);
- Transit (subway access; timing and location of Go Train service);
- Negative bias for lifestyle from young single creatives ("not cool").

Mississauga's proximity to Toronto is a unique "blessing and curse". There is no Canadian and virtually no international example to emulate. Regardless, these attributes suggest that a Mississauga Creative Industry Strategy must incorporate these realities into its framework:

1. **Only certain creatives and CI companies** can be attracted to work &/or live in Mississauga.
2. **Different areas of the City can attract different creative industries.** Warehouses near the airport may be useful for studio space; "cooler" neighbourhoods in Lakeview, Port Credit, Streetsville and downtown Mississauga may attract music, IDM and TV producers, especially if transit links are improved.
3. **Those already living or working in Mississauga offer the best potential.** The people to lead growth are those that already know Mississauga. This includes a large pool of musicians, animators, designers etc. who are studying or starting their careers here; currently employed CI executives and workers who would rather not commute to Toronto; and Mississauga CI companies that would be open to moving from Toronto.

Creative Industries in Mississauga

The Consultants identified approximately 160 CI and CI Service companies (companies that create media content or whose activities directly enable such products) in film, television, digital media, music or publishing based in Mississauga.

Mississauga CI companies (CICs) match the Ontario profile for SMEs; mostly under 100 employees with the majority under four. Total employment can be reasonably assumed at around 2,000 FTEs. With this profile, recruiting 10 new CICs to Mississauga over the next three years would only represent a 6% increase but it could increase sector employment by 20% or more and materially benefit the entire ecosystem.

These numbers, however, do not reflect one of Mississauga's greatest assets: creative industry leaders. Many leaders in our consultations lived, worked and/or have historic connections to Mississauga. In addition, at a more "grassroots" level, the enthusiasm of respondents for their City and its potential is a tangible asset.

A Strategic Approach for Mississauga

Mississauga's Basis in Strategy

A Creative Industries Strategic Plan rests on a platform of already well-developed City strategies. A key starting point is the City's Strategic Plan, which articulates Mississauga's Strategic Goal as "To attract innovative business, to be a dynamic urban environment that is the preferred location for innovative, creative and knowledge-based businesses and emerging industries." This goal, confirmed by Mayor Crombie's desire that Mississauga become a "hub of innovation and entrepreneurship" is perfectly aligned with a Creative City concept.

The City's Economic Development strategy seeks growth in Innovation Industries, a category that includes Creative Industries, so it too, is aligned with the proposed CI strategy. Many of the papers and strategies accompanying EDO's work have been considered in the development of this strategy.

In September, 2015, City Council adopted a new Cultural Policy containing these priorities:

- improving connections between subsidized and profit driven creative enterprises;
- offering guidance and support to Arts and Culture organizations;
- increasing affordability and sustainability of cultural spaces; and
- supporting the development of physical and virtual creative clusters.

Creative Industries and Mississauga's Economic Development Strategy

While CIs are, as noted above, a subset of Innovation Industries, their specialized nature, smaller size, and risk profiles mean that, with the exception of Digital Media, they are not expressly reflected in the City's economic development strategy. That said, as noted by EDO, a Creative Industry strategy can harmonize with the City's economic development strategy. In part, this is because measures designed to assist Innovation Industry firms also tend to work for CIs.

But a CI strategy contributes in another way, too.

By pursuing the cultural goal of making Mississauga a more attractive place to live and work, a CI strategy contributes to the retention of talent not only among creatives but among the kind of young talent that is needed to drive tech and other Innovation firms. In this way, economic and cultural goals align perfectly – indeed work best - together.

Moreover, Digital Media is a sector that will benefit from the attention of both departments, working in collaboration, and with strong two-way communication with all areas of the City government whose initiatives can contribute to the development of CIs.

Tools Available to Mississauga to Attract and Support Creative Industries

Mississauga's position - as the 6th largest municipality in Canada, with a population of 750,000 (2014), next to Toronto with municipality in Canada of 2.8 million, and within a broader GTA of 6.5 million – has no direct parallel anywhere.

In looking at instruments that the City of Mississauga could adopt, we therefore considered concrete examples from a variety of cities. These included London, Belfast, Birmingham, Berlin, Barcelona, New York, Austin, Edmonton and, nearer to Mississauga – Toronto, Hamilton, Sudbury and Kitchener.

All of the four types of tools used by cities are theoretically available to Mississauga. In practice, however, we believe that some of these tools may not be realistic options for the City.

In particular, we understand that:

- The city's budget reserves are limited and are expected to be fully allocated to transit and other priorities;
- Any new funding for Creative Industries will effectively have to come from increases in the municipal property tax base or from borrowing.
- The City's support for creative and cultural endeavours has historically been financed through:
  - Investments in city-owned property (e.g. Celebration Square & Living Arts Centre);
  - Operating grants directed to non-profit groups and organizations; and
  - Grants or land subsidies for academic institutions such as UTM and Sheridan College.
- The City has never granted property tax breaks for specific companies. Certain categories of property may have more favourable tax rates, but this is based on their location, zoning and use, not on particular industries or companies;
- The City has never issued grants or subsidies to private companies; and
- Defining permissible activities, through zoning and other bylaws, has been the primary tool used by the City to attract Creative industries - the ability to location shoot, use a building as studio, have a home office as a CI sole proprietor, and so on.

In other words, the City's support for Cultural Industries to date has been relatively "passive". The City has created general conditions that have attracted certain CIs, and has met specific CI demands, when necessary, to enable activity, such as location shooting.

We understand, however, that the City may be prepared to consider more active measures to support, retain and attract Creative Industries. Such measures might include:

- Greater promotion, marketing and recruiting of potential CI companies;
- Investments in City owned or leased property that can be recouped through demonstrable economic returns, such as increases in land value and higher property taxes;
- Exceptional arrangements to encourage private CI investment in properties that would otherwise be vacant, and pay little or no property taxes; and
- Transitional use of underutilized City facilities or property that is expected to be developed in perhaps seven to ten years;

This context has guided us in the specific recommendations of the Report. Appendix 1 contains a Detailed Summary of those Recommendations, which include:

Recommendation 1: Position Mississauga as an innovative creative city, a "digital" city

- Promote Mississauga's Creative Industries sector and reputation through select general and specific profile raising and marketing activity.

- Encourage the development of high-speed, high bandwidth broadband networks to meet the industry's current and future needs;

Recommendation 2: Establish a Mississauga Creative Industries Advisory Forum (MCIAF)

- Provide the City with guidance and expertise from Mississauga Creative Industry leaders in the ongoing execution of the City's Creative Industries strategy.

- Comprised of eight to twelve members including Council representation, Chief Executives or senior managers of respected CI businesses that have a connection to Mississauga; leaders of creative trade bodies, Deans of the CI departments of UTM and Sheridan College and Senior Staff representatives of the Culture Division and EDO.

Recommendation 3: Target Sector-Specific Measures for Screen-based Media

- Promote and remove barriers to location shooting in Mississauga, by aligning policies with Toronto, and in particular, relaxing the requirement for approval of 80% of affected residents in the case of more than two Film Permits being issued in the same year

- Consider the development of an incubator for Interactive Digital Media, or more broadly based digital media (IDM and IT), in order to promote this sector's growth and strength in the City.

Recommendation 4: Target Sector-Specific Measures for Live Music

- Recognize live music as a key factor in growing CIs and in the retention of young talent in the Creative and other industries that the City is seeking to grow.

- Help to build live music scene from ground up, with advice, co-ordination, promotion and indirect assistance to venues, promoters and festivals.

- Add music and festival officers to advise and develop the live events and music sector

Recommendation 5: Facilitate the development of the City's creative talent

- Creation of a "Creative Network" to support talent in a localized manner, and encourage identification with a Mississauga creative industry community.

- Celebration of local achievements in the form of an annual gathering, with awards or recognition of local excellence, in order to promote local talent and skills.

- Promote skills training available in Mississauga, and consider surveying creative and cultural sector skills needs.

Recommendation 6: Develop industry specific creative clusters

- Encourage and promote the development of creative industries in select/appropriate geographic areas (nodes). For example, Lakeview and City Centre for IDM, Port Credit and Streetsville for music and CI's generally, and the Airport for warehouses and studio space.

- Support the establishment of Creative Industry hubs with appropriate facilities in creative nodes – offices for small businesses, co-working space for freelancers, meetings rooms, broadband and a café.

- Evaluate the potential for an Incubator (per Rec 3) in partnership with academic institutions and industry players and/or alongside creative hubs

Recommendation 7: Develop Public Private Partnerships to build creative industry spaces

- Develop partnerships with supporting public agencies and key private firms.
- Pursue federal infrastructure monies for capital intensive projects.
- Consider expanding studio space, including exploring the feasibility of soundproofing warehouses near the airport

Budgetary Considerations & Priorities

As noted above, we are cognizant of Mississauga's limitations, both in resource and budget realities, and in legislative restrictions that inhibit certain modes of support. We therefore believed it to be important to be both realistic in recommendations and to recommend that the City leverage potential private and public partners to the greatest extent possible in its implementation of the measures recommended herein.

Detailed Strategy

Part 1 – Broader Context

Creative Industries Globally & Nationally

The context in which Ontario, Canadian and international creative industries find themselves today is primarily defined by three factors:

1. The growing understanding, over the last two decades, among policymakers around the world, of the complex web of interactions which exist among the creative economy, cultural identity, innovation and economic growth;

2. The massive technological change affecting information, entertainment and culture, manifesting itself in the Internet, mobile networks, smartphones, tablets, social media and other platforms; and

3. Modest economic growth and constraints in government funding.

Material consequences of these three factors include:

- Increasing public policy focus on the cultural and creative industries as engines of economic growth;

- Competitive impacts on traditional media sectors and creative industries, including music, publishing and conventional television, and increasingly, specialty television, radio, film and television production; and

- The emergence of new digital media products such as online games, as well as applications and new business models such as online distribution and exhibition.

Shifts in consumption and funding of the five identified creative industries, and the other factors noted above, will have a major impact on what Creative Industry policy approaches will be successful in the future.

Implications for Canadian Creative Industries

Global and Canadian market evidence suggests that while traditional cultural and media sectors such as broadcasting, film, and publishing remain relevant; growth in digital media products and platforms is increasingly coming at the expense of traditional media. Accordingly, public policy makers at all levels are seeking to retain cost-effective support for traditional media while adapting to and encouraging new digital business models[2].

PricewaterhouseCoopers has predicted that global spending for media and entertainment will grow at a compound annual growth rate of 5.1% for the next 5 years reaching $2.23 trillion in 2019,

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[2] Decisions in the 2015 Ontario Budget can be seen as conforming to this view.

compared with $1.74 trillion in 2014, with growth being concentrated on digital media platforms and associated consumption[3].

In Canada, having previously passed print and radio, internet advertising reached $3.8 billion in 2014 (from $700 million in 2005), passing television at $3.4 billion, and on its way to an estimated $4.2 billion in 2015. Mobile advertising has grown from nothing in 2005 to $900 million in 2014. Moreover, the lag between consumption and revenue in digital products suggests that even if consumer adoption of digital media were to slow down (a development that is not anticipated), internet advertising revenue growth, and its increasingly negative impact on traditional media, will strongly continue for some time[4].

Canada is known around the world for its music and books, driven in part by their relatively low cost of production and the existence of Canadian music quotas on domestic radio. However, Canada has historically underperformed many other countries on return on investment (ROI) in indigenous film and television for two principal reasons:

1. The challenge of amortizing the high costs of creative content production over a relatively small population base; and

2. The lower appetite/demand/need in English Canada for indigenous or "home grown" fare (i.e. Most Canadians are relatively happy with American film and television content).

Going forward, environmental factors suggest[5]:

- Mainstream Canadian film and TV production will be challenged, but there may be opportunities in certain niches, and there will be winners in those companies that can maximize export;

- Opportunities in service production and foreign location shooting should remain strong, as long as the Canadian dollar stays low;

- Greater focus on scalable, often less costly, internationally-driven digital media content[6] should pay dividends with international market growth;

- Music should continue to rebound, with live performances key to revenue growth[7]; and

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[3] PricewaterhouseCoopers LLP, *Global Entertainment and Media Outlook 2015-2019*.
http://www.pwc.com/gx/en/industries/entertainment-media/outlook.html

[4] Figures are from the Internet Advertising Bureau (IAB) annual advertising survey, 2014.
http://iabcanada.com/research/revenue-reports/ Regarding lag, for example, mobile media are estimated to occupy roughly 10% of consumer time but only 1% of media spend. This lag is also illustrated by the recent US$18 billion IPO of Twitter with 230 million active users, but little more than US$300 in 2012 revenue.

[5] OMDC Industry Profiles also provide a good snapshot:
http://www.omdc.on.ca/collaboration/research_and_industry_information/industry_profiles.htm

[6] Quality film and television production is inherently expensive, with budgets in the hundreds to millions of dollars per hour. Digital media can range from $200 million budget games to $10,000 to $100,000 mobile apps. The ability of Canadian IDM producers to pick their niche among these cost ranges gives them a huge advantage.

[7] Much can be said about the collapse of the music business, but with digital revenues exceeding physical sales, revenue generating streaming services, and the success of the GTHA as a top North American Music destination, things are looking up.

- Book publishing should remain relatively stable with digital revenues largely making up for any negative impacts from the Internet[8]; periodicals have experienced ad revenue declines, which are being partially offset by online editions.[9]

Needs of Creative Industries

Historically, creative industries needed scale, extensive infrastructure and had significant barriers to entry. Beyond the creative and business side, creative industries needed big production, recording and editing studios; book, CD & DVD distribution arms and warehouses.

Today, the core needs of creative industries can be reduced to one simple equation: talent + broadband = innovative creative products.

This equation defines the core of digital media and the future of all other creative industries. Today, even traditional creative industry businesses rely far less on their ownership of infrastructure than ever before. Internet distribution is replacing physical distribution of cultural products. Today's desktop computers can do what $50,000 editing suites did ten years ago. And, when required, rental of third party facilities – fulfilment, locations, equipment[10], studio space, special effects, high-end editing and rendering – can replace the need for ownership.

The role of government in supporting creative industries has both an economic and cultural rationale. National/federal and state/provincial governments around the world provide grants, tax incentives and regulatory support for creative products and companies to help mitigate the risk inherent in producing cultural products, and thereby support both domestic industry and culture.

Tools used by Cities to Support Creative Industries

Tools used by cities to attract and support Creative Industries are both general and specific, and can be divided into four broad categories:

1. Creation of a living/working environment that appeals to creatives;
2. Support of creative clusters or hubs;
3. Targeted tax incentives, grants or services for specific creative industry sectors, companies or institutions; and
4. Promotion, education, skills training, networking and other programs designed to build talent or general awareness.

We briefly describe these categories of tools further below, with reference to notable Canadian and international examples.

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[8] Profit margins from e-book sales are sufficiently high that they appear to mitigate against any reduction in hard cover sales. Evidence also shows that Millennials do not "pirate" books, the way they pirate TV shows.

[9] For example, for Rogers, "Texture" has replaced the combined magazine initiative "Next Issue", in an attempt to boost revenue to further offset these declines. See: http://www.theglobeandmail.com/report-on-business/rogers-new-magazine-app-caters-to-digital-reading-habits/article26599368/

[10] The latest trend being "maker spaces" which allow creators to turn ideas into functioning realized products or prototypes. While there are a number of such facilities in Toronto, there do not appear to be any in Mississauga. http://www.blogto.com/tech/2015/01/the_top_5_maker_spaces_in_toronto/

Many of the initiatives in successful creative cities are a combined effort between the municipal authority, other levels of government, the industry and private sector investors. Case studies[11] illustrate direct and indirect mechanisms used to assist the growth of creative industries, with evidenced outcomes, providing useful examples for consideration.

It is hard to determine from afar the keys to how other cities achieve their success - for example the varying degrees of intensity of involvement of each partner, or the significance of the advocacy of one key player, and who were the key players in how these cities developed as leaders - which would require direct experience of the cities in question to appreciate fully the process and importance of various actions.

Cities can also have unique circumstances that make comparisons misleading. Mississauga's own position - as the 6th largest municipality in Canada, with a population of 750,000 (2014), next to Toronto with municipality in Canada of 2.8 million, and within a broader GTA of 6.5 million – has no direct parallel anywhere.

We therefore considered, as more directly relevant, cities that provide concrete examples of instruments that the City of Mississauga could emulate within its direct scope of influence[12]. This included London, Belfast, Birmingham, Berlin, Barcelona, New York, Austin, Edmonton and nearer to Mississauga – Toronto, Hamilton, Sudbury and Kitchener[13].

Inspiring Work and Living Spaces

Creative industry companies and people are increasingly portable. Minimal infrastructure needs (beyond normal office space and broadband) means that companies can basically locate anywhere as long as they can attract and retain the right talent. Creatives are, by nature, adventurous – they are not of the type who tends to be born, live and die in the same place. They will go where good working and living environments are to be found.

This suggests that the most important thing a City can do (and some would say the only thing a City *should* do) is to create a place where people want to live and work. In other words, the primary focus should be on people, not companies.

That means all the basics of great city planning. A great mix of neighbourhoods, solid transit, convenient shopping and vibrant entertainment & cultural options. It means having the right elements, in the right balance, that make a city a great place to be.

And it means determining which aspects of city planning are the most important to be addressed, and in what way, *for creative*s.

In some cases, City governments have made specific choices of policy and programs, beyond their normal activities, to make it easier for creative industries to flourish. Berlin and London are

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[11] CITIE 2015, for example. (A Charitable-corporate partnership between Nesta, Accenture and the Future Cities Catapult) http://citie.org/2015-results/

[12] These were typically Cities in which one or more of the members of the Consulting Team had some experience, and/or could identify specifically the role played by the city council.

[13] Links to and examples of the strategies and instruments used by these cities of which are in a separate appendix.

examples of cities that began to identify themselves as homes for the creative industries in 2004/5 and worked with those industries to promote themselves[14].

In other cases, "seeds" have been planted by political action of a diffuse nature. For example, the CITIE 2015 Report[15] notes that for technology, innovation and entrepreneurship, the best cities in terms of their roles as strategists, hosts, digital governors, investors, connectors, advocates, datavores, regulators and customers are: 1. New York, 2. London, 3. Helsinki, 4. Barcelona and 5. Amsterdam.

Creative Clusters

Creative people want to be part of an environment that feeds the creative aspect of their personalities. A big part of that is being with other creative people.

The notion of supporting Creative Clusters – geographic concentrations of interconnected Creative Industries and related suppliers and services - comes both from modern business theory[16] and concepts of the *Creative City*, *Creative Economy* and *Creative Class[17]*. It received considerable support from the Province of Ontario, when in 2006, the Ministry of Tourism and Culture adopted a cluster-based approach to the development of cultural industries[18] and forming partnerships across the Ontario government.

Its application at the City level is both the general liveability/workability aspect noted above, and the encouragement, designation, creation of specific areas and/or hubs for creatives to work and/or live.

Some of the more successful examples of such hubs across Canada and around the world (including, but not necessarily, Creative Industry hubs) are:

- Toronto - Ryerson's DMZ, formerly Digital Media Zone, and now considered to be one of the foremost start-up incubators in North America, if not the world;
- Kitchener's Communitech. Opened in 2010, and a broader tech hub dedicated to collaboration and innovation;

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[14] In both those cases, much of the drive came from creative industry leaders already resident in the city. Contentious Urban Governance: the Case of Berlin's Creative Industries, Janet Merkel, 2013.

[15] http://citie.org/2015-results/

[16] In The Competitive Advantage of Nations, Michael Porter defined business cluster as:

...geographic concentrations of interconnected companies, specialised suppliers, service providers, firms in related industries, and associated institutions (for example, universities, standards agencies, and trade associations) in particular fields that compete but also co-operate.

[17] Richard Florida being most known to Canadians for such works as The Rise of the Creative Class and Cities and the Creative Class.

[18] Defined by the province here as including companies in the film, television, publishing, music, commercial theatre and interactive digital media industries. See *Ontario's Entertainment & Creative Cluster: A Framework for Growth*, Ontario Ministry of Tourism and Culture, 2010.

- <u>London, UK's</u> The Trampery. Four sites across London for creative and tech industries. Hub with music and film as well as technology. Co-working, events, matchmaking for collaboration, meeting rooms, Incubator[19];
- <u>Edinburgh</u> CodeBase. The largest tech hub in UK, digital software and interactive media, offices, co-working, hot desking space, website, events, mentoring and pro-active partnership with investors and with Innovate UK;
- <u>Rotterdam</u> - Creative Factory. Hub for creative companies, co-working, meeting rooms, internships, research to support company growth;
- <u>Madrid</u> - Factoria Cultural. Creative co-working space in a cultural building, exhibition space, seminar rooms, meeting spaces, conference space; and
- <u>Amsterdam</u> - Workspace6. Creatives and Coders Hub with 4 offices, co-working, with pods in co-working areas as well, meeting rooms, events, central space.

Targeted Incentives

The use of targeted incentives to support creative industries is an increasingly common strategy of Cities that want to maintain and grow those industries, and generally attract creatives.

Such measures can be specific to creative industries, but can also target areas, or types and sizes of enterprise typical of creative industries, more generally.

A variety of different measures are used, depending both on the needs identified by cities in question and the powers available to them. They include:

1. Relief from property taxes &/or tax credits;
2. Supporting regeneration with the inclusion of creative and cultural organisations or spaces as part of the strategy or as the main driver for the regeneration project;
3. Capital &/or operating investment in venues, design centres etc;
4. Procurement practices that priorize local CIs;
5. Use of city facilities or buildings on preferential terms; and
6. Business start up finance in loans or grants, either directly funded or public private partnerships with investors.

After analysis, some but not all of these practices may be appropriate for Mississauga.

Building Talent and Awareness

Governments tend to take pride in the achievements of their citizens in all walks of life, but particularly in science, technology, innovation, sport and creativity. This often happens when these individuals achieve international recognition or fame. Obviously, however, without earlier stage support and recognition at the more micro local level, such achievements are impossible.

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[19] London has at least three other significant hubs. Silicon Roundabout at Shoreditch is arguably the most famous, but it is a cluster not a hub.

Unfortunately, cities often do not know the individuals that make up their creative community and are unaware of their development journey or even international achievements in their various sub-genres of the creative and cultural industries – not until the point of winning a major national or international award.

This general lack of awareness is usually echoed in a lack of appropriate support. Both can, however, be relatively easily redressed through a combination of municipal marketing, advisory and support measures, which typically leverage state and national support programs. Areas include:

1. Marketing – Creative Cities promote their creative community, their events, and their achievements through e-bulletins, websites and press releases and develop a public awareness of local talent and of the City's commitment to it. Such cities often lead their entire City's public identity with creativity if that is felt to be pre-dominant or is in the process of being actively developed; the key in the latter is to take that step when there is sufficient grassroots creative activity and City support to reflect a genuine creative ethos and ensure authenticity in the image. A successful Creative Hub or Network is often the nucleus of such identification.

2. Business start-up advisory services – Cities provide this across all industries and provide general business seminars in leadership, marketing, accounting systems and business law. However creative industry practitioners often do not rate these services highly, as they may find these services lack knowledge of their industries, their range of business models, IP issues, and markets[20]. Creatives may turn to the local Arts Council, even though officers have limited knowledge of business development, because at least they generally feel better understood. (In Scotland, the enterprise agency established the Cultural Enterprise Office to bridge this gap. It provides customized business start-up advice and mentoring for creative and cultural practitioners to address these issues[21].)

3. Film Location Offices – City Film Location Offices pro-actively market their cities to national, international and local productions, broker interest to secure the work and then connect productions to local crews, production companies, talent, home and site owners and service providers. The film office promotes the city through filming news coverage and develops international reputation through the film location networks and through word of mouth of producers. Their activity helps build its national and international reputation, draw in work to the city, and support local talent.

4. Creative Networks – Creative Cities bring together the creative community, hosting their workspaces or meeting spaces, and support their co-trading, skills sharing and peer mentoring, often with a network manager. This support for their Creative Network is invaluable to creative practitioners as it reduces isolation, allows the sharing of skills and equipment, and often catalyzes ideas leading to business development and innovation. A Creative Network also

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[20] The generic business advice of standard business advisory services tends to be of limited utility to CIs.

[21] www.culturalenterpriseoffice.co.uk

provides the opportunity for city officers to meet and get to know their creative community and a forum to discuss how they may work together to develop the industry.

5. Skills Initiatives and Entry to Industry – Creative Cities also invest in skills needs and gaps in order to support the creative and cultural industries, for example, investing partial salary support for creative apprenticeships and internships to enter the industry, hosting and funding international exchanges with skills and knowledge development as integral elements of the programme, and leadership training programmes to support creative and cultural leaders (who more often than not are practitioners with a natural capacity but no training for leading an organisation or business). Some sectors have very specific skills needs and will work with the City or Arts Council to design an initiative in partnership to address them.

All of this contributes to talent retention (a key issue for Mississauga) as well as enhances a city's attractiveness to business head offices and large employers seeking to locate where there is a local hotbed of talent, and where external talent can be attracted.

Part 2 – Mississauga Context

Mississauga Strategic Plans

A Creative Industries Strategic Plan must take its place in the context of broader strategic goals for Mississauga.

A key starting point is the City's Strategic Plan, which articulates Mississauga's Strategic Goal as "To attract innovative business, to be a dynamic urban environment that is the preferred location for innovative, creative and knowledge-based businesses and emerging industries."

This goal was confirmed in Mayor Crombie's Inaugural address, where she stated:

> *To compete globally, we must also be the forefront of the knowledge economy and become a hub for new ideas and new business. Mississauga can become this hub of innovation and entrepreneurship, if we put in place the necessary supports and bring together the leaders in these sectors.*

> *Our innovators should not have to look outside our borders for supports but should be able to take their ideas from concept to commercialization right here in their own backyard.*

The City of Mississauga's Culture Master Plan was adopted in 2009. The City's Culture Division oversees the implementation of the Master Plan. The Plan identifies goals to attract and retain talent and foster innovative businesses. It also calls for collaboration between the Culture Division and other city departments, such as Economic Development, to achieve these goals.

In addition to the Strategic Plan and the Cultural Master Plan, there exists a range of other plans, strategic studies and initiatives adopted by the City that are relevant to Creative Industries – which are after all, a subset of the Innovation Industries sought by the City's Economic Development strategy. We have considered these in the course of creating this strategy, in particular:

- Digital Media Profile (Mississauga's Business Location Advantages)
- Economic Development Strategy (Building on Success)
- LAC Meadowvale Study (2011)

- An Action Plan for Innovation in Mississauga
- Employment Land Review Study (2008)
- "A Dialogue on Talent" 2013
- Advantage Mississauga Report 2013-2015

The Cultural Master Plan (CMP) identifies the Creative and Cultural Economic Sector (CCES) as structured around three interconnected layers of activity and products, Creative Core, Cultural Industries and Creative Services.

The Creative Core focuses on the production of "originals" and "experiences", e.g. live theatre, dance, music and heritage. Strategies for advancing these activities and industries, primarily involving individual artists and not for profit groups, are outside the mandate of this study.

Creative Services were identified in the CMP as those services based around providing creative services to clients, earning revenue through fee-for-service and providing IP that has a high degree of both expressive and functional value. These were not the primary focus of this study, but are clearly an important part of the ecosystem.

We have also taken note of the fact that in September, 2015, City Council adopted a new Cultural Policy[22]. Creative Industries[23] priorities noted therein included:

- improving connections between subsidized and profit driven creative enterprises;
- offering guidance and support to Arts and Culture organizations;
- increasing affordability and sustainability of cultural spaces; and
- supporting the development of physical and virtual creative clusters.

The primary focus of this study is Cultural or Creative Industry (we use the term interchangeably, although we prefer the latter) companies in film and television, digital media, music and publishing. These include, for example, film and television production, broadcasting, recording companies, book and magazine publishers, computer games and leisure software.

The Economic and Cultural Benefits of Supporting Creative Industries

Ultimately the decision to support creative industries is neither purely an economic nor a cultural one. It is always some combination of both.

By traditional economic measures, support for creative industries is not necessarily an easy sell. Creative industry firms in Canada are typically small and medium sized enterprises (SMEs)[24] that

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[22] http://www.mississauga.ca/portal/discover/artsandculture

[23] For the purposes of this policy, Creative Industries are defined as "businesses and individuals that use talent, creativity and skill in order to produce tangible and intangible goods, which are usually protected by copyright and require constant adaption. Examples include, but are not limited to, advertising, architecture, arts, antiques, crafts, design, fashion, film, photography, software, computer games, electronic publishing, music, visual and performing arts, publishing, television and radio." This is a broader definition than that used in this Plan.

[24] Typically defined as non-subsidiary, independent firms which employ fewer than a given number of employees. This number varies across countries. The upper limit designating an SME used by the Governments of Ontario & Canada is typically 500 employees, with a 100 employee threshold being the upper limit for small enterprises. SMEs accounted for

operate in a high-risk business environment where products seem intangible and most do not recoup their investment. CIs are hit-driven businesses, where only one out of ten products might be considered a strong commercial success. And yet that one hit can make up for the losses of all previous "failures".

That said, some creative industries, notably interactive digital media (IDM), which includes gaming, can have useful economic development potential as well as cultural benefits. Such sectors will benefit from the combined attention of the City's Economic Development Office (EDO) as well as its Culture Division. Moreover, a Creative industry strategy harmonizes with the City's overall economic development strategy in that it contributes to attracting talent useful in all industries.

If projecting the economic value proposition of creative industries is hard, quantifying the cultural value proposition is harder still. Even tangible metrics, such local attendance, box office or consumption available to other cultural sectors, are not necessarily available for all creative industries. Ultimately it is a matter of assessing how much the community itself values the presence of CIs, and the extent to which the presence of a diversity of creatives and creative industry companies enhances the liveability and workability of a City.

Creative Industries in Mississauga

The City of Mississauga's annual business survey identifies over 1100 "creative cultural businesses" employing 23,000 people.

The subcategories used to identify these businesses and workers have not been examined in detail by the consultants, but a review of identified companies reveals that they include such businesses as advertising companies, designers, architects, computer systems designers, software publishers, photographers, video rental storefronts and tattoo parlours.

While some such businesses can reasonably be classified as Creative Service companies for the Creative Industries under study, many may have no more relevance than accountants, lawyers and staffing firms[25]. For our purposes, we therefore sought to identify true Mississauga based Creative Industry companies, including strongly related Service Companies, within the sectors under study[26]. Our definition of such creative industry companies (CICs) is film, television, digital media,

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99.8 percent of all Ontario businesses (98.2 percent of all Canadian businesses) and typically are "micro-enterprises" with four or fewer employees.

https://www.ic.gc.ca/eic/site/061.nsf/eng/h_02103.html#footnote1

https://www.ic.gc.ca/eic/site/061.nsf/eng/02804.html

http://allontario.ca/2012/05/ontario-profile-small-businesses/

[25] We ultimately prefer an adaption of terminology similar to that used in the 2012 Canadian Interactive Profile. Creative Service companies or "peripheral" companies should be considered to be those that (a) create products or provide services that are related to media content and/or (b) provide generalized services that may be used by CI companies. "Supporting" firms would be defined as those that offer support to the industry (e.g., accountants, lawyers, staffing firms), but should not be included under the definition of Creative Services.

[26] Companies were first identified with help from the Ontario Book Publishers Organization, Magazines Canada, Association of Canadian Publishers, Music Ontario, Canadian Independent Music Association, Film Ontario, Canadian Media Producers Association, ACTRA, Computer Animation Studios of Ontario, Toronto Animation Directory, Toronto Animation Arts Festival International and Interactive Ontario. These are companies who are invested enough in their

music or publishing companies that create media content (or whose activities directly enable such products)[27].

Based on data received, as at 2015, we identified 159 such companies with the following breakdown[28]:

- 29 film/television companies[29]
- 45 digital media companies[30]
- 27 music companies
- 58 publishing companies

Mississauga CICs are virtually all SMEs, with the vast majority in the small (under 100 employee) category[31]. Mississauga's CIC profile appears to match that of Ontario SMEs generally, that is, with the majority being enterprises of less than four employees. Assuming that to be the case, total employment at Mississauga CICs is likely on the order of 2,000 FTEs[32], with the top twenty companies accounting for as much as 50% or more of employment [33]

This relatively small number of CICs (compared to the 1100 identified "creative cultural businesses") can be seen as a weakness or an opportunity. It is certainly a relevant factor in determining what is achievable in a Creative Industry Strategy.

Recruiting 10 new Creative Industry Companies to Mississauga over the next three years would only represent a 6% increase in Mississauga CICs but could increase CIC employment by 20% or more over a relatively short time frame, and materially benefit the entire ecosystem.

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industry to become members of trade associations, and revealed 94 CICs. To this we added IDM companies identified in Economic Development's ICT list and through the Yellow Pages. Finally, we reviewed the creative companies in the culture map database and included those CICs that are within our scope and definition.

[27] One can take an expansive or narrow definition of a service company whose activities directly enable creative products. For the purpose of our database, we took a more narrow definition, and therefore included only service companies whose *primary* activity was to directly enable creative products. We use the word "company" to inclusively include all enterprises, corporations and sole-proprietorships.

[28] See Appendix 2 for list of Companies. For the purposes of this itemization, 6 radio stations and 7 TV stations were included in music and film/TV respectively.

[29] As is commonplace in the industry, we do not separate film and TV for the purpose of this analysis, given that the distinctions are not, at this level, material and companies often do both, at least over time.

[30] Includes web development & design companies from the list of ICT companies created by economic development. Those that were listed as software, hardware and consulting companies were not included in this list, but it is recommended that they be added from the ICT list into the Culture Map.

[31] Only one Mississauga CIC appears to be in the medium sized category, Metalworks.

[32] This could easily be +/- 1000 FTEs.

[33] It is typical to experience difficulty in quantifying the size of creative industry activity. As noted by Merkel (Contentious Urban Governance: The case of Berlin's creative industries) "They are mainly small sized firms (80% of all businesses have less than 5 employees, … and have a high share of self-employed people or freelancers, which makes it difficult to coordinate them and even to know how many there are … A high share of these businesses is officially 'invisible' because they work below the VAT [ed. value added tax, or, in our terms, sales tax] lines and hence, are not measured statistically.

It is also important to recognize that CIC numbers fail to reflect one of Mississauga's greatest Creative Industry assets: creative industry leaders. Through our consultations, we were pleasantly surprised how many leaders in the industry lived, worked &/or have historic connections to Mississauga. The leaders of such enterprises as Canada Music Week, Corus' Kids Can Press and Blue Ant Media are among those consulted who not only had a direct connection to Mississauga, but welcomed a Mississauga Creative Industry Plan and offered to help. On a smaller scale, participants and leaders in the grassroots music scene in Mississauga also expressed enthusiasm for a CI strategy. While there may not be a large base of CICs to work with, the enthusiasm of Mississauga residents for the area and its potential is a tangible asset that can be used.

Mississauga's Strengths and Weaknesses as a Creative Industry Magnet

Mississauga's primary strengths in relation to creative industries were identified in consultations as including:

- Proximity to Toronto, the airport and Kitchener/Waterloo;
- Lower cost real estate than Toronto; and
- A lifestyle that appeals to families.

Identified Mississauga weaknesses for creative industries included;

- Proximity to Toronto (Corporate relationships may be in downtown Toronto?);
- Commuting challenges for people who live in Toronto;
- A lack of effective transit (lack of subway access; convenient access to and availability of Go Trains etc);
- A lifestyle that does not immediately appeal to young single workers.

These perceived strengths and weaknesses are well known to City officials. For example, the City's Transit plan seeks to improve the transit situation over time.

Most important, Mississauga's proximity to Toronto as "both blessing and curse" means that there is no Canadian parallel, and virtually no international parallel, that can be readily emulated.

Together, however, these attributes present an important framework for any Creative Industries strategy. Moreover, they suggest that a Mississauga Creative Industry Strategy must accept a few realities:

1. **Only certain creatives and CI companies can be attracted to work &/or live in Mississauga**. Mississauga is not a "one size fits all solution" for all possible creative industry companies.
2. **Different areas and facets of the City can attract different creative industries.** Warehouses near the airport may be useful for storage or studio space; "cooler" neighbourhoods in Lakeview, Port Credit, Streetsville and downtown Mississauga may readily house IDM and TV producers, especially if transit links make a Toronto commute realistic.
3. **Those already living or working in Mississauga offer the best potential.** An obvious point perhaps, but if Mississauga can be a hard sell for those who do not know it, or are not attracted to its merits, then the best people to attract are those that don't need to be sold on Mississauga itself. This includes a large pool of students in CI related studies who would otherwise find jobs

elsewhere; musicians, animators, designers and other creatives who are starting their careers here; currently employed CI executives and workers who would love not to have to commute to Toronto; and Mississauga CI companies who look to grow and may also otherwise move to Toronto.

Tools Available to Mississauga to Attract and Support Creative Industries

We earlier noted four types of tools used by cities to attract and support Creative Industries. All these types of tools are, at least in theory, available to Mississauga.

In practice, we are cognizant that some of these tools may not be realistic options for the City.

In particular, we understand that:

- The city's budget reserves are limited and are expected to be fully allocated to transit and other priorities;
- Any new funding for Creative Industries will effectively have to come from increases in the municipal property tax base or from borrowing. Neither is easy;
- While the City has a history of supporting creative and cultural endeavours, these have been done through:
  - Investments in city owned property and buildings (such as Celebration Square and the Living Arts Centre);
  - Operating grants directed to non-profit groups and organizations; and
  - Grants or land subsidies directed to academic institutions such as UTM and Sheridan College.
- The City has never granted specific property tax breaks for specific companies. Certain categories of property may have more favourable tax rates, but this is based on their location, zoning and use, not breaks given to attract particular industries or companies;
- The City has never issued grants or subsidies to private companies; and
- Defining permissible activities, through zoning and other bylaws, has been the primary tool used by the City to attract Creative industries - the ability to location shoot, use a building as studio, have a home office as a CI sole proprietor.

In other words, the City's support for Cultural Industries to date has been relatively "passive". The City has created general conditions that have attracted certain CIs, and has met specific CI demands, when necessary, to enable activity, such as location shooting.

We understand, however, that the City is prepared to consider more active measures to support, retain and attract Creative Industries. Such measures might include:

- Greater promotion and marketing and specific targeting/recruiting of potential CI companies;
- Investments in City owned or leased property that can be recouped through demonstrable economic returns, such as increases in land value and higher property taxes;
- Exceptional arrangements to encourage private CI investment in properties that would otherwise be vacant, and pay little to no property taxes; and

- Transitional use of un- or underutilized City facilities or property that is expected to be developed in the mid-term future, e.g. perhaps seven to ten years;

This context has guided us in the recommendations that follow. Detailed recommendations are summarized in Appendix 1.

Part 3 – General Recommendations

Themes and Principles

> *"To continue to succeed, we must first and foremost get the fundamentals right.[34]"*

A number of recommendation themes regularly emerged from consultations and research. These were expressed in different ways, but essentially came down to the following:

1. **Go with Mississauga's strengths.** This suggests, as noted above, that a priority for the City should be to support talent and companies that have a tangible connection to Mississauga. It also included the notion of trying to appeal to middle-aged demographics or families, rather than younger creatives or highly youth-oriented content. Conversely, it manifested itself in this caution from one group consultation participant: "Just build it, and they will not come". (The warning being not to spend capital resources randomly trying to build a new CI facility in what might transpire to be the 'wrong' location, but rather identify grassroots activity and natural 'clustering' of creative practitioners in a locale, and test using an existing building in or near that location.) Married with our assessment of Mississauga's attributes, above, it promotes pragmatism and realism in recommendations.

2. **Make Mississauga attractive to creatives and creative industry companies generally.** This is consistent with basic creative city theory and practice. It inherently encourages creative industries from all sectors, which can have demonstrable value in terms of the cross-sectoral connections and partnerships that result. It is consistent with an approach that says "do not pick winners, but let the market develop organically." It also ties in with the focus of the Economic Development strategy, which notes that firms in its target sectors need young talent, and that to attract that talent, Mississauga must provide significant cultural lifestyle benefits.

3. **Consider a limited number of targeted sector-specific measures** for:
   - Growth areas, including IDM and Film/Video including foreign service production; and
   - Areas like live music performance that can be supported relatively inexpensively and have strong cultural marketing and lifestyle benefits.

While the latter can be seen to mean "picking winners", it is more a matter of adjusting the means to suit the particular requirements of a sector, i.e. when more general measures won't work.

These recommendation themes are present throughout our general recommendations.

We are also guided in the recommendations by a principle of feasibility. We are aware that the City and the Culture Division's ability to act directly on recommendations may be limited by mandate, legislation or the availability of resources in a particular form. Nonetheless, where we see

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[34] Inaugural address, Mayor Bonnie Crombie, December 2, 2014.

possibilities that carry benefits in the Mississauga context, we recommend action. Where concerns have been expressed by City staff about the City's ability or willingness to act, we sometimes adjust the recommendation to suggest that the City act as a catalyst, or with partners, to bring about the desired result.

We start below with a discussion of measures designed to support all Mississauga creative industries. We review both recommended general measures, and some potential measures that are not recommended. We then discuss potential targeted measures for specific cultural industry sectors.

Measures to Support all Creative Industries

Marketing Mississauga as a Creative City

While residents of Mississauga clearly enjoy a cultural life in Mississauga, the City is perceived by stakeholders as indifferent to Creative Industries.

Creative industry companies in Mississauga see little evidence of interest or support from the City, including from the Culture Division, which is seen as primarily a support for Heritage, cultural organizations and the Arts. The CI firms consulted outside Mississauga don't think of Mississauga as a creative centre at all, merely, at best, an extension of Toronto. Virtually all the consulted Creative Industry stakeholders were encouraged, if surprised, to learn that Mississauga was even contemplating a Creative Industries Strategy.

Location shooting is seen as the most visible expression of the Cultural Industries in Mississauga, but it too seems to suffer from misperceptions about availability and service standards.

These perceptions indicate that an attempt to genuinely expand Mississauga's Creative Industries would have to be accompanied by appropriate marketing and promotion. This would include both specific outreach to companies and individuals who Mississauga would need as champions, and more general marketing of Mississauga as a "Creative City", and/or specific neighbourhoods as creative nodes[35].

The nature and extent of such marketing would obviously depend on the level of investment the City chooses to make in a Creative Industries Strategy. We note that the City recently concluded a branding study, whose report recommended the use of three separate brand "ingredients" rather than a single message[36]. Accordingly, we will not propose particular broad marketing or branding initiatives at this time.

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[35] The CMP discussed the concept of cultural nodes – a cultural centre or identity per neighborhood in Mississauga. This is borne from Mississaugans' mixed sense of the city's identity, which arose in our industry consultations, and where Mississauga's downtown really is felt to be. Instead of arriving at one city-wide identity, the industry felt the City Council should cultivate cultural nodes or neighborhoods being known for their creative industry presence e.g. film and TV production at the airport, creative industries business hub building in Streetsville, live music festivals in Lakeview and so forth. This takes time to develop from the ground up, it needs to be authentic to reflect genuine identity through dynamic activity, creating real reputational value amongst creative sectors and commentators, and depends upon the location of activity based on what currently exists and the CIs strategy and the, yet to be published, Festival Strategy.

[36] *Our Future Mississauga: Growing our Brand*, February 2014.

We do, however, recommend that Mississauga consider positioning itself, in some tangible form, as a "digital city" – encompassing both the creative and the technical. We are struck by how consistent this would be with Mississauga's overall strategic goal of being "preferred location for innovative, creative and knowledge-based businesses and emerging industries". We also see potential in the positioning of Mississauga, consistent with geography, as "between" the creative strength of Toronto and the ICT strength of Kitchener-Waterloo – and therefore attracting companies that seek access to both.

We also recommend the establishment of a Creative Industries Advisory Forum, advising the mayor and/or council, as the single best investment the City could make in promoting Mississauga as a destination for Creative Industries. The formation of such a Forum, somewhat analogous to the Toronto Film Board[37], would signal that Mississauga "is open for creative industry business". Membership would be comprised of a mix of Creatives and Creative Industry Executives who have a connection to Mississauga, personally, professionally or historically.

Broadband

The lifeblood of innovative knowledge-based companies today is broadband connectivity. Whether the need is video conferencing or cloud storage, all knowledge-based companies need reliable, fast, cost-effective broadband access. The need for creative industries is no different, except in one respect. *They often need even more bandwidth.*

With the exception of exclusively text-based creative industries (i.e. book publishing), creative industries are all increasingly screen-based, and rely on, or make extensive use of, video. While normal home broadband speeds are adequate for *streaming* video (even in HD) production, rendering and editing of screen-based media, particularly 4K film and video, requires orders of magnitude higher bandwidth so that video *files can be easily and quickly transferred* back and forth between players in the content creation value chain.

Mississauga is well, if not uniquely qualified, to meet the broadband needs of leading edge creative industries:

- "Excellent fibre optics network" has been identified as one of the City's "brand attributes and assets"[38];
- Sheridan College's Hazel McCallion Campus, located at City Centre, houses the data centre for SirtNet, an ultra-high speed secure private network (i.e. not connected to the public internet) that seeks to link, as a first phase, creative industry companies and services such as studios, video editing special effects and animation houses. Ten companies are expected to participate in this first phase starting in 2016. If successful, this network will effectively allow an end-to-end distributed production process, where components in the value chain can be located anywhere the network reaches;

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[37] One of the Consultants, Peter Miller, is a member of the Toronto Film Board.

[38] Ibid, at p. 23.

- As a relatively new City, Mississauga has more accessible underground ducts, and potentially more "dark fibre" resident therein, permitting rollout of the "fibre to the premises" necessary to allow 1 gigabit broadband speeds; and
- Mississauga has a general vision and strategic goals aligned with the broadband needs of leading edge creative industries and other innovative knowledge-based businesses.

Companies like Bell[39] and Google[40] have made commitments to investing in 1 gigabit fibre in major centres across North America. Such speed allows, for example, the download of 100 photos or songs in 3 seconds, or an entire HD movie in 7 seconds[41].

Mississauga is not currently in any such internet company plans. Without a concerted effort on the part of Mississauga to enable such broadband connectivity to the areas where creatives live and work, the City will be left out of the race to attract Creative Industries before it even starts. Moreover, an investment in ultra high speed broadband for creatives and creative industries today is an investment in the needs of all innovative knowledge-based industries of tomorrow.

Accordingly, **we recommend that Mississauga develop, as a major priority, an ultra high speed broadband strategy to meet the current and emerging needs of creative and other knowledge based industries**, including:

1. Providing greater ease-of-access to poles, underground ducts and "dark fibre" for potential broadband partners such as SirtNet and Telcos, developers and other Internet providers;
2. Considering incentives to promote ultra high speed broadband installation in Mississauga; and
3. Prioritizing any cluster or hub sites chosen for, or currently attracting, creative industries for any such initiatives or support.

Clusters, Hubs & Incubators

In addition to being part of Ontario's broad creative cluster, Mississauga creatives and CIs seek to be part of the broader GTA creative cluster, and geographically, physically and sectorally appropriate Mississauga creative clusters.

For the purposes of this analysis, we will use the word "cluster" in the geographic sense of creative industry companies being located close together in an a particular area of the City. Our research and consultations suggest that prime candidates for different types of creative clusters in Mississauga include Lakeview, Port Credit, Streetsville, City Centre and the Airport.

We will use the word "hub" in reference to a particular building or campus that houses creative industry companies. Hubs can be owned or operated by private, public or academic institutions. They bring the notion of a cluster down to a very immediate and intimate setting – allowing the

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[39] In June, 2015, Bell announced a $1.14 billion investment to rolled out Gigabit Fibe to be to 1.1 million City of Toronto homes and businesses. http://www.bce.ca/news-and-media/releases/show/Bell-Gigabit-Fibe-bringing-the-fastest-Internet-to-Toronto-residents-with-a-billion-dollar-network-investment-creation-of-2-400-direct-jobs-1

[40] Currently, Google has no immediate plans to launch Google Fiber anywhere in Canada. Mississauga could become the first location. https://fiber.google.com/about/

[41] While such plans largely revolve around connection to the public internet, once fibre to the premises is available, it can equally be used to connect to secure private networks, such as SirtNet.

kind of chance and easy encounters between different people in different companies that breed partnership and innovation. In that way, they replicate (or at least simulate) between companies what bigger companies – like Corus, Microsoft, and Samsung - can do within themselves.

A hub is a community. By being located together at a hub, CIs and creatives enhance opportunities for co-trading, skills sharing, expanding teams, and innovation. "Hubs" encompass a variety of approaches to encouraging co-location by different CI ecosystem players. They may have several aspects to their operation depending on the scale of the facility and need of the sector in the area, including:

- Room for small companies to set up their own offices;
- Co-working spaces (which appear to be in short supply in Mississauga) including hot desks, rented cubicles and meeting rooms;
- Shared facilities including specialized equipment that is difficult for start-ups to afford;
- Very-high bandwidth connectivity;
- Coffee shops and other social areas;
- In the case of creative industries, presentation spaces;
- Some models also have incubator space built-in or a maker space for craft workers.

Incubators take the notion of a hub and add an element of active support or guidance. Incubators can target start-ups or early stage companies, the broad ICT sector or a specific creative industry, like IDM or specialties like e-medicine. Whatever the sector or specialty, it is always leading edge, innovative, high potential, high risk.

Our general recommendation is that Mississauga develop a City Cluster strategy to:

1. **Actively encourage creative industries to locate in specific nodes** (areas of creative activity in the city) depending on their specific needs and place in the value chain;
2. **Promote or establish a network of creative industries hubs** in appropriate facilities in Lakeview, Port Credit or City Centre, the first hub to start within two years; and
3. **Evaluate the potential for an Incubator** in partnership with academic institutions UTM &/or Sheridan and industry players (such as Samsung, Microsoft, Xerox, Amazon) to target start-ups or early stage companies that seek to combine leading edge creativity and technology.

In respect of the first two of these, we note that the Culture Division recently solicited bids on an RFP for a Cultural Infrastructure and Creative Spaces Strategy[42]. As such a study is essentially synonymous with the analysis required to evaluate the geographic and space requirements for any of these types of creative cluster, we will provide only limited comments on the matter of specific locations in this report.

On the concepts of hubs, nodes and incubators, wherever located, we would, however, offer the following additional comments:

Regarding hubs:

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[42] FA.49.212-15 issued September 28, 2015.

- Any Mississauga CI hub should be open to all creative industries and, potentially, related ICT. An emphasis on attracting companies that produce innovative digital content could interest publishers and music companies as well as TV and IDM. A more diverse focus would both increase the pool of potential inhabitants and foster new kinds of synergies and connections.

- A hub would need to be located in an area with a transit point and retail outlets, and in an identified or potential creative cluster, near other cultural facilities and creative industries businesses.

- An economic assessment of the operational costs and income potential of each suggested hub building would also be required. The unique layout of each building would determine what each could offer, and would determine the rental and other fees to be charged to hub tenants;

- The viability of the hub should depend not only on operational costs and income, but the broader context of land development plans and future value;

- No hub should be launched without the commitment of an anchor creative industry tenant or tenants. "Satellite offices" of larger creative industry companies, headquartered in Toronto, could be strong candidates. The feasibility of a hub will be immediately evident by whether or not it can attract such anchor tenants.

- It may be desirable to locate city business advice services within hubs. This would require the staff therein to become expert in the creative industries, their markets, modes of working, business planning, funding and finance sources and business models, IP, and industry skills needs, or to use part time creative practitioners experienced in business as business advisers.

- The hub would require ultra-high speed broadband, through the public internet and private networks, such as SirtNet.

In the course of creating this strategy, the consultants considered whether a cross-sectoral hub could be developed based on a common audience – i.e. whether CIs focused on family-and children's based content could gain advantage by grouping together. This kind of demographic link did not gain much traction with informants, however. The response was largely that, since there was insufficient nexus between the content type and the creatives who work on it, such a hub would not make sense.

Like hubs, incubators come in many different forms. While very popular at the moment, they are difficult to execute successfully. They typically involve providing massively subsidized, if not free, space to start-ups and early stage companies as well as a high degree of active support and management (business, legal, marketing etc.) - in other words, high costs and low revenues.

Nevertheless, as for example with Ryerson's DMZ, they can be a real catalyst for success and growth. We thus include the potential for at least one incubator as a concept that the City should actively and seriously consider[43].

Given the expertise required, and risks involved, we believe it crucial that Mississauga find a strong managing incubator partner in academia, and other strong partners in business &/or other levels of government. A clearly defined and valued niche is also a prerequisite. As already noted, we believe that combining leading edge creativity and technology in digital media could be a basis for such a niche.

A final expression of the "cluster" concept is that of a "scene" or more formally, a "culture node". This is perhaps best understood through examples, like Toronto's "Queen Street West", a location that is popularly understood to be a haven for fashion, music and other cultural expressions.

In Mississauga, both Streetsville and Port Credit have the basics on which a scene could be developed. Compared to a hub, a scene is not a single campus, but is distributed – a number of spaces (bars, shops, coffee houses, restaurants, mid-size performance venues) are part of it and are typically within walking distance of each other. Inclusion in a "scene" is informal. If an operation chooses to locate nearby and can attract customers, then they are in it.

Music, particularly of the kind that might be a lifestyle attractor for other CI talent, is often the core of such a scene. As discussed below, a number of measures might be undertaken by the City that would encourage the neighbourhoods mentioned above to be identified even more successfully as cool places to go to hear live performance.

Fostering Mississauga Talent

Mississauga has been called a "magnet" for talent, though perhaps less so in the Creative Industries than in the sectors targeted by EDO[44].

Mississauga has well known and successful creative and cultural figures who are celebrated on the Mississauga Walk of Fame. For the City to be congruent in its approach, and in developing a coherent creative industries strategy, designated city officers across education, economic development, culture and possibly planning should be more in touch with Mississaugan creatives[45]; to be conversant with their ambitions, feel confident to approach them and discuss support mechanisms, and to build an authentic connection with their creative community not just at the point of acclaim but to be able to take genuine credit for being part of the creative's journey.

Supporting talent in very localized and specific ways is often a successful role for Cities.

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[43] We leave the issue of type of incubator to more detailed study. The *right* kind of incubator for Mississauga would make a huge difference, but would take considerable study to guarantee success. The City should ideally consider inclusion of an incubator in a new CI Hub, perhaps at a later stage in the Hub's development.

[44] As noted in "A Dialogue on Talent", millierdickinsonblais, 2013.

[45] A number of interviewees suggested that they found City staff fiercely proud of their talent but somewhat uninformed about them.

Creative nodes, hubs and incubators are all mechanisms that generally support talent and increase talent retention, a key tenet of the City's economic development strategy given its proximity to the creative hotspot of Toronto.

A more specifically talent oriented initiative would be the creation of a "creative network" or networks.

During the consultations, many industry representatives stated that they had limited knowledge of the other creative activity happening in the city[46], and that a creative network would be beneficial to their co-trading and skills or equipment sharing. A creative network came out strongly as a first step and something the city could catalyse with an initial creative gathering to get it started.

A City's creative network becomes the focal point of the city's creative activity, and gives the City its creative identity. Among other things, a Mississauga creative network could:

- Bring in Mississauga members, expand the local base, and employ the organizational expertise of relevant trade associations such as the Computer Animation Studios of Ontario (CASO), Interactive Ontario (IO), Film Ontario, Music Ontario[47] and even Folk Music Ontario, which has held its annual conference in Mississauga since 2012;
- Potentially employ a Hub Manager or another creative practitioner as a coordinator within a designated Creative Industries Hub or across the region, arranging, inspiring and/or informing on a calendar of events such as creative hackathons to initiate innovations, *Pecha Kucha*-like Nights[48] to introduce creatives to each other, and match making for those seeking skills, and training events[49].
- Include a virtual digital meeting, showcase and directory space online[50].
- Provide the capacity for an annual creative industries gathering that would attract Mississaugans and creatives from Toronto and surrounding areas;

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[46] In particular, they felt they did not really know creatives from other disciplines and would not know who to seek out or how to find them if they required other skills to work with them.

[47] Most such trade associations are relatively Toronto-centric (where most of their membership resides), but are open and enthusiastic about partnering on initiatives outside of Toronto. Moreover, OMDC, who provides program funding for most trade association, may be prepared to financially support such initiatives, particularly of a cross-sectoral nature. Interactive Ontario's Executive Director expressed a specific interest in examining the potential for a Mississauga-based digital media/cross-sectoral. (As previously disclosed, one of the Consultants, Peter Miller, is the *pro bono* Chair of IO, and another, Michelle McIver, is an occasional paid consultant to IO.)

[48] Launched in Tokyo in February, 2003, *Pecha Kucha* Nights are events for young designers to meet, network and show their work in public. There are a reported 800 cities around the world that now host *Pecha Kucha* Nights. There appear to have been at least *Pecha Kucha* events in Toronto over the last decade. We are not aware of any having been held in Mississauga. http://www.pechakucha.org/

[49] If there was more than one hub in the City, then the creative network can meet in other hubs in rotation and thereby create cross regional links and enhancing relationships for business and innovation.

[50] For example, in addition to local broadband, including SirtNet connections, this website this would provide a much needed digital face for the creative community, and could connect creative hubs or clusters across the city becoming the digital mirror image of the human creative network.

A network bringing together creative Mississaugans becomes a central point for City engagement in delivery of the creative industries strategy, a constant source of up to date knowledge on the sector and its skills needs, and a means for quantifying the creative industries and their value in the city.

We therefore strongly recommend the City take appropriate steps to foster a genuine, cross-sectoral, Mississauga Creative Industries Network. As a first step, we recommend the City initiate a creative gathering, marketed intensively, and developed with the guidance and support of the Creative Industries Advisory Forum[51]. While we are aware that the Culture Division's resources and mandate in this area are limited, it is the City's logical role to provide leadership and hold the vision for this community. Specific parts of the implementation of the concept may have to be performed by the City's partners.

The need to foster talent also, of course, has a more formal education dimension.

Fortunately, Mississauga has three diploma or university granting institutions within its borders of direct relevance to the Cultural Industries - Metalworks[52] Institute, Sheridan College and University of Toronto Mississauga (UTM) – who are obvious potential partners[53]. These institutions offer a variety of specialized programs for particular sectors, and more general business education and training[54].

To the extent that fostering Mississauga talent may require more direct support, a number of initiatives (with parallels in other jurisdictions) could be indirectly supported by the City for the benefit of creative practitioners. Such initiatives could be developed using the Creative Network as a means to gather and host training, with industry trade bodies and/or in partnership with Mississauga educational institutions, and could potentially include[55]:

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[51] This could most readily be done in partnership with one or a number of the trade associations already noted, in cooperation with OMDC and leading local CIs and institutions in Mississauga. Another approach would be to make an open call for a Mississauga-based creative entrepreneur willing to lead the venture. Some level of coordination and/or funding on the part of Mississauga would be required, depending on the approach taken, and level of potential sponsor/partner interest.

[52] Metalworks is comprised of three business lines: a premiere full service recording studio http://metalworksstudios.com/, a live event group, Metalworks production http://metalworksproductions.com/, and a school, Metalworks Institute http://metalworksinstitute.com, all located in downtown Mississauga on Mavis Rd., south of Burnhamthorpe. The Institute alone is reported to include over 80 full-time staff members with an enrollment of approximately 250 to 300 students.

[53] While currently Mississauga-based institutions would be the obvious first choice, the City may want to be open to partnerships with other institutions that might welcome more of a presence in Mississauga. We note, for example, the recently announced partnership between MarbleLIVE and OCAD, which could be of relevance should the proposed MarbleLIVE *amazement park* does end up being located in Mississauga. http://www.marblelive.com/press/

[54] Mississauga Economic Development provides a good (although now somewhat dated) review of educational institutions in and around Mississauga, and their program offerings, in *Digital Media Interviews & Findings*, amended August 23, 2013.

[55] We don't include here examples of initiatives common to municipalities in non-Canadian jurisdictions, but in Canada typically the purview of provincial governments or agencies, such as:

- Business skills advice and mentoring, possibly through the incubator, if such a project is launched;
- Training for new entrants into creative industries covering internships, or awards partially covering tuition[56];
- Leadership development programmes for creative practitioners with action learning and mentoring.

It is our experience that a surprising number of creatives are not aware of the training opportunities and funding that may be available to them. **Our basic recommendations here are therefore three-fold:**

1. Use the Creative Network initiative to inform Mississaugans of CI centred or related training opportunities and funding available to them in and around Mississauga;

2. Consider, at a modest expenditure level, one or more annual Mississauga CI scholarships or grants, to be awarded at the proposed annual creative industries gathering. Again, if the Culture Division's resources for the implementation of this concept are limited, it may find it expedient to work through partners, perhaps not-for-profit agencies, that can implement aspects of this strategy. (The promotional value, if done properly, could be significant[57]);

3. Conducting a survey of perceived creative and cultural sector skills needs in Mississauga in partnership with industry bodies and/or local colleges and universities develop initiatives. (This could focus the proposed annual awards initiative &/or be used to determine any priorities Mississauga might pursue in specific City initiatives.)

Governance

A Creative Industry strategy can only achieve results if it is a shared responsibility between the City and the community of Creative Industry firms.

Training awards (partial funding) to assist creatives to purchase sector specific training through their trade body (for example the Smart Seed Fund, used, for example, by IO. http://www.oce-ontario.org/programs/entrepreneurship-programs/smartstart-seed-fund)

Exchanges with other countries to allow for skills development and potential opportunities to expand trading. Supported, for example, on an *ad hoc* basis by OMDC through their Industry Development Program

Support for artists and creatives to showcase nationally or internationally to expand their trading potential or in music, their fanbase and opportunity for distribution deals and touring. For example, OMDC's Export Development Fund

[56] For example, for design towards a portfolio, commercial art galleries, publishing, fashion design towards a collection, music industry including music business, film and TV in craft as well as production and finance areas, and web design, interactive digital media and software/coding companies. In non-Canadian jurisdictions, such schemes typically provide support for salaries for three months or more in partnership with industry, through a matchmaking agency that matches graduates to interested creative businesses. They usually involve some pastoral care/mentoring, education units delivered by local college or University (one day per week) and internships must have a structure to them such as working on a specific project or delivery of a specific output. In Canada, coop programs of colleges and universities more commonly fill this need.

[57] This could be expanded to include a "Mississauga Creative Innovator/Entrepreneur" of the year award etc.

Within government, different cities have different governance structures. In some cases the structure of the city government has been altered to accommodate a full-scale effort to attract and support Creative Industries. In Austin, Texas, the Cultural Arts Division has sat within the Economic Growth and Redevelopment Services Office since the city identified the economic importance of creative industries to that city.[58] Several other cities have also seen a need to make a structural connection between their economic development and culture teams. There is no single structural formula for successful creative cities.

In Mississauga's case, we anticipate no immediate need for changes in the governance structure within the City. At the end of the day, regardless of structure, a successful Creative Industries strategy needs elected champions and the involvement of a number of departments and motivated individuals within them – Culture Division, Economic Development Office, IT, Transportation. Far more important than revised governance structures is a commitment to a comprehensive communication process among the various departments whose work may be touched by these recommendations, to ensure that the Creative Industries Strategy remains aligned with the general and specific directions of the City.

This communication effort becomes even more important in this case because of one sector: Digital Media. Mississauga's Economic Development Office and Culture Division each have a mandate to develop this sector, but from different perspectives.

The notion that IDM has perhaps the greatest economic potential among CIs for Mississauga is one echoed through this report. It is not simply a growth engine, however; its other dimensions call for the Culture division's involvement for a number of important reasons:

- EDO has a mandate to look at sectors through an economic growth lens; Culture looks at both growth and a creative/cultural perspective focused on the quality of life in the City.
- Economic development efforts often look to inward investment from large, often foreign-owned enterprises, while a cultural lens focuses on organic support and growth of local SMEs.
- Culture Division's interest naturally extends to the areas of IDM beyond the high growth potential subsectors (like video game companies) to convergent media, mobile apps, e-learning etc.
- IDM is key to the future success of all creative industries. Culture Division will want to ensure its approach is holistic, and encourage cross-sectoral engagement between creatives and cultural industries, IDM and other sectors.

Simply put, both the cultural and economic goals of a CI strategy still need to have a prominent place in the City's thinking.

Consequently, parts of this report will need to be considered by both EDO and the Culture Division. While some recommendations are of greatest concern to the high-growth areas of IDM, several measures take an integrated approach and address the needs of IDM, Film/video, and Music together. Rather than attempt to separate the sectors and lose the synergies that would otherwise

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[58] *Austin's Economic Future: The Mayor's Taskforce on the Economy: Subcommittee Findings by TXP, Inc.*, 2003 chapter 4. The City of Toronto has also placed Culture within Economic Development.

be available, the Consultants encourage the City's responsible departments to communicate and collaborate on these recommendations.

Thus while **we do not recommend any structural change to departments involved in Cultural Industries in Mississauga, in its place we recommend the adoption of a process of continuous communication**. One way to foster communication would be to appoint a staff lead on all or designated Creative Industry priorities with reporting relationships to *both* culture and economic development.

But whatever structure is adopted, communication should be two-way since the cultural recommendations of this Strategy are both complementary and contributory to Mississauga's Economic Development Strategy. Even outside IDM, co-ordination will be useful.

Culture and economic development are complementary because measures taken to attract entrepreneurial tech firms are suitable for CI firms as well, and CI firms should be involved where appropriate. The questions of transportation and land use are also apposite. Efficient and affordable mass transport infrastructure in Mississauga is critical to development of CIs in several sectors, most notably IDM and music, which attract the youngest demographics. The Employment Land Use study identifies locations where a CI Hub might be located, with implications for CI cluster development.

On the reverse, EDO and other departments need to be aware of CI-related initiatives, since they are contributory to their strategies. That is, to attract talent needed for economic development, Mississauga must provide cultural benefits important to those demographics. Students graduating from the city's educational facilities are also more likely to stay if such amenities are present. In that sense, the CI strategy pursues a cultural goal that contributes to an economic goal.

External Partnerships

A Creative Industries strategy is best executed by a combination of public and private partners working together, because each partner brings qualities that the others lack. City agencies have a long-term, public good view, without the need for short-term returns. They are also the partner who can take initiative, and hold the vision for the community. Private firms bring an agility and adaptability to market conditions, especially among the SMEs that make up most CIs. And, as noted in several places in this report, where the City is restricted in the actions it can undertake, it can still act as inspiration and facilitator to private or other government partners who have the remit to act in these areas.

Of course, the City of Mississauga has already engaged in a number of partnerships in its pursuit of its Innovation agenda, including gatherings of private and public institutions. The Culture Division should have a valued seat at the table..

Co-operation with Mississauga's formal educational institutions is a given, of course. As noted elsewhere in this Report, Sheridan and UTM graduate students every year in the disciplines of interest to CIs, such as animation, film and television, applied computer science (mobile), game design, theatre, interactive digital media, and digital enterprise management. Metalworks' music industry students graduate into Mississauga facing many of the same issues - both finding work in the City and finding the kind of cultural "scene" that is necessary to their creativity. In addition,

Sheridan's Screen Industries Research and Training Centre (SIRT) could be an important partner and its private high-speed network, SirtNet, potentially vital to the creation of a Mississauga media hub.

Large Toronto-based CI companies may be interested in partnering to locate satellite offices in Mississauga, that take advantage of lower operating costs, and proximity to talent and the airport. Other private companies with a less cultural bent may or may not wish to take part in CI initiatives or the discussions around a CI strategy[59]. It seems likely that participation from companies interested primarily in technical innovation will wax and wane, though recruitment of some should be a goal.

One must note that such co-operative governance efforts, while necessary, are not necessarily easy. Individual initiatives can attract political controversy, both in the case of nearby Hamilton/ Niagara's CI incubator project, or far-off Berlin. Even Advantage Mississauga, an excellent example of collaboration on youth employment, still finds that there is a "lack of collaboration amongst key stakeholders". Assembling the stakeholders is not sufficient; a CI strategy is more likely to obtain success if it focuses on partnerships around specific projects.

Finally, while other levels of government are always both direct and indirect partners, they are particularly so in the case of Creative Industries. All the Creative Industries rely on grants and tax incentives to support their businesses[60], in some cases amounting to subsidies effectively approaching 50% of costs or more[61]. Federal and provincial governments are also open to targeted incentives for particular regions or Cities.

Such partnerships might well present a solid opportunity at this time for appropriate Mississauga projects: In particular, we note:

- The Government of Ontario's $14 million Live Music Strategy, administered by OMDC offers grants that supports music promotion initiatives[62]
- The Government of Ontario recently announced an investment of $12.8 million in film and TV productions and renovations to film facilities in the Greater Sudbury area[63].
- The new Federal Liberal Government has promised to increase federal infrastructure investment to the tune of an annual additional investment of $9.5 billion per year (at full

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[59] This includes the major ICT firms and campuses in Mississauga: Samsung, Bell Mobility, Rogers, Microsoft etc.

[60] For a summary of federal and provincial incentives for film and digital media, for example, we recommend PwC's "big tables", which can be found here: http://www.pwc.com/ca/en/industries/entertainment-media/publications/film-video-tax-incentives-canada.html

[61] This would be the case of most Canadian Telefim supported Feature Film and CMF supported TV drama. In the latter case, it includes a monetary valuation of the value of CRTC regulatory subsidies. Support subsidies for music, publishing and IDM are in the 10 -15% range; and for foreign Film/TV production, 25-30%.

[62] http://www.omdc.on.ca/music/the_ontario_music_fund/live_music.htm. Grants are a maximum of $500,000, and must be through a promoter. Mississauga promoters appear to be under-represented in funding.

[63]   https://news.ontario.ca/mndmf/en/2015/11/ontario-investing-128-million-in-northern-film-and-television-productions.html

implementation), almost doubling federal infrastructure investment to nearly $125 billion, from $65 billion, over ten years[64];

- The Federal government also promised on the order of $400 million annually in new investment in "cultural and creative industries" [65]. The promised plan also calls for significant investment in cultural infrastructure, as part of proposed infrastructure spending[66].

- The region of Durham appears to be investing more heavily in its film and TV sector, launching a first film festival in September, 2015[67]. Durham and Mississauga could, in practice, be more partners than competitors in encouraging CIs to use regions outside Toronto, and working together to secure Federal and provincial government funding.

While federal and provincial funding could be sought for any number of projects we note, in particular, the immediate opportunity to seek federal infrastructure dollars to support film/TV studio facilities, creative industry hubs and/or incubators, including, in particular, facilities in support of IDM[68].

Accordingly, as a matter of general principle, **we recommend the pursuit of true win-win public-public and public-private partnerships on specific creative industry projects, and as an immediate priority, the pursuit of federal infrastructure dollars** to support creative industry capital-intensive projects, such as hubs and incubators.

Measures to Support Specific Creative Industries

Music

Music can become a significant source of economic activity, but there are limits in the short term, arising from the dynamics of the music industry itself and from Mississauga's proximity to Toronto. The difficulties of the recording industry are well known. On the other hand, live music performance has grown and remains the greatest revenue generator for talent. This section will therefore consider the "Live Events" input as well as that of the music respondents.

Mississauga has advantages such as the presence of Metalworks, but it also neighbours a self-identified "Music City" in Toronto, which exerts a gravitational pull on talent and audiences. However. Mississauga's distance and transit limitations become particularly problematic in attempting to draw 20-30 year-old audiences out of Toronto to come to events in Mississauga.

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[64] See   https://www.liberal.ca/files/2015/08/An-historic-investment-plan.pdf

[65]   https://www.liberal.ca/liberals-to-invest-in-canadian-culture-and-middle-class-jobs/

[66] The plan states "As part of our historic new investment in social infrastructure of nearly $6 billion over the next four years and almost $20 billion over ten years, we will invest significantly more in cultural infrastructure. These investments will include facilities used by communities to express and promote their culture."

[67] http://tickets.regenttheatre.ca/eventperformances.asp?evt=215. To be clear, we are not recommending such an initiative for Mississauga.

[68] The Liberal platform was noticeably absent in support for digital media, an omission not lost on the IDM community, and one the new Federal Minister of Canadian Heritage may be interested in correcting.

Under the circumstances, a strategy for music must be gradual - it should concentrate on building upward from a "grassroots" live music scene. This scene, we have confirmed via interviews and surveys, is small-scale compared with Toronto, but it is strong and enthusiastic. The strategy can lever this advantage, using Mississauga's own talent and serving its own population. The proposed strategy is therefore aimed initially at cultural benefits for Mississaugans, with a secondary economic impact on other industries of greater size.

The cultural benefits of a live music scene, oddly enough, accompany direct economic benefits, in that a live music scene is a key pre-condition for attracting the talent pool that populates other industries. As noted by EDO in consultations, the presence of a thriving music scene is a factor in the acquisition and retention of young talent in all of the industries that they are seeking to grow in the City. This is reason enough for the City to help grow the independent music scene in Mississauga.

Talent Retention

Another positive for Mississauga is its supply of musical talent in all the skills required. While talent develops strongly however, there is difficulty in retaining production and management talent, as reported during consultations with Metalworks and Canadian Music Week. This, again, arises to a material extent[69] from the lack of a music "scene" – a solid reason to try to grow the scenes that exist.

Mississauga has incubated bands – such as Triumph, Billy Talent, and PartyNextDoor – who have international careers. Before they achieve success, however, such acts must grow through a local live music scene. Such a scene is typically somewhat "underground" in nature. But the talent core is here. Local journalist Jason Spencer recently compiled a list of 15 up-and-coming bands in Mississauga[70] – focused on the indie rock genre - that is impressive. All of the bands presented professional quality recordings and his accounts of their live shows showed real promise. One of these, Tomahawk Love, opened RiotFest in Toronto in 2015. The consultants verified his opinion in their independent assessment of the talent pool.

Facilities

While talent is present, all of those consulted agreed that to retain it and grow the scene, a mixed ecology of venues must be built up. There are many bands and bars, but the absence of places to play original material in Mississauga is a significant barrier to the growth of their careers.

Small Venues

Mississauga does not have a single nucleus of bars, clubs and restaurants presenting live music, but there are two areas where there is a nascent but promising scene featuring musicians who play their own work: Streetsville and Port Credit.

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[69] The other major factor being transit.

[70]   http://m.mississauga.com/whatson-story/5236475-mississauga-bands-to-watch-out-for-in-2015

Port Credit is home to several restaurants and bars that present live music and a number of music festivals. If a hub or incubator for the screen-based and interactive industries is to be developed there, then music should be a part of it – especially because it is desirable to have a scene close to the workplace of the talent one is trying to attract to the area.

Streetsville is one of the few pedestrian-friendly areas in the City, and it hosts a number of music-presenting restaurants and bars. It also has recording studios and an established music store/school with roots in the community (Strings Attached). Its business district would be friendly for small music-business SMEs. Moreover, it is our understanding that Streetsville has been under consideration as a Heritage district – if this goes forward, it could be a positive advantage, as it would maintain the street-accessible nature of the area.

The 'Streetsville scene' is an identity that could develop traction, ranging from somewhat edgy indie-rock, spawned in suburban basements and high schools, to singer-songwriter acts. The core of a scene is present and could grow with the right encouragement.

Mid-Sized Venues

The next step up from restaurants and bars are the 200-250 seat halls that can be rented by bands and promoters to present CD releases, multi-band nights and other similar events. The Masonic Lodge in Streetsville and Clarke Heritage Hall in Port Credit have been useful in this regard.

Clarke Memorial Hall is already the subject of an arrangement between the City and the Mississauga Arts Council, which makes it somewhat affordable for musicians to use. It could, however, benefit from some infrastructure improvements to make it more useable. If the parallel study on cultural spaces had not already surveyed this building for needed improvements, this Report definitely recommends such a step.

Some consideration should be given to how the Meadowvale Theatre may be integrated into a music strategy. Currently it has costs that are a barrier for "street" level music performances. Certainly, a number of musicians felt that more mid-sized and larger venues (up to 700 capacity) would be in use if they existed. They would also be used by touring bands, of course, but the nature of the live business is such that touring bands coming in to Mississauga can create opportunities for local bands to tour.

Large Venues

The use of large venues (over 1000) in the development of a "scene" is limited. They can be helpful to a grassroots scene if local promoters can use them, or if local bands can open for larger acts, or as the home for a festival.

Both the small "large venue" Hammerson Hall (1300 seats) and Celebration Square have limitations[71]. As a core venue for attractive festivals they can provide a step up for local acts to perform to larger audiences.

Our general recommendation regarding music is that **Mississauga consider how best to increase support for a live music "scene" in small, medium and large venues across the City,**

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[71] These include crowd control and noise restrictions at Celebration Square; cost at Hammerson Hall.

particularly Streetsville and Port Credit. Some form of partnership with promoters and not-for-profit institutions could assist in obtaining support from the federal government through its infrastructure spending initiative and the government of Ontario through its Music Initiative (administered by OMDC). Specific potential initiatives include:

1. Assistance with the Creation of "Scenes"

    - Location – identify areas of concentration, probably centering on Port Credit and Streetsville, or local heritage buildings that can be converted.

    - Local business owners' support – it would be necessary to gain the support of local businesses via their BIAs who could host live music, to lay a foundation before embarking on a strategy.

2. Venues

    - Development of Clarke Memorial Hall, with better permanent facilities for shows.

    - Help for small venues. Advice and assistance through the Music Officer (recommended below) would be helpful, and collaborations, like that with the Mississauga Arts Council, can help to channel resources to improvements such as live sound systems and publicity when hosting music events. Support for festivals to attract crowds and increase an area's identification with music would also be helpful.

3. Promotion and Festivals

    - Themed music festivals could play an important part in developing a music scene; both the designated areas have festivals now and one – the jazz festival in Port Credit – follows the useful strategy of moving festival acts into the small venues at night; this both helps to get audiences used to the venues and generates economic activity.

    - The City could help with dedicating resources to assist promoters - as is done for location shooting. Advice on permits, hours, policing, licensing, media etc. and the co-ordination of potentially competing festivals could be made available.

    - We specifically recommend the creation of a Music and Live Events Officer position, whose responsibilities would include the above. Beyond this service and advisory role, such an Officer would work with BIAs, the OMDC, and the Toronto Music Advisory Council on the marketing of the scene in designated areas.

4. The Hub Strategy

    - A CI-based hub should include a multi-use performance space. This would provide a creative audience and a nucleus for live music that would be opened up to members of the public for live performances, thereby further integrating the hub into the fabric of the local community.

5. Talent Retention

    - Public transit development should consider how to assist movement of the teen to 30 age groups to live events. Port Credit will be on the Hurontario route and the Go line, but Streetsville might need a fast connection to the new transitway development along Highway 403. While this is not the responsibility of Culture Division, its influence in pointing out the advantages of a transit strategy for movement of audiences to live events would be helpful.

Film and TV are the most visible, and arguably have the strongest current economic heft[72], of all creative industries in Mississauga. There are two separate, but often related aspects to this: location shooting and studio space. We look at each.

Demand for location shoots and studio space in the GTA is driven by the needs of domestic and foreign film and TV productions. Part of the "magic" of film and TV is that locations and facilities for shoots are in large measure interchangeable. Producers choose filming destinations on the basis of a number of criteria – cost, availability of talent, expertise & facilities, and, too a far more limited extent, attributes of the specific physical environment.

While there is legitimate concern that Canadian production activity may start to wane over the next five years, with the Canadian dollar back down at $0.70 U.S., foreign location and service production in the GTA is booming[73].

This situation presents a clear, but limited, opportunity for Mississauga to exploit. If historic patterns repeat, the Canadian dollar will in all likelihood return to near parity with the U.S. dollar some time over the next three to seven years[74]. Thus, if Mississauga is to take advantage of the opportunity, it must do so quickly, so it can establish itself as a competitive alternative, before the highly favourable exchange rate dissipates, and Mississauga is forced to compete more directly with other GTA/Ontario jurisdictions.

In looking at that longer-term opportunity, Mississauga should take an inventory of its unique value proposition, which has distinct qualities, including:

- While not a "region" for the purposes of regional tax credits available in Ontario markets like Hamilton and Ottawa, Mississauga is in the "zone" for the purpose of union agreement rates – that is, no additional step ups are required for travel outside Toronto;

- Underused warehouse facilities, potentially repurposable for studio space, are available; and

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[72] We say "arguably" here because we have no clear economic data, but note that at over a hundred permanent FTEs and students, Metalworks is likely the single largest CI company in Mississauga, and theoretically could contribute more economically to the City than all Film and TV.

[73] We are not aware of any official stats from the City, but Toronto reported a record $1.23 billion in on-location filming in 2014, exceeding 2013 levels by with a 4.3 per cent. https://www.google.ca/search?q=Toronto+film+activity&ie=utf-8&oe=utf-8&gws_rd=cr&ei=w8S3VtPxOcXVetyaraAC#q=Toronto+film+activity+booming

[74] Obviously there is no set pattern, but it is instructive to note that the Canadian dollar was last at parity with the US dollar in 2012/13, and before that in 2007/2008. See, for example: http://www.xe.com/currencycharts/?from=USD&to=CAD&view=10Y

- Property valuations and rents are generally less in Mississauga compared to like Toronto facilities.

Location shooting in Mississauga appears to have suffered from misperceptions about availability and service standards. Certain industry representatives during the consultations suggested the service was considered to be disjointed, unnecessarily politicized and/or required engagement with various departments. We understand that, in actual fact, the service has been recently joined up as a 'one stop shop', but this was not apparently known to all consulted[75]. To the extent that location managers are labouring under such perceptions they will resist filming in Mississauga.

Nevertheless, the same industry representatives felt that Mississauga had an opportunity to accommodate more location shooting as Toronto becomes more and more saturated, impossible for parking of production vehicles and expensive to use. This would require more marketing, which gave rise to the comment that actually Mississauga 'doesn't toot its own horn enough'.

Location shooting is subject to pre-approval in the case of use of property owned by the City. As any major shoot requires significant use of city streets for parking, in effect all Film and TV location shoots require pre-approval, through the obtaining of Film Permits from the Film Office[76].

Mississauga approval of location shoots is generally automatic, and compliance requirements meet normal industry standards, with one exception. Location filming in residential areas is limited to two Film Permits per year (for a given residential block) unless approval of 80% of affected residents is obtained. The 80% approval requirement is considered by most in the industry to be unduly restrictive and a major disincentive to shooting in Mississauga.

Perhaps because of this, perceptions remain that location shooting in Mississauga is more subject to political interference than, for example, in Toronto. Presumably, depending on the ward, some residents and councillors do, in fact, witness the benefits at minor cost; while others see material inconvenience at minimal benefit.

In any event, location managers are keen to understand which areas can be chosen with certainty rather than risk planning for locations that then become unavailable.

Unlike the economic, youth employment and skilled employment benefits of expanding studio space available in the city, the economic benefits to Mississauga of pressing for more location shooting may produce more modest results. During the consultation, it was reported that Mississauga location shoots appear to mostly employ labour that commutes in, using little of Mississauga hotels and other services. Even crew and cast catering often come from elsewhere in the GTA due to pre-existing working relationships.

Shoots express an unwillingness to pay the City for anything but parking. While there is economic spend in the City, it appears to be mostly limited to local services such as gas stations, restaurants,

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[75] This concern was raised by a location scout interviewee, but whether it is a more general perception is not known. Some in the Industry also seemed to be unclear about whether Mississauga is in the zone for union contract rates or 'half in the zone'. It is the former.

[76] Mississauga Policy No. 06-03-02 *Filming on City of Mississauga Property.*

takeaway catering and miscellaneous retail, and rental of homes and other sites. We understand that this makes for annual revenue to the City of approximately $200,000. There is also some direct economic benefit to Mississauga for skilled labour that resides in the City[77].

Maximal economic benefits to location shooting would appear to be present when:

- Location shoots are tied to use of studio space. That is, the full filming occurs in Mississauga, increasing the use of Mississauga resources;
- Shoots contribute generally to the attractiveness of the GTA as a destination, indirectly benefiting Mississauga; and
- Direct economic spends in rentals of locations be it homes or other sites.

That said, the cultural benefits of location shoots can be considered similar to, or better than, use of studio space. While any one shoot may not have an apparent lasting effect, the accumulation of activity adds to the vibrancy of cultural life in the City, and adds to the City's creative identity. (Films and TV series that feature identifiable Mississauga sites can, in particular, create a link to the city for the audience, which can lead to film/TV site visits or "set-jetting".)

Our primary recommendation here is that the City seek to better market location shooting in Mississauga, and in particular, redress incorrect perceptions (and unnecessary restrictions) regarding service and availability[78]. This might include:

1. Development of a solid "pitch" document, selling Mississauga's attributes and summarizing incentives, availability & benefits[79];

2. Consideration of relaxing the requirement that approval of 80% of affected residents be obtained in the case of more than two Film Permits being issued in a given residential block in the same year;

3. Direct communications via industry e-newsletters, and increased press engagement to report on filming in the City[80]; and

4. Familiarization visits for location managers and producers in Mississauga to showcase areas where filming can be done and clarify the service. (This could also be an opportunity to draw in politicians also and promote mutual understanding between industry and the City.)

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[77] The notion being that the more freelance creative Mississaugans can work in the City, the more inclined they are to continue to reside here.

[78] Secondarily, a review of the Film Policy and related bi-laws may be appropriate. We note that Sudbury's efforts here appear to have been a backdrop to new provincial funding, noted earlier. http://www.greatersudbury.ca/living/arts-and-culture/film-by-law/

[79] This might usefully be linked to popular properties on OMDC's online location database, as well as (per below) details on studios, including specifications and an up to date schedule of availability.

[80] We note, for example, the Region of Durham's Film and TV pitch presentation, here: http://rto6.biz/wp-content/uploads/2015/04/5.Film-Tourism-Summit-March-26-2015.pdf (one of the first entries that appears when googling "Durham Film and TV"). Googling "Mississauga Film and TV" brings basic information, but little "pitch": http://www.mississauga.ca/portal/business/filmoffice

Although location shooting is not a major source of income for the city, addressing these issues corrects and enhances the city's reputation in film and TV and its friendliness towards the sector, which in turn will assist in marketing and in addressing industry other perceptions, especially if the city wishes to develop a film and TV cluster/infrastructure at Pearson Airport.

Studio Space

Mississauga currently offers a number of warehouses in the south of the city, close to Toronto, as studio space[81]. These facilities are well used, which suggests demand and that they are providing a satisfactory and much needed service. Mississauga has an opportunity to exploit this proximity and develop its available studio space, using suitable existing, un-or under-utilized warehouses and other former-industrial buildings.

The advantages of such an approach include:

- Relatively little new rebuilding or permanent infrastructure is required[82];
- Minimum required production ceiling heights of 20-30 ft can be achieved;
- Market rental rates are above those of other uses (e.g. storage), but can be low enough to be competitive with Toronto rates[83]; and
- Building/area use is typically in "transition", therefore an interim 7-10 year use strategy may well be appropriate.

Consultations revealed that that there are on the order of five potentially available warehouses in the airport area - which has been identified as an area for industry and employment growth in the city's economic development plan. However proximity to the airport brings noise concerns that would require soundproofing to resolve. Such an investment would enhance the availability of studio space for temporary productions or the opportunity for a leading studio to be attracted to Mississauga to locate a permanent studio presence. Surrounding buildings could potentially house post-production and related support services creating a viable film and TV studio and post-production cluster, or node.

We were also told by one developer with a transitional warehouse property in the southern part of Mississauga that it had sufficient "word of mouth" demand to have a succession of film shoots. However, as bank financing is not available for short-term lease business models, the developer may be forced to seek other interim uses.

As an immediate general recommendation we suggest that the City fast track the commissioning of an internal or external economic analysis of the benefits of various approaches to expanding

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[81] These are not, apparently, officially considered studios as they are not identified in the OMDC's studio listing. http://www.omdc.on.ca/film_and_tv/Ontario_Film_Commission/Ontario_Production_Guide/Studios__Warehouses__Sets.htm

[82] The basic criteria is large (often 10,000 sq ft +) open quiet spaces with heat and air conditioning.

[83] For example, we were advised by one Mississauga developer that a large warehouse space (10,000 sq ft +) might typically earn 4-5 per sq ft for general use, but could earn double that as studio space.

available studio space in the City[84]. Such approaches could include exploring creative ideas to encourage property owners to maintain existing space and develop new facilities, potentially with the use of soundproofing. This should be initiated as early as possible in this fiscal so that, if so decided, action could be taken in late 2016/early 2017.

Interactive Digital Media (IDM)

Digital Media (DM) and Interactive Digital Media (IDM) are terms that can be used narrowly in the context of purely "interactive" digital media, (that is games, mobile apps, e-learning) or all forms of new digital media (that is, also including, web series, ebooks, emagazines, streaming music, social media and the platforms that enable them).

While we prefer to use the acronym IDM, we believe that the broader perspective of digital media is warranted for Mississauga, both because it is naturally more inclusive, and also because it encompasses much of the current reality and certainly the future of creative industries, particularly in Mississauga.

While many traditional cultural industry companies like broadcasters and book publishers may continue to succeed, growth in all CI sectors will be driven by digital media.

We identified over forty IDM businesses in Mississauga, more than any other creative industry sector except publishing. These include close to twenty IDM producers plus associated direct service providers. Most of these digital media companies appear to have been recently founded by Mississaugans, and many still operate as home-based businesses. [85]

Unlike film, TV or music, IDM companies do not appear to have any unique municipal needs, other than broadband. We therefore do not feel it necessary to target IDM with sector-specific incentives[86], beyond those recommended initiatives that support screen-based, creative or digital industries more generally.

That said, the key role that IDM increasingly plays in the broader creative industry should not be underestimated or taken for granted. IDM naturally lends itself to interesting collisions with other creative industry companies. By working together, traditional and digital content producers engage audiences in new and exciting ways. For this reason, it is vital that any initiatives the City takes for creative industries, any nodes, hubs or incubators setup, strongly encourage IDM creators to be part of the action in order to facilitate these connections.

We also see IDM as one of the best opportunities for substantial growth in Mississauga's creative industries. This is both because of industry growth internationally, and because Mississauga's attributes lend themselves to a working environment very favourable to IDM.

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[84] We would suggest this combine a general demand/market analysis with the potential for developing studio space at specific designated sites and determine what incentives the City would need to employ, at what cost, and their payback.

[85] See Appendix 2 for list of IDM companies in Mississauga. The average age of IDM companies in Ontario is under 10 years. Source: Interactive Ontario.

[86] There is an argument for proposing an exclusively IDM based Incubator. We certainly see any Incubator emphasizing IDM, but we believed it important not to foreclose the potential for such an initiative including, and encouraging, cross-sectoral innovation.

We note, in this regard, the 2013 study of Digital Media (more particularly the game sub-sector) by Economic Development. We do not necessarily dispute the study's general view that the "[p]otential for developing a traditional digital media company/gaming cluster in Mississauga is low", *if the intent were to recruit a major gaming company via "inward investment".* As already recognized, we also accept that based on typical ROI metrics, the case for investment in digital media would not be as strong as it is, for example, for hardware or software based ICT companies.

That said, among all CIs in Mississauga, we are of the view that the IDM sector promises the best potential for economic growth over the next five years, and ultimately is the best placed CI for a material ROI on strategic investment in the medium to long term.

In addition to including IDM in hub initiatives, we therefore, **recommend that IDM be a focus of other initiatives, including the potential development of a creative-technology Incubator** and as a key framework for the fostering of a Mississauga Creative Industries Network.

Publishing

Based on our research, Mississauga currently has close to sixty publishing companies, the majority online/magazine/newspaper companies. They include specialized and ethnic Canadian publications, as well Mississauga press.

Given the nature of the publishing business[87], the very diverse composition of the sector in Mississauga, and the lack of apparent common sector-specific needs[88], we do not recommend any specific measures for the publishing sector. Companies in the sector could, however, potentially benefit from a number of the proposed general measures above, including hubs and the creative network[89].

Budgetary Considerations & Priorities

We are cognizant of Mississauga resource and budget realities, and believe it is therefore crucial to be both realistic in recommendations and to leverage potential private and public partners to the greatest extent possible.

There are three important elements to this reality:

- First, that as the budget planning cycle for the next fiscal (2016-2017 is nearing completion, implementation of recommendations would ordinarily only be slated for the 2017-2018 fiscal;

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[87] As a primarily text/image-based media, publishing does not have high fixed or operating costs for production, and therefore is capable of operating, even as local media, without the degree of subsidy common in screen-based sectors. The notion of state support for the "free press" is also not something that democracies tend to be comfortable with.

[88] None of the publishing representatives we spoke with recommended publishing specific initiatives,

[89] Note also that based on our research of the community, and staff input, we have not seriously explored the benefit of measures directed at specific ethnic communities, such as the dominant South Asian Community. This could be a successful strategy economically but culturally would inherently be supporting the "multiple identities" of creative ethnic Mississaugan's more than supporting a common identity. That said, it would be worth considering in the future, particularly in areas of great cross over potential from the ethnic to the mainstream – e.g. pushing Bollywood connections and local shooting/production.

- Second, given the lack of available budget reserves, any new operating budget commitments would effectively require incremental property tax increases. Ongoing incremental operating costs[90] of even a few hundred thousand dollars, for implementation of a CI strategy, would be considered material; and

- Third, capital commitments, particularly related to improvement of transitional "employment lands", that will generate sufficient revenue &/or contribute to increased property values can be more readily financed.

As a consequence, we believe that the immediate opportunity to fast track the development of one or more creative industry facilities, including studio spaces or hubs with ultra high speed broadband connectivity, using federal government infrastructure funding, should be actively pursued as a priority as soon as possible. To the extent that this strategy can support such an initiative, it suggests a twin track approach to "thinking big" to solicit federal government funding as well as "thinking realistically", in the event of Mississauga-only funding.

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[90] Be they staffing, grants or lost property tax revenue

Appendix 1: Detailed Summary of Recommendations

Recommendation 1: Position Mississauga as an Innovative Creative City – 'Digital City'.

Overriding Goal

To align with and support the City's goal of being the *"preferred location for innovative, creative and knowledge-based businesses and emerging industries".*

Rationale

Creative industry companies and people are increasingly portable. Their minimal infrastructure needs means that companies can basically locate anywhere as long as they can attract and retain the right talent. Creatives will move to where good working and living environments – including connectivity – are to be found.

"Creative City" positioning is consistent with Mississauga's broad strategic goals, its specific goals of retaining and attracting creative knowledge-based businesses, and its strengths in location, infrastructure and educational institutions.

Recommendations

1. Promote Mississauga's Creative Industries sector and reputation through select general and specific profile raising and marketing activity.
   a. Include references to the creative industries in promotions of the City, raise the creative industries profile through the MCIAF (Rec 2), and through increased creative industries presence on the City's social media platforms
   b. Publicize facilities, available support (City, provincial and federal), music events and festivals, nodes and hubs, success stories such as growth, new contracts and awards.
2. Encourage the development of high-speed, high bandwidth broadband networks to meet the industry's current and future needs;
   a. Publicize ultra high-speed broadband installation in Mississauga.
   b. Prioritise ultra-high-speed connections to cluster or hub sites chosen for, or currently attracting, creative industries.

Implementation

- Encourage the promotion of Mississauga as a 'Creative and Digital City' within City communications and specific creative clusters according to their specialities. Promotion to include outreach to companies and individuals wanted as champions.
- Encourage the identification of specific neighbourhoods in the City as creative nodes with particular CI specialties.

- Encourage provision of greater ease-of-access to poles, underground ducts and "dark fibre" for potential broadband partners such as SirtNet and Telcos, developers and other Internet providers.

Indicators of Success

The success of the City's promotional activities can be monitored through such means as:

- Media hits and mentions of Mississauga in association with the "creative industries"
- Increases in social media followers for the City's online profiles and numbers of visits to the City's website.
- Surveys of public perception of Mississauga's reputation as a creative city.

More broadly, the success of this initiative can be measured through:

- Growth in new companies established in Mississauga, the numbers they employ and the growth in the numbers of freelance creatives located in the city.
- Monitoring the uptake of broadband by creative businesses through data gathered by broadband providers.

Recommendation 2: Establish a Mississauga Creative Industries Advisory Forum (MCIAF).

Overriding Goal

To provide the City with guidance and expertise from Mississauga Creative Industry leaders in the ongoing execution of the City's Creative Industries strategy.

Rationale

Establishing a Creative Industries Advisory Forum is the single best investment the City could make in promoting Mississauga as a destination for Creative Industries. The formation of such a Forum would signal that Mississauga "is open for creative industry business".

The MCIAF would be an advisory body. Its purpose would be to advise the City on policy, strategy, and corporate practices to ensure the competitiveness and viability of the Creative Industries sector. The Advisory would also work to provide advice and 'a Mississauga voice' on issues of concern that affect the Creative Industries sector.

Members of the Advisory would sit as individual members and not as representatives of any one organization or company. Skills, qualifications and experience for these representatives would include: detailed knowledge of the sector; awareness of research, trends and changes in the sector; understanding of industry issues, risks and challenges; familiarity with by-laws, legislation and regulations governing the sector within a municipal setting; connections to organizations and agencies that influence policy and regulations; demonstrated success in marketing and promotion; and experience in business management, labour relations and strategic planning.

1. Create an Advisory Forum to provide advice and recommendations on strategies and long term plans. This will enhance the attractiveness and competitiveness of Mississauga for business and activity in the film and television, music and digital media.

2. Liaise with the Advisory Forum to canvass the industry for ideas, issues and concerns and enable the advisory to act as a forum through which the CI industry can communicate with the City.

3. Assist the Advisory Forum to provide advice and recommendations to Council for change on existing or new policies and practices of City Departments which affect the CI sector; monitor industry legislation and policies at senior government levels.

Implementation

- The Culture Division to take a leadership role in catalyzing a meeting of the creative industries prior to the launch of the strategy, to gain feedback and begin a relationship with the sector.

- The Culture Division to identify potential industry members, develop a nominations process, consider nominations and announce the Forum.

- The MCIAF to consist of eight to twelve members comprising designated members of Council, Chief Executives or senior managers of respected CI businesses that have a connection to Mississauga; leaders of creative trade bodies, Deans of the CI departments of UTM and Sheridan College and Senior Staff representatives of the Culture Division and EDO.

- The MCIAF to be co-chaired by a leader of a creative enterprise and the Director of Culture.

- The MCIAF to meet once or twice a year - frequently enough to ensure its work responds to developments and aligns with City plans and priorities, while ensuring it engages at the most senior Industry and City level.

Indicators of success

An active advisory Forum, expanding awareness of creative industries in the city of Mississauga.

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Recommendation 3: Target Sector-Specific Measures for Film & TV, Interactive Digital Media.

Overriding Goal

To maintain activity and enhance growth in high profile, high potential cultural industry sectors.

Rationale

To maximise the potential of growth areas, a limited number of targeted sector-specific measures are proposed for screen-based media.

Recommendations

1. The City to promote and remove barriers to location shooting in Mississauga.
   - Align policies with the Toronto Film Office
   - Seek relaxation of the requirement that approval of 80% of affected residents be obtained in the case of more than two Film Permits being issued in a given residential block in the same year
   - Increase the marketing of location shooting in Mississauga, and in particular, redress incorrect perceptions regarding service and availability
   - Develop of a solid "pitch" document, selling Mississauga's one-stop-shopping approach
   - Communicate directly via press and industry e-newsletters to report on filming in the City.
2. Consider approaches to expanding available studio space in the City.
   - Such approaches could include creative arrangements to encourage the retention of space currently used for studio production and promote use of unused warehouses to meet sector capacity needs.
   - Internal or external economic analysis of benefits should be initiated as soon as possible so that any measures could be in place while demand for studio space remains high.
3. Establish a facility based Creative Hub or hubs in a location or locations connected to current grassroots activity.
4. Consider the development of an incubator for Interactive Digital Media, or more broadly based digital media (IDM and IT), in order to promote this sector's growth and strength in the City.

Indicators of success

Increases in the number of filming days and number of film and TV productions filming in Mississauga per year.

Establishment of an IDM hub &/or incubator.

Increase in the number of IDM companies and economic activity.

Recommendation 4: Target Sector-Specific Measures for Live Music

Support live music as a key element in growing CIs and in the retention of young talent in the Creative and other industries that the City is seeking to grow.

Overriding Goal

To enhance growth in high potential CI sectors.

Specific Recommendations

1. Help to build a live music scene from the ground up, with advice, co-ordination, promotion and indirect assistance for venues, promoters and festivals.
2. Add music and festival officers to advise and develop the live events and music sector

Implementation

1. **Assistance with the Creation of Music "Scenes"**

   - Identify locations of concentration, likely centering on Port Credit and Streetsville, or local heritage buildings that can be converted or upgraded for music performance.
   - Gain the support of local business owners in those areas to host live music, in order to lay a foundation before embarking on a strategy.
   - Open up opportunities for themed music festivals; both designated areas have festivals now and the jazz festival in Port Credit moves festival acts into small venues at night; helping audiences get used to the venues and generating economic activity.
   - Encourage public transit development to assist movement of the teen to 30 age groups to live events. Port Credit will be on the Hurontario route and the Go line, but Streetsville might need a fast connection to the new transitway development along Highway 403.
   - Advise and assist producers and promoters with grant applications to provincial and federal bodies for creation, recording, promotion, etc.

2. **Venues**

   - Survey Clarke Memorial Hall and seek capital improvements for better permanent facilities for shows, including live music.

- Assist presenters in obtaining OMDC funding that could be used for live sound systems in small venues, publicity when hosting music events, and support for festivals to attract crowds and identify an area with music.
- Through a non-profit enterprise, (e.g. the Mississauga Arts Council) establish assistance for small venues to provide original music, to participate in festivals or year-round promotional events.
- Include a multi-use performance space in the creative industries hub as a nucleus for live music that will weave the hub into the fabric of the local community.

3. **City Advice and Support**

- Provide one-stop shopping for Promoters, with advice on permits, hours, policing, licensing, media and the co-ordination of potentially competing festivals through a Music & Live Events Officer, who would also work with venues and BIAs on the marketing of a music scene in specific areas, and with musicians on educational events for career development, finding grants, etc.

Indicators of success

- The number of performances in small venues and other spaces each year
- Increase in attendance across all music activity.

Recommendation 5: Facilitate the Development of the City's Creative Talent

Overriding Goal

To increase the success of creative in Mississauga, and thereby increase the City's attractiveness to creatives in key sectors.

Rationale

Creative industries are driven first and foremost by talent.   As Mississauga is so close to the creative hotspot of Toronto, achieving talent retention in, and attraction to, the City would benefit all commercial creative businesses in the City. Such measures are also a key part of developing the City's identity as a 'Creative and Digital City' and in growing the creative industries in Mississauga.

Recommendations

1. Creation of a "Creative Network" to support talent in a localized manner, and encourage identification with a Mississauga creative industry community.
2. Celebration of local achievements in the form of an annual gathering, with awards or recognition of local excellence, in order to promote local talent and skills.
3. Promote skills training available in Mississauga, and consider surveying creative and cultural sector skills needs.

- The Culture Division to catalyze an annual creative gathering to foster a Mississauga creative network, with the guidance of the MCIAF, and potential involvement of trade associations, e.g. Film Ontario, Interactive Ontario and CASO.
- The Culture Division to consider involving the Mississauga Arts Council (MAC) to support the identification, celebration and engagement of the broader Mississauga creative community in a creative network that encourages Mississauga based cross-sectoral creative industry activity.
- The Culture Division to consider a survey of the creative and cultural sector's skills needs and develop appropriate responses (with the MCIAF), such as fostering greater awareness of available skills training in and around Mississauga, and encouraging institutions to fill evident needs.

Indicators of success

An annual gathering of Mississauga creatives featuring successful Mississauga creative and/or artistic performances.

The launch of a Mississauga Creative Hub.

Growth of a network of creative Mississauga individuals, with evidence of significant connections within Mississauga's CIs through a survey of creative network members.

Increased awareness of the creative industries and their economic contribution to the City of Mississauga.

Recommendation 6: Develop Industry Specific Creative Clusters.

Clusters can be:

- Geographically based nodes;
- Facility based hubs; and/or
- Value added incubators.

Overriding Goal

Industry specific creative clusters attract specialised talent and skill in sub sector disciplines, achieving a concentration of ability and knowledge leading to innovation, market leadership and economic wealth.

Rationale

Creative industry businesses gain strength by clustering in one place, usually attracted by dynamic cultural activity in a city and in areas with affordable space to start businesses and warehouses for making and production space.

In developing new businesses, proximity to other creatives provides the opportunity for sharing of ideas, skills and co-trading, which helps the companies grow and innovate. Mississauga creatives seek to be part of the broader GTA creative cluster, and part of geographically, physically and sectorally appropriate creative clusters in Mississauga.

Mississauga has a number of prime candidates for different types of creative clusters and different industry needs, including Lakeview, Port Credit, Streetsville, City Centre and the Airport.

Recommendations

1. Encourage and promote the development of creative industries in select/appropriate geographic areas (nodes). For example, Lakeview and City Centre for IDM, Port Credit and Streetsville for music and CI's generally, and the Airport for warehouses and studio space.
2. Support the establishment of Creative Industry hubs with appropriate facilities in creative nodes – offices for small businesses, co-working space for freelancers, meetings rooms, broadband and a café.
3. Evaluate the potential for an Incubator in partnership with academic institutions and industry players and/or alongside creative hubs.

Implementation

- The Culture Division recently commissioned a Cultural Infrastructure and Creative Spaces Strategy, which would assist in identifying creative sectors per area to market and develop as clusters for music, film & TV, and interactive digital media.
    - One or more facilities suitable to act as a creative hub should be selected from those identified in creative notes.
    - An assessment of demand will be required for each area identified
    - The City to consider identifying and attracting an anchor tenant
    - The City to analyse feasibility given the potential for private partnerships, anchor tenants, income generation and demand
- Encourage the retaining of a hub manager to manage activity and coordinate within the broader Mississauga creative network
- Consider the viability of an incubator within the hub, in association with an anchor industry tenant, academic institutions (UTM &/or Sheridan) or other industry players (such as Samsung, Microsoft, Xerox, Amazon)

Indicators of success

Number and vibrancy of creative nodes identified across the City.

Number of hubs established.

Establishment of an Incubator.

Recommendation 7: Develop Public Private Partnerships to Build Creative Industry Spaces.

Rationale

A Creative Industries strategy is best executed by a combination of public and private partners working together, because each partner brings qualities that the others lack. Private firms bring an agility and adaptability to market conditions, especially among the SMEs that make up most CIs. City agencies have a long-term, public good view, without the need for short-term returns. They are also the partner who can take initiative, draw on provincial funding and hold the vision for the community. The City's strategic overview provides the evaluation base to identify suitable spaces, and private firms can be attracted to establish creative businesses there. Such partnerships present a solid opportunity for appropriate projects to develop creative industries infrastructure.

Recommendations

1. Develop partnerships with supporting public agencies and key private firms.
2. Pursue federal infrastructure monies for capital intensive projects.
3. Pursue expanding studio space.

Implementation

- Culture Division to identify public or academic partners such as SirtNet, Sheridan and UTM to support skills development and the creation of Mississauga CI clusters, and engage CI or IT companies in, or contemplating locating in Mississauga such as Microsoft, Samsung, Canadian Music Week, MetalWorks, and Marblemedia.
- The City to apply, or encourage CIs and Mississauga Cultural agencies to apply, as appropriate, to Ontario's funds in music, film & TV, and digital media; the new Federal Liberal Government's federal infrastructure investment of $9.5 billion per year, and the proposed $400M annual investment in CIs including cultural infrastructure. The City should explore working cooperatively with "outer Toronto" regions such as Durham.
- The City to explore the feasibility of adapting warehouses at the airport, including exploring the feasibility of soundproofing, to meet anticipated demand for studio space which, consultations suggested, was at capacity south of the city.

Metrics

- Develop 3 private public partnerships to support the creative industries space development plans over the next two years.
- Secure sufficient resources from federal funds to support creative spaces and studio conversion in the City.

Appendix 2 – Creative Industry Companies in Mississauga

LIST OF BUSINESSES
WeeDan Music
Shaw Broadcast Services
The Haze F M
Radio 7 - Polskie Radio Toronto 1320 A M
Blues & Roots Radio
C I N A Radio - 1650 A M
Rawal T V Studios
Aikam Media Group
The Shopping Channel
Rogers Television Mississauga
University of Toronto at Erindale Campus Radio - 91.9 F M
Pot Pourri Radio
Bell Mobility Creekbank Campus
Maad Productions
Circus Ink Entertainment
IC Technology
IMAX Corporation
insauga
Neezo Inc.
Okino Computer Graphics Inc
Optimum Production Services Inc.
Pyman Media Group
R&D Funding Management Inc.
Rogers TV
Shakeel Noor
Wallace Kirkwood
Fresca Films
Ruoff & Company Inc.
Pinewood Films Inc./ Peter Rowe Productions Inc.
Van Valkenburg Communications
Granite Point Productions Inc.
Frischkorn Associates Inc.
Motion Picture Enterprises Inc.
LimeStyle Productions
Milgrom & Associates Inc.
Ambianz Inc
BartSoft Inc.
BDA Entertainment
Big Brain Productions Inc.

Brisk Mobile
ClickTecs
dotH Inc.
Evolusent
Farrago Media Inc.
G Web Pro Marketing Inc.
GMB Consulting
GMX Media
harpLabs
Kinex Media
Koda Media Group
New Toronto Group
Platina Technologies
RaeRock Enterprises
Refero Group Solutions
Saigma Strategic Systems Inc.
VCM Interactive
Decosta Inc.
SeaWell Networks Inc
Microsoft Canada
Reverie World Studios
Revolver Games
Allied Game
A V Solutions
Ackley Corporation
AdoSoft Inc.
Ambianz Inc.
Cybervision Media
D P I Graphics Group Inc.
Gateway Visual Communications Ltd.
iTool Pro System Inc.
Leafcom Corporation
Logo Factory Media Works, The
M S P Stream
Marketspace
Search Gurus Inc.
Site Systems Inc.
The Newland Group
W E B 4 Y O U Inc.
Zipzoom National Inc.
Activision Blizzard, Inc
Canadian Association for the Advancement of Music & the Arts (CAAMA)
Debi Sander Walker Entertainment
Exodus Studio Productions

FatLabs
Frederick Harris Music
Lets Make Good Productions
Metalworks Studios Inc
PlayD
Red Couch Recordings
Rehearsal Factory
Rob Taggart Talent Agency
Studio 1652/Ndlovo Music
The Booking House
The Natural Frequency
Velvet Sound Studios
Black Box Music
Morning Music Limited
A V More
Hall Train Studios
Ghost Rider Studios
E M I Music Canada
Academia Press
Below the Belt Boxing Magazine
Benben Publications
Canadian Controlled Media Communications
Copp Clark Limited
Coulter Publishing Ltd
Entis Communications
Global Marketing Co Ltd
Home & Cottages
In Our Words Publishing Co.
Ishcom Publications Ltd
Nextgen Interactive Media Inc
North Island Publishing
Pace Publishing
Publications Rousseau & Associes Inc
Silver Saver Publications Inc
STA HealthCare Communications Inc
The Mississauga News / Metroland
Truck'N Roll Magazine
Weekly Pakistan News Canada Ltd
Sans Magazine
Carpages.ca
Spirit of the City - Mississauga Life
C T M Media Group
Keith Communications Inc.
my mississauga magazine

iPromote Media Inc.
D&B Canada
Wiadomosci Press Inc.
Pakistan Post Inc.
The Asian Connections Newspaper
GOODLIFE Mississauga
Weekly Urdu Post Canada
South Asian Weekender
India Journal
Hindi Abroad Media
The Weekly Voice
Graphic Monthly Canada
SNAP South Mississauga
SNAP North Mississauga
Pakistan Times
Random House of Canada Limited
Owen Media Partners Inc.
South Asian Focus Newspaper
Hamdard Weekly
Can India News/ World Media Corp (Canada) Inc
Business Times - Business & Financial Newspaper
T H N Publications Inc.
John Wiley & Sons Canada Ltd.
ATIN ITO Communications Ltd.
Awam Newspaper and Urdu Times
Punjab Star
Master Web Inc.
Ajit Weekly Newspaper
George Media Network
Lithuanian Weekly Teviskes Ziburiai
Punjabi Daily
Benben Publications

Appendix 3 – List of Individuals Consulted

Group Consultation Attendees:

Film & TV

Luis Mendosa, Director's Guild of Canada
Victoria Harding, Director's Guild of
Canada David Plant, Trinity Square Video
Gina Power, Disney Company
Canada Kathleen Webb, CRS
Technology Corp Khaled Iwamura,
insauga
David Hardy, William F. Whites
Doug Barrett, Barcode SDG & Professor at Schulich
Mark Bishop, MarbleMedia
John Barrack, MarbleLIVE/APC

Business

Anthony Wensley, Univ Of Toronto Mississauga (UTM) Campus
Sandeep Badwal, Starwood Hotels
Nick Ianelli, Deluxe
Lata Pada, Sampradaya Dance
Vivien Tam, Mississauga Business Enterprise Centre (MBEC)

Music

Neill Dixon, Canadian Music Week
Sarah Konwal, Metal Works

Live Events

Alex Bart, Fresca Films
Stephanie Scott, Malton BIA
Anu Vittal, Mississauga Arts Council
Bob Spencer, Metal Works
Patti Janetta Baker, Big Music
Ellen Timms, Port Credit BIA
Vikas Kohli, Entrepreneur

Valerie Fox, Consultant (Previously Ryerson DMZ Incubator/Pivotal
Point) Jamshaid Hashmi, ClikTecs
Muriel Rosilio, Farrago Media Inc.
Christa Dickenson, Interactive Ontario
Carly Beath, Interactive Ontario
Angela Stukator, Sheridan College
Wojtek Kawczynski, BDA
Entertainment

Informal Consultations

Lisa Lyons, Corus
Raja Khanna, Blue Ant Media
Av Utukuri, Nytric
Michael Packham, Skyline
Inbae Ahn, Gibraltar and Tower 10 Labs
Matt Zadkovich, musician and presenter
Arlene Paculan, musician/Live Event promoter "Let's Make Good Productions", Television
host Erin Benjamin, CEO Music Canada Live!
Todd Collins, owner, Chuchulainn's, Streetsville
Thomas Beaney, salesperson, Strings Attached, Streetsville
Marina Adam, OMDC
Kristine Murphy, OMDC
Raina Wells, OMDC
James Weyman, OMDC
Donna Zuchlinski,
OMDC
Eric Jensen, City of Toronto Film Office
Michel Alosinac, City of Toronto Film
Office David Dexter, Sirt
John Hellicker, SirtNet
Bike Thiefs; Band
Farrell Rafferty;
Musician
Huge Cosmic/Denim Skeletons (Jacob Hrajnik); Musician
Pretty Odd, Band
Tomahawk Love (Michael); Musician

Bands Surveyed for Scene Evaluation

Yonder Peak; Aukland; Hammerhands; Animal Faces; River Groves; Bien Agiter; Denim Skeletons;
Peace Be Still; Tomahawk Love; The Posts; Ballroom Babies; K.I.D.; John River; Rich Kidd; Devon
Tracy; Kiki Rowe; Wondagurl; Nineteen85

Venues Evaluated

Clarke Heritage Hall, Port Credit; Masonic Lodge, Streetsville; Chichulainn's, Streetsville; Danforth Music Hall, Toronto; Sound Academy, Toronto; The Phoenix, Toronto; The Hoxton, Toronto

Appendix 4 - List of Documents Consulted

Mississauga Documents

2013 Culture Report Card

2014 Strategic Plan

ACMP Appendixes

ACMP Full Report (Culture Master Plan)

Action Plan for Innovation in Mississauga

A Framework for a Public Art Program

A Dialogue on Talent, millierdickinsonblais, 2013

Arts Culture Summary 2015-18 Business Plan and 2015 Budget

Briefing Note Mayor

Celebration Square Strategic Plan

CI Background Briefing Document

Clarke Memorial Hall - Feasibility Study

Cultural Infrastructure Inventory (excel file)

Culture Department Website (including Culture on the Map Webpage)

Culture Report Card

Cultural Policy, September, 2015

Digital Media Executive Summary

Digital Media Interviews & Summary

Digital Media Post Secondary Education Programme

Digital Media Profile

Employment Lands Review, Council Documents (June 22, 2015)

Employment Lands Review Study (D-15-Hemson-Mississauga –Emp- Land – Review)

Executive Summary (Economic Development Strategy – Building on Success)

Executive Summary (Culture Master Plan)

Final Film Policy

Final MusicOntario ODRP Report

LAC Meadowvale Study

M-29-2015 Vacant Land Site Maps (webpage)

Masterplan Corporate Report Final

Masterplan Implementation Plan

Masterplan Vision Final

Mississauga.ca.Business Strategy (Webpage)

Our Future Mississauga: Growing our Brand

Parking Strategy - Phase II - Port Credit & Lakeview

Public Art Framework

Report on Economic Development 2014

Reporting Out Five Year Update (on the strategic plan)

Strategic Plan Web 04 29 2009

Tax Comparisons – economic development

Winthehumanrace.ca (Mississauga economic development website)

Other Documents[91]

CITIE Report 2015

Cultureonthemap.ca

OMDC Industry Profiles (and other data and program information)

Ontario's Entertainment & Creative Cluster: A Framework for Growth

"Live Music Measures Up: An Economic Impact Analysis of Live Music in Ontario"; Music Canada Live, 2016

Miscellaneous municipal creative industry strategies and policies from municipalities such as Amsterdam, Austin, Belfast, Birmingham, Berlin, Barcelona, Durham, Edmonton, Edinburgh, Glasgow, London, New York, Helsinki, Hamilton, Sudbury, Kitchener, Toronto and Vancouver (see Working Documents for further detail and excerpts)

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[91] Note that this is just a sampling of some of the more important third party documents reviewed.