MDB INSIGHT

City of Hamilton Creative Industries Sector Profile Study

Creative Industries Sector Profile Report

October 2018

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Executive Summary

Sector Profile Study Purposes

The City of Hamilton undertook the Creative Industries Sector Profile Study to establish a clear and accurate description of the city's creative industries sector. In doing so, key gaps and opportunities, objectives, and actions were identified to assist the City of Hamilton and its businesses and entrepreneurs to grow and support the sector.

Six sub-sectors were identified as the focus of the study:

- Film
- Music
- Fashion
- Live Performance
- Visual and Applied Arts & Makers
- Written and Published Works

The Study Process

The Creative Industries Sector Profile Study started in March 2018 and had been implemented in four phases as seen below.

- Phase 1: Research and Analysis – April 2018 – July 2018
- Phase 2 – Consultation and Better Practice Research – June 2018 – August 2018
- Phase 3 – Key Findings Report and Potential Actions – August 2018
- Phase 4 - Reporting – September 2018 – October 2018

This report presents a summary of research and consultation findings, together with a list of potential actions. A City of Hamilton Creative Industries Sector Profile Technical Report presents detailed findings from all phases of the project.

The Municipal Planning Context

The City of Hamilton was an "early adopter" among Canadian municipalities in recognizing the importance of the creative industries sector in planning and economic development strategies dating back to 2005. More recently, *Transforming Hamilton through Culture: Cultural Plan 2013* and the *2016-2020 Economic Development Action Plan* recognize the importance of the sector and set out strong recommendations for advancing a creative industries sector agenda in the city.

A Statistical Portrait of Hamilton's Creative Industries Sector

This section of the study examines the size, composition, and growth of Hamilton's creative labour force, creative businesses and worker trends. The baseline analysis also includes a benchmarking analysis of Hamilton's business composition and available workforce in creative industries against 10 comparator Canadian cities. Some highlights from the statistical analysis follow.

- In 2016, approximately 11% of Hamilton's total labour force (29,790 persons) contributed either directly or indirectly to the production of goods and services in the creative industries sector.
- In 2017, approximately 2,488 businesses in Hamilton were creative industries sector businesses, representing 6% of total businesses. The percentage of creative industries sector businesses is similar to provincial and national rates at 6.5% and 6%, respectively.
- In 2016, the median employment income of creative industries sector workers in Hamilton was $36,657 compared to $38,953 for workers in all occupations. Although the median employment income of creative industries sector workers in Hamilton is lower than the rest of occupations, the income is still higher compared to $35,945 in Ontario and $33,746 in Canada.
- Employment growth in the sector, from 2011 to 2016, has been quite strong at 16% and is higher than both provincial and national rates at 12% and 10%, respectively.
- Hamilton's creative industries sector workers have 4 common characteristics: Young, Self-Employed, Educated and Commuting.
- The majority of creative industries sector businesses were self-employed establishments with 64% of all creative industries sector businesses in 2017 were sole proprietor. Of the businesses with employees, the majority were micro-establishments employing 1-4 employees.

Benchmarking Hamilton's Creative Industry Sector

Creative industries sub-sectors in Hamilton were benchmarked against 10 comparator cities in Canada: Toronto, Edmonton, Ottawa, Kitchener, London, Victoria, Halifax, Regina, Windsor and Sudbury. An accepted metric of the competitive strength of specific creative industries sub-sectors is the percentage of occupations in that sub-sector as a percentage of total creative industries occupations. Based on this analysis, Hamilton's performance is as follows:

- *Music* - Hamilton ranked FIRST among all other comparator regions
- *Film* - Hamilton ranked SECOND among all other comparator regions
- *Live Performance* - Hamilton ranked SECOND among all other comparator regions
- *Fashion* - Hamilton ranked THIRD among all other comparator regions
- *Written and Published Works* - Hamilton ranked FIFTH among all other comparator regions
- *Visual and Applied Arts and Makers* - Hamilton ranked SEVENTH among all other comparator regions

Because Live Performance draws occupations from both Film and Music, Hamilton's top creative industries sub-sectors are *Music, Film Fashion.* This report provides a profile of these three sub-sectors. The Technical Report contains profiles for all six sub-sectors.

Creative Asset Mapping

In addition to a statistical analysis of the creative industries sector, the Study completed a spatial analysis of the sector as-a-whole, together with individual sub-sectors. The analysis confirmed much of what was already know, while revealing some pockets of activity that may have been underestimated. The major clusters are found along:

- James Street North between Barton and King
- Ottawa Street North from Dunsmure Road and Barton Street

Creative Industries Business Support Services – Better Practice Research

A key element of the research for the Hamilton Creative Industries Sector Profile was best practice research on integrated business and sector support infrastructure or programs and services. The research identified four acknowledged leaders in creative industries sector support systems in Canada and internationally. Informed by the survey, workshop, and gap assessment, six categories were developed to compare the four case studies under review as examined in the Technical Report. Hamilton can learn from these examples, specifically, how to build on existing business support infrastructure (e.g. Business Enterprise Centre), to connect with existing collaborative makers' spaces and incubators, (e.g. the Cotton Factory, Steel City Studios, the Hamilton Public Library's Makerspaces[1]), and further develop existing networking initiatives such as the Creative Exchange.

Sector Consultation and SWOC Analysis

To gain community input and secure continued support for Hamilton's creative industries sectors, a consultation program with the business community and local stakeholders was conducted which included:

- *Business Telephone Survey* – 190 responses to a survey of creative industries businesses and organizations
- *Stakeholder Interviews* – interviews with approximately 15 stakeholders in the sector as well as senior City of Hamilton staff
- *Three Consultation Workshops* - with stakeholders drawn from the Film, Music and Fashion sub-sectors

Findings from all consultations are summarized below and set-out in detail in the Technical Report. Emerging from the Strengths, Weaknesses, Opportunities, Constraints (SWOC) analysis, and all prior research findings, a Sector Gaps Analysis and Opportunity Identification was undertaken. This analysis informed the list of Potential Actions included in this report.

[1] https://www.hpl.ca/makerspaces

Potential Actions

The primary focus of the City of Hamilton Creative Industries Sector Profile Study was to build a strong body of knowledge to inform subsequent, research, consultation and strategy formulation. What follows is not a creative industries sector strategy. Rather it sets out a "menu" of potential actions to advance the sector and its sub-sectors. There has been no attempt to prioritize these Potential Actions, nor identify potential partners that could support the City in moving forward.

Six cross-sectoral and seven sub-sectors recommended actions in Music, Film and Fashion are set forward in the Potential Actions section.

Introduction

Study Purpose

The City of Hamilton has completed a Creative Industries Sector Profile Study to provide a clear and accurate description of the city's creative industries sector. In doing so, key gaps and opportunities, objectives, and actions were identified to assist the City of Hamilton and its creative industries businesses and entrepreneurs to grow and support the creative industries.

As a sector profile study, the aim was not to lay out a detailed creative industries strategy but rather to undertake the research and consultation necessary to establish the foundation from which to identify areas for more in-depth research and provide the City with an appreciation for the impact of the sector in order to inform decisions moving forward.

Six creative industry sub-sectors were identified as the focus of the study:

- Film
- Music
- Fashion
- Live Performance
- Visual and Applied Arts & Makers
- Written and Published Works

Research and Data Gathering

The Creative Industries Sector Profile Study started in March 2018 and had been implemented in four phases as seen below.

Phase 1: Research and Analysis – April 2018 – July 2018

This phase included the following objectives:

- *Review of the City of Hamilton's existing planning documents & policies* – City plans and strategies relevant to creative industries sector development
- *Creative Industries Sector Overview and Baseline Analysis* – a statistical analysis of the creative industries sector and sub-sectors
- *Creative Industries Sector Benchmarking Analysis*– comparing Hamilton's creative industries sector against 10 comparator Canadian cities
- *Creative Industries Sector Asset Mapping* – spatial analysis to understanding the concentration or clusters of creative industries sectors
- *Creative Industries Sector Business Survey* – 190 responses to a survey of creative industries businesses and organizations
- *Creative Industries Sector Economic Contribution Assessment* – establishing the monetary contributions of Hamilton's creative industries sector

Phase 2 – Consultation and Better Practice Research – June 2018 – August 2018

This phase included the following objectives:

- *Creative Industries Sector Stakeholder Interviews* – interviews with approximately 15 stakeholders in the sector as well as senior City of Hamilton staff
- *Creative Industries Sector Consultation Workshops* - with stakeholders drawn from the Film, Music and Fashion sub-sectors
- *Creative Industries Sector SWOC Analysis and Gap Assessment* – address the Strengths, Weaknesses, Opportunities and Constraints of Hamilton's creative industries sector
- *Creative Industries Business Support Services Better Practices Research* - for assistance in defining optimum tools and methods related to creative industries business resources and support

Phase 3 – Key Findings Report and Potential Actions – August 2018

- *Creative Industries Sub-Sector Profiles* – detailed profile of Hamilton's top 3 creative industries sub-sectors – Music, Film and Fashion
- *Creative Industries Sector Opportunity Identification and Potential Actions* - to prioritize the most compelling opportunities for growth in Hamilton's creative industries

Phase 4 - Reporting – September 2018 – October 2018

- *Creative Industries Sector Profile Report* – A summary of previously conducted research and consultation together with identified Opportunities and Potential Actions

Technical Report

The *Creative Industries Sector Profile Report* is supported by a Technical Report containing detailed research findings.

- Section 1: Creative Industries Sector Document Review and Planning Context
- Section 2: Creative Industries Sector Baseline Analysis and Benchmarking Analysis
- Section 3: Creative Industries Sector Asset Mapping
- Section 4: Creative Industries Sector Business Survey Findings
- Section 5: Creative Industries Sector Economic Contribution Assessment
- Section 6: Creative Industries Sector SWOC Analysis and Gap Assessment
- Section 7: Creative Industries Business Support Services Better Practices Research
- Section 8: Creative Industries Sub-Sector Profiles

Creative Ecosystems and Their Requirements

A useful frame of reference which offers one perspective on the perceived gaps in Hamilton's creative industries sector is that of *creative ecosystems*[2]. Creative ecosystems are a well-established set of ideas that evolved with input from researchers, policy makers and creative industries and wider cultural sector thought leaders. The idea evolved to understand the dynamics and conditions for sector health and resilience. Health and resilience are used deliberately rather than growth. While growth can be one element of sector health and resilience, it can disguise the dynamics of a sector in which many small enterprises have found a size and equilibrium that does not aspire to growth and expansion.

Creative ecosystems consist of interlinked creative cultural resources (e.g., facilities, spaces, festivals, makers, artists, designers, arts and heritage organizations, digital enterprises), human resources, policymakers, entrepreneurs, intermediaries and knowledge transfer channels, and also creative venues, workspaces and platforms either physical or digital.[3] Some operating principles of creative ecosystems include the following.

- Interaction and interdependency is essential in the creative ecosystem as often a cultural product, service or experience is the result of collaboration across a variety of creative individuals and skills and also across public, private and philanthropic funding.
- The interconnections and interdependencies make *knowledge and knowledge flow* the underlying dynamic and requirement of a creative ecosystem. Knowledge flow connects individuals across cultural disciplines, across public, private and non-profit sectors, from community-based to professional forms of creative expression and participation, among others.
- Physical interactions are a key factor for knowledge flow among creative individuals, more than other professionals. That is why the interconnections that occur in creative hubs – in urban centres and neighbourhoods are essential infrastructure for creative ecosystems.
- Bottom-up initiatives, led by individuals in the system, are needed to strengthen interconnection and networking, sometimes by organizing working groups to act more effectively and to react in the process of change.

Attracting flagship creative investments as economic generators (catalysts) is an essential element of a creative ecosystem. This is often a single event or a specific flagship institutional investment which is seen as a major catalyst for urban development.

[2] Paraskevi Tarani, *Emergent Creative Ecosystems: Key Elements for Urban Renewal Strategies* University of Thessaloniki, Department of Spatial Planning and Development, 2013

[3] Ibid.

The Research

The Hamilton Planning Context

A review of City of Hamilton planning documents was completed to establish the overall planning context for the Hamilton Creative Industries Sector Profile Study. A full examination of the planning context is set out in Section 1: Creative Industries Sector Document Review and Planning Context in the Technical Report.

Key themes that emerged from the review follow:

Support for the Creative Industries Sector

The City of Hamilton has long recognized that creative industries are integral to long-term economic competitiveness and innovation. Support for creative industries has been identified in various City plans including the *2005 Economic Development Strategy, 2010-2015 Economic Development Strategy, Transforming Hamilton through Culture: Cultural Plan 2013* and *the 2016-2020 Economic Development Action Plan*. The *2016-2020 Economic Development Action Plan*, in particular, identifies the Creative and Cultural Industries as a key industries sector. The Plan identifies major actions to advance the sector including zoning review, launching the City of Music marketing efforts, animating public spaces and establishing incubator and maker spaces.

Support for Local Creative Entrepreneurs

Support for entrepreneurship and local business growth were key priorities of the *2010-2015 Economic Development Strategy* and the *2016-2020 Economic Development Action Plan*. In addition, the City aims to grow entrepreneurship opportunities and small business creation by leveraging connections to cultural development. The *Cultural Plan 2013* identified specific recommendations to support artists and creative workers including increased collaborations with local business networks and allocation of resources to grow creative businesses. Also, the City provides many professional development and networking opportunities for the creative workers through Creative Exchange Networking Events and Biz SmARTs lunchtime series.

Enabling Environment for Creative Industries

In addition to emerging and established creative individuals and enterprises, the city is home to a range of strong cultural assets, including the Art Gallery of Hamilton (AGH), First Ontario Concert Hall, Theatre Aquarius, The Cotton Factory and Hamilton Arts Council. Educational institutions including Mohawk College, McMaster University and Redeemer University College offer opportunities for partnerships and collaboration to support the growth of the creative industries sector.

Other resources and support for creative industries sector growth and development include the Chamber of Commerce actions in support of both creative industries and placemaking, Business Improvement Area programs aimed at beautification and promotional initiatives for businesses and creative enterprises, including encouraging the reuse and repurposing of buildings for creative spaces, favourable busking policies from the City, provincial/regional film incentives, support for festivals and street animation, and cultural asset data to inform creative city-building.

Support for Specific Industries Sub-Sectors

In addition to the support provided for the entire creative industries sector, the City has developed specific initiatives to promote the Fashion, Film, and Music sub-sectors. These include:

- Development of a film studio - a ‘stretch target’ in the *2016-2020 Economic Development Action Plan*
- Hamilton Music Advisory Team
- Zoning By-law 05-200 amendments - to enable the addition of a production studio and associated warehousing, prop and set design and storage
- City Enrichment Fund Arts programs – in 2017, $809,425 in funds were provided to support a wide range of music not-for-profit cultural organizations and artists in Hamilton
- Noise Control By-Law amendments - exemption permits for entertainment on a commercial outdoor patio
- Musicians Welcome Signs initiative - to enable parking for musicians with easy access to venues
- *Fashion Incubators as Economic Infrastructure: A Case Study Analysis* – based on research in other jurisdictions, the study reviewed four potential incubator models to inform decisions for the fashion sector in Hamilton

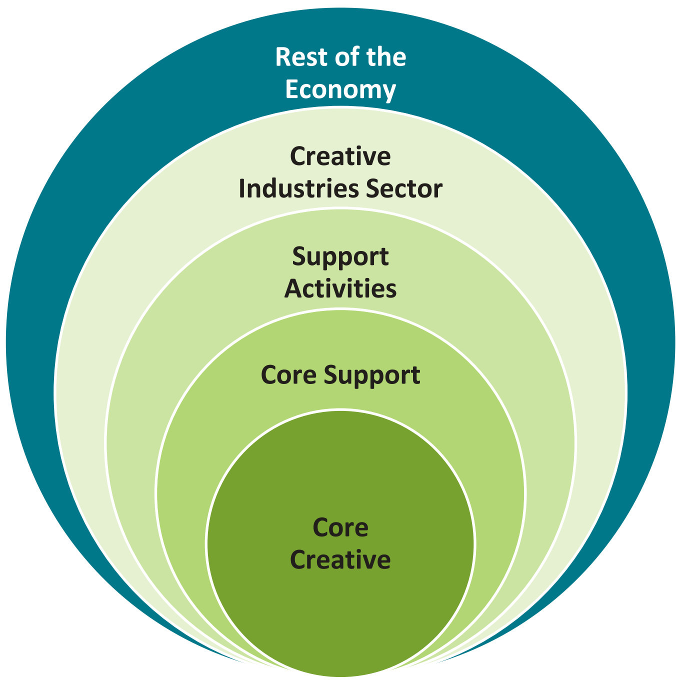
A Statistical Portrait of Hamilton’s Creative Industries Sector

This section of the study examines the size, composition, and growth of Hamilton’s creative labour force, creative businesses and worker trends. The baseline analysis also includes a benchmarking analysis of Hamilton’s business composition and available workforce in creative industries against 10 comparator Canadian cities. The size, growth and nature of the creative industries sector were studied regarding:

- **Creative Industries Employment** - identified based on the North American Industry Classification System (NAICS). These industries sectors refer to the general nature of the business carried out in the establishment where the person worked.
- **Creative Industries Occupations** - identified based on the National Occupational Classification (NOC). These refer to the kind of work performed by persons and closely relate to certain industries sectors.
- **Creative Industries Businesses** - identified based on the North American Industry Classification System (NAICS). Canadian Business Counts provide data on active businesses by industry classification and employment-size.

Based on Hamilton’s creative industries sector definitions, this report classifies the sector in three categories related to different functions in the creative industries production process.

- **Core Creative** – An industry, occupation or business that is critical to the creative industries sector. Without it, the creative industries sector would not exist – e.g., a musician, graphic designer, actor
- **Core Support** – An industry, occupation or business that exists predominantly to support the creative industries sector – e.g., film studios, music recording studios, commercial art gallery
- **Support Activities** – An industry, occupation or business that occasionally supports the creative industries sector but does not rely on the growth of the creative industries sector to exist – e.g., a carpenter working on a film set, an electrician working on a live performance



The following section of this report builds a statistical profile of the creative industries sector that will ground the planning and actions that will advance the sector. Data collected from the National Census, National Household Survey and Canadian Business Counts reveal the current state of Hamilton's creative industries sector.

A complete baseline analysis of the creative industries sector is provided in the Technical Report in Section 2: Creative Industries Sector Baseline Analysis and Benchmarking Analysis.

The city of Hamilton is home to 536,917 residents and has seen a 3% growth in population from 2011 to 2016. This population growth is supported by growth in two economic sectors directly tied to the creative industries sector: the *information and cultural industries* and the *arts, entertainment and recreation industries*. Related sectors include *accommodation and food services* and *construction industries*.

Notes to Reader

Due to the standardized data classification system and the creative industries definition implemented by the City of Hamilton, the data captured has overlaps between creative workers and workers in the rest of the economy. Due to these limitations, it is best to interpret this data as a trend rather than drawing conclusions based on the numbers

Due to the standardized data classification system and the creative industries definition implemented by the City of Hamilton, various overlaps were identified when classifying employment according to the sub-sectors. For example, *independent artists, writers and performers* include independent visual artists and artisans, independent actors, comedians and performers and independent writers and authors. Thus, the NAICS is captured under Film, Live Performance, Visual & Applied Arts & Makers and Written & Published Works. Due to these overlaps, it is best to study each sub-sector individually as a total of the creative industries sector.

Hamilton's Creative Industries Sector

An Economic Snapshot

Young

The majority of Hamilton's labour force in the creative industries sector is young; 50% of workers are between the ages of 25 to 44 years compared to only 41% in other sectors of the economy.

Self-Employed

The creative industries sector has a higher percentage of self-employed workers at 26% compared to other sectors of the economy (10%).

Educated

In 2016, 6% of all residents (~ 19,330 residents) had a post-secondary certificate, diploma or degree related to a discipline within the creative industries sector.

Commuting

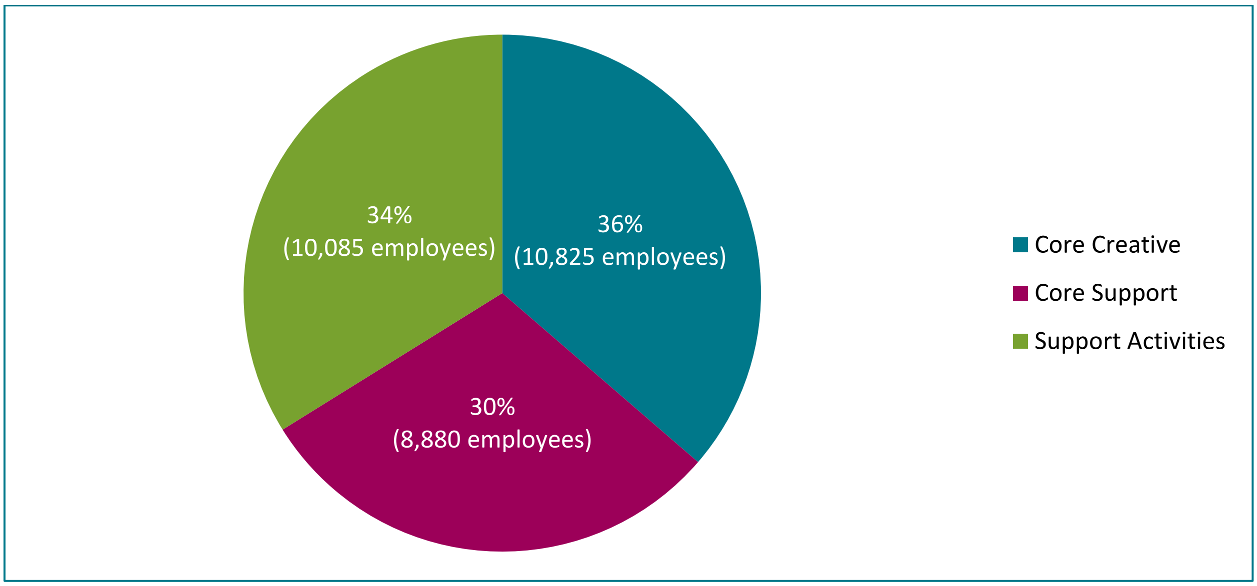
In 2016, Hamilton imported approximately 11,905 workers from other communities to work in its creative industry sector.

Creative Industries Sector Employment

In 2016, approximately 11% of Hamilton's total labour force (29,790 persons) contributed either directly or indirectly to the production of goods and services in the creative industries sector.

Of the 29,790 creative industries sector employment, approximately 10,825 workers (36%) are employed in core creative industries sector, 8,880 employees (30%) are employed in core support industries sector, and 10,085 employees (34%) are employed in support activities.

Figure 1: Creative Industries Sector Employment by Function, 2016



Source: Statistics Canada, Census of Canada 2016

Figure 2 shows the top employing creative industries sectors by function in 2016.

The top core creative, core support and support activities industries sectors are:

- **Core Creative** - *Architectural, engineering and related services* were the top employing core creative industries sector, representing 10% (2,940 employees) of all creative industries sector employment
- **Core Support -** *Other schools and instruction*[4] was the top core support employment, representing 5% (1,580 employees) of all creative industries sector employment.
- **Support Activities** - *Clothing stores* were the top support employment industry, representing 9% (2,580 employees) of all creative industries sector employment

[4] This industries group comprises establishments primarily engaged in providing instruction in fine arts; athletics and sports; languages; and other instruction (except academic, business, computer, management, and technical and trade instruction); and providing services, such as tutoring and exam preparation.

Figure 2: Top Employing Creative Industries Sectors by Function, 2016

Creative Industries Sector (NAICS)	Function	Employees (number)
Architectural, engineering and related services	Core Creative	2,940
Computer systems design and related services	Core Creative	2,765
Motion picture and video industries	Core Creative	875
Specialized design services	Core Creative	780
Other schools and instruction	Core Support	1,580
Advertising, public relations, and related services	Core Support	1,185
Newspaper, periodical, book and directory publishers	Core Support	895
Other miscellaneous store retailers	Core Support	870
Clothing stores	Support Activities	2,580
Other professional, scientific and technical services	Support Activities	1,290
Sporting goods, hobby and musical instrument stores	Support Activities	1,185
Electronics and appliance stores	Support Activities	1,180

Source: Statistics Canada, Census of Canada 2016

Employment in the creative industries sector saw growth by approximately 16% (4,200 persons) from 2011 to 2016. The following inferences can be made about creative industries sector employment growth:

- **Core Creative** - the largest growth in core creative employment sectors were in
  - *Computer systems design and related services*[5]
  - *Independent artists, writers and performers*
  - *Motion picture and video industries*
- **Core Support** – the largest growth in core support creative employment sectors were in
  - *Advertising, public relations, and related services*
  - *Other schools and instruction*
- **Support Activities** – the largest growth in support activities employment in the creative industries sector was in
  - *Clothing stores*

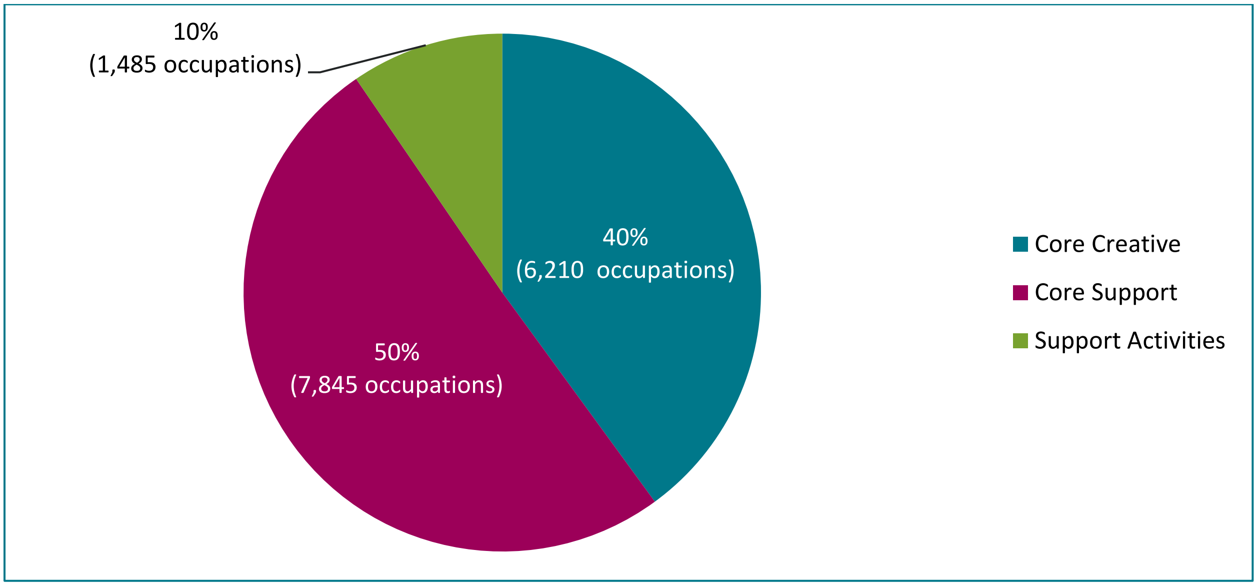
[5] This industry comprises establishments primarily engaged in providing expertise in the field of information technologies through one or more activities, such as writing, modifying, testing and supporting software to meet the needs of a particular customer, including custom video game design and development.

Creative Industries Occupations

In 2016, Hamilton's creative industries occupations accounted for 5% (15,540 persons[6]) of total occupations in the city.

Approximately 40% (6,210 occupations) are core creative industries sector occupations, 50% (7,845 occupations) are core support industries sector occupations and 10% (1,485 occupations) are support activities.

Figure 3: Creative Industries Sector Occupations by Function, 2016



Source: Statistics Canada, Census of Canada 2016Figure 4 shows the top creative industries occupations by function in 2016.

- **Core Creative** - *Graphic designers and illustrators* were the top employing core creative industries occupations, representing 8% (1,320 occupations) of all creative industries sector occupations
- **Core Support** - *Advertising, marketing and public relations managers* were the top employing core support industries occupations, representing 12% (1,900 occupations) of all creative industries sector occupations
- **Support Activities** - *Library assistants and clerks* were the top employing support activities occupations, representing 3% (410 occupations) of all creative industries sector occupations

Figure 4: Top Creative Industries Sector Occupations by Function, 2016

[6] While the creative industries sector employment show data related to industries such as manufacturing, retail and trade, the occupational data is categorized based on the creative function and thus includes only those occupations that are creative or have varying degrees of a creative component. Thus, while clothing knitting mills are identified as a support industry to the creative sector, labourers in textile processing are not accounted as a creative industries occupation. Thus, the labour force for occupations is less than the labour force in employment.

Creative Industries Sector Occupations (NOC)	Function	Occupations (number)
Graphic designers and illustrators	Core Creative	1,320
Musicians and singers	Core Creative	875
Authors and writers	Core Creative	555
Web designers and developers	Core Creative	550
Advertising, marketing and public relations managers	Core Support	1,900
Professional occupations in advertising, marketing and public relations	Core Support	1,765
Computer programmers and interactive media developers	Core Support	1,565
Interior designers and interior decorators	Core Support	510
Library assistants and clerks	Support Activities	410
Tailors, dressmakers, furriers and milliners	Support Activities	330
Library and public archive technicians	Support Activities	175
Graphic arts technicians	Support Activities	115

Source: Statistics Canada, Census of Canada 2016

The creative industries sector occupations saw 13% growth from 2011 to 2016, approximately 1,805 occupations.

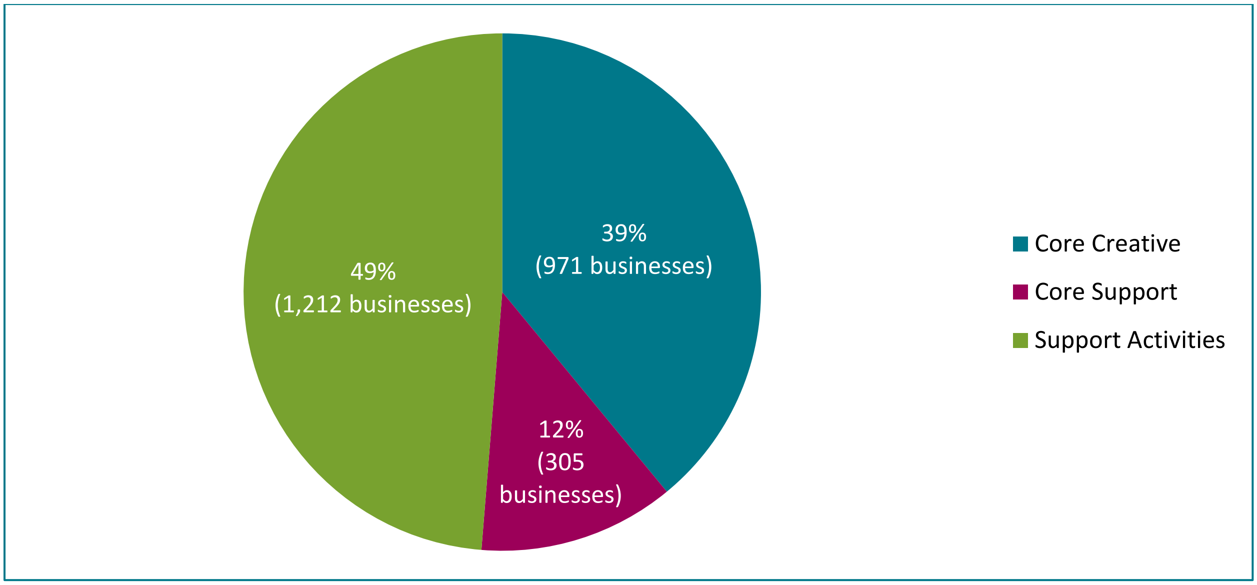
- **Core Creative -** The largest growth in core creative industries occupations was
  - *Authors and writers*
  - *Producers, directors, choreographers and related occupations*
  - *Musicians and singers*
- **Core Support** - The largest growth in core support industries occupations was
  - *Advertising, marketing and public relations managers and*
  - *Professional occupations in advertising, marketing and public relations*
- **Support Activities -** The largest growing support activities industries occupations were
  - *Tailors, dressmakers, furriers and milliners*

Creative Industries Businesses

In 2017, approximately 2,488 businesses in Hamilton were creative industries sector businesses, representing 6% of total businesses. The percentage of creative industries sector businesses is similar to provincial and national rates at 6.5% and 6%, respectively.

Of the 2,488 businesses, approximately 39% (971 businesses) were core creative industries sector businesses, 12% (305 businesses) were core support industries sector businesses, and 49% (1,212 businesses) supported activities businesses.

Figure 5: Creative Industries Businesses by Function, 2017



Source: Canadian Business Counts, 2017

The majority of creative industries sector businesses were self-employed establishments: 64% of all creative industries sector businesses in 2017 were sole proprietors compared to 36% of businesses with employees. Of the businesses with employees, the majority were micro-establishments employing 1-4 employees. However, the sector is also characterized by a number of large employers such as CHCH Hamilton, Corus Radio (CING FM), Theatre Aquarius. In total Hamilton has 37 businesses that employ more than 50 people.

Figure 6 shows the top creative industries businesses by function in 2017. The top core creative, core support and support activities industries businesses are:

- **Core Creative** - *Motion picture and video production* businesses were the top core creative industries sector businesses in Hamilton, representing 6% (160 businesses) of all creative industries sector businesses
- **Core Support** - *Fine arts schools,* were the top core support sector businesses in Hamilton, representing 2% (57 businesses) of all sector businesses
- **Support Activities** - *Interior design services* were the top support creative industries sector businesses in Hamilton, representing 4% (91 businesses) of all sector businesses

Figure 6: Top Creative Industries Sector Businesses by Function, 2017

Creative Industries Sector Businesses (NAICS)	Function	Businesses (number)
Motion picture and video production	Core Creative	160
Photographic services	Core Creative	128
Graphic design services	Core Creative	122
Independent actors, comedians and performers	Core Creative	112
Fine arts schools	Core Support	57
Book stores and news dealers	Core Support	28
Periodical publishers	Core Support	20
Musical instrument and supplies stores	Core Support	17
Interior design services	Support Activities	91
Advertising agencies	Support Activities	89
Women's clothing stores	Support Activities	85
All other miscellaneous manufacturing	Support Activities	75

Source: Canadian Business Counts, 2017

These statistical measures suggest that the creative industries sector is a growth sector for Hamilton. The city is well positioned to build upon the sector’s existing strengths to realize further economic growth and development.

Employment growth in the sector, from 2011 to 2016, has been quite strong at 16% and is higher than both provincial and national rates at 12% and 10%, respectively.

The creative industries sector is characterized by a high proportion of young workers and a self-employed workforce. Businesses in the sector are characterized by a high number of self-employed or small enterprises. These creative enterprises and creative entrepreneurship will help diversify the local economy, contribute to innovation and employment growth. Hamilton creative industries sector is also seen to be highly educated, with educational rates comparable to provincial and national levels. Access to a skilled talent pool will enable the City to support business growth, attraction and retention efforts.

The Economic Contribution of Hamilton’s Creative Industries

Part of the research completed for the *Hamilton Creative Industries Sector Profile* was a calculation of the economic contribution of the overall sector to the city’s economy. This was calculated based on data collected through the statistically valid telephone survey, combined with Statistic Canada data. Businesses were asked several questions regarding the number of full-time and part-time employees, the income of employees, the business’ operating costs, and total revenue. These numbers were used in combination with Statistics Canada information regarding the total number of businesses in the creative industries sector in Hamilton, and the number of employees employed in the sector. The methodology used to calculate the economic contribution of other economic sectors is detailed in the Technical Report in Section 5: Creative Industries Sector Economic Contribution Assessment.

Based on the estimations provided by businesses, the following observations were made:

- The core creative industries sector accounted for a total of $67,970,000 made in revenues across the creative industries sector, $48,550,000 spent on operating costs, and $19,420,000 made in profits.

The core support creative industries sector accounted for a total of $21,350,000 made in revenues across the creative industries sector, $15,250,000 spent on operating costs, and $6,100,000 made in profits.

The total number of employees in the creative industries sector was also multiplied by the median annual salary paid to employees to obtain the total amount of wages paid to individuals in creative roles in 2017. Using this methodology,

- The total median wages paid to core creative industries sector employees was $320,000,000
- The total median wages paid to those self- employed in the core creative industries sectors was $113,200,000
- The total median wages paid to core support creative industries sector employees was $295,200,000
- The total median wages paid to those self- employed in the core support creative industries sectors was $62,200,000

One can assume that the proportion of the amount that has been paid out in wages will be injected into the economy through local spending and that a percentage of the businesses operating costs are being spent through local spending.

NOTE: The calculation of the economic contribution of the creative industries sector used information gathered from businesses through the telephone survey in combination with Statistics Canada information regarding the total number of businesses in the creative industries sector in Hamilton, and the number of employees employed in the sector. It is important to note that these numbers are used from a median of self-reported numbers given in a telephone survey, are intended only for approximation purposes only.

There is a discrepancy between the total operating costs of the industries and the amount paid in wages, where the amount paid in wages exceeds the operating costs. The reason for this is that there are many individuals who perform creative roles within companies are not necessarily classified as part of the creative industries sector and not counted as creative businesses.

Benchmarking Hamilton's Creative Industries

The creative industries sector occupations and industries sector businesses in Hamilton were benchmarked against the selected census divisions, to determine the strength of individual sub-sectors. The ten selected census divisions were Toronto, Edmonton, Ottawa, Kitchener, London, Victoria, Halifax, Regina, Windsor and Sudbury.

The results of the creative industries occupations benchmarking analysis are presented here. Complete benchmarking analysis of the creative industries sectors is provided in Section 2:

Creative Industries Sector Baseline Analysis and Benchmarking Analysis in the Technical Report.

Note: Figure 7 shows creative industries sector occupations for each of the six sub-sectors. Due to the standardized National Occupational Classification (NOC) system and job-related cross-over between the six sub-sectors, several overlaps are seen when classifying occupations for each sub-sector. For example, the occupational class *actors and comedians*[7] can be attributed to both the film and live performance sector. Another example would be occupations in *advertising, marketing and public relations*[8] as individuals in this occupation class can work in any or all of the six sectors.

The analysis provided in this study is not intended to compare the sub-sectors with each other but rather are to be studied individually as a factor of the total creative industries sector, because of the nature of the creative industries sector encompassing various sub-sectors and the standardised classification.

[7] Actors and comedians perform roles in motion picture, television, theatre and radio productions to entertain a variety of audiences. They are employed by motion picture, television, theatre and other production companies. This unit group includes acting teachers employed by private acting schools.

[8] These occupations include specialists in advertising, marketing and public relations who analyse, develop and implement communication and promotion strategies and information programs, analyse advertising needs and develop appropriate advertising and marketing plans, publicize activities and events, and maintain media relations on behalf of businesses, governments and other organizations, and for performers, athletes, writers and other talented individuals.

Figure 7: Creative Industries Sector Occupations by Sub-sector

Creative Industries Sector Occupations (NOC)	Music	Film	Live Performance	Fashion	Written & Published Works	Visual and Applied Arts & Makers
Actors and comedians		■	■			
Advertising, marketing and public relations managers	■	■	■	■	■	■
Announcers and other broadcasters	■	■	■			
Architects						■
Architectural technologists and technicians						■
Architecture and science managers						■
Artisans and craftspersons	■					■
Audio and video recording technicians	■	■	■			
Authors and writers					■	
Broadcast technicians	■	■	■			
Camera, platemaking and other prepress occupations		■				■
Computer programmers and interactive media developers						■
Conductors, composers and arrangers	■		■			
Dancers			■			
Editors					■	
Fabric, fur and leather cutters				■		
Film and video camera operators		■				
Graphic arts technicians						■
Graphic designers and illustrators						■
Industrial designers						■
Interior designers and interior decorators		■				■
Jewellers, jewellery and watch repairers and related occupations				■		
Journalists					■	
Librarians					■	
Library and public archive technicians					■	
Library assistants and clerks					■	
Library, archive, museum and art gallery managers					■	

Creative Industries Sector Occupations (NOC)	Music	Film	Live Performance	Fashion	Written & Published Works	Visual and Applied Arts & Makers
Managers - publishing, motion pictures, broadcasting and performing arts						
Musicians and singers						
Other performers, n.e.c.						
Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts						
Painters, sculptors and other visual artists						
Patternmakers - textile, leather and fur products						
Photographers						
Photographic and film processors						
Producers, directors, choreographers and related occupations						
Professional occupations in advertising, marketing and public relations						
Shoe repairers and shoemakers						
Supervisors, library, correspondence and related information workers						
Support occupations in motion pictures, broadcasting, photography and the performing arts						
Tailors, dressmakers, furriers and milliners						
Technical occupations related to museums and art galleries						
Theatre, fashion, exhibit and other creative designers						
Weavers, knitters and other fabric making occupations						
Web designers and developers						

Source: Statistics Canada, Census of Canada, 2016. Adapted by MDB Insight

Music

Music accounts for 41.7% of the total creative industries sector occupations in Hamilton.

- The Hamilton region **ranked 1st** among all the comparator regions in terms of music occupations as a factor of total creative occupations.
- The region **ranked 2nd** behind London in growth in Music occupations between 2011 and 2016.

Figure 8: Total Percent of Creative Industry Occupations, Music Related Occupations, 2011-2016

Census Division	Total Occupations		Absolute Change	% Change	% of Total Creative Industries Occupations
	2011	2016	2011-2016	2011-2016	2016
Hamilton	5,380	6,480	1,100	20%	41.7%
Toronto	69,825	81,625	11,800	17%	41.5%
Regina	1,980	1,885	(95)	-5%	40.4%
Edmonton	7,205	8,370	1,165	16%	38.4%
Halifax	3,990	3,700	(290)	-7%	37.7%
Sudbury	635	675	40	6%	35.8%
London	2,595	3,160	565	22%	35.6%
Victoria	3,505	3,440	(65)	-2%	35.0%
Ottawa	12,565	13,775	1,210	10%	33.5%
Windsor	1,325	1,250	(75)	-6%	33.1%
Kitchener	3,295	4,015	720	22%	32.2%

Source: Statistics Canada, Census of Canada 2016 & 2011. Ranked by % of Total Creative Industries Occupations, 2016

Film

Film accounts for 45.7% of total creative industries sector occupations in Hamilton.

- The Hamilton region **ranked 2nd** surpassed only by Toronto in Film occupations as a percentage of total creative occupations.
- The region **ranked 3rd** behind Sudbury and Kitchener in growth in Film occupations between 2011 and 2016.

Figure 9: Total Percent of Creative Industry Occupations, Film Related Occupation, 2011-2016

Census Division	Total Occupations		Absolute Change	% Change	% of Total Creative Industries Occupations
	2011	2016	2011-2016	2011-2016	2016
Toronto	81,680	94,670	12,990	16%	48.2%
Hamilton	5,940	7,105	1,165	20%	45.7%
Regina	1,975	2,060	85	4%	44.1%
Sudbury	605	820	215	36%	43.5%
Edmonton	7,915	9,385	1,470	19%	43.1%
Halifax	4,045	3,935	(110)	-3%	40.1%
Victoria	3,735	3,725	(10)	0%	37.9%
London	3,080	3,360	280	9%	37.9%
Ottawa	13,680	14,915	1,235	9%	36.3%
Windsor	1,440	1,340	(100)	-7%	35.5%
Kitchener	3,445	4,410	965	28%	35.4%

Source: Statistics Canada, Census of Canada 2016 & 2011. Ranked by % of Total Creative Industries Occupations, 2016

Fashion

Fashion accounts for 31.7% of the total creative industries sector occupations in Hamilton.

- The region **ranked 3rd** among comparator cities below only Toronto and Regina.
- From the standpoint of growth in occupations between 2011 and 2016, occupations in Fashion **ranked 4th**, below Sudbury, Kitchener and London.

Figure 10: Total Percent of Creative Industry Occupations, Fashion Related Occupations, 2011-2016

Census Division	Total Occupations		Absolute Change	% Change	% of Total Creative Industries Occupations
	2011	2016	2011-2016	2011-2016	2016
Toronto	53,025	63,110	10,085	19%	32.1%
Regina	1,220	1,490	270	22%	31.9%
Hamilton	3,925	4,925	1,000	25%	31.7%
Edmonton	5,310	6,645	1,335	25%	30.5%
London	1,995	2,580	585	29%	29.1%
Sudbury	375	535	160	43%	28.4%
Kitchener	2,565	3,425	860	34%	27.5%
Ottawa	9,635	11,130	1,495	16%	27.1%
Victoria	2,300	2,570	270	12%	26.1%
Windsor	900	960	60	7%	25.4%
Halifax	2,525	2,485	(40)	-2%	25.3%

Source: Statistics Canada, Census of Canada 2016 & 2011. Ranked by % of Total Creative Industries Occupations, 2016

Live Performance

Live Performance accounts for 45.8% of the total creative industries sector occupations in Hamilton.

- As with Film, the Hamilton region **ranked 2nd** surpassed only by Toronto in Live Performance occupations as a factor of total creative industries occupations.
- The region **ranked 2nd** behind Sudbury (and tied with Kitchener) in the growth in Live Performance occupations between 2011 and 2016.

Figure 11: Total Percent of Creative Industry Occupations, Live Performance Related Occupations, 2011-2016

Census Division	Total Occupations		Absolute Change	% Change	% of Total Creative Industries Occupations
	2011	2016	2011-2016	2011-2016	2016
Toronto	79,135	92,215	13,080	17%	46.9%
Hamilton	5,800	7,115	1,315	23%	45.8%
Regina	2,095	2,130	35	2%	45.6%
Edmonton	8,080	9,410	1,330	16%	43.2%
Sudbury	650	805	155	24%	42.7%
Halifax	4,250	4,080	(170)	-4%	41.6%
Victoria	3,950	3,885	(65)	-2%	39.5%
Windsor	1,500	1,465	(35)	-2%	38.8%
London	3,045	3,435	390	13%	38.7%
Ottawa	13,340	14,975	1,635	12%	36.5%
Kitchener	3,625	4,470	845	23%	35.9%

Source: Statistics Canada, Census of Canada 2016 & 2011. Ranked by % of Total Creative Industries Occupations, 2016

Written & Published Works

Written & Published Works accounts for 36.8% of the total creative industries sector occupations in Hamilton.

- The region **ranked 5th** behind Regina, Edmonton, Ottawa and Sudbury of occupations as a percentage of total creative occupations.
- The region ranked 3rd in percentage growth in occupations between 2011 and 2016 behind Kitchener, London and Toronto

Figure 12: Total Percent of Creative Industry Occupations, Written & Published Works Related Occupations, 2011-2016

Census Division	Total Occupations		Absolute Change	% Change	% of Total Creative Industries Occupations
	2011	2016	2011-2016	2011-2016	2016
Regina	1,880	1,810	(70)	-4%	38.8%
Edmonton	8,010	8,390	380	5%	38.5%
Ottawa	15,975	15,805	(170)	-1%	38.5%
Sudbury	745	725	(20)	-3%	38.5%
Hamilton	5,235	5,720	485	9%	36.8%
Toronto	65,800	72,195	6,395	10%	36.7%
Halifax	4,025	3,570	(455)	-11%	36.4%
London	2,840	3,190	350	12%	36.0%
Victoria	3,640	3,465	(175)	-5%	35.2%
Kitchener	3,630	4,060	430	12%	32.6%
Windsor	1,275	1,075	(200)	-16%	28.5%

Source: Statistics Canada, Census of Canada 2016 & 2011. Ranked by % of Total Creative Industries Occupations, 2016

Visual and Applied Arts & Makers

Visual and Applied Arts & Makers accounted for 65.4% of the total creative industries sector occupations in the Hamilton region.

- The region **ranked 7th**th behind Ottawa, Kitchener, Toronto, Windsor, Regina and London in occupations as a percentage of total creative occupations.
- In terms of growth in occupations from 2011 and 2016, the region **ranked 3**rd behind Sudbury and Kitchener.

Figure 13: Total Percent of Creative Industry Occupations, Visual & Applied Arts & Makers Related Occupations, 2011-2016

Census Division	Total Occupations		Absolute Change	% Change	% of Total Creative Industries Occupations
	2011	2016	2011-2016	2011-2016	2016
Ottawa	28,580	29,785	1,205	4%	72.5%
Kitchener	7,545	8,740	1,195	16%	70.1%
Toronto	117,660	132,160	14,500	12%	67.2%
Windsor	2,280	2,485	205	9%	65.8%
Regina	2,870	3,065	195	7%	65.6%
London	5,200	5,815	615	12%	65.6%
Hamilton	9,000	10,170	1,170	13%	65.4%
Victoria	6,105	6,355	250	4%	64.6%
Edmonton	13,275	13,730	455	3%	63.0%
Halifax	5,990	6,155	165	3%	62.7%
Sudbury	905	1,125	220	24%	59.7%

Source: Statistics Canada, Census of Canada 2016 & 2011. Ranked by % of Total Creative Industries Occupations, 2016

Sub-Sector Profiles

As a result of the benchmarking analysis, the music, film, live performance and fashion sectors were identified as sub-sector strengths for the city. The results of the benchmarking analysis are:

- **Music -** Hamilton ranked FIRST among all other comparator regions in music occupations as a percentage of total creative industries sector occupations
- **Film** - Hamilton ranked SECOND among all other comparator regions in film occupations as a percentage of total creative industries sector occupations
- **Live Performance** - Hamilton ranked SECOND among all other comparator regions in live performance occupations as a percentage of total creative industries sector occupation.
- **Fashion** - Hamilton ranked THIRD among all other comparator regions in fashion occupations as a percentage of total creative industries sector occupations
- **Written and Published Works** - Hamilton ranked FIFTH among all other comparator regions in written and published works occupations as a percentage of total creative industries sector occupations
- **Visual and Applied Arts and Maker**s - Hamilton ranked SEVENTH among all other comparator regions in visual and applied arts and makers occupations as a percentage of total creative industries sector occupations

Although the live performance sub-sector is a competitive strength for the region, the profile for the sector is not presented below. The live performance sector includes several overlaps in industries sub-sectors, occupations and businesses with the film and music sector. Thus, it can be summarized that focussing on supporting the film and music sector will also benefit the live performance sector.

Although Visual and Applied Arts & Makers make up the largest sub-sector with 10,170 occupations in Hamilton, the three leading sub-sectors in Hamilton in order of growth and market competitiveness are:

- Music
- Film
- Fashion

A complete sub-sector profile of the leading sub-sectors is provided in the Technical Report in Section 8: Creative Industries Sub-Sector Profiles in the Technical Report.

Hamilton's Music Sector

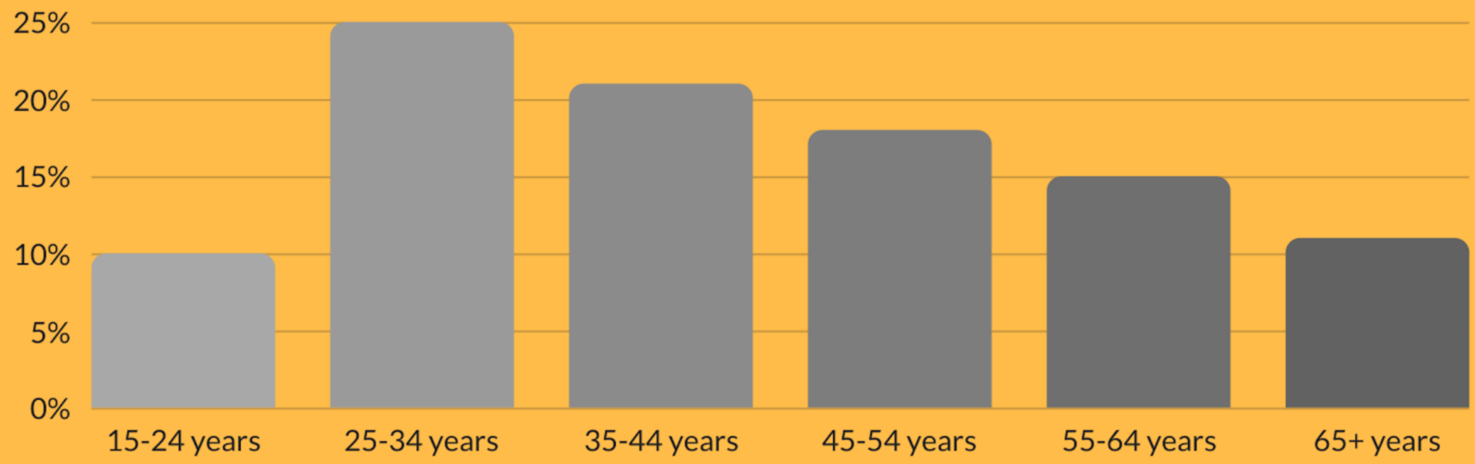
Young

54% of music industry workers are between the ages of 25 to 44 years compared to only 41% in other sectors of the economy

22%

22% of all music industry workers are self-employed

Age of Population with a Post-secondary Certificate, Diploma or Degree in Music Related Programs, 2016



7,725

Total Employment in Hamilton's Music Industry

6,480

Total Number of Workers with Music Related Occupations

541

Total Number of Businesses in Hamilton's Music Industry

1st

Comparatively, Hamilton ranks as a top destination for music related occupations

2nd

Comparatively, Hamilton had the 2nd largest growth of employment in its Music Industry

6th

Hamilton has the 6th largest cluster of Music Industry Businesses across Canada

Hamilton's Film Sector

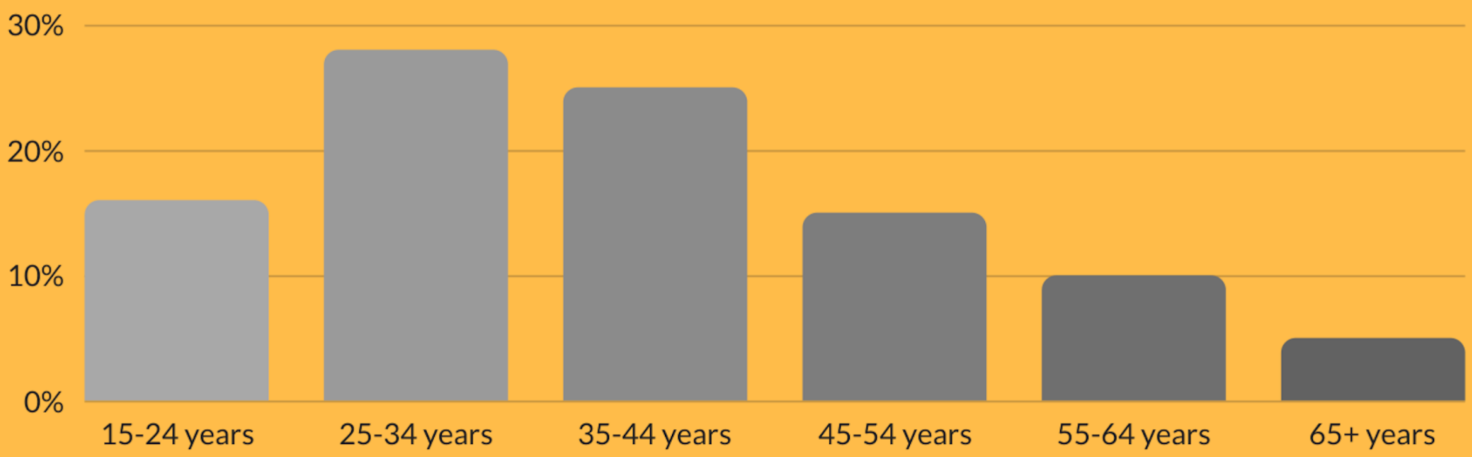
Young

54% of film industry workers are between the ages of 25 to 44 years compared to only 41% in other sectors of the economy

24%

24% of all film industry workers in Hamilton are self-employed

Age of Population with a Post-secondary Certificate, Diploma or Degree in Film Related Programs, 2016



9,400

Total Employment in Hamilton's Film Industry

7,105

Total Number of Workers with Film Related Occupations

901

Total Number of Businesses in Hamilton's Film Industry

2nd

Comparatively, Hamilton ranks as a top two destination for film related occupations

3rd

Comparatively, Hamilton had the 3rd largest growth of employment in its Film Industry

3rd

Hamilton has the 3rd largest cluster of Film Industry Businesses across Canada

Hamilton's Fashion Sector

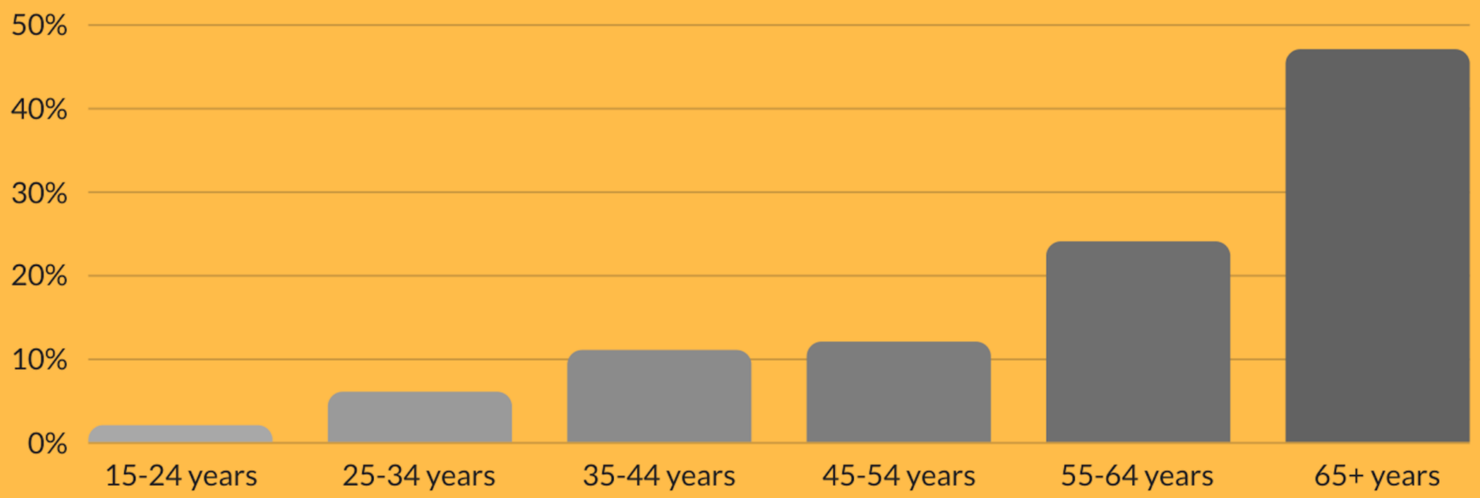
Young

53% of fashion industry workers are between the ages of 25 to 44 years compared to 41% in other sectors of the economy

18%

18% of all fashion industry workers in Hamilton are self-employed

Age of Population with a Post-secondary Certificate, Diploma or Degree in Fashion Related Programs, 2016



7,540

Total Employment in Hamilton's Fashion Industry

4,925

Total Number of Workers with Fashion Related Occupations

521

Total Number of Businesses in Hamilton's Fashion Industry

3rd

Comparatively, Hamilton ranks as a top three destination for fashion related occupations

4th

Comparatively, Hamilton had the 4th largest growth of employment in its Fashion Industry

5th

Hamilton has the 5th largest cluster of Fashion Industry Businesses across Canada

Creative Industries Asset Mapping

In addition to statistical analysis of the creative industries sector, an asset mapping exercise was completed to spatially locate creative industries enterprises and cultural organizations in the city that were listed in the public domain.

The chart below summarizes the results of this baseline of creative industries across the six categories. The numbers in brackets represent the total number of assets (businesses and organizations) identified in each of the categories. The framework for categorizing creative industries asset was based on the *Statistics Canada Framework for Cultural Statistics.* This framework is used by the Federal government to define the cultural sector in Canada.

Figure 14: Overview of Cultural Mapping Findings

Cultural Resource Framework (Number of assets)					
Fashion (114)	Film (114)	Live Performance (229)	Music (280)	Visual and Applied Arts & Makers (474)	Written & Published Works (80)

The asset mapping results for Hamilton's three leading sub-sectors are described below.

The asset mapping findings mark the beginning not the end of cultural mapping efforts in Hamilton. What the exercise has done is to establish a solid baseline of data captured in a consistent set of categories that can be broadened or deepened over time. A complete description of the asset mapping findings is set out in Section 3: Creative Industries Asset Mapping in the Technical Report. Key highlights from the asset mapping analysis are presented here.

Two major clusters and a few minor clusters of creative industries were identified through the mapping process.

The major clusters are along:

- James Street North between Barton and King
- Ottawa Street North from Dunsmure Road and Barton Street

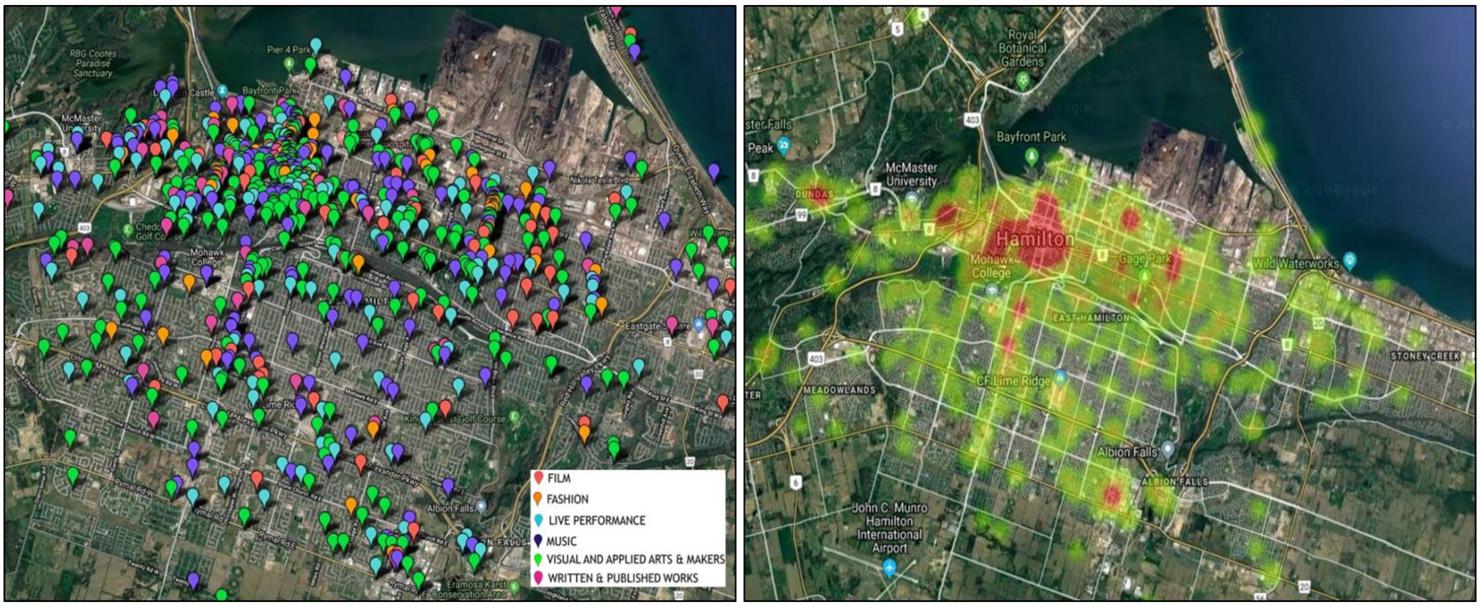
The minor cluster nodes were seen at

- Wentworth Street North and Sherman Avenue North
- Locke Street South
- Downtown Dundas

- Westdale

James Street extends north to the city's waterfront where it ends at Guise Street West. The street is informally recognized as the James North Art District and is home to the monthly James North Art Crawl. The district stretches across the city centre and includes lively sidewalks, cafes and restaurants. Ottawa Street is also informally recognized as the Fabric & Textile District is Hamilton's "Decor Destination." It hosts the annual Ottawa Street "Sew Hungry", a national award-winning restaurant and food truck rally.

Figure 15: Creative Industries in Hamilton

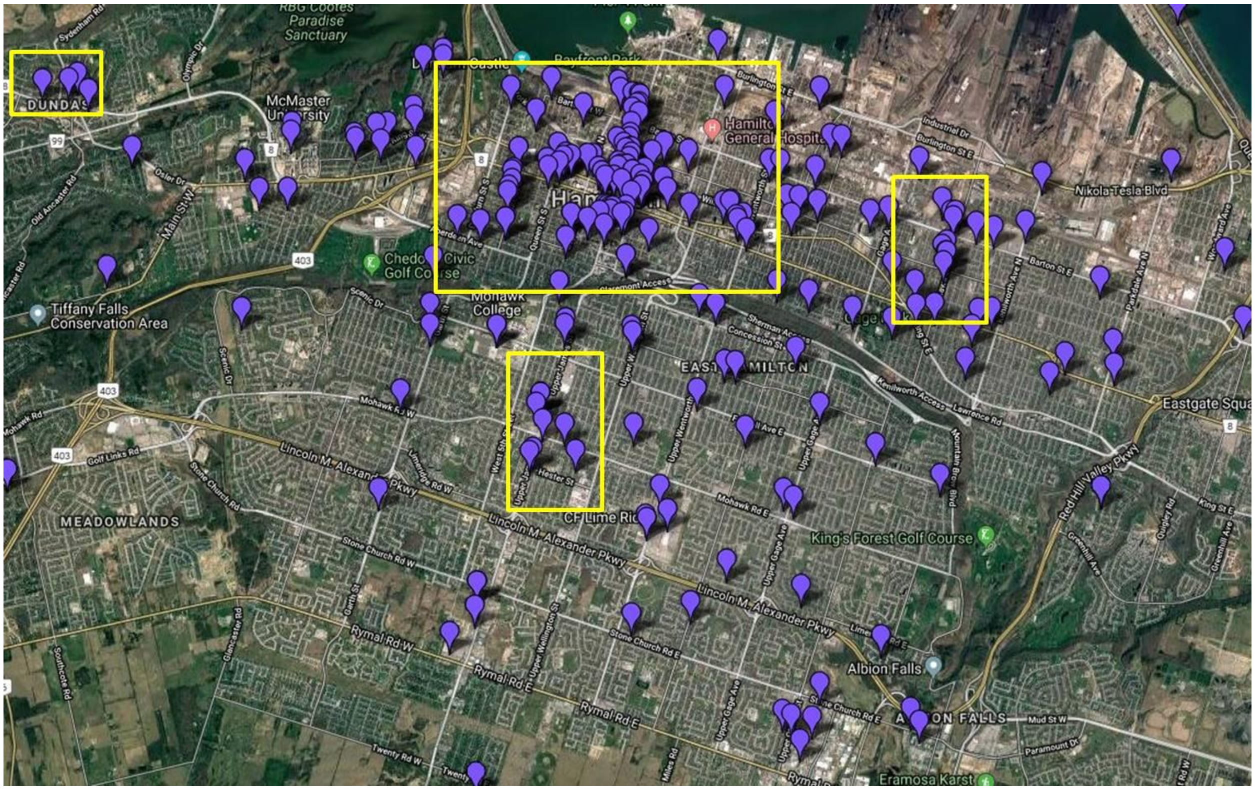


Source: MDB Insight

Music Sub-Sector

The creative industries in the Music sector in Hamilton are widely spread across the city. Three distinct clusters are seen in Central Hamilton, Ottawa St and Upper James St. The largest concentrations of creative industries are along James Street, Locke Street, Main Street West, Wentworth Street South, Ottawa Street, and the Westdale and Dundas neighbourhoods. The city is home to 20+ recording studios, many of which have been operational in Hamilton for over ten years. In addition, the city is also home to eight record stores. Business and facilities in this sector include ADS Media, Grant Avenue Studio, Bel Canto Strings Academy, Chamber Music Hamilton and the First Ontario Concert Hall among others.

Figure 16: Creative Industries in the Music Sector

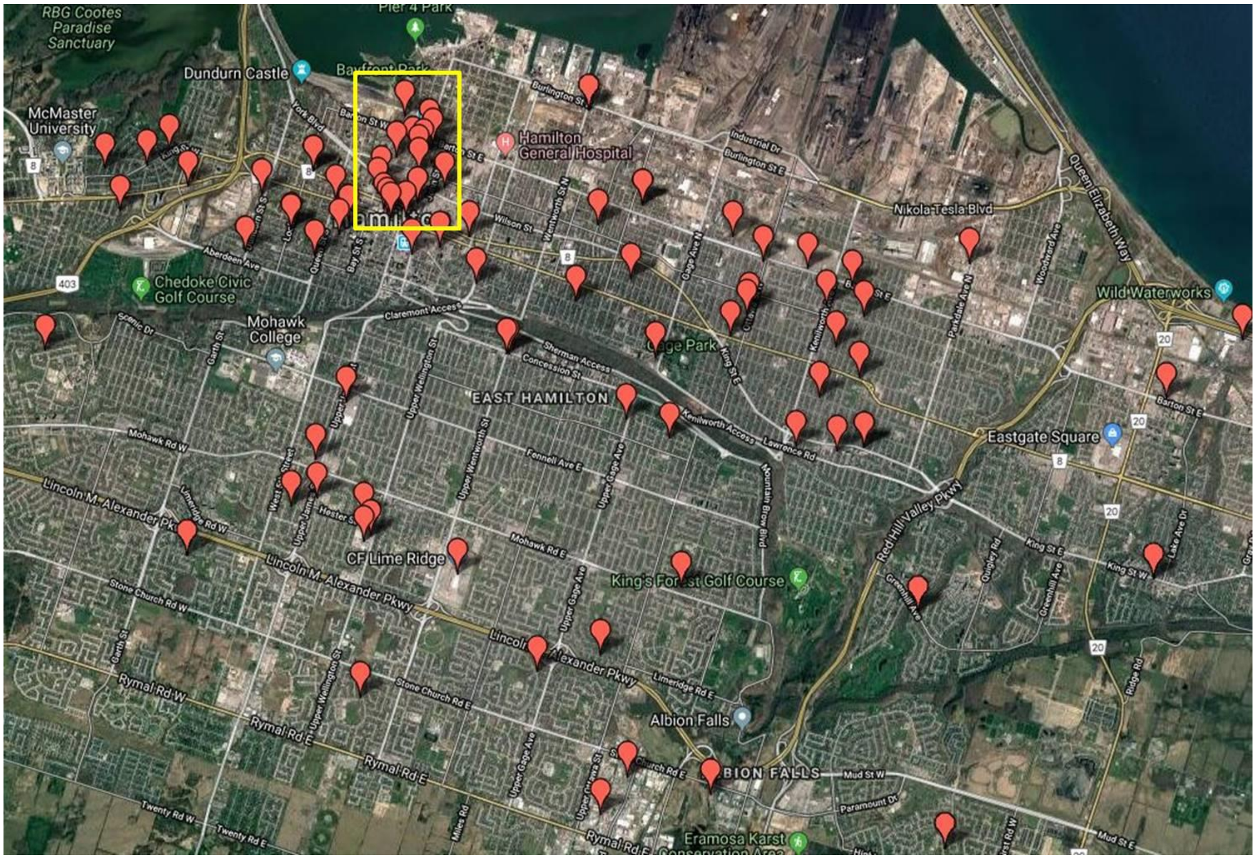


Source: MDB Insight

Film Sub-Sector

The asset mappings of creative industries in the Film sector shows businesses concentrated along and around James Street North at Barton Street. Film businesses are also seen in the area around central Hamilton at Queen St N, Locke St N and Dundurn St N and also along John St North. A few businesses are also seen near McMaster University, Lime Ridge Road and Kenilworth Avenue. The cluster near James Street North includes Factory Media Center and HAVN. The city also has some clustering of film businesses (spaces and production studios) such as Digital Canaries located in the city's north end and its industrial zones. Additional investment in the film sector includes renovations to Sherman Avenue Playhouse Theatre. The Playhouse Theatre started operations in 1913 showing silent films and vaudeville. When reopened, the theatre will be the oldest movie house in Hamilton and be a part of Hamilton's architectural heritage.

Figure 17: Creative Industries in the Film Sector

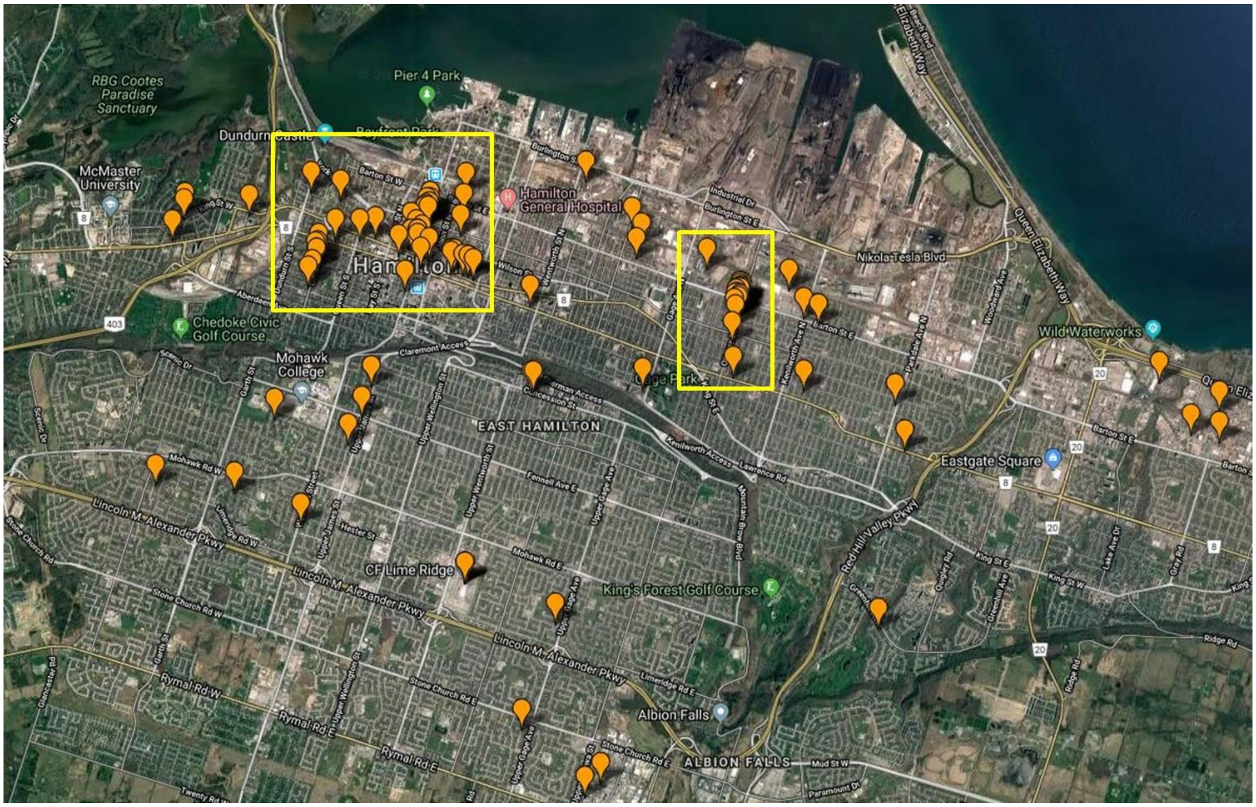


Source: MDB Insight

Fashion Sub-Sector

The Fashion sector is seen to be clustered in two nodes, namely, James Street North and Ottawa Street North. Businesses in the sector are also seen along King Street East and Locke Street South. The James Street North cluster has several retail and designer shops and plays a predominant distribution role for the sector. The cluster seen in Ottawa Street focuses predominantly on activities surrounding textile and fabric production, textile and fabric manufacturing and textile and fabric distribution. Businesses are also emerging near Mohawk College which might serve as an enabler of the sector or the creative element of the sector. Mohawk College provides continuing education courses in Fashion Design, Dressmaking and Sewing.

Figure 18: Creative Industries in the Fashion Sector



Source: MDB Insight

Creative Industries Business Support Services - Better Practices Research

A key element of the research for the Hamilton Creative Industries Sector Profile was best practice research on integrated business and sector support programs and services. This work was undertaken by Civicplan, a planning, engagement and research firm based in Hamilton. Civicplan has a long history of involvement in examining the creative industries in Hamilton. The full report is found in Section 7: Creative Industries Business Support Services Better Practice Research in the Technical Report.

In studying best practices, Civicplan brought forward knowledge of findings from the research and sector consultations process for the Hamilton Creative Industries Sector Profile. Specifically, what emerged was a noted desire across subsectors for assistance in terms of creative industry business resources and supports. Thus, four case studies that incorporate various forms of business support were identified and studied.

Based on national and international research, four creative industries business support systems were identified. Each is described in detail in the Technical Report. Several of the creative industries business support systems identified operated at a regional and national level. These case studies were nevertheless felt to be relevant and possibly scalable to inform potential future initiatives in the city. A summary of each case study follows.

Four Case Studies and Best Practices

1. **Cultural Enterprise Organization (CEO), Glasgow, Scotland** – This case study was selected because of its cross-sectoral reach; it's blend of supports for business development at the start up, as well as mid-business level, and for its dedicated fashion incubator model. Additionally, the CEO is expanding its focus to the film industries in the near future.
2. **Flanders DC, Flanders, Belgium** – This case study demonstrates a focused effort at providing business supports for the creative sector. While it is regional in scale, it offers concrete examples of training and mentorship programs, as well as linking the regional creative industries sector into a larger global network.
3. **London Music Office, London, Ontario** – This example was selected as a local Ontario example. It is municipal in scale and focused on one of the key creative industries sub-sectors assessed in the Sector Profile. Further, it demonstrates how to build upon existing local industry resources and stakeholders.
4. **QUT Creative Enterprise Australia (CEA), Brisbane, Australia** – This case study exemplifies links between educational institutions and the creative industries sector. Its emphasis is more on the provision of space, but also on supporting different subsectors through start-up capital and accelerator programming.

Summary Findings

Informed by the survey, workshop and gap assessment, six categories were developed to compare the four case studies under review as follows.

1. **Funding and Assistance with Funding** – Only two of the four case studies incorporate a level of funding support to the creative sector. The London Music Office provides resources to external funding bodies, like the Canada Council, as well as assistance and advice around grant writing. The QUT CEA in Brisbane recently created a Startup Fund for creative tech startup businesses.
2. **Sector Awareness and Marketing** – All four of the case studies provide some element of sector promotion and awareness, as well as marketing assistance. QUT CEA Brisbane hosts Fashion 360 events, Flanders DC hosts the Creative World Forum, CEO Scotland host many networking events around skills training (e.g. marketing skills, social media) as well as speaker series with leaders in different fields.
3. **Skills Training and Mentorship** – All four examples provide skills training and mentorship opportunities as access to external resources. The London Music Office provides access and information on external resources, while the other case studies directly provide this

assistance, such as Flanders DC's set of Toolkits for creative entrepreneurs, or CEO Scotland's FGIC Incubation Program of the FGIC Accelerator, or QUT CEA's Fashion 360 Accelerator program.

4. **Incubator or Venue Spaces** – Two of the four examples have physical space in which they host sector incubators. CEO Scotland runs the Fashion Foundry, providing programs and services for those in this subsector to access creative space and machinery. QUT CEA in Brisbane hosts a number of the incubator and co-working spaces in the Creative Industries Precinct, including the Coterie, and the Fashion 360 Accelerator.
5. **Networking Support** – All the examples host networking events that not only raise the profile of creative industries but also allow for sector-specific networking opportunities. CEO Scotland host Creative Mornings events bring together like-minded creative professionals. QUT CEA in Brisbane hosts StartUp Weekends for creative tech entrepreneurs, while Flanders DC host the annual Fashion Talks event, among others.
6. **Municipal Government Support** – While three of the four examples are defined as connectors between governments and their agencies and the creative sector, only one, the London Music Office, provides direct support for navigating municipal government services, such as permits, licensing or zoning and bylaws.

Relevance for Hamilton

As is common with many other business sectors, the top concerns that arose in the research focused on the need for sector-specific business support. The challenges highlighted in the Hamilton sector profile research are found in other jurisdictions both regionally and internationally. The four case studies offer examples of how others are addressing these challenges at various scales, both locally and regionally. Hamilton can learn from these examples, specifically, how to build on existing business support infrastructure (e.g. Small Business Enterprise Center), to connect with existing collaborative makers' spaces and incubators, (e.g. the Cotton Factory, Steel City Studios, the Hamilton Public Library's Makerspaces), and further develop existing networking initiatives such as the Creative Exchange.

Sector Consultation and SWOC Analysis

To gain community input and secure continued support for Hamilton's creative industries sectors, a consultation program with the business community and local stakeholders was conducted. This included:

- **Business Telephone Survey –** 190 responses to a survey of creative industries businesses and organizations
- **Stakeholder Interviews** – interviews with approximately 15 stakeholders in the sector as well as senior City of Hamilton staff
- **Three Consultation Workshops** - with stakeholders drawn from the Film, Music and Fashion sub-sectors

Findings from all consultations were summarized in a Strengths, Weaknesses, Opportunities, Constraints (SWOC) report found in Section 6: Creative Industries Sector SWOC Analysis and Gap Assessment in the Technical Report.

SWOC Analysis

The following chart presents key themes that emerged from the consultation process.

STRENGTHS

- **Location, Location, Location** - Hamilton's central location in the Greater Golden Horseshoe, one of the fastest growing regions in North America
- **Quality of Life and Cost of Living** - the city's enviable quality of life and reasonable - although increasing growing - the cost of living (especially vis-a-vis Toronto)
- **Housing Costs** - since 2010, home prices across the GTA west have increased between $270,000 - $400,000. The Hamilton-Burlington area had a housing price increase of approximately $272,100. However, comparatively, Hamilton-Burlington is still considered an affordable alternative to all other GTA west communities. On average, Hamilton-Burlington home prices in 2018 average about $186,000-$370,000 less than its competitors. In 2010, that range was $125,000-$250,000, indicating that despite the increase in housing prices across the GTA West, Hamilton-Burlington's increases in prices are still the most affordable community for artists and by a significant margin (approximately 40% cheaper than Greater Toronto and 25% cheaper than Oakville-Milton area).
- **Rental Rates** – similar to housing prices, residential rental rates across the GTA west from 2010 have increased between 18-23% (On average $221-316 increase). Hamilton had a monthly rental increase of approximately $221. However, comparatively, Hamilton is still considered an affordable alternative to all other GTA west communities. On average, Hamilton rents in 2017 average about $260-$378 less than its competitors. In 2010, that range was $234-$283, indicating that despite the same increase in rental rates across the GTA West, Hamilton's increases in rental prices are still the most affordable community for artists and by a significant margin (approximately 20-27% cheaper).
- **A Favourable Size for Business** - the size of the city is a strength – large enough to provide a critical mass but small enough to support networks and communication
- **Strong and Consistent Growth** - Hamilton's creative industries employment grew faster than the rate of growth for Ontario and Canada from 2011-2016
- **Established Cultural Institutions** - such as the Art Gallery of Hamilton, First Ontario Concert Hall, Theatre Aquarius, among others
- **Supportive City Planning and Resources** – Hamilton has a long record of plans and strategies identifying the creative industries as a priority in planning and economic development
- **A Vibrant and Revitalized Downtown** – the arts and creative industries have been major drivers in the transformation of the downtown

- **Supportive Post-Secondary Institutions** – McMaster University and Mohawk College have programs focusing on various of the creative industries, offering opportunities for future partnerships
- **Economic Contribution of the Creative Industries** – in addition to the dollar contributions noted earlier, the arts, culture and creative industries are tourism magnets and contribute to overall quality of life that draws people and investment

WEAKNESSES

- **Perceptions of the City** – Hamilton's identity for many is still tied to its industrial history even though its economy has been driven by knowledge-based and creative economy sectors
- **Demographic Challenges** – Hamilton fell behind both Ontario and Canada in population growth from 2011-2016. While median household income was lower than Ontario in 2016, the Hamilton CMA experienced an increase in total household income of 5.3% compared to 3.8% for Ontario between 2005 and 2015, along with a noticeable drop in the city's poverty rate[9].
- **The Outflow of Labour** – the difference between those who live in the city and work elsewhere exceeds those who live elsewhere and work in the city by 8995 workers. This may indicate the lack of job opportunities but also reflects a choice to live in Hamilton and work elsewhere given its quality of life, relative affordability and proximity to the City of Toronto.
- **Lack of Understanding & Common Definition of the Sector** – many of those working in the creative industries sector as well as the broader community do not understand fully the breadth and diversity of businesses and activities, and thus the significance of the sector to the city
- **Underperforming in Sales and Marketing** – a theme frequently repeated in consultation with the sector is that individuals and creative industry businesses in the sector are stronger at creation than they are at sales and marketing, hampering profitability and sustainability
- **Lack of or Limited Grants and Financial Support** – connected to the previous point and revenue shortfalls, there was a call for grant support from the City which currently does not exist to for-profit enterprises
- **Weak Projected Business Growth** – the business telephone survey revealed that a strong majority (60%) did not foresee business growth over the next 3 years. One factor could be that some businesses had reached a point of equilibrium and did not desire further growth.

OPPORTUNITIES

- **Education & Awareness** – the City and its business and community partners, should continue efforts to promote an image and identity for the city consistent with its knowledge-based and creative economy

[9] Hamilton Community Foundation Annual Report 2015.

- **Implement Property Tax Reductions** – the City of Toronto in the summer of 2018 implemented 50% reduction in property taxes for creative spaces to ensure they were not priced out of the downtown area, which would have resulted in a loss of cultural vitality and appeal for residents and visitors.
- **Increase Start-Up and Expansion Business Support and Entrepreneurship Training** – there was a call for the City to work with its business and post-secondary partners to increase training offerings in business start-up and entrepreneurship.
- **Filling Specific Infrastructure Gaps in the Sector** – feedback received aligns with the City's existing priorities for new infrastructure including a film studio, 800-1200 seat multi-use performance space and enhanced access to broadband to support emerging digital enterprises
- **Digital Media Growth** – digital media is a top policy priority for the Governments of Ontario and Canada. There is an opportunity for the City to recognize digital media as a distinct sub-sector with targeted growth and development strategies and actions
- **Building Cross-Sectoral Awareness and Connectivity –** there is insufficient awareness and connectedness across the creative industries sector. Building online and in-community platforms for interaction will strengthen the sector and support its growth
- **Leveraging City-Owned Land and Spaces** – there was a call for the use of City-owned land and buildings to serve as creative spaces – co-working spaces, incubators or accelerators, maker labs, etc.

CONSTRAINTS

- **Advancing Gentrification** – increasing property values and taxes are making it challenging for individual artists and creative industry businesses to locate and remain in Hamilton
- **Weak Transit** – the City is making significant investments in transit inside the city, but the availability of transit in and out of Hamilton is becoming a barrier to the flow of creative industry sector workers and businesses, as well as visitors to the city
- **Potential Non-Renewal of the Regional Tax Credit for Film and Television** – the film sub-sector pointed to the vital importance of the Film Fund and Ontario Film and Television Tax Credit that provides a regional incentive for film activity outside the GTA. This is a provincial and not a municipal incentive.
- **Lack of Diversity in the Sector** - while there has been no empirical study of the ethnocultural and racial diversity of the sector, input from consultations together with the heritage and background of participants at the sub-sector workshops points to a lack of diversity. This hypothesis warrants further examination.
- **The Absence of a Central Information Hub(s)** – among the core characteristics of a healthy creative ecosystem described earlier in this report is the flow of information and knowledge. At the moment there is no central hub or clearinghouse for information across the sector

Sector Gaps Analysis and Opportunity Identification

The SWOC Analysis has identified a series of gaps in the creative industries system in Hamilton, as well as potential opportunities to respond to these gaps. Gaps in this analysis refer to weaknesses in the system or element which, if strengthened or enhanced, could enhance the overall performance of the sector or specific sub-sectors. Specific Actions related to these opportunities are set out in the Potential Actions section.

Fragmentation and Lack of Interaction

One of the most consistent themes heard through the consultation workshops, and interviews were the lack of connectivity and networks both within and across sub-sectors. People felt the capacity exists to address systemic challenges of resourcing, awareness and promotion, skill development and capacity building, but that none of these things could be achieved with individuals and enterprises acting along. This gap relates directly to the first principle of healthy creative ecosystems, interaction and interdependencies.

The City was called on to play a convening role, bringing stakeholders and sector partners (e.g., post-secondary institutions, Chamber of Commerce) to share knowledge, build relationships and generate collective solutions to shared challenges.

Insufficient Creative Hubs and Collaborative Spaces

One response to the challenge of fragmentation is the creation of more shared workspaces and venues for sector interaction. Existing incubators or creative complexes such as the Cotton Factory were identified as demonstrating the potential of these spaces, but smaller, more modest spaces can still make a significant impact on the sector. This gap also relates to the third principle of healthy ecosystems – physical interactions in creative hubs.

The City was called on, whenever possible to use City-owned properties as potential creative hubs or incubators.

Divided Perceptions of the City

Two types of divided or conflicting perceptions were identified. The first is the divide in perception about the city itself with an identity still defined internally and externally by its industrial past rather than the creative economy and its knowledge-based industries. Some of those consulted believed that the City, in its investments and efforts to communicate and rebrand the city, have been more successful externally than internally. The divide between current and past economic realities influence the second division in perception in which some view the creative industries sector as a small, relatively marginal part of Hamilton's economy and civic life versus those who understand its importance and future potential.

The City, working with its business, post-secondary and community partners was called on to continue their efforts to promote a vision of the city in which the arts and creativity are defining elements. Many of the City's marketing efforts have (understandably) been focused outward on attracting visitors, as well as new residents and businesses. However, it was felt that some of these efforts and investments must also be directed toward residents, who are also, it was pointed out consumers and customers for the creative industries sector.

Gaps in Start-Up Business Support and Entrepreneurship Training

Closely linked to the previous gap is the call, across all sub-sectors, for building on and expanding current commitments to training and resource development in business start-up and entrepreneurship. There was a call for the City to increase its commitments in this area, working in partnership with business and post-secondary partners.

A strong message heard during consultations is the need for creative industry businesses and entrepreneurs to strengthen competencies in sales and marketing. A number of times the observation was made that creative industry enterprises and entrepreneurs “are better at creating than marketing and revenue generation.”

Low Levels of Diversity in the Sector

This identification of the lack of diversity in the sector is based on anecdotal rather than empirical evidence. It was identified in workshop consultations and several interviews. The composition of participants at the engagement workshops is also consistent with this observation.

This is an area worthy of further study as the gap may be lack of access to the established creative community and their resources and not a low level of diversity in the sector. A more diverse creative industries sector enriches cultural production and potentially expands cultural participation and consumption, enhancing the profile and impact of the sector in the city.

Recognition of Digital Media

The lack of formal recognition by the City of digital media as a discrete and important sub-sector of the creative industries places Hamilton at odds with the creative industries policies and investments of the Federal and Provincial governments for whom digital media is one of their top priorities. Enabled by digital media, the stark contrasts between non-profit and for-profit creative cultural enterprises are shrinking as both move towards digital media as platforms for the creation and distribution of cultural content.

Digital media is one of the fastest growing parts of the creative cultural industries, both as a sector onto itself, tied closely to gaming, and as a force transforming the creation and distribution of a wide range of cultural content. The fragmentation of the creative industries in Hamilton reflects the reality in most cities. Although traditionally the different industries have operated in silos, convergence and interaction have been growing, as new digital platforms act as common denominators for both the production and delivery of cultural products. The *2016-2020 Economic Development Action Plan* includes an action to develop and implement an ICT and Digital Media Sector Strategy. However, the City was called on to formally designate digital media as a recognized sub-sector and to identify best practices in digital sector development in Canadian cities.

Lack of a Central Information Hub

One element of better connecting the sector and sub-sectors identified as a gap was some form of a central information hub. This gap relates directly to one of the requirements of healthy creative ecosystems, the flow of information through the system.

Sub-Sector Opportunities

Film

There is an opportunity to promote Hamilton as a film centre and potentially to build a film and TV media hub in Hamilton. The City can be a catalyst, working with the sector to advance this agenda. Simply providing venues where people can come together would be a strong step. There is an opportunity to enhance online presence for the industry – such as a possibility for producers to preview locations online and decide on filming locations and dates. Another possibility is facilitating access to the workforce online.

Film Infrastructure Opportunities:

- Additional small to medium-size studios
- Support infrastructure (e.g., rental shops, equipment leasing shops, rental spaces)
- Creation, by the industry, of a local film board

Music

To increase the profile and address fragmentation in the sector, the City coordinates the Hamilton Music Advisory Team (HMAT) that advises the City on the Music Strategy and utilizes the Hamilton City of Music brand to promote a wide range of initiatives and activities. The Hamilton Musician’s Guild and Mohawk College Music Department are working together to build training and entrepreneurship opportunities for both emerging and established artists. These resources can be better known and promoted. There is an opportunity to provide greater support for emerging artists through channels such as the Hamilton Arts Awards and the programs and partnerships identified above.

Music Infrastructure Opportunities:

- The possibility of a coalition of recording studios
- Addressing a gap in venues by establishing a small, entry-level venues spaces (e.g. Baltimore House and Homegrown style), as well as a more medium sized 600-800 seat venues
- A better understanding of Hamilton’s Music Industry economic impacts

Fashion

An opportunity and a priority for the City should be raising the profile of the fashion sector and brand fashion as a vibrant part of the creative industries scene in Hamilton, which will also help broaden the consumer base. To a greater extent than other sub-sectors such as film and music, the fashion industry in Hamilton has little capacity to organize itself for purposes of advocacy, training, mentorship, networking, etc. The City could play a very powerful role in convening the sector to address these issues. There was an opportunity identified to establish an online information hub (a “Fashion Exchange”) to support individuals with start-ups and business development, as well as a forum for collaboration.

Fashion Infrastructure Opportunities:

- Fashion incubator – potentially a shared workspace and place for large-scale equipment currently lacking in the city (with possible collaboration in equipment purchase)

Potential Actions

The primary focus of the City of Hamilton Creative Industries Sector Profile Study was to build a strong body of knowledge to inform subsequent, research, consultation and strategy formulation. What follows is not a creative industries sector strategy. Rather it sets out a "menu" of potential actions to advance the sector and its sub-sectors. There has been no attempt to prioritize these actions, nor identify potential partners that could support the City in moving forward. The Potential Actions are:

Prioritize the City's Role as a Convener of Creative Industries to Improve Sector Partnerships and Collaboration

- Create a Creative Industries Forum (event) to discuss and advance a cross-sectoral agenda in Hamilton. While the Forum can be used as an advisory forum for the City, its core purpose would be to identify actions and mobilize the resources and partnerships to strengthen and grow the creative industries sector.
- Establish a cross-sectoral Creative Industries group. The group should be comprised of City staff, creative industry stakeholders, a range of community and business interests, representatives from local post-secondary institutions. Members should bring knowledge, expertise and access to human and funding resources.
- Examine best practices for digital platforms to sustain communication and the flow of knowledge within the creative industry sector and between the sector and the City, community, and business partners.

Explore Potential Locations and Partnerships to Establish Dedicated Creative Hubs or Collaborative Spaces

- Examine the feasibility of converting an existing community building - either publicly (e.g., school) or City-owned building into a creative shared space or co-working hub that could serve a variety of purposes as defined by the tenants and other stakeholders as the space evolves. This space could potentially evolve into an incubator space for creative industries.
- Explore the use of public-private partnerships to introduce creative hubs or collaborative spaces in new developments. Build relationships with developers to encourage the integration of creative spaces into new buildings or the redevelopment of existing structures.
- Encourage and promote the development of creative industries in select areas. For example, James Street for music and creative industries generally, Ottawa Street for fashion, and industrial areas/warehouses for studio space.

Enhance Hamilton's Creative Industries Sector's Story through Existing Promotion and Marketing Campaigns and Platforms

- Leverage findings from the current Study to strengthen current efforts to profile the creative industries sector story/narrative across the ongoing implementation efforts of the Economic Development Marketing Strategy (i.e. Invest in Hamilton) to direct/increase customers to support the Creative Industries Sector Businesses. Draw on the findings from this Study as well as profile creative industries sector success stories to support these marketing efforts.

- Create a local creative industries campaign that highlights the efforts of the City's sector support. This could include references to the creative industries in promotions of the City, through increased creative industries presence on the City's social media platforms, and through the publicizing of available facilities, available support, events and festivals, nodes and hubs, and creative industry success stories.

Support Skills Development and Entrepreneurship Training in the Creative Industry Sector

- Identify and connect creative industries businesses to public or academic partners such as Innovation Factory, The Forge, Mohawk College, and McMaster University to support skills development across Hamilton's creative industries sector.
- Promote participation of creative industries in the Business Mentoring and Apprenticeship Program at Mohawk College, aimed at building an entrepreneurial ecosystem in Hamilton and teaching creative entrepreneurs how to sell and market.
- Promote the Hamilton Technology Centre to the broader creative industries sector.

Undertake Research to Better Understand Issues of Diversity in the Sector

- Identify potential graduate students at McMaster or students at Mohawk College to undertake demographic research on the sector through the lens of the ethnocultural and racial composition of the labour force in the creative industries.
- Undertake a literature review to identify systemic barriers to participation in the creative industries sector from diverse communities, together with strategies developed to address these barriers.

Designate Digital Media as a Priority for Hamilton with Links to other Sub-Sectors

- Connect creative industries to work with Hamilton's tech and digital community on leveraging 'big data/open data' for audience development tools, digital media promotions, live-to-screen options, digital literacy training, interactive arts opportunities, and other digital technologies.
- Examine best practices in creative industries leveraging digital media as a tool for creating, producing, presenting and distributing creative content across sub-sector disciplines. In particular, examine success models used by creative industries content creators' that leverage digital media networks, including social media platforms and crowd-sourced funding campaigns, to connect content to markets.

Prioritize Hamilton's Key Creative Industry Sub-Sectors in Music, Film and Fashion in Advancing the Broader Creative Industry Activities Sector in the City

Music

- Continue to implement the Hamilton Music Strategy.

- Continue to provide City support for Promoters, with advice on permits, hours, policing, licensing, media and the coordination of potentially competing festivals. Work with venues and BIAs on the marketing of a music scene in specific areas.

Film

- Explore the feasibility of creating a Hamilton Film Advisory Team (similar to the Hamilton Music Advisory Team) who would assist with the development of the local industry to retain and develop local talent, attract talent, better use talent, and connect with post-secondary institutions to create programs that are currently not offered in Hamilton. Consideration could also be given to extending the mandate of such a group to a Hamilton Film, Television and Digital Media Advisory Team.
- Mandate this Team to develop a Film (or Film, Television and Digital Media) Business Plan to consolidate these and other initiatives to advance these industries, drawing on good practices in jurisdictions such as Toronto.
- 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 the use of unused warehouses to meet sector capacity need.

Fashion

- Building on the research that examined the feasibility of a Fashion Incubator and consider potential sites and partnerships with post-secondary educators, examine the potential of the development of a dedicated fashion facility to promote this sector's growth and strength in the City. Consider making fashion an anchor discipline in the incubator as well as other sub-sectors as feasible or advantageous.

MDB INSIGHT

City of Hamilton Creative Industries Sector Profile Study

Document Review and Planning Context

June 2018

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1. Introduction

This report takes stock of past and present plans and strategies developed by the City of Hamilton or its partners that relate to the development of the creative industries in the city. The following documents were reviewed.

- 2005 Economic Development Strategy
- 2007 Hamilton Creative City Initiative Phase I Report
- 2008 Building a Creative Catalyst Report
- 2010-2015 Economic Development Strategy
- 2012 Strategic Municipal Investment in the Arts Report
- 2013 Music Strategy
- 2013 Transforming Hamilton Through Culture: The Cultural Plan
- 2014 City Enrichment Fund Report
- 2016 - 2020 Economic Development Action Plan
- 2016 Music Strategy Update
- 2016 - 2025 Strategic Plan
- 2017 Fashion Incubators As Economic Infrastructure
- 2017 Our Future Hamilton: Communities In Conversation Initiative
- 2017 The Big Picture

The creative industries as defined by the City of Hamilton include Live Performance, Visual and Applied Arts & Makers, Fashion, Written and Published Work, Film, and Music. These industries specialize in the use of creative talent and skill for job creation and commercial purposes. Contrary to primary industry sectors, the creative sector is primarily made up of individuals, small and micro-businesses. Larger enterprises (including giant media companies) do exist, but they are the exception to the rule.

This section of the report focuses on a review of the plans and initiatives that the City has undertaken to support and grow the creative industries sector.

2. Planning Context Themes

2.1 Creative Industries

The reports and plans reviewed indicate that the City of Hamilton is focused on leveraging future growth and development through culture and the creative industries. In 1988, the City conducted the “Downtown: A Marketplace for Ideas” workshop which identified that Hamilton could transform itself into a “Creative City,” by leveraging culture as a tool for economic development. Through the *2005 Economic Development Strategy*, the Film and Cultural Industries was recognized as an emerging economic cluster. A key outcome of this strategy was the *2013 Cultural Plan*. The *Cultural Plan* recognized the importance of culture to grow local economies, shape the character of the community and enhance the quality of life.

The *2016-2025 Strategic Plan* was adopted in 2016, to support the long-term community vision of the City. Priorities of the plan included promoting a diverse local economy (Economic Prosperity and

Growth) and supporting arts, culture, and heritage (Culture and Diversity). The priorities were reinforced by a number of short/medium term plans, one of which was the *2016-2020 Economic Development Action Plan*. An essential consideration in the *2016-2020 Economic Development Action Plan* was the need to define the creative industry sub-sectors. The creative cultural industries thus included music, film, fashion, writing and publishing, visual and applied arts and graphic design, and live performance and festivals.

The *2005 Economic Development Strategy, 2010-2015 Economic Development Strategy, 2016-2020 Economic Development Action Plan* and the *2013 Cultural Plan*, highlight the need for a supportive environment including infrastructure, labour force, zoning considerations and access to local and global markets to support the growth of a vibrant creative economy.

By recognizing creative industries as a driver of the economy, the City can advance the cluster and offer opportunities for jobs and growth. Having creative people and places attracts people and investment and improves the overall quality of life.

2.2 Enabling Environments

A SWOT analysis conducted as part of the *2010-2015 Economic Development Strategy* identified that Hamilton has much local strength including the presence of emerging and established creative individuals and collectives. Also, strong cultural assets such as the Art Gallery of Hamilton (AGH), First Ontario Concert Hall, Theatre Aquarius, The Cotton Factory, Hamilton Music & Film Office and Hamilton Arts Council, among others ensure that the cultural development in the city is well-supported. The presence of post-secondary institutions such as Mohawk College, McMaster University and Redeemer University College along with specific educational institutions for the arts has enabled participation and collaboration to support the growth of the creative industries.

In addition to local strengths, planning and development efforts include downtown revitalization, BIA programs to encourage reuse and repurposing of buildings for creative facilities, provincial/regional film incentives, site location assistance, support for festivals and street animation, and cultural asset data to inform creative city-building.

A significant action in the *2016-2020 Economic Development Action Plan* was the presence of incubators and maker spaces to advance and support the creative/cultural industries. The Action Plan also identified youth education and integration in the local community and economy as a priority to develop a robust creative workforce and an environment of innovation. Actions and assets include improved partnerships with The Forge, McMaster University's on-campus entrepreneurship initiative, Hamilton Technology Centre, Youth Engagement and Action, and the Youth Advisory Council. The importance of tourism to support the creative sector is also identified in development efforts.

Recognizing that arts, cultural and creative industries are integral to economic development and community revitalization goals, the City developed recommendations to support local artists. This included the redevelopment of the City Housing Hamilton property at 95 King Street East into an artist's live/work development in 2009. Additionally, in 2011, the City developed policy guidelines on Street Performance (Busking) to promote street performance or "busking" as a positive activity and to support the rights of individuals to express themselves creatively.

2.3 Support for Entrepreneurship

Key priorities identified in the *2010-2015 Economic Development Strategy* and the *2016-2020 Economic Development Action Plan* were supporting entrepreneurship and business growth and developing strong networks and collaborative partnerships. A critical area of focus in the *2016-2020 Economic Development Action Plan* was small business development. As part of the 'Culture as an Economic Engine' goal, the *2013 Cultural Plan* identified specific recommendations to grow cultural businesses. This included:

- Recognition of artists and creative workers as entrepreneurs
- Develop tools and services to support artists and creative workers in collaboration with the Hamilton Small Business Enterprise Centre (SBEC) and other arts/culture service organizations
- Allocation of resources for the development of film/video/broadcasting; design and digital media; music; festivals and events; performing arts; and visual art businesses
- Position Hamilton as a creative city as part of the business attraction and retention initiatives
- Collaborate with local business networks such as the Workforce Planning Hamilton; Hamilton Immigration Partnership Council; Chamber of Commerce and HIVE in areas aligned with the goals of the Cultural Plan

Hamilton has had a rich history of innovation driven by entrepreneurial individuals and firms, earning the title of "the Ambitious City." By enabling the growth of small businesses, the city aims to be a leader in encouraging entrepreneurship and small business creation. By drawing a connection to culture, the city is well positioned to attract new businesses, investment, jobs, and talent. Also, the City provides many professional development and networking opportunities for the creative workers through Creative Exchange Networking Events and Biz SmARTs lunchtime series. Evidence demonstrates that these networking opportunities are catalysts in promoting creative hubs and activities including skill sharing, business development, and peer support.

2.4 Support for Specific Industry Sub-Sectors

In addition to the support provided for the entire creative industry sector, Hamilton promotes individual sub-sectors. Three that have received particular focus are Fashion, Film, and Music.

Fashion

The Fashion sub-sector includes Fashion Designers, Jewellery makers/designers, Textile, Dressmaker, and tailors and has been identified as an important emerging industry for the city. In working to develop this sector, the City researched the feasibility of establishing a Fashion Incubator in the former Eastmount School Site. In addition, the *Fashion Incubators as Economic Infrastructure: A Case Study Analysis* report reviewed four potential incubator models to inform decisions for the sector in Hamilton. The incubator models were connecting to a University creative program, a local fashion industry, a co-working space, or one directly connected to government. While the study reported that the incubator by itself would not be a profitable enterprise, it is viewed as an essential foundation for entrepreneurs and small businesses to establish and grow the fashion sub-sector.

Film

Although Hamilton has not developed any specific plans or reports for the Film industry, the sector is an essential growth industry in the city. In 2017, the City issued 539 film permits, which resulted in $12,176,945 direct spend by production companies. Also, over 700+ unionized film workers live in Hamilton and include directors, technicians, writers, actors, hair and makeup specialists, and costume designers[1].

The development of a major film studio is identified as a 'stretch target' in the *2016-2020 Economic Development Action Plan.* 'Stretch targets' are defined as 'ambitious targets that challenge current assumptions and processes, and inspire teams to re-imagine what they previously thought possible.' Approximately, 11 stretch targets were identified in the Plan. Those directly related to creative industries included:

- A major film studio
- An 800 to 1,200 seat multi-use performance centre
- Enhance Hamilton's image as a Digital City by enabling access to broadband Internet speeds

The City has developed amendments to *Zoning By-law 05-200* to enable the addition of a production studio and associated warehousing, prop and set design and storage. It also allows the use of digital media such as an animation studio, and associated software development and processing.

Music

Based on the reports reviewed and other City initiatives, the majority of City and staff efforts have been placed on the Music sub-sector. Hamilton is identified as 7th in the world for independent musicians per capita. The Hamilton's Musician Guild has more than 600 active members and is the fastest growing local of the American Federation of Musicians. The city has over 20 recording studios, 150 live performance venues and an average of 70 live music show across the city each month[2]. In 2008, the City completed the *'Building a Creative Catalyst Report'* which identified that Hamilton's music industry is well positioned to be harnessed as a means to grow Hamilton's economy, re-activate the downtown area, improve the physical condition of buildings and neighbourhoods, and build pride in the community.

The Hamilton Music Advisory Team was created as a result of the *Music Strategy* completed in 2013. The group has supported the implementation of 25 of the 30 recommended actions in the Strategy. These include better practice research, the formation of a Live Music Venue Alliance, development of Hamilton music branding (City of Music), and participation of 13,000 people in a music branding and marketing plan.

An update of the Music Strategy was completed in 2016 to expand the mandate of the Advisory Team and launch marketing activities that support Hamilton as a City of Music. The Team seeks to create a local solution that incorporates better practices from leading music cities such as Toronto that leverage their industry, demonstrate economic impacts of the music industry, and strengthen and grow the sector to ensure its competitiveness and viability. Other recommendations of the Strategy include a budget enhancement of $25,000 to fund marketing efforts and the creation of a focused Music Industry

[1] http://www.investinhamilton.ca/key-industries/creative-industries/

[2] ibid

Business Plan.

In addition to the above efforts, the City Enrichment Fund Arts programs provided approximately $809,425 in funds to support 24 music organizations, events, and musicians in Hamilton[3] in 2017. Furthermore, the Noise Control By-Law was amended to provide an exemption permit for entertainment on a commercial outdoor patio. The City also developed the Musicians Welcome Signs initiative to enable musicians to park and unload equipment in the loading zones without any encumbrances from law enforcement. The Zoning By-law 05-200 mentioned above applies to the music sector.

2.5 Conclusion

The document review shows that the City of Hamilton has made a significant investment in plans and initiatives to grow the creative industries. Creative individuals have access to maker spaces, businesses growth, and entrepreneurship support. However, the links between creative individuals and enterprises operating at the intersection of arts, business, and technology have not been fully realized. Hamilton is considered a location that offers a positive quality of life and a more affordable place to live and work than in Toronto. However, there are growing concerns about creeping prices and gentrification.

Additionally, while Hamilton does identify the need to enhance its image as a Digital City and develop strategies to improve the ICT infrastructure (broadband internet), the integration of culture and creativity with digital technology has not yet been developed.

The importance of municipal involvement lack and attract funding is identified in the2016-2020 Economic Development Action Plan*, Cultural Plan* and studies carried out by the Arts Advisory Commission (AAC). Hamilton's funding programs for non-profit arts organizations, creative individuals and businesses are seen to be limited. However, the City made a significant step in addressing funding needs in the non-profit sector through a $1 million increase in funding to support the Arts in 2015.

[3] ibid

MDB INSIGHT

City of Hamilton Creative Industries Sector Profile Study

Creative Industries Sector Baseline and Benchmarking Analysis

August 2018

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1. Creative Industries Sector Baseline Analysis

This study profiles Hamilton's Creative Industries Sectors to help shape the vision for the continued growth of the sector. The City of Hamilton has long recognized the importance of the creative industries sector to economic growth. Consistent with the priorities identified in the Economic Development Action Plan 2016-2020, this report provides insights into the sector to inform future policy and planning by the City of Hamilton. For the purpose of this report, Creative Industries are defined as a wide range of sub-sectors, namely

- Fashion
- Film
- Live Performance (i.e. theatre, comedians, dance, and festival organizers)
- Music
- Visual and Applied Arts and Makers (i.e. original visual art, photography, graphic design, animation, architecture and crafts)
- Written and Published Works

The Creative Industries Sector Baseline and Benchmarking Analysis report examines the size, composition, and growth of Hamilton's creative labour force, creative businesses and worker trends such as labour flow and wages. The baseline analysis also includes a benchmarking analysis of Hamilton's business composition and available workforce in creative industries sectors against 10 Canadian cities.

1.1 Methodology

The creative industries do not have well-defined boundaries or definitions as they encompass different industries and are part of various industry sectors. Traditionally, the creative industries have been perceived to comprise sectors such as performing and visual arts, publishing and music. However, the evolution of the economy has resulted in acknowledging that the sector includes the digital economy and professional services. For this report, the creative industries are defined as the segment of the larger economy whose principal orientation is to apply creative ideas and processes to generate goods, services and innovations that provide both economic and aesthetic value.

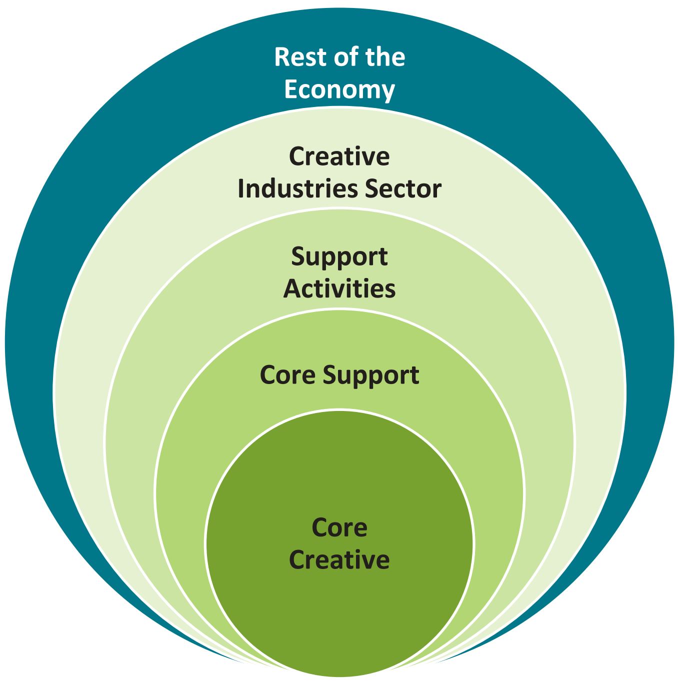
The size, growth and nature of the creative industries sector were studied in terms of:

- Creative Industries Employment - identified based on the North American Industry Classification System (NAICS). These industry sectors refer to the general nature of the business carried out in the establishment where the person worked.
- Creative Industries Occupations - identified based on the National Occupational Classification (NOC). These refer to the kind of work performed by persons and closely relate to certain industry sectors.

- Creative Industries Businesses - identified based on the North American Industry Classification System (NAICS). Canadian business counts provide counts of active businesses by industry classification and employment-size.

Based on Hamilton's creative industries sector definitions, this report classifies the sector in terms of the functions that are directly related to the sector and the support activities that may support the sector occasionally. The definitions of the classifications are provided below:

- Core Creative – An industry, occupation or business that is critical to the creative industries sector. Without it, the creative industries sector would not exist.
- Core Support – An industry, occupation or business that exists predominantly to support the creative industries sector
- Support Activities – An industry, occupation or business that occasionally supports the creative industries sector but does not rely on the growth of the creative industries sector to exist.



Notes to the Reader

Due to the standardized data classification system and the creative industries definition implemented by the City of Hamilton, the data captured has overlaps between creative workers and workers in the rest of the economy. Due to these limitations, it is best to interpret this data as a trend rather than drawing conclusions based on the numbers

Due to the standardized data classification system and the creative industries definition implemented by the City of Hamilton, various overlaps were identified when classifying employment according to the sub-sectors. For example, independent artists, writers and performers include independent visual artists and artisans, independent actors, comedians and performers and independent writers and authors. Thus, the NAICS is captured under Film, Live Performance, Visual & Applied Arts & Makers and Written & Published Works. Due to these overlaps, it is best to study each sub-sector individually as a total of the creative industries sector.

Data Sources

The Data Sources used for the study were

- 2016 and 2011 National Census
- 2011 National Household Survey
- 2017, 2016, 2015 and 2014 Canadian Business Counts

Notes on Data

- The 2011 National Household survey was a voluntary long-form questionnaire and thus may have some data discrepancies.
- The Canadian Business Counts for 2014 and 2015 separates record production and distribution into *Record production* and *Integrated record production/distribution*. These businesses have been combined to complement the data for 2017.
- Certain NAICS and NOC classifications cannot be solely classified as creative industries sectors. See Appendix for a full list of definitions.
- The data for section 1.2.1 Working-Age Statistics and section 1.2.3 Class of worker was studied using 4-digit NOC data. Due to the standardized data classification system and the creative industries definition implemented by the City of Hamilton, the data captured has overlaps between creative workers and workers in the rest of the economy. Due to these limitations, it is best to interpret this data as a trend rather than drawing conclusions based on the numbers.
- The data for section 1.2.2 Median Income of Creative workers was studied using 3-digit NOC data. Due to the standardized data classification system and the creative industries definition implemented by the City of Hamilton, the data includes income for both creative workers and workers in the rest of the economy. For example, *Managers in engineering, architecture, science and information systems* includes engineering managers, architecture managers, science managers, computer managers and information systems managers. Due to these limitations, it is best to interpret this data as a trend rather than drawing conclusions based on the numbers.
- The data for section 1.2.4 Labour Flow of the Workforce was obtained at the 3-digit NAICS. Due to the standardized data classification system and the creative industries definition implemented by the City of Hamilton, various overlaps were identified when classifying labour flow according to the sub-sectors. For example, *Professional, scientific and technical services* include workers in legal services, accounting, tax preparation, bookkeeping and payroll services, architectural, engineering and related services and specialized design services. Due to these limitations, it is best to study this data as a trend rather than drawing conclusions based on the numbers.
- The data for Section 1.3 Creative Industries Sector Employment was obtained at the 4-digit NAICS. Due to the standardized data classification system and the creative industries

definition implemented by the City of Hamilton, various overlaps were identified when classifying employment according to the sub-sectors. For example, *Independent artists, writers and performers* include *Independent visual artists and artisans*, *Independent actors, comedians and performers* and *Independent writers and authors*. Thus, the NAICS is captured under Film, Live Performance, Visual & Applied Arts & Makers and Written & Published Works. Due to these overlaps, it is best to study each sub-sector individually as a total of the creative industries sector.

- The data for Section 1.4 Creative Industries Sector Occupations was studied using 4-digit NOC data. Due to the standardized data classification system and the creative industries definition implemented by the City of Hamilton, various overlaps were identified when classifying sub-sector occupations. For example, *Producers, directors, choreographers and related occupations* include producers, directors, choreographers and others who oversee and control the technical and artistic aspects of film, television, video game, radio, dance and theatre productions. Thus, the NOC is captured under Film, Live Performance and Music. Due to these overlaps, it is best to study each sub-sector individually as a total of creative industries sector.
- Section 1.4 Creative Industries Sector Occupations employs Location Quotients (LQ) to indicate the concentration of occupations in Hamilton relative to the province. An LQ of over 1.25 suggests a high concentration of occupations in that sector. An LQ of over 1 suggests occupations on par with occupations in the province in that sector. An LQ of less than 0.75 suggests that the industry has low concentration and lower growth potential.
- The data for Section 1.5 Creative Industries Sector Businesses was studied at the 6-digit NAICS. A complete and valid NAICS code contains six digits and designates the national industry. Due to the standardized data classification system and the creative industries definition implemented by the City of Hamilton, various overlaps were identified when studying businesses according to the sub-sectors. For example, *Agents and managers for artists, entertainers and other public figure* comprises establishments primarily engaged in representing or managing creative and performing artists, entertainers, and other public figures. Thus, the NAICS is captured under Film, Live Performance, Music and Visual & Applied Arts & Makers. Due to these overlaps, it is best to study each sub-sector individually as a total of creative industries sector

1.2 Creative Industries Sector Workers

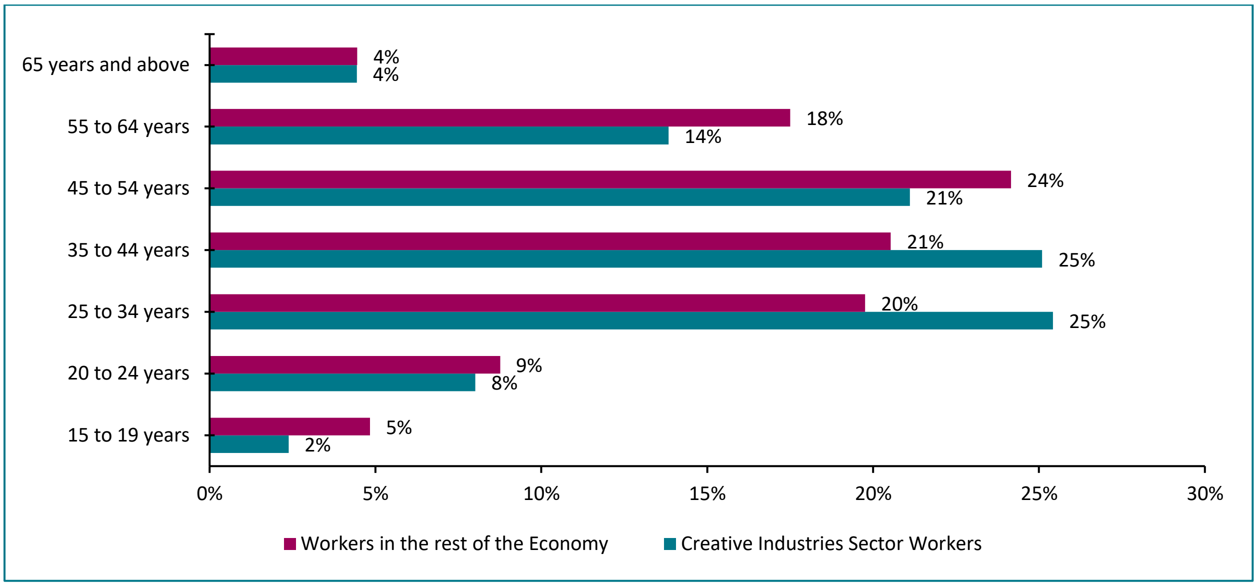
The socio-economic profile of creative industries sector workers is studied by analyzing the age of workers, employment income, and type of worker and commuting patterns of the workforce.

1.2.1 Working Age Statistics

The majority of Hamilton's creative industries sector labour force is made up of young workers; approximately 25% (3,950 workers) are from the ages of 25 to 34 years and 25% (3,900 workers) between the ages of 35 to 44 years. The working-age statistics of Hamilton is comparable to the provincial and national creative labour force rates.

The creative industries sector labour force in Hamilton is younger compared to the labour force in the rest of the economy. The majority of workers in the rest of the economy are between 45 to 54 years (Figure 1).

Figure 1: Creative Industries Sector Workers by Age, 2016

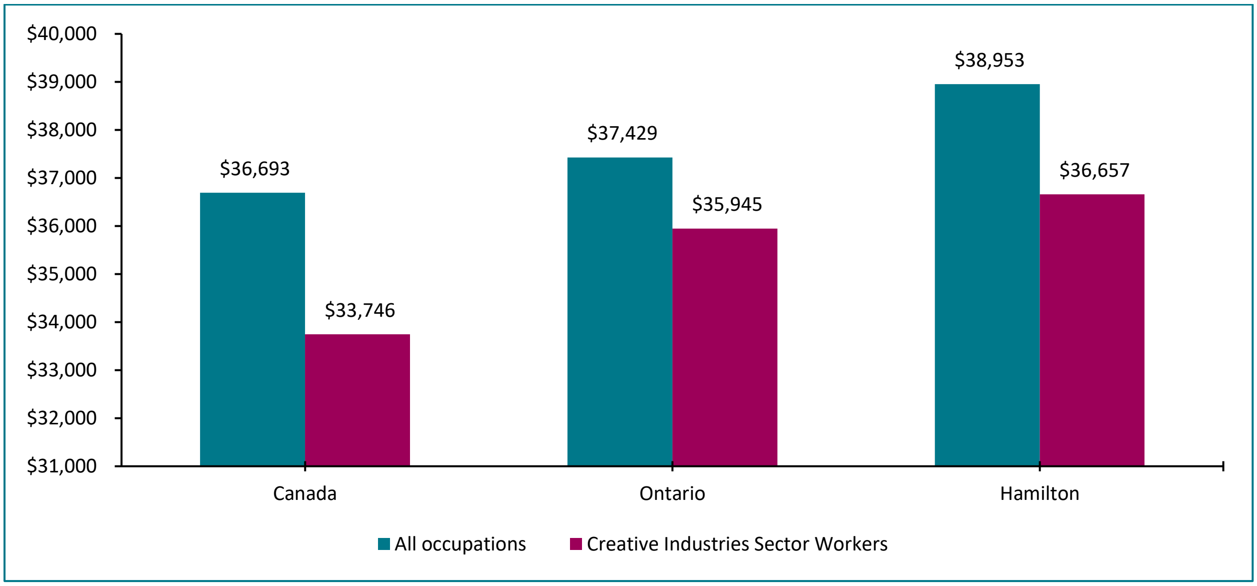


Source: Statistics Canada, Census of Canada 2016

1.2.2 Median Employment Income

In 2016, the median employment income of creative industries sector workers in Hamilton was $36,657 compared to $38,953 for workers in all occupations. Although the median employment income of creative industries sector workers in Hamilton is lower than the rest of occupations, the income is still higher compared to $35,945 in Ontario and $33,746 in Canada. Employment income refers to total income received as wages and salaries, net income from a business and/or professional practice, and/or self-employment income.

Figure 2: Median Employment Income by Creative Industries Sector Occupations, 2016

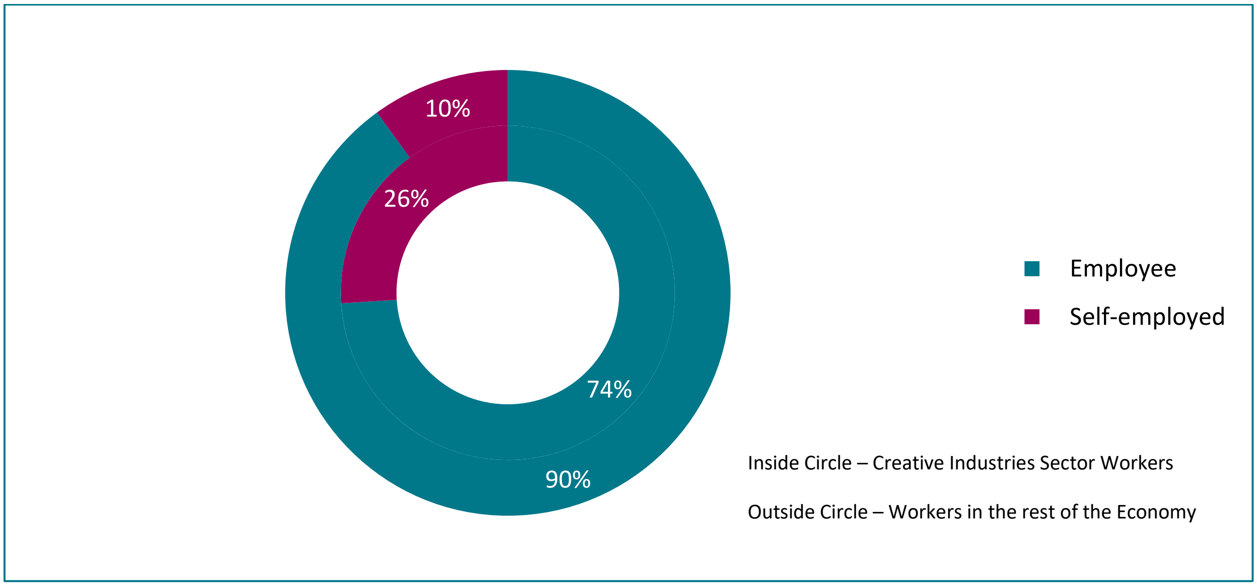


Source: Statistics Canada, 2016 Census of Population, Catalogue no. 98-400-X2016304.

1.2.3 Class of worker

Analyzing occupations by class of worker, it was determined that the creative industries sector workforce has a higher percentage of self-employed workers compared to the rest of the economy.

Figure 3: Class of worker, 2016



Source: Statistics Canada, Census of Canada 2016

1.2.4 Commuting Patterns

The labour flow of the workforce provides a representation of the movement of labour in and out of a community. The labour flow analysis shows that approximately 57,320[1] Hamilton residents are employed in the creative industries sector. This includes residents who live and work in Hamilton and residents who work outside Hamilton. While 36,420 residents are employed in Hamilton, 20,900 residents work outside Hamilton to work. On the other hand, approximately 11,905 workers travel from other communities to work in creative industries sectors in Hamilton. Thus, taking into account the labour loss and labour gain, Hamilton sees a net loss of 8,995 of creative resident workers to other communities.

The commuting labour force by communities is shown in Figure 4. The labour outflow indicates residents travelling outside the community of residence to work while labour inflow indicates workers who travel from outside communities to the community of interest. If the difference between the labour inflow and labour outflow is positive, it means that there are more local jobs in the sector than the resident employed labour force (net gain of labour). On the other hand, a negative number indicates that people are commuting out of the community to work in this sector; the community is "exporting" labour (net loss of labour).

Figure 4: Commuting Labour Force by Communities to and from Hamilton

Communities[2]	Labour Outflow	Labour Inflow	Net Gain (+) / Net Loss (-) of workers
Burlington CY	7,670	2,540	-5,130
Toronto C	2,810	605	-2,205
Mississauga CY	2,410	620	-1,790
Oakville T	2,270	790	-1,480
Brantford CY	775	910	135
Milton T	580	210	-370
Cambridge CY	460	240	-220
St. Catharines CY	435	550	115
Guelph CY	410	210	-200
Brampton CY	390	185	-205
Haldimand County CY	365	1,145	780
Grimsby T	235	1,035	800
Kitchener CY	225	110	-115
Waterloo CY	215	15	-200
Brant CY	165	420	255
Vaughan CY	140	65	-75
Lincoln T	140	370	230
Halton Hills T	105	55	-50
West Lincoln TP	80	445	365

Source: Statistics Canada, 2016 Census of Population, Catalogue no. 98-400-X2016325.

Hamilton shows a net loss of creative industries sector workers to communities including

[1] The data is analysed at the 3-digit NAICS and hence includes both creative workers and workers in other occupations.

[2] Listed in order of communities with top labour outflow

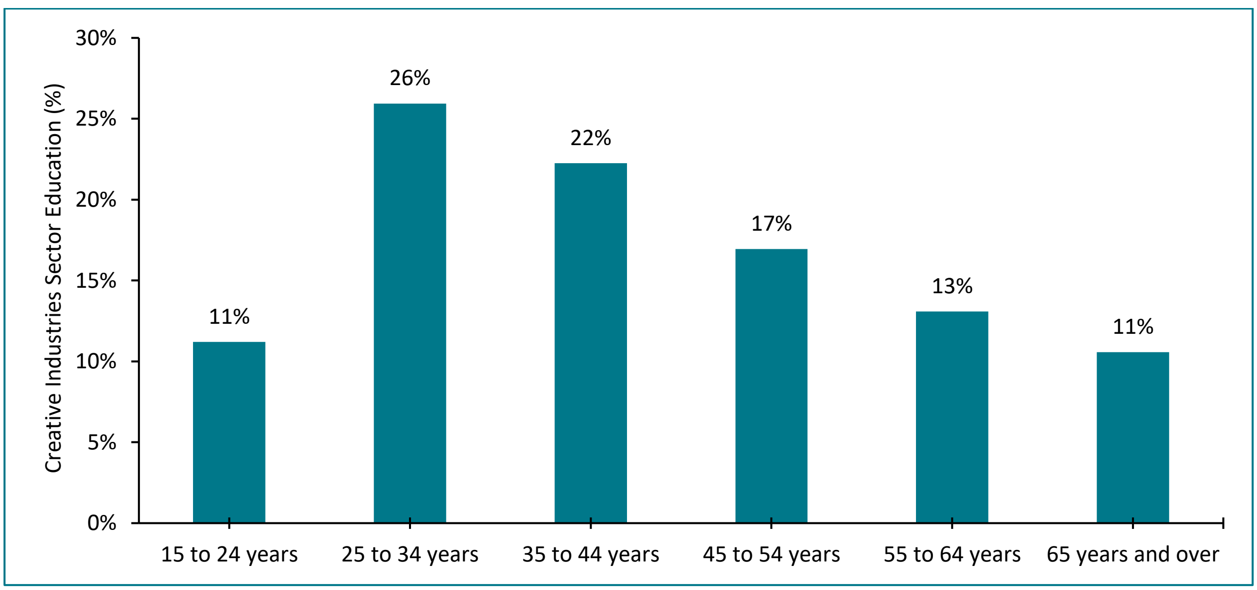
Burlington, Toronto, Mississauga and Oakville. Hamilton shows a net gain of workers from Grimsby, Haldimand County, West Lincoln, Brant, Lincoln, Brantford and St. Catharines. Hamilton experiences a significant outflow of workers to surrounding communities, possibly due to a lack of local job opportunities. However, it also indicates that creative workers still choose to live in Hamilton because of the quality of life it affords, regardless of where they may choose to work.

1.3 Creative Industries Sector Education Profile

In 2016, approximately 332,950 residents aged 15 years and over had a postsecondary certificate, diploma or degree in Hamilton. 5.8% (19,330 residents) had a postsecondary certificate, diploma or degree related to the creative industries sector. The proportion of population with creative industries related degrees is comparable to provincial and national rates at 5.9% and 5.4%, respectively.

Figure 5 shows the percentage of age groups with postsecondary certificate, diploma or degree related to the creative industries sector. The majority of the population are from the ages of 25 to 34 years, representing 26% (5,015 residents) of the population with creative industries related education while 22% (4,300 residents) are from the ages of 35 to 44 years. Approximately 11% (2,165 residents) of the population represent the incoming labour force from the ages of 15 to 24 years. Based on the data analysed, it can be broadly said that the Hamilton has sufficient talent available to participate in the workforce related to the creative industries.

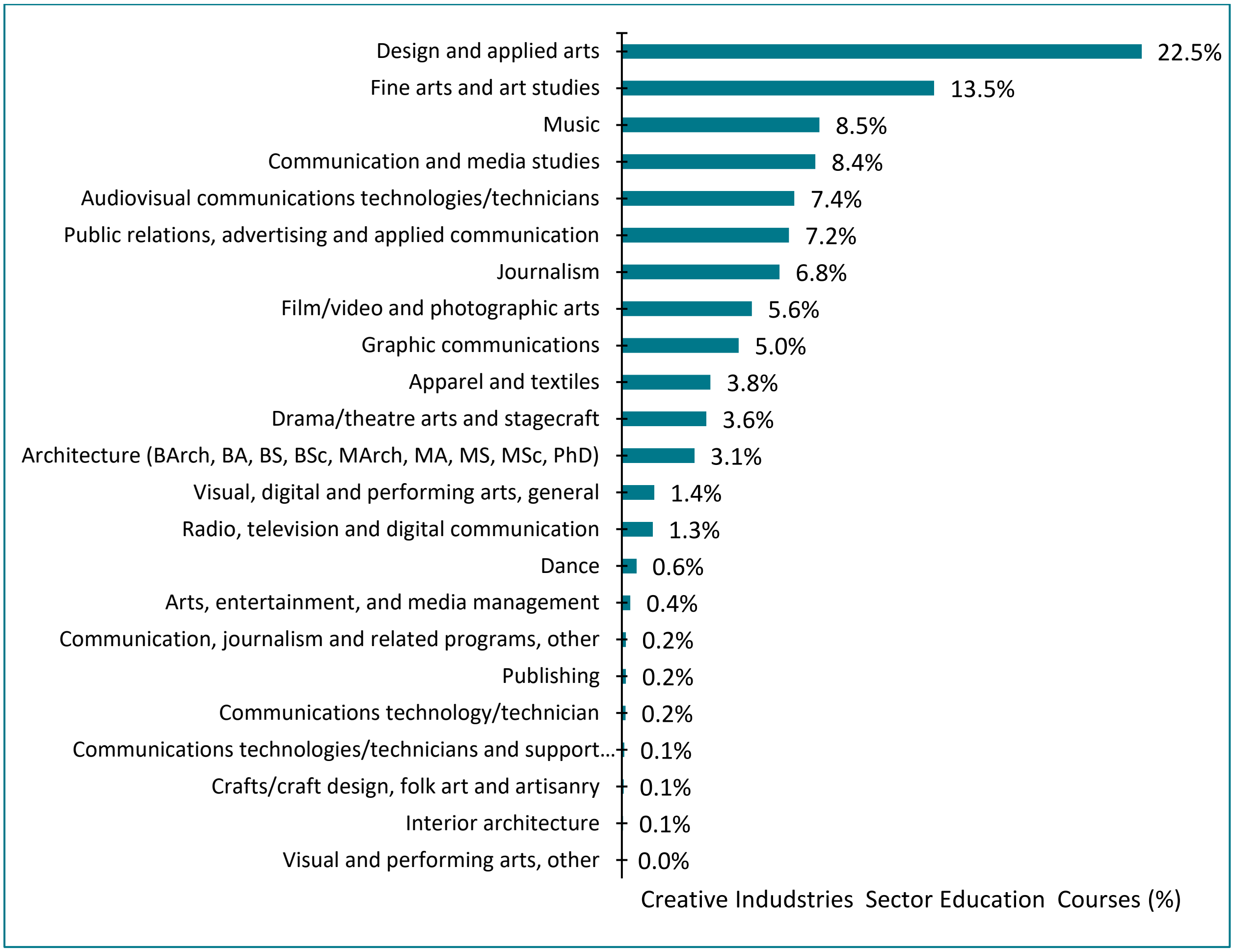
Figure 5: Age of Population with Creative Industries Sector related Education, 2016



Source: Statistics Canada, Census of Canada 2016

As illustrated in Figure 6, of the 19,330 residents with a certificate, diploma or degree related to the creative industries sector, approximately 22.5% had *design and applied arts* degrees. This includes general design and visual communications, commercial and advertising art, industrial design, commercial photography, fashion/apparel design, interior design, graphic design, illustration and other design and applied arts degrees. 13.5% of the population had degrees in *fine arts and art studies* while 8.5% had *music* degrees.

Figure 6: Proportion of Creative Industries Sector Education Courses, 2016



Source: Statistics Canada, Census of Canada 2016

Creative Industries Sector Education Course Completions

In 2014, approximately 614 program completions in Hamilton were in creative industries sector related education. This relates to 6% of total program completions in Hamilton in 2014.

Figure 7: Creative Industries Sector Education Course Completions by Year

Region	Completions by Year		2009-2014 Change	
	2009	2014	Net Change	% Change
Hamilton	486	614	128	26.3%
Ontario	11,336	14,487	3,151	27.8%
Canada	27,311	31,243	3,932	14.4%

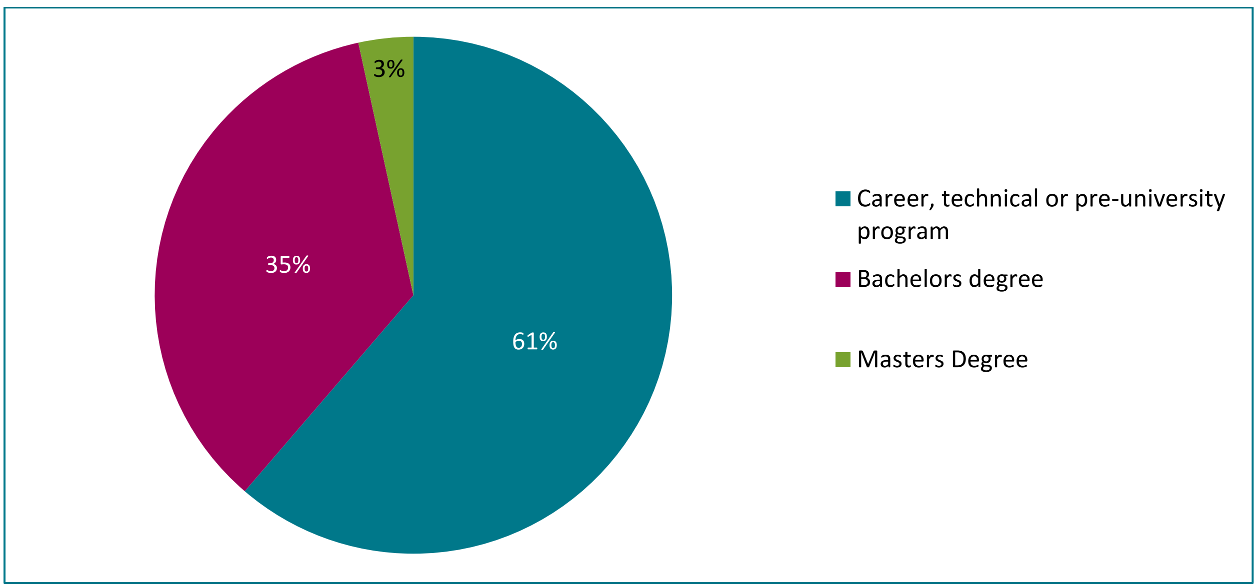
Source: EMSI Analyst, 2016

Analyzing the regional completions by institution, it was seen that McMaster University and Mohawk College of Applied Arts and Technology offer degrees related to the creative industries sector.

- In 2014, McMaster University accounted for 237 program completions of which 217 were bachelor's degrees and 21 master's degree
- In 2014, Mohawk College of Applied Arts and Technology accounted for 377 program completions, all of which were career, technical or pre-university programs

Figure 8 shows the degree levels of the program completions in 2014. The majority of program completions were career, technical or pre-university programs.

Figure 8: Creative Industries Sector Course Completions by Degree Level, 2014



Source: EMSI Analyst, 2016

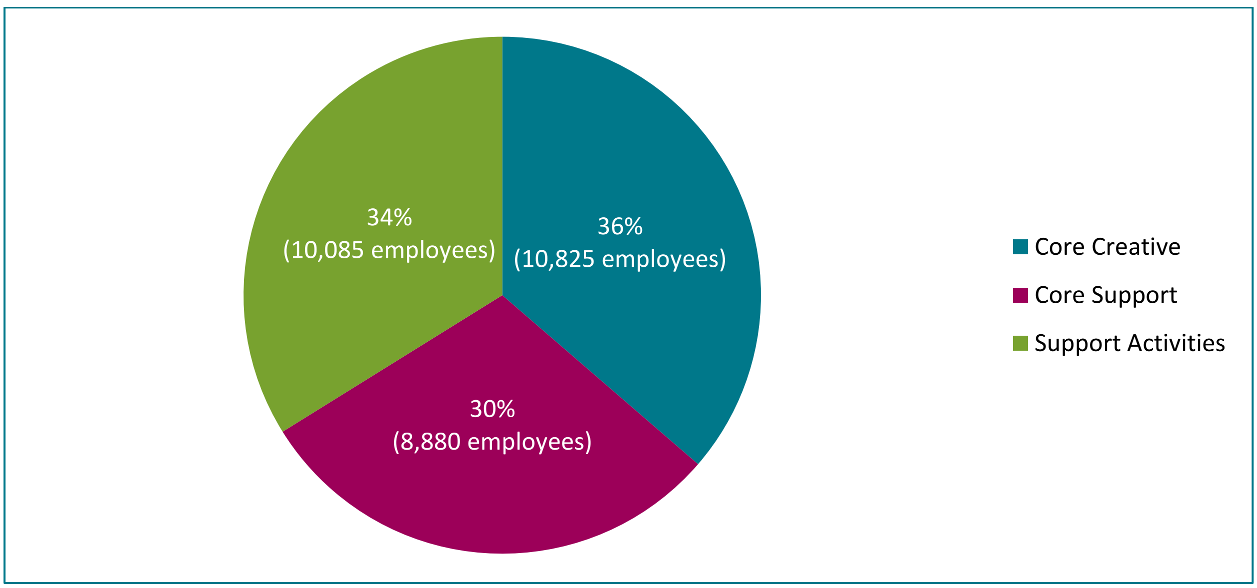
Figure 8 shows the various programs and the completion numbers in 2014. The top three programs in 2014 were Communication and media studies, Radio, television and digital communication, and Music. The complete list of Programs by Institution and Completion numbers in 2014 is given in Appendix III.

1.4 Creative Industries Sector Employment

In 2016, Hamilton accounted for 29,790 creative industries sector employment or 11% of Hamilton total labour force. The creative industries sector labour force in Hamilton is comparable to provincial and national rates at 13% and 12%, respectively. Creative industries sector employment grew by 4,200 people from 2011 to 2016 (16% growth). This rate of growth is higher compared to provincial and national rates at 12% and 10%, respectively. Additionally, this growth rate is comparatively higher than labour force growth in the rest of the economy at 11%.

Employment in the creative industries sector encompasses various sectors including *arts, entertainment and recreation, information and cultural industries, professional, scientific and technical services, manufacturing, retail trade, wholesale trade, retail estate and rental and leasing and other services*. As shown in Figure 9, employees in the creative industries perform core creative industries sector, core support industries sector and support activities. Approximately 10,825 employees (36%) of creative industries employees perform core creative functions, 8,880 employees (30%) work in core support establishments and 10,085 employees (34%) are employed in support activities.

Figure 9: Creative Industries Sector Employment by Function, 2016



Source: Statistics Canada, Census of Canada 2016

Analyzing employment by individual creative industry sub-sectors, the following assumptions can be made (Figure 10):

- **Fashion** – 25% of Hamilton's creative industries sector employment can be attributed to this subsector. Employment in the sector grew by 16% from 2011 to 2016. Employment in core creative, core support and support activities saw growth by 35, 230 and 780 employees, respectively

- **Film** – 32% of Hamilton's creative industries sector employment can be attributed to this subsector. Employment in the sector grew by 10% from 2011 to 2016. Employment in core creative and core support saw growth by 725 and 565 employees, respectively while and support activities declined by 465 employees
- **Live Performance** – 14% of Hamilton's creative industries sector employment can be attributed to this subsector. Employment in the sector grew by 35% from 2011 to 2016. Employment in core creative, core support and support activities saw growth by 480, 240 and 330 employees, respectively
- **Music** – 26% of Hamilton's creative industries sector employment can be attributed to this subsector. Employment in the sector grew by 14% from 2011 to 2016. Employment in core creative, core support and support activities saw growth by 320, 555 and 100 employees, respectively
- **Visual & Applied Arts & Makers** – 74% of Hamilton's creative industries sector employment can be attributed to this subsector. Employment in the sector grew by 15% from 2011 to 2016. Employment in core creative, core support and support activities saw growth by 1,460, 300 and 1,170 employees, respectively
- **Written & Published Works** – 10% of Hamilton's creative industries sector employment can be attributed to this subsector. Employment in the sector grew by 10% from 2011 to 2016. Employment in core creative, saw growth by 290 employees while and support activities declined by 20 employees

Figure 10: Creative Industries Sector by Employment Growth, 2011-2016

Creative Industries Sector (NAICS)	Function	Employment by Year		Employment Change	
		2011	2016	Net Change	% Change
Fashion		6,495	7,540	1,045	16%
Specialized design services	Core Creative	745	780	35	5%
Other miscellaneous manufacturing	Core Support	640	775	135	21%
Other textile product mills	Core Support	140	315	175	125%
Cut and sew clothing manufacturing	Core Support	300	240	-60	-20%
Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing	Core Support	95	80	-15	-16%
Footwear manufacturing	Core Support	120	75	-45	-38%
Clothing knitting mills	Core Support	35	45	10	29%
Fabric mills	Core Support	30	40	10	33%
Textile and fabric finishing and fabric coating	Core Support	20	30	10	50%
Clothing accessories and other clothing manufacturing	Core Support	-	10	10	
Fibre, yarn and thread mills	Core Support	-	-	-	
Leather and hide tanning and finishing	Core Support	-	-	-	
Other leather and allied product manufacturing	Core Support	-	-	-	
Clothing stores	Support Activities	2,160	2,580	420	19%
Sporting goods, hobby and musical instrument stores	Support Activities	975	1,185	210	22%
Shoe stores	Support Activities	340	460	120	35%
Jewellery, luggage and leather goods stores	Support Activities	410	390	-20	-5%
Personal goods merchant wholesalers	Support Activities	300	325	25	8%
Textile, clothing and footwear merchant wholesalers	Support Activities	185	210	25	14%
Film		8,575	9,400	825	10%
Motion picture and video industries	Core Creative	585	875	290	50%
Independent artists, writers and performers	Core Creative	360	655	295	82%
Radio and Television Broadcasting	Core Creative	435	570	135	31%
Agents and managers for artists, athletes, entertainers and other public figures	Core Creative	65	70	5	8%
Other schools and instruction	Core Support	1,340	1,580	240	18%
Advertising, public relations, and related services	Core Support	855	1,185	330	39%
Personal goods merchant wholesalers	Core Support	300	325	25	8%
Pay and Specialty Television	Core Support	90	60	-30	-33%
Other professional, scientific and technical services	Support Activities	1,320	1,290	-30	-2%
Electronics and appliance stores	Support Activities	1,425	1,180	-245	-17%
Specialized design services	Support Activities	745	780	35	5%

Creative Industries Sector (NAICS)	Function	Employment by Year		Employment Change	
		2011	2016	Net Change	% Change
Printing and related support activities	Support Activities	760	655	-105	-14%
Consumer goods rental	Support Activities	295	175	-120	-41%
Live Performance		3,000	4,050	1,050	35%
Independent artists, writers and performers	Core Creative	360	655	295	82%
Performing arts companies	Core Creative	205	385	180	88%
Agents and managers for artists, athletes, entertainers and other public figures	Core Creative	65	70	5	8%
Promoters (presenters) of performing arts, sports and similar events	Core Creative	175	175	-	0%
Other schools and instruction	Core Support	1,340	1,580	240	18%
Advertising, public relations, and related services	Support Activities	855	1,185	330	39%
Music		6,750	7,725	975	14%
Radio and Television Broadcasting	Core Creative	435	570	135	31%
Performing arts companies	Core Creative	205	385	180	88%
Agents and managers for artists, athletes, entertainers and other public figures	Core Creative	65	70	5	8%
Promoters (presenters) of performing arts, sports and similar events	Core Creative	175	175	-	0%
Other schools and instruction	Core Support	1,340	1,580	240	18%
Sporting goods, hobby and musical instrument stores	Core Support	975	1,185	210	22%
Personal goods merchant wholesalers	Core Support	300	325	25	8%
Sound recording industries	Core Support	40	120	80	200%
Advertising, public relations, and related services	Support Activities	855	1,185	330	39%
Electronics and appliance stores	Support Activities	1,425	1,180	-245	-17%
Other miscellaneous manufacturing	Support Activities	640	775	135	21%
Consumer goods rental	Support Activities	295	175	-120	-41%
Visual & Applied Arts & Makers		18,975	21,905	2,930	15%
Architectural, engineering and related services	Core Creative	2,740	2,940	200	7%
Computer systems design and related services	Core Creative	2,010	2,765	755	38%
Other professional, scientific and technical services	Core Creative	1,320	1,290	-30	-2%
Specialized design services	Core Creative	745	780	35	5%
Independent artists, writers and performers	Core Creative	360	655	295	82%
Software publishers	Core Creative	120	320	200	167%
Agents and managers for artists, athletes, entertainers and other public figures	Core Creative	65	70	5	8%
Other schools and instruction	Core Support	1,340	1,580	240	18%
Other miscellaneous store retailers	Core Support	810	870	60	7%

Creative Industries Sector (NAICS)	Function	Employment by Year		Employment Change	
		2011	2016	Net Change	% Change
Sporting goods, hobby and musical instrument stores	Support Activities	975	1,185	210	22%
Advertising, public relations, and related services	Support Activities	855	1,185	330	39%
Electronics and appliance stores	Support Activities	1,425	1,180	-245	-17%
Architectural and structural metals manufacturing	Support Activities	680	965	285	42%
Newspaper, periodical, book and directory publishers	Support Activities	1,035	895	-140	-14%
Lumber, millwork, hardware and other building supplies merchant wholesalers	Support Activities	835	845	10	1%
Other miscellaneous manufacturing	Support Activities	640	775	135	21%
Printing and related support activities	Support Activities	760	655	-105	-14%
Other personal services	Support Activities	375	645	270	72%
Other wood product manufacturing	Support Activities	410	535	125	30%
Household and institutional furniture and kitchen cabinet manufacturing	Support Activities	400	495	95	24%
Other fabricated metal product manufacturing	Support Activities	225	350	125	56%
Personal goods merchant wholesalers	Support Activities	300	325	25	8%
Clay product and refractory manufacturing	Support Activities	285	225	-60	-21%
Office furniture (including fixtures) manufacturing	Support Activities	60	160	100	167%
Home furnishings merchant wholesalers	Support Activities	160	135	-25	-16%
Glass and glass product manufacturing	Support Activities	45	80	35	78%
Written & Published Works		2,650	2,925	275	10%
Independent artists, writers and performers	Core Creative	360	655	295	82%
Newspaper, periodical, book and directory publishers	Core Support	1,035	895	-140	-14%
Other information services	Core Support	610	770	160	26%
Personal goods merchant wholesalers	Core Support	300	325	25	8%
Book stores and news dealers	Core Support	260	235	-25	-10%
Pulp, paper and paperboard mills	Core Support	85	45	-40	-47%

Source: Statistics Canada, Census of Canada 2016 & 2011 National Household Survey

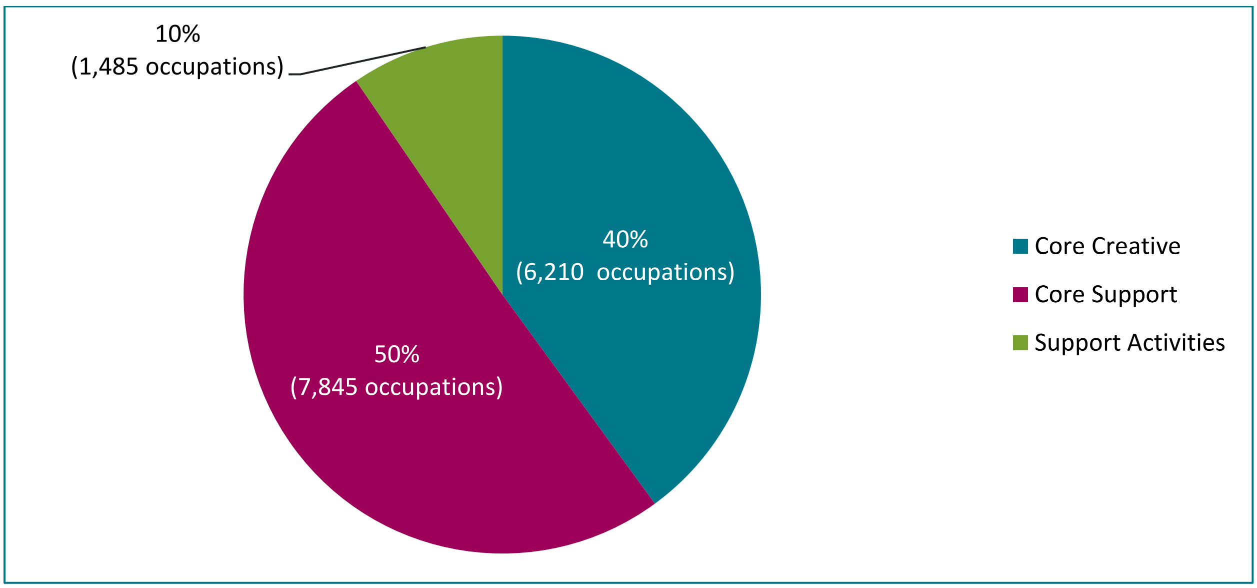
1.5 Creative Industries Sector Occupations

The creative industries sector occupation analysis shows that Hamilton accounted for 15,540 workers performing core functions in *art, culture, applied sciences and related occupations* and support occupations in *management, sales and administration*. The creative industries sector occupations account for 5% of total occupations and are comparable to provincial and national rates at 5% and 4%, respectively.

The creative industries sector occupations saw 13% growth from 2011 to 2016, approximately 1,805 occupations. This is higher than occupational growth in the rest of the economy, which saw growth of only 6%. Additionally, Hamilton's creative industries sector occupations are high compared to provincial and national growth rates at 7% and 8%, respectively.

While Hamilton accounts for 15,540 creative industries sector occupations, it is important to determine the proportion of occupations by function. Approximately 40% (6,210 occupations) are core creative, 50% (7,845 occupations) are core support and 10% (1,485 occupations) are support activities.

Figure 11: Creative Industries Sector Occupations by Function, 2016



Source: Statistics Canada, Census of Canada 2016

Analyzing creative industries sector occupations by individual creative industry sub-sectors (Figure 12), the following assumptions can be made:

- **Fashion** – 32% of Hamilton's creative industries sector occupations can be attributed to this subsector. Occupations in the sector grew by 25% from 2011 to 2016. Core creative, core support and support activities grew by 50, 745 and 205 numbers, respectively. The fashion sector with an LQ of 1.04 indicates occupations on par with the province. On examining individual sector occupations in this sector, the highest LQ's were seen for:
    - *Fabric, fur and leather cutters* – LQ 1.34

  - *Tailors, dressmakers, furriers and milliners* - LQ 1.2
- **Film** – 46% of Hamilton's creative industries sector occupations can be attributed to this subsector. Occupations in the sector grew by 20% from 2011 to 2016. Core creative and core support occupations grew by 395 and 965 while support occupations declined by 195 numbers. The largest growth in core creative occupations was seen for *producers, directors, choreographers and related occupations*, *film and video camera operators* and *actors and comedians*. The largest decline in support activities was *broadcast technicians* and *audio and video recording technicians*. The film sector with an LQ of 1.02 indicates occupations on par with the province. On examining individual sector occupations in this sector, the highest LQ's were seen for:
  - *Film and video camera operators* – LQ 1.68
  - *Broadcast technicians* – LQ 1.65
- **Live Performance** – 46% of Hamilton's creative industries occupations can be attributed to this subsector. Occupations in the sector grew by 23% from 2011 to 2016. Core creative and core support occupations grew by 535 and 890 while support activities declined by 110. The live performance sector with an LQ of 1.04 indicates occupations on par with the province. On examining individual occupations in this sector, the highest LQ's were seen for:
  - *Broadcast technicians* – LQ 1.65
  - *Musicians and singers* – LQ 1.35
- **Music** – 42% of Hamilton's creative industries occupations can be attributed to this subsector. 5133 Musicians and singers accounted for 6% (875 occupations) of total music occupations. Occupations in the sector grew by 20% from 2011 to 2016. Core creative and core support occupations grew by 460 and 750 while support occupations declined by 110. The music sector with an LQ of 1.06 indicates occupations on par with the province. On examining individual occupations in this sector, the highest LQ's were seen for:
  - *Broadcast technicians* – LQ 1.65
  - *Artisans and craftspersons* – LQ 1.43
  - *Musicians and singers* – LQ 1.35
- **Visual and Applied Arts & Makers** – 65% of Hamilton's creative industries occupations can be attributed to this subsector. Occupations in the sector grew by 13% from 2011 to 2016. Core creative and core support occupations grew by 635 and 610 while support occupations declined by 75. The largest growing core creative occupations were *painters, sculptors and other visual artists, web designers and developers, artisans and craftspersons* and *interior designers and interior decorators*. The Visual and Applied Arts & Makers sector with an LQ of 0.98 indicates occupations slightly below par with occupations in the province. On examining individual occupations in this sector, the highest LQ's were seen for:
  - *Graphic arts technicians* – LQ 1.54
  - *Architecture and science managers* – LQ 1.52
  - *Artisans and craftspersons* – LQ 1.43
- **Written & Published Works** – 37% of Hamilton's creative industries occupations can be attributed to this subsector. Occupations in the sector grew by 9% from 2011 to 2016. Core creative and core support occupations grew by 120 and 565 while support occupations declined by 200. The largest core creative occupation growth was seen for *authors and*

*writer*s. *Editors* and *journalists* were among declining occupations in Hamilton. The sector with an LQ of 1.01 indicates occupations on par with occupations in the province. On examining individual occupations in this sector, the highest LQ's were seen for:

- *Library assistants and clerks* – LQ 1.4
- *Librarians* – LQ 1.21

Figure 12: Creative Industries Sector Occupations Growth and Location Quotient (LQ), 2011 & 2016

Creative Industries Sector Occupations (NOC)	Function	Occupation by Year		2011-2016 Occupation Change		LQ 2016
		2011	2016	Absolute Change	% Change	
Fashion		3,925	4,925	1,000	25%	1.04
Theatre, fashion, exhibit and other creative designers	Core Creative	190	240	50	26%	0.98
Advertising, marketing and public relations managers	Core Support	1,440	1,900	460	32%	1.18
Professional occupations in advertising, marketing and public relations	Core Support	1,535	1,765	230	15%	0.9
Photographers	Core Support	360	395	35	10%	1.18
Other performers, n.e.c.	Core Support	70	90	20	29%	0.82
Tailors, dressmakers, furriers and milliners	Support Activities	200	330	130	65%	1.2
Jewellers, jewellery and watch repairers and related occupations	Support Activities	45	95	50	111%	0.97
Weavers, knitters and other fabric making occupations	Support Activities	25	60	35	140%	0.95
Fabric, fur and leather cutters	Support Activities	50	40	-10	-20%	1.34
Patternmakers - textile, leather and fur products	Support Activities	10	10	-	0%	0.9
Shoe repairers and shoemakers	Support Activities	-	-	-		0
Film		5,940	7,105	1,165	20%	1.02
Producers, directors, choreographers and related occupations	Core Creative	295	470	175	59%	0.87
Theatre, fashion, exhibit and other creative designers	Core Creative	190	240	50	26%	0.98
Actors and comedians	Core Creative	90	165	75	83%	0.81
Film and video camera operators	Core Creative	60	155	95	158%	1.68
Advertising, marketing and public relations managers	Core Support	1,440	1,900	460	32%	1.18
Professional occupations in advertising, marketing and public relations	Core Support	1,535	1,765	230	15%	0.9
Interior designers and interior decorators	Core Support	410	510	100	24%	1.03
Photographers	Core Support	360	395	35	10%	1.18
Painters, sculptors and other visual artists	Core Support	220	360	140	64%	1.06
Audio and video recording technicians	Core Support	330	240	-90	-27%	1.1
Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts	Core Support	95	230	135	142%	1.01
Support occupations in motion pictures, broadcasting, photography and the performing arts	Core Support	105	200	95	90%	1.18
Managers - publishing, motion pictures, broadcasting and performing arts	Core Support	200	140	-60	-30%	0.86
Other performers, n.e.c.	Core Support	70	90	20	29%	0.82
Announcers and other broadcasters	Core Support	100	60	-40	-40%	0.64
Photographic and film processors	Core Support	100	40	-60	-60%	0.94

Creative Industries Sector Occupations (NOC)	Function	Occupation by Year		2011-2016 Occupation Change		LQ 2016
		2011	2016	Absolute Change	% Change	
Broadcast technicians	Support Activities	200	90	-110	-55%	1.65
Camera, platemaking and other prepress occupations	Support Activities	140	55	-85	-61%	0.93
Live Performance		5,800	7,115	1,315	23%	1.04
Musicians and singers	Core Creative	705	875	170	24%	1.35
Producers, directors, choreographers and related occupations	Core Creative	295	470	175	59%	0.87
Theatre, fashion, exhibit and other creative designers	Core Creative	190	240	50	26%	0.98
Dancers	Core Creative	150	220	70	47%	1.19
Actors and comedians	Core Creative	90	165	75	83%	0.81
Conductors, composers and arrangers	Core Creative	75	70	-5	-7%	0.84
Advertising, marketing and public relations managers	Core Support	1,440	1,900	460	32%	1.18
Professional occupations in advertising, marketing and public relations	Core Support	1,535	1,765	230	15%	0.9
Painters, sculptors and other visual artists	Core Support	220	360	140	64%	1.06
Audio and video recording technicians	Core Support	330	240	-90	-27%	1.1
Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts	Core Support	95	230	135	142%	1.01
Support occupations in motion pictures, broadcasting, photography and the performing arts	Core Support	105	200	95	90%	1.18
Managers - publishing, motion pictures, broadcasting and performing arts	Core Support	200	140	-60	-30%	0.86
Other performers, n.e.c.	Core Support	70	90	20	29%	0.82
Announcers and other broadcasters	Core Support	100	60	-40	-40%	0.64
Broadcast technicians	Support Activities	200	90	-110	-55%	1.65
Music		5,380	6,480	1,100	20%	1.06
Musicians and singers	Core Creative	705	875	170	24%	1.35
Producers, directors, choreographers and related occupations	Core Creative	295	470	175	59%	0.87
Conductors, composers and arrangers	Core Creative	75	70	-5	-7%	0.84
Artisans and craftspersons	Core Creative	230	350	120	52%	1.43
Advertising, marketing and public relations managers	Core Support	1,440	1,900	460	32%	1.18
Professional occupations in advertising, marketing and public relations	Core Support	1,535	1,765	230	15%	0.9
Audio and video recording technicians	Core Support	330	240	-90	-27%	1.1
Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts	Core Support	95	230	135	142%	1.01
Support occupations in motion pictures, broadcasting, photography and the performing arts	Core Support	105	200	95	90%	1.18
Managers - publishing, motion pictures, broadcasting and performing arts	Core Support	200	140	-60	-30%	0.86
Other performers, n.e.c.	Core Support	70	90	20	29%	0.82
Announcers and other broadcasters	Core Support	100	60	-40	-40%	0.64
Broadcast technicians	Support Activities	200	90	-110	-55%	1.65
Visual and Applied Arts & Makers		9,000	10,170	1,170	13%	0.98
Graphic designers and illustrators	Core Creative	1,240	1,320	80	6%	1.06
Web designers and developers	Core Creative	425	550	125	29%	1.01

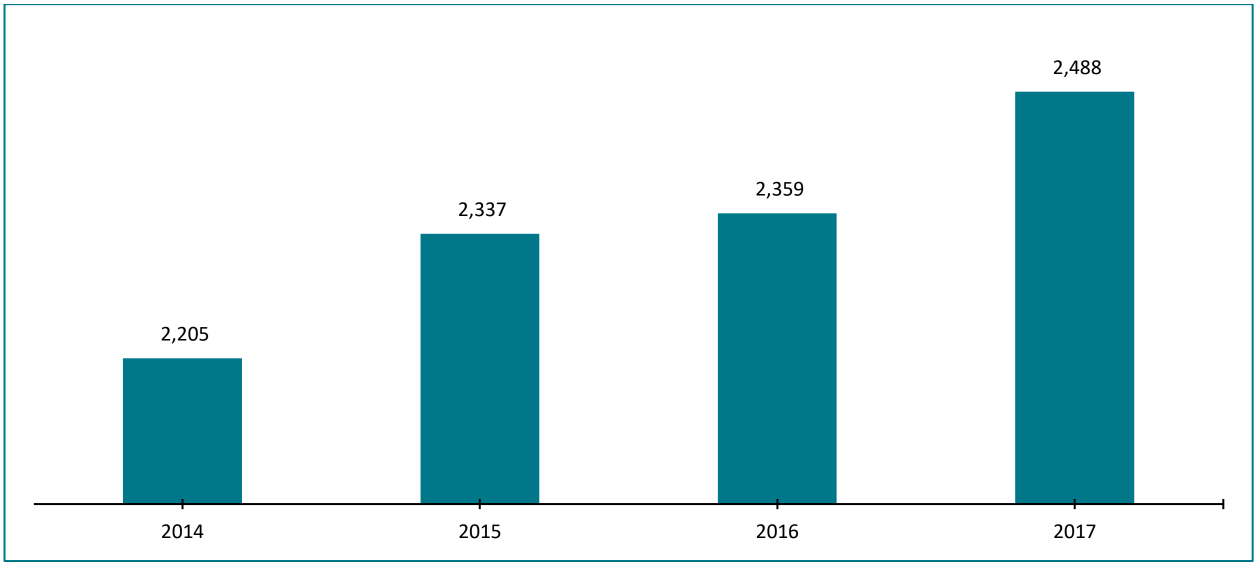
Creative Industries Sector Occupations (NOC)	Function	Occupation by Year		2011-2016 Occupation Change		LQ 2016
		2011	2016	Absolute Change	% Change	
Interior designers and interior decorators	Core Creative	410	510	100	24%	1.03
Photographers	Core Creative	360	395	35	10%	1.18
Painters, sculptors and other visual artists	Core Creative	220	360	140	64%	1.06
Artisans and craftspersons	Core Creative	230	350	120	52%	1.43
Architects	Core Creative	150	165	15	10%	0.52
Industrial designers	Core Creative	145	165	20	14%	0.99
Advertising, marketing and public relations managers	Core Support	1,440	1,900	460	32%	1.18
Professional occupations in advertising, marketing and public relations	Core Support	1,535	1,765	230	15%	0.9
Computer programmers and interactive media developers	Core Support	1,625	1,565	-60	-4%	0.71
Architecture and science managers	Core Support	180	260	80	44%	1.52
Architectural technologists and technicians	Core Support	270	225	-45	-17%	1.16
Support occupations in motion pictures, broadcasting, photography and the performing arts	Core Support	105	200	95	90%	1.18
Library, archive, museum and art gallery managers	Core Support	80	75	-5	-6%	0.94
Supervisors, library, correspondence and related information workers	Core Support	135	50	-85	-63%	0.81
Photographic and film processors	Core Support	100	40	-60	-60%	0.94
Graphic arts technicians	Support Activities	85	115	30	35%	1.54
Technical occupations related to museums and art galleries	Support Activities	125	105	-20	-16%	1.03
Camera, platemaking and other prepress occupations	Support Activities	140	55	-85	-61%	0.93
Written & Published Works		5,235	5,720	485	9%	1.01
Authors and writers	Core Creative	360	555	195	54%	0.93
Journalists	Core Creative	230	155	-75	-33%	0.75
Advertising, marketing and public relations managers	Core Support	1,440	1,900	460	32%	1.18
Professional occupations in advertising, marketing and public relations	Core Support	1,535	1,765	230	15%	0.9
Editors	Core Support	285	275	-10	-4%	0.75
Librarians	Core Support	185	220	35	19%	1.21
Managers - publishing, motion pictures, broadcasting and performing arts	Core Support	200	140	-60	-30%	0.86
Library, archive, museum and art gallery managers	Core Support	80	75	-5	-6%	0.94
Supervisors, library, correspondence and related information workers	Core Support	135	50	-85	-63%	0.81
Library assistants and clerks	Support Activities	540	410	-130	-24%	1.4
Library and public archive technicians	Support Activities	245	175	-70	-29%	1.11

Source: Statistics Canada, Census of Canada 2016 & 2011 National Household Survey

1.6 Creative Industries Sector Businesses

In 2017, creative industries sector businesses in Hamilton accounted for 6% of total business compared to 6.5% in Ontario and 6% in Canada. Figure 13 shows the number of creative industries businesses for each year from 2014 to 2017.

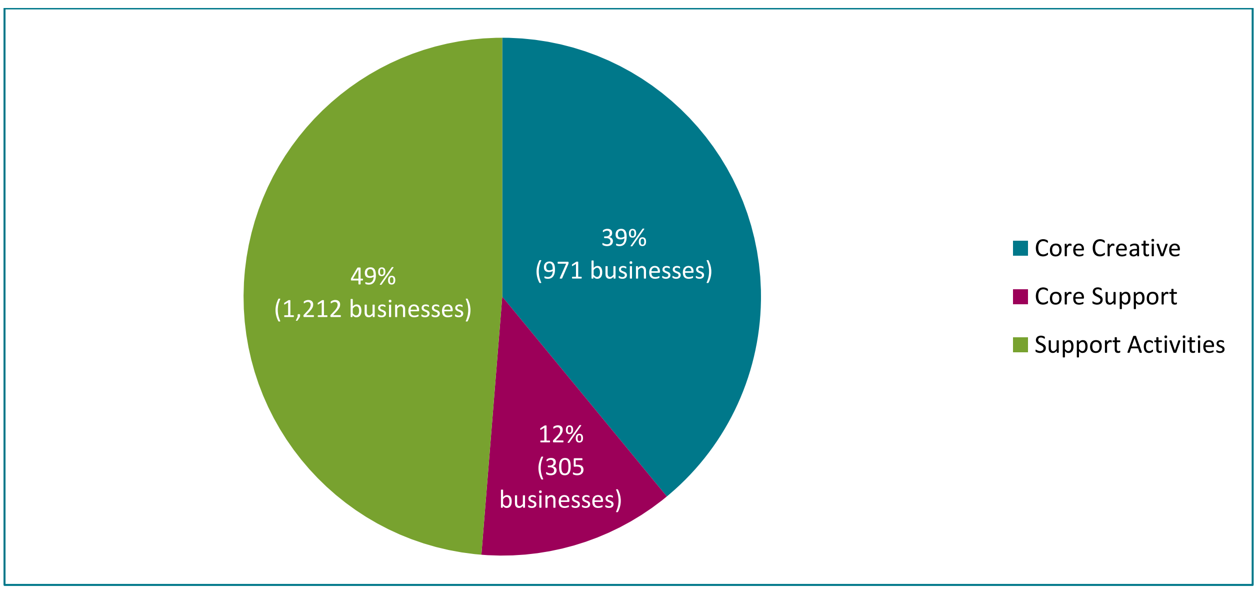
Figure 13: Creative Industries Sector Businesses by Year



Source: Canadian Business Counts, 2014, 2015, 2016 and 2017

Approximately 39% (971 businesses) are core creative, 12% (305 businesses) are core support, and 49% (1,212 businesses) are support activities in creative industries sector.

Figure 14: Creative Industries Sector Businesses by Function, 2017



Source: Canadian Business Counts, 2017

The majority of creative industries sector businesses within the sub-sectors were sole proprietor establishments. Approximately 64% of all creative industries sector businesses were sole proprietor establishments compared to 36% businesses with employees. Of the businesses with employees, the majority were micro-establishments employing 1-4 employees. Figure 15 shows the proportion of creative industries sector businesses in Hamilton by employee number.

Figure 15: Creative Industries Sector Businesses, 2017

Total	Without employees	Micro-Business	Small Business		Medium Business		Large Business
		1-4	5-9	10-19	20-49	50-99	100+
2,488	1,585	437	217	141	71	26	11
	64%	18%	9%	6%	3%	1%	0.4%

Source: Canadian Business Counts, 2017

1.7 Creative Value Chain of Individual Sub-Sectors

Creative businesses are those in which cultural expression and aesthetic value drive the output, in terms of products or services, which in turn generate wealth. These businesses are characterized by inter-connected processes, referred to as 'the creative value chain'. The creative value chain includes the creation, production, manufacturing, distribution and support of creative cultural output. These categories can be further defined by the function as:

- Core Creative - These are establishments involved in the development of a creative artistic idea. Examples include independent artists, writers and performers
- Core Support - These include establishments involved primarily in producing, mass reproduction and distribution of a creative good or service. Examples include film studios, music recording studios, commercial art gallery
- Support Activities - These include establishments that occasionally support the creative industries sector. Examples include a carpenter working on a film set, an electrician working on a live performance

Analyzing the creative value chain by individual sub-sectors (ibrary

Figure 16), the following conclusions can be drawn:

- **Fashion** - this sector has a total of 521 businesses. Of these, 27 businesses are involved in core creative functions. These include establishments primarily engaged in providing clothing design services and fashion design services, among others. The sub-sector has 60 businesses involved in core support functions including clothing and textile manufacturing and 434 businesses involved in support activities such as wholesale and retail services. Majority of businesses in this sector are self-employed establishments or micro-businesses. The sector has 3 businesses that employ 100 or more employees. These businesses perform functions related to *narrow fabric mills and Schiffli machine embroidery, textile product mills and men's and boys' cut and sew clothing manufacturing.*

- **Film** – this sector has a total of 901 businesses. 277 businesses are engaged in core creative functions such as 512110 - Motion picture and video production and 711512 - Independent actors, comedians and performers. Hamilton has approximately 112 independent actors, comedians, and performers engaged in performance in creative industry businesses. The sector has 70 businesses involved in core support businesses including a *fine arts school*. Majority of businesses in this sector are self-employed establishments or micro-businesses. The sector has 5 businesses that employ 100 or more employees. Of these 2 businesses are Motion picture and video exhibition, 1 fine arts school and 2 printing businesses.
- **Live Performance** – this sector has a total of 527 businesses. 524 businesses including *musical groups and artists, theatre (except musical) companies* and *dance companies* are engaged in core creative functions. Majority of businesses in this sector are self-employed establishments or micro-businesses. The sector has 1 business that employs 100 or more employees, namely the *fine arts school.*
- **Music** - this sector has a total of 541 businesses. Of these, 137 businesses are involved in core creative functions. These include *musical groups and artists* and *radio broadcasting*. The sub-sector has 112 businesses involved in core support functions and 292 businesses involved in support activities. Majority of businesses in this sector are self-employed establishments or micro-businesses. The sector has 1 business that employs 100 or more employees, namely a *fine arts school*. 92 businesses in Hamilton are self-employed *musical groups and artists* while 5 of these businesses have employees.
- **Visual & Applied Arts & Makers** - this sector has a total of 1,129 businesses. Of these, the core creative and support activities make up the majority and almost equal proportion of businesses. The sector has limited businesses in core support functions which may affect the uptake of creative functions in this sector. Majority of businesses in this sector are self-employed establishments or micro-businesses. The sector has 4 businesses that employ 100 or more employees. These businesses perform functions related to o*rnamental and architectural metal product manufacturing*, *printing* and a *fine arts school*
- **Written & Published Works -** this sector has a total of 292 businesses. Of these, 151 businesses are involved in core creative functions and comprise of *independent actors, comedians and performers* and *independent writers and authors*. The sector has 100 businesses involved in core support functions and 41 in support. Majority of businesses in this sector are self-employed establishments or micro-businesses. The sector has 2 businesses that employ 100 or more employees. These include a *newspaper publisher* and a *library*

Figure 16: Creative Industries Sector Business by Employee Type and Size of Establishment by Sub-sector, 2017

Creative Industries Sector Businesses	Function	Total	Without employees	Micro-Business	Small Business		Medium Business		Large Business
				1-4	5-9	10-19	20-49	50-99	100+
Fashion	Core Creative	27	20	5	2	-	-	-	-
	Core Support	60	34	9	4	4	3	3	3
	Support Activities	434	149	86	88	74	29	8	-
	Total	521	203	100	94	78	32	11	3
Film	Core Creative	315	247	55	4	-	4	3	2
	Core Support	76	51	13	3	6	2	-	1
	Support Activities	510	355	89	42	11	8	3	2
	Total	901	653	157	49	17	14	6	5
Live Performance	Core Creative	277	239	27	5	2	3	1	-
	Core Support	70	45	11	3	7	3	-	1
	Support Activities	180	127	33	16	3	1	-	-
	Total	527	411	71	24	12	7	1	1
Music	Core Creative	137	111	13	5	4	4	-	-
	Core Support	112	74	22	5	7	3	-	1
	Support Activities	292	190	55	30	11	4	2	-
	Total	541	375	90	40	22	11	2	1
Visual & Applied Arts & Makers	Core Creative	524	409	84	18	7	4	2	-
	Core Support	71	43	16	3	6	2	-	1
	Support Activities	534	307	115	58	30	14	7	3
	Total	1,129	759	215	79	43	20	9	4
Written & Published Works	Core Creative	151	133	16	1	-	1	-	-
	Core Support	100	45	24	16	7	6	-	2
	Support Activities	41	38	2	1	-	-	-	-
	Total	292	216	42	18	7	7	-	2

Source: Canadian Business Counts, 2017

2. Benchmarking Analysis

In addition to understanding the nature and characteristics of the creative industries sector, it is essential that Hamilton benchmark the creative industries sector against those in select peer regions. This exercise will enable Hamilton to determine overall success in the growth of the sector and determine specific sub-sectors that are leading or lagging behind other regions.

2.1 Methodology

Comparable census divisions were selected to provide a consistent benchmark that Hamilton can track and evaluate over time and assess Hamilton's creative industries composition and overall performance. The regions were compared by overall sector growth and individual sub-sectors to determine the business composition and available workforce. The creative industries sector businesses and creative industries sector occupations by sub-sector are shown in Appendix I and Appendix II respectively. The ten selected census divisions were Hamilton, Toronto, Edmonton, Ottawa, Kitchener, London, Victoria, Halifax, Regina, Windsor and Sudbury. The regions were selected based on:

- Size and nature – urban centres
- Culture & heritage assets and amenities
- A critical mass of creative industries

Figure 17 shows creative industries sector occupations for each of the six sub-sectors. Due to the standardized National Occupational Classification (NOC) system and job-related cross-over between the six sub-sectors, several overlaps are seen when classifying occupations for each sub-sector. For example, the occupational class *actors and comedians*[3] can be attributed to both the film and live performance sector. Another example would be occupations in *advertising, marketing and public relations*[4] as individuals in this occupation class can work in any or all of the six sectors.

As described above, the benchmarking analysis compares Hamilton to ten other census divisions for each individual sector. It identifies how each individual sector performs in Hamilton compared to other regional comparators.

The benchmarking analysis provides the percentage of occupations in each sub-sector sector as a percentage of total creative industries sector occupations. For example, the music sector is

[3] Actors and comedians perform roles in motion picture, television, theatre and radio productions to entertain a variety of audiences. They are employed by motion picture, television, theatre and other production companies. This unit group includes acting teachers employed by private acting schools.

[4] These occupations includes specialists in advertising, marketing and public relations who analyse, develop and implement communication and promotion strategies and information programs, analyse advertising needs and develop appropriate advertising and marketing plans, publicize activities and events, and maintain media relations on behalf of businesses, governments and other organizations, and for performers, athletes, writers and other talented individuals.

benchmarked as an individual sector, and the percentage derived as a factor of total creative industries data. Because individual occupations in this sub-sector also cross-over to other sub-sectors as illustrated in the Figure below, some occupations are counted more than once. Thus, the proportion of occupations in one sector cannot be compared to the proportion of occupations and in another sector. Also, the percentage of occupations if totalled by sub-sector will add up to more than 100% due to the cross-over of occupations across sub-sectors.

Figure 17: Creative Industries Sector Occupations by Sub-sector

Creative Industries Sector Occupations (NOC)	Music	Film	Live Performance	Fashion	Written & Published Works	Visual and Applied Arts & Makers
Actors and comedians		■	■			
Advertising, marketing and public relations managers	■	■	■	■	■	■
Announcers and other broadcasters	■	■	■			
Architects						■
Architectural technologists and technicians						■
Architecture and science managers						■
Artisans and craftspersons	■					■
Audio and video recording technicians	■	■	■			
Authors and writers					■	
Broadcast technicians	■	■	■			
Camera, platemaking and other prepress occupations		■				■
Computer programmers and interactive media developers						■
Conductors, composers and arrangers	■		■			
Dancers			■			
Editors					■	
Fabric, fur and leather cutters				■		
Film and video camera operators		■				
Graphic arts technicians						■
Graphic designers and illustrators						■
Industrial designers						■
Interior designers and interior decorators		■				■
Jewellers, jewellery and watch repairers and related occupations				■		
Journalists					■	
Librarians					■	
Library and public archive technicians					■	
Library assistants and clerks					■	
Library, archive, museum and art gallery managers					■	

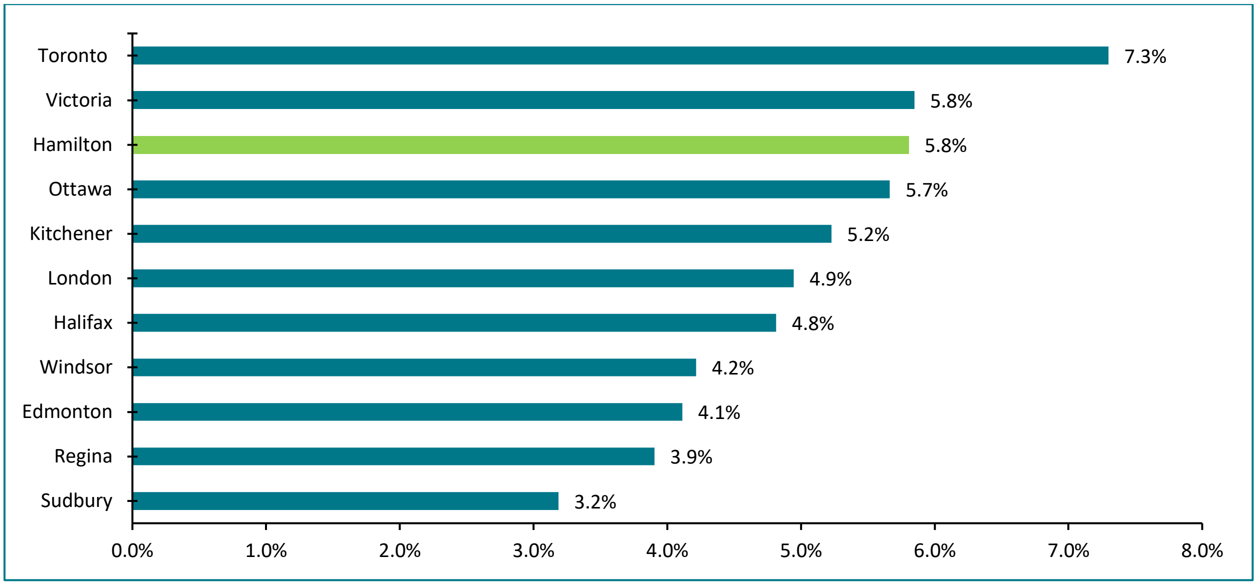
Creative Industries Sector Occupations (NOC)	Music	Film	Live Performance	Fashion	Written & Published Works	Visual and Applied Arts & Makers
Managers - publishing, motion pictures, broadcasting and performing arts						
Musicians and singers						
Other performers, n.e.c.						
Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts						
Painters, sculptors and other visual artists						
Patternmakers - textile, leather and fur products						
Photographers						
Photographic and film processors						
Producers, directors, choreographers and related occupations						
Professional occupations in advertising, marketing and public relations						
Shoe repairers and shoemakers						
Supervisors, library, correspondence and related information workers						
Support occupations in motion pictures, broadcasting, photography and the performing arts						
Tailors, dressmakers, furriers and milliners						
Technical occupations related to museums and art galleries						
Theatre, fashion, exhibit and other creative designers						
Weavers, knitters and other fabric making occupations						
Web designers and developers						

Source: Statistics Canada, Census of Canada, 2016. Adapted by MDB Insight

2.2 Creative Industries Sector Education

In terms of creative industries sector education graduates as a percentage of total education graduates, Hamilton ranks lower than Toronto. The proportion of creative industries sector education in Hamilton is comparable to Victoria and Ottawa and ranks higher than Kitchener, London, Halifax, Windsor, Edmonton, Regina and Sudbury.

Figure 18: Creative Industries Sector Education by Census Divisions, 2016

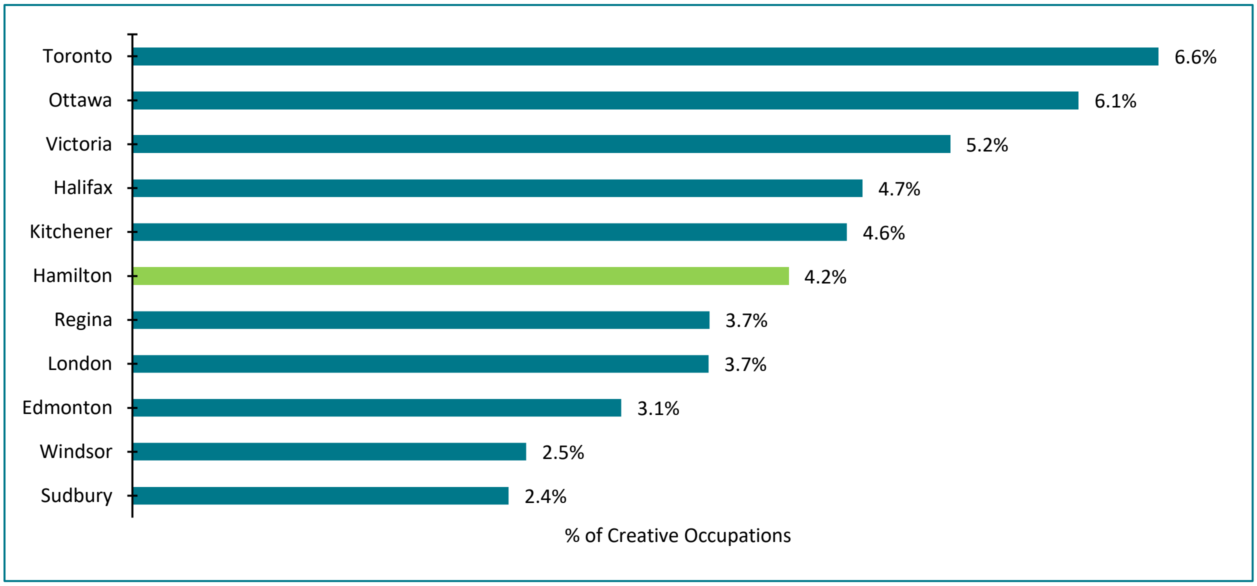


Source: Statistics Canada, Census of Canada, 2016

2.3 Creative Industries Sector Occupations

The creativity of a region is reflected in part by the size and capacity of its creative industries sector occupations. Hamilton creative industries sector occupation accounts for 4.2% of the total workforce. On benchmarking Hamilton's creative industries sector occupations, it can be determined that Hamilton ranks lower compared to Toronto, Ottawa, Victoria, Halifax, and Kitchener. It ranks higher than Regina, London, Edmonton, Windsor and Sudbury in creative industry occupations.

Figure 19: Creative Industries Sector Occupations by Census Divisions, 2016

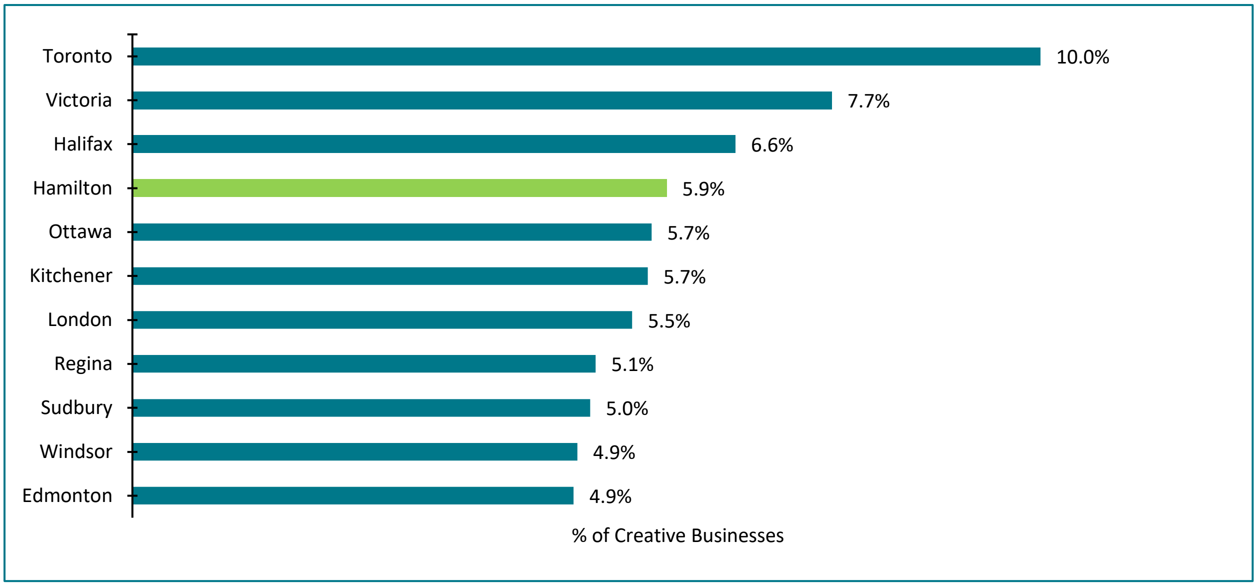


Source: Statistics Canada, Census of Canada, 2016

2.4 Creative Industries Sector Businesses

In terms of creative industries sector businesses as a percentage of total businesses in the economy, Hamilton ranks lower than Toronto, Victoria and Halifax. The proportion of creative industries sector businesses in Hamilton is comparable to Ottawa and Kitchener and ranks higher than London, Regina, Sudbury Windsor and Edmonton.

Figure 20: Creative Industries Sector Businesses as a Factor of Total Businesses by Census Divisions, 2017



Source: Canadian Business Counts 2017

2.5 Creative Industries Benchmarking by Sub-Sectors

The creative industries sector occupations and industries sector businesses in Hamilton were benchmarked against the selected census divisions, to determine the strength of individual sub-sectors. The growth in industries sector occupations and creative industries sector businesses is examined in terms of the value chain.

Fashion

Fashion accounts for 31.7% of total creative industries sector occupations in Hamilton.

- The region **ranked 3rd** among comparator cities below only Toronto and Regina.
- From the standpoint of growth in occupations between 2011 and 2016, occupations in Fashion **ranked 4th**, below Sudbury, Kitchener and London.

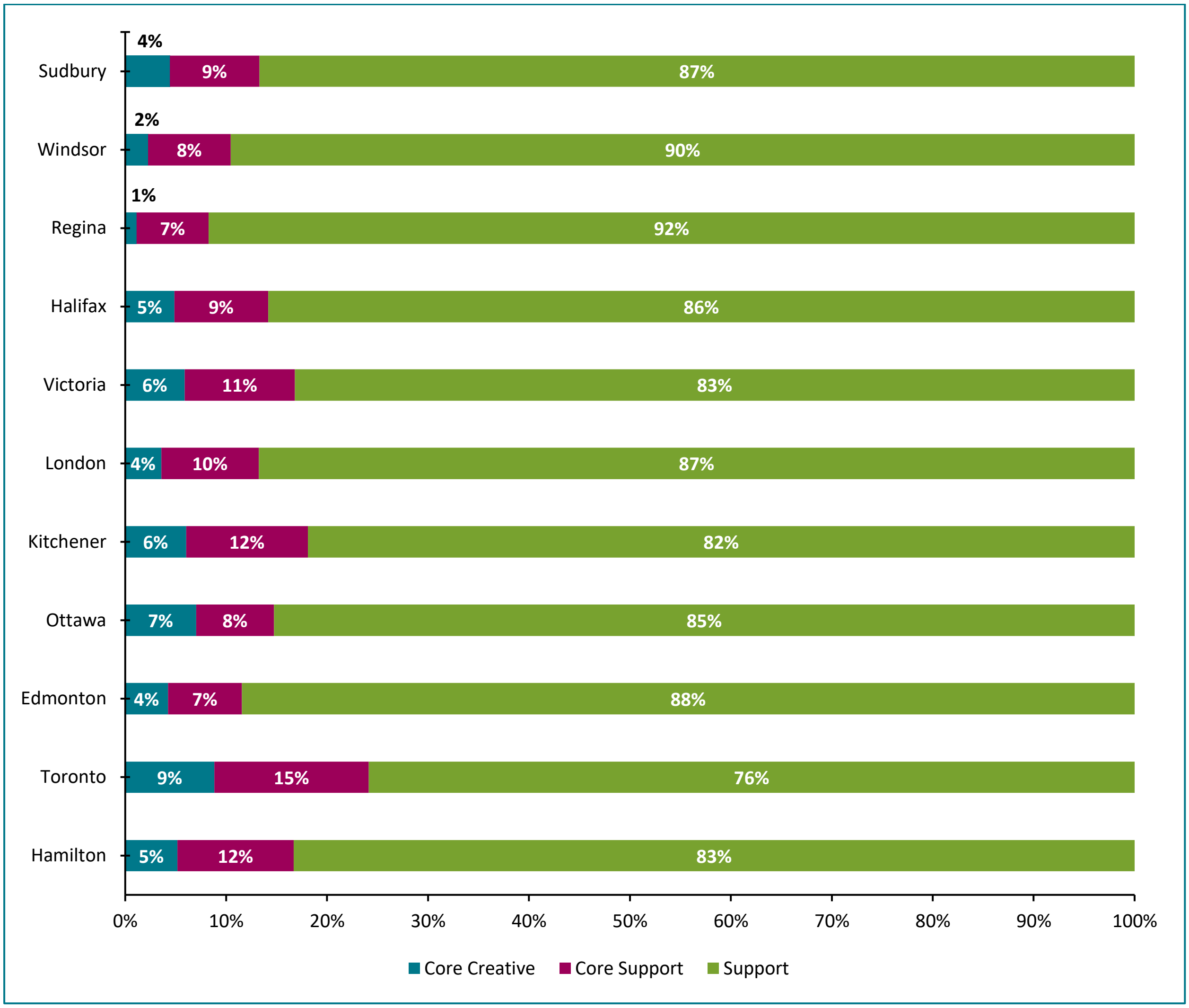
Figure 21: Fashion Sector Occupations Growth, 2011-2016

Census Division	Total Occupations		Absolute Change	% Change	% of Total Creative Industries Occupations
	2011	2016	2011-2016	2011-2016	2016
Toronto	53,025	63,110	10,085	19%	32.1%
Regina	1,220	1,490	270	22%	31.9%
Hamilton	3,925	4,925	1,000	25%	31.7%
Edmonton	5,310	6,645	1,335	25%	30.5%
London	1,995	2,580	585	29%	29.1%
Sudbury	375	535	160	43%	28.4%
Kitchener	2,565	3,425	860	34%	27.5%
Ottawa	9,635	11,130	1,495	16%	27.1%
Victoria	2,300	2,570	270	12%	26.1%
Windsor	900	960	60	7%	25.4%
Halifax	2,525	2,485	(40)	-2%	25.3%

Source: Statistics Canada, Census of Canada 2016 & 2011. Ranked by % of Total Creative Industry Occupations, 2016

As seen in Figure 22, Toronto has the highest number of creative industries sector businesses involved in the core creation of Fashion products/services at 9% while Hamilton accounts for 5%. The city also ranks behind in core support functions at 12% compared to Toronto at 15%. Regina has the highest number of support businesses for the sector. However, Regina has a comparatively limited proportion of core creative and core support businesses.

Figure 22: Fashion Sector Businesses in the Creative Value Chain, 2017



Source: Canadian Business Counts 2017

Film

Film accounts for 45.7% of total creative industries sector occupations in Hamilton.

- The Hamilton region **ranked 2nd** surpassed only by Toronto in Film occupations as a percentage of total creative occupations.
- The region **ranked 3rd** behind Sudbury and Kitchener in growth in Film occupations between 2011 and 2016.

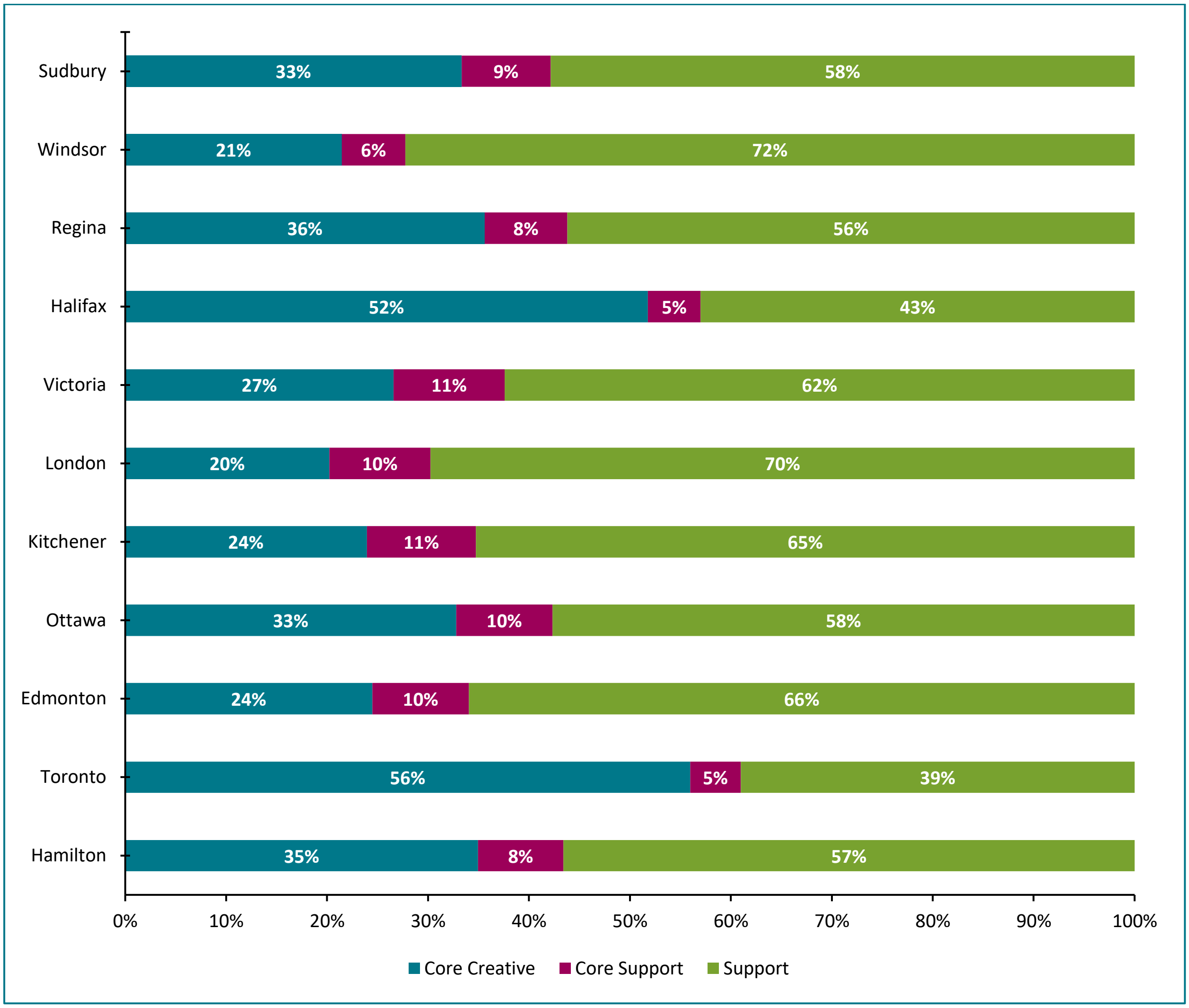
Figure 23: Film Occupation Growth, 2011-2016

Census Division	Total Occupations		Absolute Change	% Change	% of Total Creative Industry Occupations
	2011	2016	2011-2016	2011-2016	2016
Toronto	81,680	94,670	12,990	16%	48.2%
Hamilton	5,940	7,105	1,165	20%	45.7%
Regina	1,975	2,060	85	4%	44.1%
Sudbury	605	820	215	36%	43.5%
Edmonton	7,915	9,385	1,470	19%	43.1%
Halifax	4,045	3,935	(110)	-3%	40.1%
Victoria	3,735	3,725	(10)	0%	37.9%
London	3,080	3,360	280	9%	37.9%
Ottawa	13,680	14,915	1,235	9%	36.3%
Windsor	1,440	1,340	(100)	-7%	35.5%
Kitchener	3,445	4,410	965	28%	35.4%

Source: Statistics Canada, Census of Canada 2016 & 2011. Ranked by % of Total Creative Industry Occupations, 2016

As seen in Figure 24, Toronto has the highest number of businesses involved in the core creation of Film products/services at 56% while Hamilton accounts for 35%. The city also ranks behind in core support functions at 8% compared to Victoria at 11%. Windsor has the highest number of support businesses for the sector. However, Windsor has comparatively limited proportion of core creative and core support businesses.

Figure 24: Film Sector Business in the Creative Value Chain, 2017



Source: Canadian Business Counts 2017

Live Performance

Live Performance accounts for 45.8% of total creative industries sector occupations in Hamilton.

- As with Film, the Hamilton region **ranked 2nd** surpassed only by Toronto in Live Performance occupations as a factor of total creative industry occupations.
- The region **ranked 2nd** behind Sudbury (and tied with Kitchener) in the growth in Live Performance occupations between 2011 and 2016.

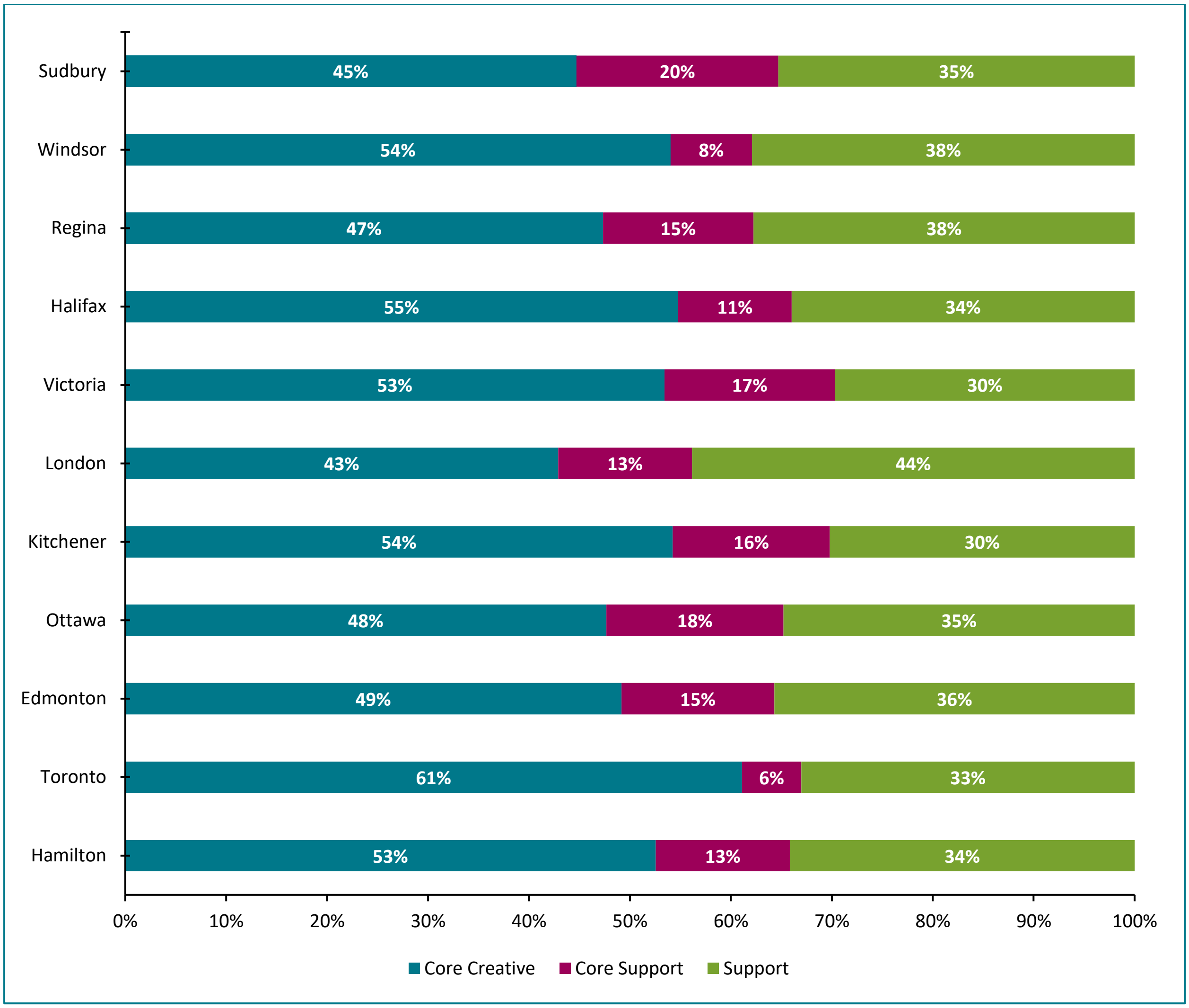
Figure 25: Live Performance Occupation Growth, 2011-2016

Census Division	Total Occupations		Absolute Change	% Change	% of Total Creative Industry Occupations
	2011	2016	2011-2016	2011-2016	2016
Toronto	79,135	92,215	13,080	17%	46.9%
Hamilton	5,800	7,115	1,315	23%	45.8%
Regina	2,095	2,130	35	2%	45.6%
Edmonton	8,080	9,410	1,330	16%	43.2%
Sudbury	650	805	155	24%	42.7%
Halifax	4,250	4,080	(170)	-4%	41.6%
Victoria	3,950	3,885	(65)	-2%	39.5%
Windsor	1,500	1,465	(35)	-2%	38.8%
London	3,045	3,435	390	13%	38.7%
Ottawa	13,340	14,975	1,635	12%	36.5%
Kitchener	3,625	4,470	845	23%	35.9%

Source: Statistics Canada, Census of Canada 2016 & 2011. Ranked by % of Total Creative Industry Occupations, 2016

As seen in Figure 26, Toronto has the highest number of businesses involved in the core creation of live performance products/services at 61% while Hamilton accounts for 53%. The city also ranks behind in core support functions at 13% compared to Sudbury at 20%. London has the highest number of support businesses for the sector.

Figure 26: Live Performance Businesses in the Creative Value Chain, 2017



Source: Canadian Business Counts 2017

Music

Music accounts for 41.7% of total creative industries sector occupations in Hamilton.

- The Hamilton region **ranked 1st** among all the comparator regions in terms of music occupations as a factor of total creative occupations.
- The region **ranked 2nd** behind London in growth in Music occupations between 2011 and 2016.

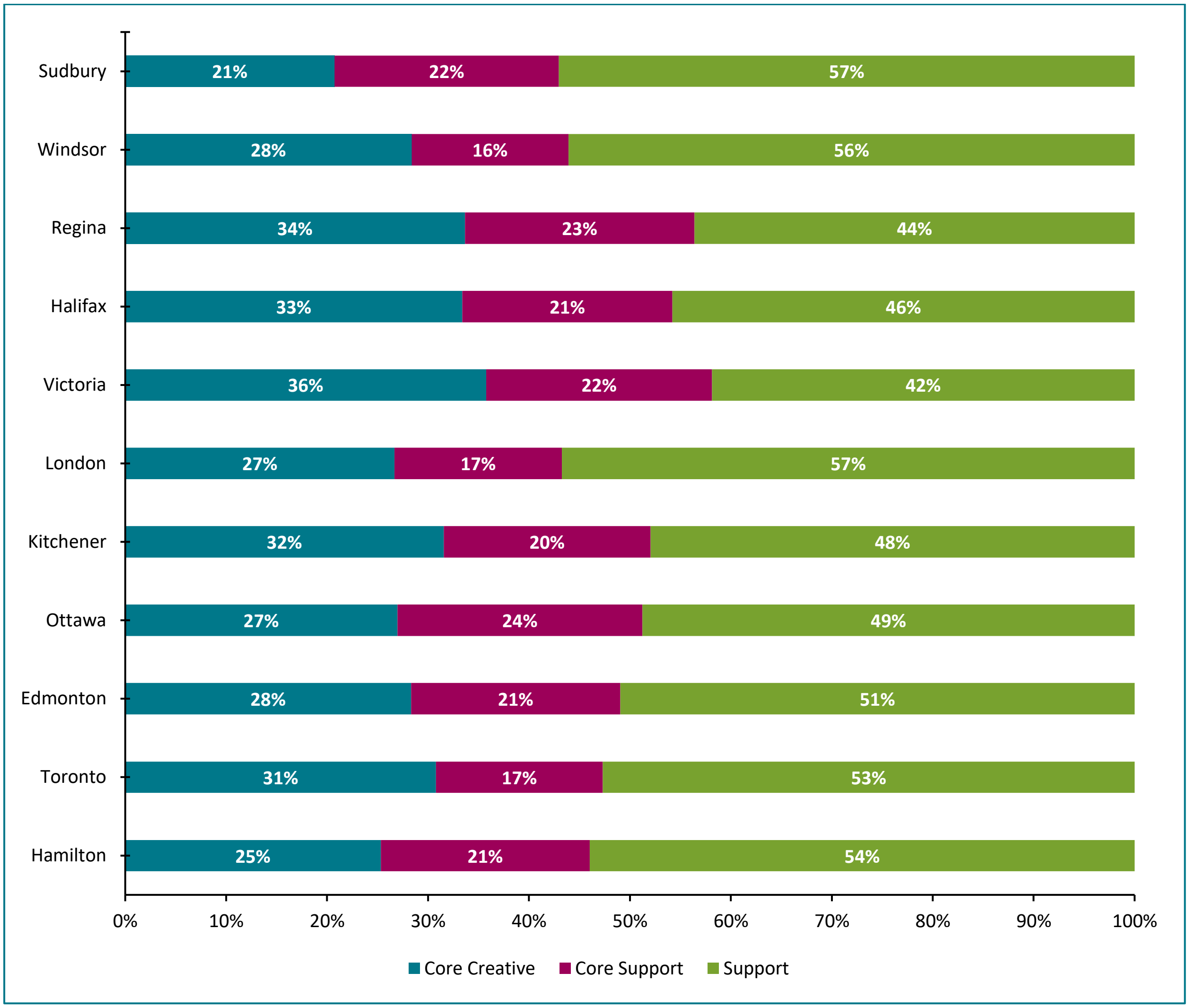
Figure 27: Music Occupation Growth, 2011-2016

Census Division	Total Occupations		Absolute Change	% Change	% of Total Creative Industry Occupations
	2011	2016	2011-2016	2011-2016	2016
Hamilton	5,380	6,480	1,100	20%	41.7%
Toronto	69,825	81,625	11,800	17%	41.5%
Regina	1,980	1,885	(95)	-5%	40.4%
Edmonton	7,205	8,370	1,165	16%	38.4%
Halifax	3,990	3,700	(290)	-7%	37.7%
Sudbury	635	675	40	6%	35.8%
London	2,595	3,160	565	22%	35.6%
Victoria	3,505	3,440	(65)	-2%	35.0%
Ottawa	12,565	13,775	1,210	10%	33.5%
Windsor	1,325	1,250	(75)	-6%	33.1%
Kitchener	3,295	4,015	720	22%	32.2%

Source: Statistics Canada, Census of Canada 2016 & 2011. Ranked by % of Total Creative Industry Occupations, 2016

As seen in Figure 28, Victoria has the highest number of businesses involved in the core creation of Music products/services at 36% while Hamilton accounts for 25%. The city also ranks behind in core support functions at 21% compared to Ottawa at 24%. Sudbury has the highest number of support businesses for the sector.

Figure 28: Music Businesses in the Creative Value Chain, 2017



Source: Canadian Business Counts 2017

Visual and Applied Arts & Makers

Visual and Applied Arts & Makers accounted for 65.4% of total creative industries sector occupations in the Hamilton region.

- The region **ranked 7thth** behind Ottawa, Kitchener, Toronto, Windsor, Regina and London in occupations as a percentage of total creative occupations.
- In terms of growth in occupations from 2011 and 2016, the region **ranked 3rd** behind Sudbury and Kitchener.

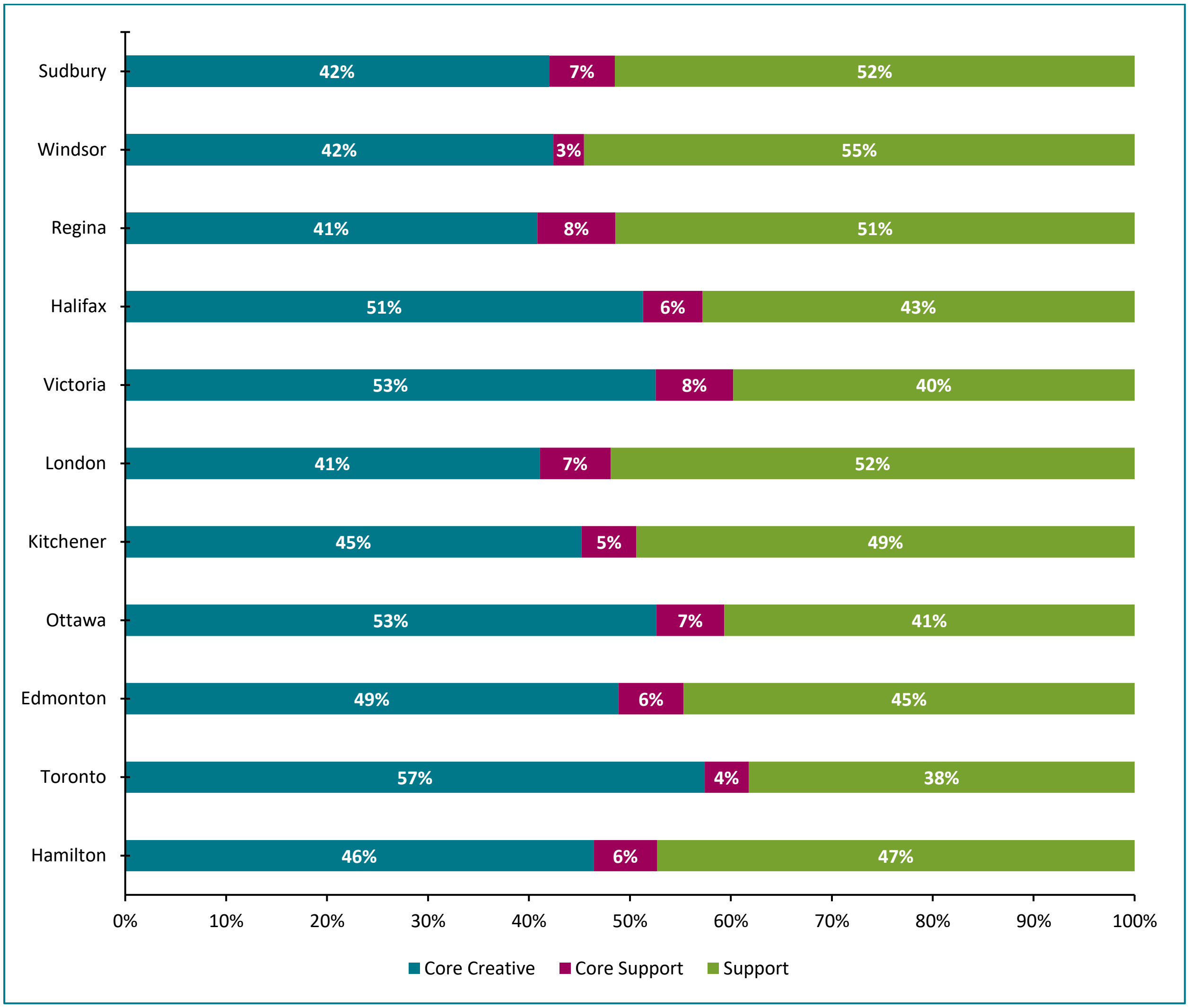
Figure 29: Visual & Applied Arts & Makers Occupation Growth, 2011-2016

Census Division	Total Occupations		Absolute Change	% Change	% of Total Creative Industry Occupations
	2011	2016	2011-2016	2011-2016	2016
Ottawa	28,580	29,785	1,205	4%	72.5%
Kitchener	7,545	8,740	1,195	16%	70.1%
Toronto	117,660	132,160	14,500	12%	67.2%
Windsor	2,280	2,485	205	9%	65.8%
Regina	2,870	3,065	195	7%	65.6%
London	5,200	5,815	615	12%	65.6%
Hamilton	9,000	10,170	1,170	13%	65.4%
Victoria	6,105	6,355	250	4%	64.6%
Edmonton	13,275	13,730	455	3%	63.0%
Halifax	5,990	6,155	165	3%	62.7%
Sudbury	905	1,125	220	24%	59.7%

Source: Statistics Canada, Census of Canada 2016 & 2011. Ranked by % of Total Creative Industry Occupations, 2016

As seen in Figure 30, Toronto has the highest number of businesses involved in the core creation of Visual & Applied Arts & Makers products/services at 57% while Hamilton accounts for 46%. The city also ranks behind in core support functions at 6% compared to Regina at 8%. Windsor has the highest number of support businesses for the sector.

Figure 30: Visual & Applied Arts & Makers Businesses in the Creative Value Chain, 2017



Source: Canadian Business Counts 2017

Written & Published Works

Written & Published Works accounts for 36.8% of total creative industries sector occupations in Hamilton.

- The region **ranked 5th** behind Regina, Edmonton, Ottawa and Sudbury of occupations as a percentage of total creative occupations.
- The region **ranked 3rd** in percentage growth in occupations between 2011 and 2016 behind Kitchener, London and Toronto

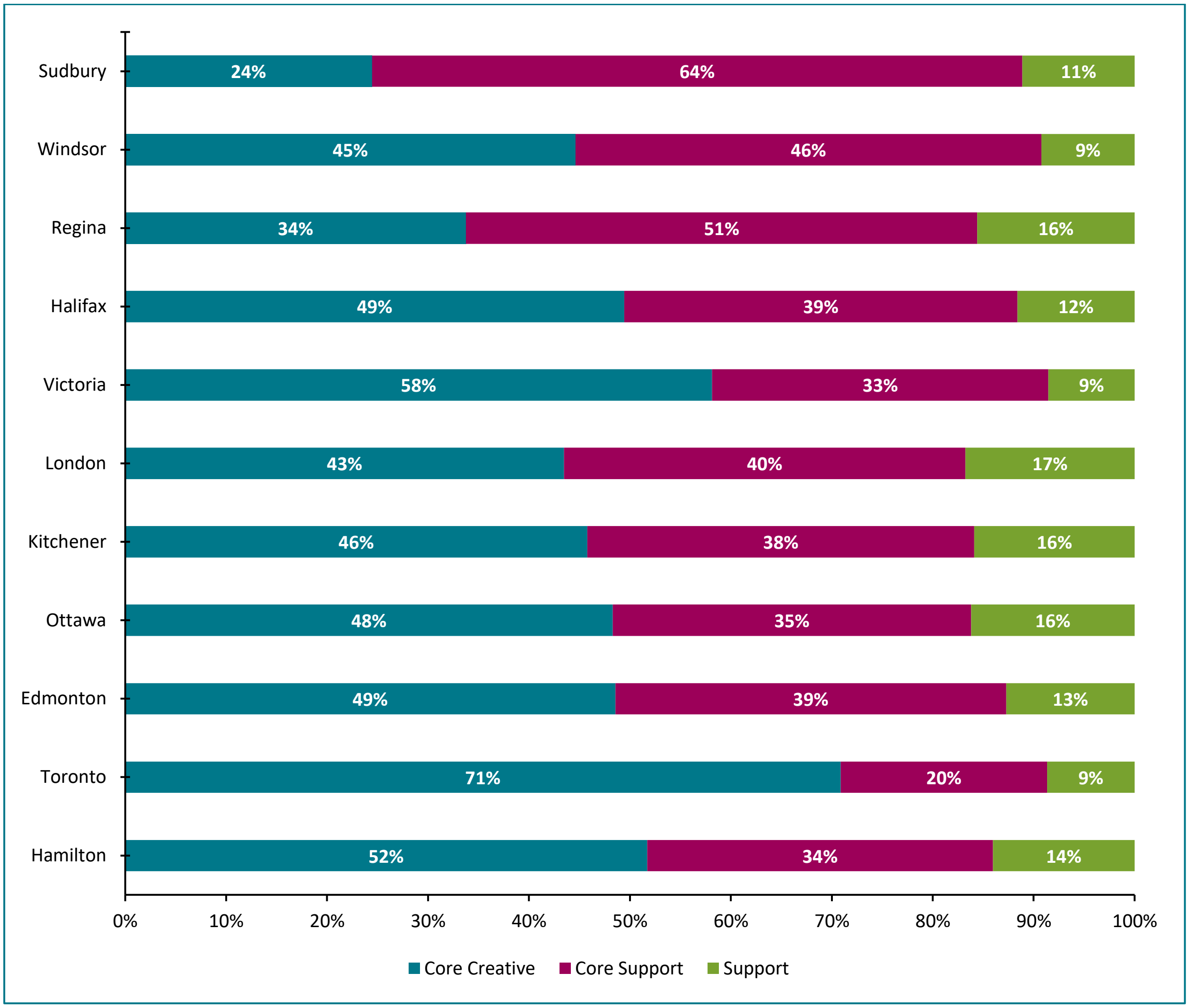
Figure 31: Written & Published Works Occupation Growth, 2011-2016

Census Division	Total Occupations		Absolute Change	% Change	% of Total Creative Industry Occupations
	2011	2016	2011-2016	2011-2016	2016
Regina	1,880	1,810	(70)	-4%	38.8%
Edmonton	8,010	8,390	380	5%	38.5%
Ottawa	15,975	15,805	(170)	-1%	38.5%
Sudbury	745	725	(20)	-3%	38.5%
Hamilton	5,235	5,720	485	9%	36.8%
Toronto	65,800	72,195	6,395	10%	36.7%
Halifax	4,025	3,570	(455)	-11%	36.4%
London	2,840	3,190	350	12%	36.0%
Victoria	3,640	3,465	(175)	-5%	35.2%
Kitchener	3,630	4,060	430	12%	32.6%
Windsor	1,275	1,075	(200)	-16%	28.5%

Source: Statistics Canada, Census of Canada 2016 & 2011. Ranked by % of Total Creative Industry Occupations, 2016

As seen in Figure 32, Toronto has the highest number of businesses involved in the core creation of Written & Published Works products/services at 71% while Hamilton accounts for 52%. The city also ranks behind in core support functions at 34% compared to Sudbury at 64%. London has the highest number of support businesses for the sector.

Figure 32: Written & Published Works Businesses in the Creative Value Chain, 2017



Source: Canadian Business Counts 2017

MDB INSIGHT

City of Hamilton Creative Industries Sector Profile Study

Appendices to Creative Industries Sector Baseline and Benchmarking Analysis

August 2018

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Appendix I: Creative Industries NAICS

Industry (NAICS)	Function	Description
FASHION		
31-33 Manufacturing		
313 textile mills		
3131 Fibre, yarn and thread mills		
313110 Fibre, yarn and thread mills	Core Support	This Canadian industry comprises establishments primarily engaged in spinning yarn from fibres; texturing, throwing or twisting man-made fibre filaments or purchased yarns; or manufacturing thread for sewing, crocheting, embroidery, tatting and similar uses.
3132 Fabric mills		
313210 Broad-woven fabric mills	Core Support	This Canadian industry comprises establishments primarily engaged in weaving broad fabrics. Establishments classified in this industry may finish the fabrics that they weave.
313220 Narrow fabric mills and Schiffli machine embroidery	Core Support	This Canadian industry comprises establishments primarily engaged in weaving or braiding narrow fabrics; or manufacturing embroideries with Schiffli machines.
313230 Nonwoven fabric mills	Core Support	This Canadian industry comprises establishments primarily engaged in manufacturing nonwoven fabrics, by bonding and/or interlocking fibres. Mechanical, chemical, thermal and solvent methods, and combinations thereof, are used.
313240 Knit fabric mills	Core Support	This Canadian industry comprises establishments primarily engaged in knitting fabrics, on both circular (weft fabric) and flat-bed (warp fabric) machines.
3133 Textile and fabric finishing and fabric coating		
313310 Textile and fabric finishing	Core Support	This Canadian industry comprises establishments primarily engaged in preparing and finishing yarn and thread, textile fabrics, textile products (except carpets and rugs), and clothing, not made in the same establishment.
313320 Fabric coating	Core Support	This Canadian industry comprises establishments primarily engaged in manufacturing coated or laminated fabrics; and in finishing textile fabrics or clothing by coating, laminating, rubberizing, varnishing, waxing or similar processes.
314 Textile product mills		
3149 Other textile product mills		
314910 Textile bag and canvas mills	Core Support	This Canadian industry comprises establishments primarily engaged in manufacturing textile bags, such as shipping and other industrial bags; or products from canvas or canvas substitutes, such as tarpaulins and tents.
314990 All other textile product mills	Core Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in manufacturing textile products. Establishments primarily engaged in garneting textile waste or other textile recycling; or embroidering textile products, including clothing, whether or not on a contract basis, are included.
315 Clothing manufacturing		
3151 Clothing knitting mills		
315110 Hosiery and sock mills	Core Support	This Canadian industry comprises establishments primarily engaged in knitting hosiery for men, women and children. Establishments classified in this industry may finish the clothing that they knit.
315190 Other clothing knitting mills	Core Support	This Canadian industry comprises establishments, not classified to any other industry, primarily engaged in knitting clothing, other than hosiery.
3152 Cut and sew clothing manufacturing		
315210 Cut and sew clothing contracting	Core Support	This Canadian industry comprises establishments primarily engaged in manufacturing clothing from materials owned by others. These establishments are commonly referred to as contractors. This industry is limited to contract establishments that perform cutting and sewing operations, such as sewing arms to shirt bodies.

Industry (NAICS)	Function	Description
315220 Men's and boys' cut and sew clothing manufacturing	Core Support	This Canadian industry comprises establishments primarily engaged in manufacturing men's and boys' clothing from purchased fabric. Clothing jobbers, who perform entrepreneurial functions involved in clothing manufacture, such as buying raw materials, designing and preparing samples, arranging for clothing to be made from their materials, and marketing the finished apparel, are included.
315241 Infants' cut and sew clothing manufacturing	Core Support	This Canadian industry comprises establishments primarily engaged in manufacturing infants' clothing from purchased fabric.
315249 Women's and girls' cut and sew clothing manufacturing	Core Support	This Canadian industry comprises establishments primarily engaged in manufacturing women's and girls' clothing from purchased fabric. Clothing jobbers, who perform entrepreneurial functions involved in clothing manufacture, such as buying raw materials, designing and preparing samples, arranging for clothing to be made from their materials, and marketing the finished apparel, are included.
315281 Fur and leather clothing manufacturing	Core Support	This Canadian industry comprises establishments primarily engaged in manufacturing fur and leather clothing.
315289 All other cut and sew clothing manufacturing	Core Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in manufacturing clothing from purchased fabric.
3159 Clothing accessories and other clothing manufacturing		
315990 Clothing accessories and other clothing manufacturing	Core Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in manufacturing clothing or clothing accessories
316 Leather and allied product manufacturing		
3161 Leather and hide tanning and finishing		
316110 Leather and hide tanning and finishing	Core Support	This Canadian industry comprises establishments primarily engaged in tanning, currying, colouring and finishing hides and skins into leather.
3162 Footwear manufacturing		
316210 Footwear manufacturing	Core Support	This Canadian industry comprises establishments primarily engaged in manufacturing footwear, of any material.
3169 Other leather and allied product manufacturing		
316990 Other leather and allied product manufacturing	Core Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in manufacturing leather and allied products. Some important products of this industry are small articles normally carried on the person or in a handbag, such as billfolds, key cases and coin purses of leather or other materials, except precious metal.
325 Chemical manufacturing		
3252 Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing		
325220 Artificial and synthetic fibres and filaments manufacturing	Core Support	This Canadian industry comprises establishments primarily engaged in manufacturing artificial and synthetic fibres and filaments in the form of monofilament, filament yarn, staple or tow. Artificial fibres are made from organic polymers derived from natural raw materials, mainly cellulose. Synthetic fibres are generally derived from petrochemicals. Establishments that both manufacture and texture fibres are included.
339 Miscellaneous manufacturing		
3399 Other miscellaneous manufacturing		
339910 Jewellery and silverware manufacturing	Core Support	This Canadian industry comprises establishments primarily engaged in manufacturing, engraving, chasing or etching jewellery, novelties or precious metal flatware; stamping coins; cutting, slabbing, tumbling, carving, engraving, polishing or faceting precious or semiprecious stones; recutting, repolishing and setting gem stones; or drilling, sawing, and peeling cultured and costume pearls. Establishments primarily engaged in manufacturing pewter jewellery or flatware are included.

Industry (NAICS)	Function	Description
41 Wholesale trade		
414 Personal and household goods merchant wholesalers		
4141 Textile, clothing and footwear merchant wholesalers		
414110 Clothing and clothing accessories merchant wholesalers	Support	This Canadian industry comprises establishments primarily engaged in wholesaling clothing and clothing accessories for adults and children.
414120 Footwear merchant wholesalers	Support	This Canadian industry comprises establishments primarily engaged in wholesaling footwear.
4144 Personal goods merchant wholesalers		
414410 Jewellery and watch merchant wholesalers	Support	This Canadian industry comprises establishments primarily engaged in wholesaling jewellery, finished gem stones, watches, silverware, and table flatware, hollowware or cutlery made of precious metal.
44-45 Retail trade		
448 Clothing and clothing accessories stores		
4481 Clothing stores		
448110 Men's clothing stores	Support	This industry comprises establishments primarily engaged in retailing a general line of new, men's and boys', ready-to-wear clothing. These establishments may also provide alterations on the garments they sell.
448120 Women's clothing stores	Support	This industry comprises establishments primarily engaged in retailing a general line of new, women's, ready-to-wear clothing, including maternity wear.
448130 Children's and infants' clothing stores	Support	This industry comprises establishments primarily engaged in retailing a general line of new, children's and infants', ready-to-wear clothing.
448140 Family clothing stores	Support	This industry comprises establishments primarily engaged in retailing a general line of new, ready-to-wear clothing for men, women and children, without specializing in sales for an individual gender or age group.
448150 Clothing accessories stores	Support	This industry comprises establishments primarily engaged in retailing a single or general line of new clothing accessories.
448191 Fur stores	Support	This Canadian industry comprises establishments primarily engaged in retailing ready-to-wear or custom-made fur apparel.
448199 All other clothing stores	Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in retailing specialized lines of new clothing.
4482 Shoe stores		
448210 Shoe stores	Support	This Canadian industry comprises establishments primarily engaged in retailing all types of new footwear.
4483 Jewellery, luggage and leather goods stores		
448310 Jewellery stores	Support	This Canadian industry comprises establishments primarily engaged in retailing jewellery, sterling and plated silverware, and watches and clocks.
448320 Luggage and leather goods stores	Support	This Canadian industry comprises establishments primarily engaged in retailing luggage, briefcases, trunks and related products, and establishments engaged in retailing a line of leather items.
451 Sporting goods, hobby, book and music stores		
4511 Sporting goods, hobby and musical instrument stores		
451130 Sewing, needlework and piece goods stores	Support	This Canadian industry comprises establishments primarily engaged in retailing new sewing supplies, fabrics, patterns, yarns and other needlework accessories.
54 Professional, scientific and technical services		
541 Professional, scientific and technical services		
5414 Specialized design services		

Industry (NAICS)	Function	Description
541490 Other specialized design services	Core Creative	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in providing professional design services.
FILM		
31-33 Manufacturing		
323 Printing and related support activities		
3231 Printing and related support activities		
323113 - Commercial screen printing	Support	This Canadian industry comprises establishments primarily engaged in commercial printing using silk-screen printing equipment.
323119 - Other printing	Support	This Canadian industry comprises establishments primarily engaged in commercial printing using silk-screen printing equipment.
41 Wholesale trade		
414 Personal and household goods merchant wholesalers		
4144 Personal goods merchant wholesalers		
414430 - Photographic equipment and supplies merchant wholesalers	Support	This Canadian industry comprises establishments primarily engaged in wholesaling photographic equipment and supplies.
414450 - Video recording merchant wholesalers	Core Support	This Canadian industry comprises establishments primarily engaged in wholesaling video recordings.
44-45 Retail trade		
443 Electronics and appliance stores		
4431 Electronics and appliance stores		
443145 - Camera and photographic supplies stores	Support	This Canadian industry comprises establishments primarily engaged in retailing new cameras, photographic equipment and photographic supplies. These establishments may also retail used cameras and photographic equipment, and replacement parts and accessories, and provide repair and film developing services.
443146 - Audio and video recordings stores	Support	This Canadian industry comprises establishments primarily engaged in retailing new audio and video recordings in any format or medium.
51 Information and cultural industries		
512 Motion picture and sound recording industries		
5121 Motion picture and video industries		
512110 - Motion picture and video production	Core Creative	This Canadian industry comprises establishments primarily engaged in producing, or producing and distributing, motion pictures, videos, television programs or commercials.
512120 - Motion picture and video distribution	Core Creative	This Canadian industry comprises establishments primarily engaged in acquiring distribution rights and distributing film and video productions to motion picture theatres, television networks and stations, and other exhibitors.
512130 - Motion picture and video exhibition	Core Creative	This Canadian industry comprises establishments primarily engaged in exhibiting motion pictures. Establishments primarily engaged in providing occasional motion picture exhibition services, such as those provided during film festivals, are also included.
512190 - Post-production and other motion picture and video industries	Core Creative	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in providing post-production services and services to the motion picture and video industries.
515 Broadcasting (except Internet)		
5151 Radio and Television Broadcasting		

Industry (NAICS)	Function	Description
515120 - Television broadcasting	Core Creative	This Canadian industry comprises establishments primarily engaged in operating broadcasting studios and facilities for the production, and over-the-air transmission to the public, of a variety of television programs. Programming may originate in their own studios, from an affiliated network or from external sources.
5152 Pay and Specialty Television		
515210 - Pay and specialty television	Core Support	This Canadian industry comprises establishments primarily engaged in broadcasting television programs, in a defined and limited format, such as family and youth-oriented, news, feature films, music, health, sports, religion, weather, travel and educational programming.
53 Real Estate and Rental and Leasing		
532 Rental and leasing services		
5322 Consumer goods rental		
532210 - Consumer electronics and appliance rental	Support	This Canadian industry comprises establishments primarily engaged in renting consumer electronics and appliances.
532280 - All other consumer goods rental	Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in renting consumer goods.
54 Professional, scientific and technical services		
541 Professional, Scientific, and Technical Services		
5414 Specialized design services		
541410 - Interior design services	Support	This Canadian industry comprises establishments primarily engaged in planning, designing and administering projects in interior spaces to meet the physical and aesthetic needs of people, taking into consideration building codes, health and safety regulations, traffic patterns and floor planning, mechanical and electrical needs, and interior fittings and furniture.
541420 - Industrial design services	Support	This Canadian industry comprises establishments primarily engaged in creating and developing designs and specifications that optimize the function, value and appearance of products.
5418 Advertising, public relations, and related services		
541810 - Advertising agencies	Core Support	This Canadian industry comprises establishments primarily engaged in creating advertising campaigns and placing such advertising in periodicals and newspapers, on radio and television, on the Internet, or with other media.
541830 - Media buying agencies	Core Support	This Canadian industry comprises establishments primarily engaged in purchasing advertising time or space from media owners and reselling it directly to advertising agencies or advertisers.
541840 - Media representatives	Core Support	This Canadian industry comprises establishments primarily engaged in selling media time or space for media owners.
541850 - Display advertising	Support	This Canadian industry comprises establishments primarily engaged in creating public display advertising material, such as printed, painted, or electronic displays, and placing such displays on indoor or outdoor billboards and panels, on or within transit vehicles or facilities, in shopping mall displays, and on other display structures or sites.
541860 - Direct mail advertising	Support	This Canadian industry comprises establishments primarily engaged in creating and designing direct mail advertising campaigns, and preparing advertising material for mailing or other direct distribution. These establishments may also compile, maintain, sell and rent mailing lists.
541870 - Advertising material distribution services	Support	This Canadian industry comprises establishments primarily engaged in the distribution or delivery, except by mail or electronic distribution, of advertising materials or samples.
541891 - Specialty advertising distributors	Support	This Canadian industry comprises establishments primarily engaged in creating, and organizing the production of, promotional messages applied to specialty advertising products, such as wearables, writing instruments, calendars, desk accessories, buttons, badges and stickers.
541899 - All other services related to advertising	Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in providing advertising related services.
5419 Other professional, scientific and technical services		

Industry (NAICS)	Function	Description
541920 - Photographic services	Support	This Canadian industry comprises establishments primarily engaged in providing still, video or computer photography services, such as the video taping of special events.
61 Educational services		
611 Educational services		
6116 Other schools and instruction		
611610 - Fine arts schools	Core Support	This Canadian industry comprises establishments primarily engaged in providing instruction in fine arts.
71 Arts, entertainment and recreation		
711 Performing arts, spectator sports and related industries		
7114 Agents and managers for artists, athletes, entertainers and other public figures		
711411 - Agents and managers for artists, entertainers and other public figures	Core Creative	This Canadian industry comprises establishments primarily engaged in representing or managing creative and performing artists, entertainers, and other public figures. These establishments represent their clients in contract negotiations, manage or organize their client's financial affairs, and generally promote the careers of their clients.
7115 Independent artists, writers and performers		
711512 - Independent actors, comedians and performers	Core Creative	This Canadian industry comprises independent individuals (freelance) primarily engaged in performing in artistic and cultural productions, or providing technical expertise necessary for these works. Independent celebrities, such as athletes, engaged in endorsement, speaking and similar services are included, as are independent radio and television journalists.
LIVE PERFORMANCE		
54 Professional, scientific and technical services		
541 Professional, Scientific, and Technical Services		
5418 Advertising, public relations, and related services		
541810 - Advertising agencies	Support	This Canadian industry comprises establishments primarily engaged in creating advertising campaigns and placing such advertising in periodicals and newspapers, on radio and television, on the Internet, or with other media.
541850 - Display advertising	Support	This Canadian industry comprises establishments primarily engaged in creating public display advertising material, such as printed, painted, or electronic displays, and placing such displays on indoor or outdoor billboards and panels, on or within transit vehicles or facilities, in shopping mall displays, and on other display structures or sites.
541860 - Direct mail advertising	Support	This Canadian industry comprises establishments primarily engaged in creating and designing direct mail advertising campaigns, and preparing advertising material for mailing or other direct distribution. These establishments may also compile, maintain, sell and rent mailing lists.
541870 - Advertising material distribution services	Support	This Canadian industry comprises establishments primarily engaged in the distribution or delivery, except by mail or electronic distribution, of advertising materials or samples.
541891 - Specialty advertising distributors	Support	This Canadian industry comprises establishments primarily engaged in creating, and organizing the production of, promotional messages applied to specialty advertising products, such as wearables, writing instruments, calendars, desk accessories, buttons, badges and stickers.
541899 - All other services related to advertising	Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in providing advertising related services.
61 Educational services		
611 Educational services		
6116 Other schools and instruction		
611610 - Fine arts schools	Core Support	This Canadian industry comprises establishments primarily engaged in providing instruction in fine arts.

Industry (NAICS)	Function	Description
71 Arts, entertainment and recreation		
711 Performing arts, spectator sports and related industries		
7111 Performing arts companies		
711111 - Theatre (except musical) companies	Core Creative	This Canadian industry comprises establishments primarily engaged in producing live presentations that involve the performances of actors and actresses. Theatre companies that operate their own facilities, primarily for the staging of their own productions, are included.
711112 - Musical theatre and opera companies	Core Creative	This Canadian industry comprises establishments primarily engaged in producing live presentations that involve the performances of actors and actresses, opera singers and other vocalists. Establishments, known as dinner theatres, engaged in producing live theatrical entertainment and in providing food and beverages for consumption on the premises, are included.
711120 - Dance companies	Core Creative	This industry comprises establishments primarily engaged in producing live presentations that involve the performances of dancers. Dance companies that operate their own facilities, primarily for the staging of their own production, are included.
711130 - Musical groups and artists	Core Creative	This industry comprises establishments primarily engaged in producing live presentations (except musical theatre and opera) that involve the performances of musicians and/or vocalists. Establishments in this industry may consist of independent groups or individual artists.
711190 - Other performing arts companies	Core Creative	This industry comprises establishments, not classified to any other industry, primarily engaged in producing live performing arts presentations.
7113 Promoters (presenters) of performing arts, sports and similar events		
711311 - Live theatres and other performing arts presenters with facilities	Core Creative	This Canadian industry comprises establishments primarily engaged in operating live theatres and other arts facilities, and organizing and promoting performing arts productions held in these facilities.
711321 - Performing arts promoters (presenters) without facilities	Core Creative	This Canadian industry comprises establishments primarily engaged in organizing and promoting performing arts productions in facilities operated by others.
711322 - Festivals without facilities	Core Support	This Canadian industry comprises establishments primarily engaged in organizing and promoting festivals in facilities operated by others.
7114 Agents and managers for artists, athletes, entertainers and other public figures		
711411 - Agents and managers for artists, entertainers and other public figures	Core Creative	This Canadian industry comprises establishments primarily engaged in representing or managing creative and performing artists, entertainers, and other public figures. These establishments represent their clients in contract negotiations, manage or organize their client's financial affairs, and generally promote the careers of their clients.
7115 Independent artists, writers and performers		
711512 - Independent actors, comedians and performers	Core Creative	This Canadian industry comprises independent individuals (freelance) primarily engaged in performing in artistic and cultural productions, or providing technical expertise necessary for these works. Independent celebrities, such as athletes, engaged in endorsement, speaking and similar services are included, as are independent radio and television journalists.
MUSIC		
31-33 Manufacturing		
339 Miscellaneous manufacturing		
3399 Other miscellaneous manufacturing		
339990 - All other miscellaneous manufacturing	Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in manufacturing activities. Includes musical instruments (except toy), manufacturing

Industry (NAICS)	Function	Description
41 Wholesale trade		
414 Personal and household goods merchant wholesalers		
4144 Personal goods merchant wholesalers		
414440 - Sound recording merchant wholesalers	Core Support	This Canadian industry comprises establishments primarily engaged in wholesaling sound recordings in any format, including cassette and CD. These establishments engage in buy-and-sell distribution, including the distribution of imported CDs and cassettes, and they may be known as rack-jobbers or one-stop distributors.
44-45 Retail trade		
443 Electronics and appliance stores		
4431 Electronics and appliance stores		
443146 - Audio and video recordings stores	Support	This Canadian industry comprises establishments primarily engaged in retailing new audio and video recordings in any format or medium.
451 Sporting goods, hobby, book and music stores		
4511 Sporting goods, hobby and musical instrument stores		
451140 - Musical instrument and supplies stores	Core Support	This Canadian industry comprises establishments primarily engaged in retailing new musical instruments, sheet music and related supplies. These establishments may also rent and repair musical instruments.
51 Information and cultural industries		
512 Motion picture and sound recording industries		
5122 Sound recording industries		
512230 - Music publishers	Core Support	This Canadian industry comprises establishments primarily engaged in acquiring and registering copyrights in musical compositions, in accordance with the law, and promoting and authorizing the use of these compositions in recordings, on radio and television, in motion pictures, live performances, print, multimedia or other media.
512240 - Sound recording studios	Core Support	This Canadian industry comprises establishments primarily engaged in providing the facilities and technical expertise for sound recording in a studio, and audio production and post-production services for film, television and video. These establishments do not hold the copyrights to the sound recordings produced in their facilities.
512250 - Record production and distribution	Core Support	This Canadian industry comprises establishments primarily engaged in record production and/or releasing, promoting and distributing sound recordings.
512290 - Other sound recording industries	Core Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in providing sound recording services.
515 Broadcasting (except Internet)		
5151 Radio and Television Broadcasting		
515110 - Radio broadcasting	Core Creative	This Canadian industry comprises establishments primarily engaged in operating broadcasting studios and facilities for the production and transmission of radio programs to its affiliates or the public.
53 Real Estate and Rental and Leasing		
532 Rental and leasing services		
5322 Consumer goods rental		
532210 - Consumer electronics and appliance rental	Support	This Canadian industry comprises establishments primarily engaged in renting consumer electronics and appliances.
532280 - All other consumer goods rental	Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in renting consumer goods.
54 Professional, scientific and technical services		
541 Professional, Scientific, and Technical Services		

Industry (NAICS)	Function	Description
5418 Advertising, public relations, and related services		
541810 - Advertising agencies	Support	This Canadian industry comprises establishments primarily engaged in creating advertising campaigns and placing such advertising in periodicals and newspapers, on radio and television, on the Internet, or with other media.
541850 - Display advertising	Support	This Canadian industry comprises establishments primarily engaged in creating public display advertising material, such as printed, painted, or electronic displays, and placing such displays on indoor or outdoor billboards and panels, on or within transit vehicles or facilities, in shopping mall displays, and on other display structures or sites.
541860 - Direct mail advertising	Support	This Canadian industry comprises establishments primarily engaged in creating and designing direct mail advertising campaigns, and preparing advertising material for mailing or other direct distribution. These establishments may also compile, maintain, sell and rent mailing lists.
541870 - Advertising material distribution services	Support	This Canadian industry comprises establishments primarily engaged in the distribution or delivery, except by mail or electronic distribution, of advertising materials or samples.
541891 - Specialty advertising distributors	Support	This Canadian industry comprises establishments primarily engaged in creating, and organizing the production of, promotional messages applied to specialty advertising products, such as wearables, writing instruments, calendars, desk accessories, buttons, badges and stickers.
541899 - All other services related to advertising	Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in providing advertising related services.
61 Educational services		
611 Educational services		
6116 Other schools and instruction		
611610 - Fine arts schools	Core Support	This Canadian industry comprises establishments primarily engaged in providing instruction in fine arts.
71 Arts, entertainment and recreation		
711 Performing arts, spectator sports and related industries		
7111 Performing arts companies		
711112 - Musical theatre and opera companies	Core Creative	This Canadian industry comprises establishments primarily engaged in producing live presentations that involve the performances of actors and actresses, opera singers and other vocalists. Establishments, known as dinner theatres, engaged in producing live theatrical entertainment and in providing food and beverages for consumption on the premises, are included.
711130 - Musical groups and artists	Core Creative	This industry comprises establishments primarily engaged in producing live presentations (except musical theatre and opera) that involve the performances of musicians and/or vocalists. Establishments in this industry may consist of independent groups or individual artists.
7113 Promoters (presenters) of performing arts, sports and similar events		
711311 - Live theatres and other performing arts presenters with facilities	Core Creative	This Canadian industry comprises establishments primarily engaged in operating live theatres and other arts facilities, and organizing and promoting performing arts productions held in these facilities.
711321 - Performing arts promoters (presenters) without facilities	Core Creative	This Canadian industry comprises establishments primarily engaged in organizing and promoting performing arts productions in facilities operated by others.
711322 - Festivals without facilities	Core Support	This Canadian industry comprises establishments primarily engaged in organizing and promoting festivals in facilities operated by others.
7114 Agents and managers for artists, athletes, entertainers and other public figures		

Industry (NAICS)	Function	Description
711411 - Agents and managers for artists, entertainers and other public figures	Core Creative	This Canadian industry comprises establishments primarily engaged in representing or managing creative and performing artists, entertainers, and other public figures. These establishments represent their clients in contract negotiations, manage or organize their client's financial affairs, and generally promote the careers of their clients.
7115 Independent artists, writers and performers		
711511 - Independent visual artists and artisans	Core Creative	This Canadian industry comprises establishments primarily engaged in creating visual art and craft works using a studio-based method of production. These works are artistic and cultural objects, designed by the producing establishment, made in small quantities, of any material.
VISUAL & APPLIED ARTS & MAKERS		
31-33 Manufacturing		
321 Wood Product Manufacturing		
3219 Other wood product manufacturing		
321919 - Other millwork	Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in millwork. These establishments generally use woodworking machinery, such as jointers, planers, lathes and routers, to shape wood.
321999 - All other miscellaneous wood product manufacturing	Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in manufacturing wood products.
323 Printing and related support activities		
3231 Printing and related support activities		
323113 - Commercial screen printing	Support	This Canadian industry comprises establishments primarily engaged in commercial printing using silk-screen printing equipment.
323115 - Digital printing	Support	This Canadian industry comprises establishments primarily engaged in digital printing.
323119 - Other printing	Support	This Canadian industry comprises establishments primarily engaged in commercial printing using silk-screen printing equipment.
327 Nonmetallic Mineral Product Manufacturing		
3271 Clay product and refractory manufacturing		
327110 - Pottery, ceramics and plumbing fixture manufacturing	Support	This Canadian industry comprises establishments primarily engaged in shaping, moulding, glazing and firing pottery, ceramics and plumbing fixtures These products may be made of clay or other materials with similar properties. Establishments that fire and decorate white china (whiteware) for the trade are included.
3272 Glass and glass product manufacturing		
327214 - Glass manufacturing	Support	This Canadian industry comprises establishments primarily engaged in making glass from sand and cullet.
327215 - Glass product manufacturing from purchased glass	Support	This Canadian industry comprises establishments primarily engaged in remelting, pressing, blowing or otherwise shaping purchased glass.
332 Fabricated metal product manufacturing		
3323 Architectural and structural metals manufacturing		
332329 - Other ornamental and architectural metal product manufacturing	Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in manufacturing ornamental and architectural metal products.
3329 Other fabricated metal product manufacturing		
332999 - All other miscellaneous fabricated metal product manufacturing	Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in fabricating metal products.
337 Furniture and related product manufacturing		

Industry (NAICS)	Function	Description
3371 Household and institutional furniture and kitchen cabinet manufacturing		
337123 - Other wood household furniture manufacturing	Support	This Canadian industry comprises establishments primarily engaged in manufacturing wood furniture designed for household use, except upholstered. Such furniture may be used in buildings other than private dwellings, for example in hotel rooms.
3372 Office furniture (including fixtures) manufacturing		
337213 - Wood office furniture, including custom architectural woodwork, manufacturing	Support	This Canadian industry comprises establishments primarily engaged in manufacturing wood furniture designed for office use.
339 Miscellaneous manufacturing		
3399 Other miscellaneous manufacturing		
339930 - Doll, toy and game manufacturing	Support	This Canadian industry comprises establishments primarily engaged in manufacturing dolls, toys and games.
41 Wholesale trade		
414 Personal and household goods merchant wholesalers		
4143 Home furnishings merchant wholesalers		
414310 - China, glassware, crockery and pottery merchant wholesalers	Support	This Canadian industry comprises establishments primarily engaged in wholesaling household china, glassware, crockery and pottery, including ceramic kitchenware and tableware.
4144 Personal goods merchant wholesalers		
414430 - Photographic equipment and supplies merchant wholesalers	Support	This Canadian industry comprises establishments primarily engaged in wholesaling photographic equipment and supplies.
416 Building material and supplies merchant wholesalers		
4163 Lumber, millwork, hardware and other building supplies merchant wholesalers		
416340 - Paint, glass and wallpaper merchant wholesalers	Support	This Canadian industry comprises establishments primarily engaged in wholesaling paints and varnishes, glass, wallpaper and building decorators' supplies.
44-45 Retail trade		
443 Electronics and appliance stores		
4431 Electronics and appliance stores		
443143 - Appliance, television and other electronics stores	Support	This Canadian industry comprises establishments primarily engaged in retailing new household appliances, home audio and video equipment, and other electronic products. These establishments may also retail used electronics and appliances, provide repair services, and retail computers and computer software.
443144 - Computer and software stores	Support	This Canadian industry comprises establishments primarily engaged in retailing new computers, computer peripherals, pre-packaged software, game software and related products. These establishments may also retail used computer equipment and replacement parts and accessories, and provide repair services.
443145 - Camera and photographic supplies stores	Support	This Canadian industry comprises establishments primarily engaged in retailing new cameras, photographic equipment and photographic supplies. These establishments may also retail used cameras and photographic equipment, and replacement parts and accessories, and provide repair and film developing services.
451 Sporting goods, hobby, book and music stores		
4511 Sporting goods, hobby and musical instrument stores		

Industry (NAICS)	Function	Description
451120 - Hobby, toy and game stores	Support	This Canadian industry comprises establishments primarily engaged in retailing new toys, games, and hobby and craft supplies.
453 Miscellaneous store retailers		
4539 Other miscellaneous store retailers		
453920 - Art dealers	Core Support	This Canadian industry comprises establishments primarily engaged in retailing original and limited edition art works. Establishments primarily engaged in the exhibition of Aboriginal art for retail sale are also included.
51 Information and cultural industries		
511 Publishing industries (except Internet)		
5111 Newspaper, periodical, book and directory publishers		
511190 - Other publishers	Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in publishing other works such as calendars, colouring books, greeting cards and posters
5112 Software publishers		
511212 - Video game publishers	Core Creative	This Canadian industry comprises establishments primarily engaged in video game publishing. These establishments carry out operations necessary for producing and distributing computer video game software, such as designing video games, providing documentation, and providing support services to video game purchasers. They may design and publish, or publish only.
54 Professional, scientific and technical services		
541 Professional, Scientific, and Technical Services		
5413 Architectural, engineering and related services		
541310 - Architectural services	Core Creative	This Canadian industry comprises establishments primarily engaged in planning and designing the construction of residential, institutional, leisure, commercial and industrial buildings and other structures by applying knowledge of design, construction procedures, zoning regulations, building codes and building materials.
5414 Specialized design services		
541410 - Interior design services	Core Creative	This Canadian industry comprises establishments primarily engaged in planning, designing and administering projects in interior spaces to meet the physical and aesthetic needs of people, taking into consideration building codes, health and safety regulations, traffic patterns and floor planning, mechanical and electrical needs, and interior fittings and furniture.
541420 - Industrial design services	Core Creative	This Canadian industry comprises establishments primarily engaged in creating and developing designs and specifications that optimize the function, value and appearance of products.
541430 - Graphic design services	Core Creative	This Canadian industry comprises establishments primarily engaged in planning, designing and managing the production of visual communication, so as to convey specific messages or concepts, clarify complex information or project visual identities.
5415 Computer systems design and related services		
541515 - Video game design and development services	Core Creative	This Canadian industry comprises establishment primarily engaged in designing and developing video games through one or more activities without publishing them. Establishments herein may custom design video games to meet the needs of specific users.
5418 Advertising, public relations, and related services		
541810 - Advertising agencies	Support	This Canadian industry comprises establishments primarily engaged in creating advertising campaigns and placing such advertising in periodicals and newspapers, on radio and television, on the Internet, or with other media.
541850 - Display advertising	Support	This Canadian industry comprises establishments primarily engaged in creating public display advertising material, such as printed, painted, or electronic displays, and placing such displays on indoor or outdoor billboards and panels, on or within transit vehicles or facilities, in shopping mall displays, and on other display structures or sites.

Industry (NAICS)	Function	Description
541860 - Direct mail advertising	Support	This Canadian industry comprises establishments primarily engaged in creating and designing direct mail advertising campaigns, and preparing advertising material for mailing or other direct distribution. These establishments may also compile, maintain, sell and rent mailing lists.
541870 - Advertising material distribution services	Support	This Canadian industry comprises establishments primarily engaged in the distribution or delivery, except by mail or electronic distribution, of advertising materials or samples.
541891 - Specialty advertising distributors	Support	This Canadian industry comprises establishments primarily engaged in creating, and organizing the production of, promotional messages applied to specialty advertising products, such as wearables, writing instruments, calendars, desk accessories, buttons, badges and stickers.
541899 - All other services related to advertising	Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in providing advertising related services.
5419 Other professional, scientific and technical services		
541920 - Photographic services	Core Creative	This Canadian industry comprises establishments primarily engaged in providing still, video or computer photography services, such as the video taping of special events.
61 Educational services		
611 Educational services		
6116 Other schools and instruction		
611610 - Fine arts schools	Core Support	This Canadian industry comprises establishments primarily engaged in providing instruction in fine arts.
71 Arts, entertainment and recreation		
711 Performing arts, spectator sports and related industries		
7114 Agents and managers for artists, athletes, entertainers and other public figures		
711411 - Agents and managers for artists, entertainers and other public figures	Core Creative	This Canadian industry comprises establishments primarily engaged in representing or managing creative and performing artists, entertainers, and other public figures. These establishments represent their clients in contract negotiations, manage or organize their client's financial affairs, and generally promote the careers of their clients.
7115 Independent artists, writers and performers		
711511 - Independent visual artists and artisans	Core Creative	This Canadian industry comprises establishments primarily engaged in creating visual art and craft works using a studio-based method of production. These works are artistic and cultural objects, designed by the producing establishment, made in small quantities, of any material.
81 Other Services (except Public Administration)		
812 Personal and laundry services		
8129 Other personal services		
812921 - Photo finishing laboratories (except one-hour)	Support	This Canadian industry comprises establishments, known as commercial and professional photo finishing laboratories, primarily engaged in developing film and making photographic slides, prints, and enlargements, on a large-scale basis, typically for commercial clients, and providing specialty services not normally available from one-hour photo finishing laboratories.
WRITTEN & PUBLISHED WORKS		
31-33 Manufacturing		
322 Paper manufacturing		
3221 Pulp, paper and paperboard mills		

Industry (NAICS)	Function	Description
322122 - Newsprint mills	Core Support	This Canadian industry comprises establishments primarily engaged in manufacturing newsprint.
41 Wholesale trade		
414 Personal and household goods merchant wholesalers		
4144 Personal goods merchant wholesalers		
414420 - Book, periodical and newspaper merchant wholesalers	Core Support	This Canadian industry comprises establishments primarily engaged in wholesaling books, periodicals and newspapers, including textbooks, dictionaries and encyclopedias.
44-45 Retail trade		
451 Sporting goods, hobby, book and music stores		
4513 Book stores and news dealers		
451310 - Book stores and news dealers	Core Support	This Canadian industry comprises establishments primarily engaged in retailing new books, newspapers, magazines and other periodicals.
51 Information and cultural industries		
511 Publishing industries (except Internet)		
5111 Newspaper, periodical, book and directory publishers		
511110 - Newspaper publishers	Core Support	This Canadian industry comprises establishments primarily engaged in carrying out operations necessary for producing and distributing newspapers, including gathering news; writing news columns, feature stories and editorials; and selling and preparing advertisements. These establishments may publish newspapers in print or electronic form.
511120 - Periodical publishers	Core Support	This Canadian industry comprises establishments, known as magazine or periodical publishers, primarily engaged in carrying out operations necessary for producing and distributing magazines and other periodicals. Periodicals are published at regular intervals, typically on a weekly, monthly or quarterly basis.
511130 - Book publishers	Core Support	This Canadian industry comprises establishments primarily engaged in carrying out various design, editing and marketing activities necessary for producing and distributing books of all kinds, such as text books; technical, scientific and professional books; and mass market paperback books. These books may be published in print, audio or electronic form.
519 Other information services		
5191 Other information services		
519110 - News syndicates	Core Support	This Canadian industry comprises establishments primarily engaged in supplying information, such as news reports, articles, pictures and features to the news media.
519121 - Libraries	Core Support	This Canadian industry comprises establishments primarily engaged in maintaining collections and facilitating the use of such documents (regardless of its physical form and characteristics) as are required to meet the informational, research, educational or recreational needs of their users.
519190 - All other information services	Support	This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in providing information services.
71 Arts, entertainment and recreation		
711 Performing arts, spectator sports and related industries		
7115 Independent artists, writers and performers		
711512 - Independent actors, comedians and performers	Core Creative	This Canadian industry comprises independent individuals (freelance) primarily engaged in performing in artistic and cultural productions, or providing technical expertise necessary for these works. Independent celebrities, such as athletes, engaged in endorsement, speaking and similar services are included, as are independent radio and television journalists.

Industry (NAICS)	Function	Description
711513 - Independent writers and authors	Core Creative	This Canadian industry comprises independent individuals (freelance) primarily engaged in creating artistic and cultural literary works, technical writing or copywriting. Independent print journalists are included.

Appendix II: Creative Industries Occupations

Occupation (NOC)	Function	Description
FASHION		
012 - Managers in financial and business services		
0124 Advertising, marketing and public relations managers	Core Support	Advertising, marketing and public relations managers plan, organize, direct, control and evaluate the activities of establishments and departments involved in commercial, industrial and e-business advertising, marketing and public relations. They are employed by commercial and industrial establishments, government departments, and advertising, marketing and public relations firms or consulting businesses.
112 - Human resources and business service professionals		
1123 Professional occupations in advertising, marketing and public relations	Core Support	This unit group includes specialists in advertising, marketing and public relations who analyse, develop and implement communication and promotion strategies and information programs, analyse advertising needs and develop appropriate advertising and marketing plans, publicize activities and events, and maintain media relations on behalf of businesses, governments and other organizations, and for performers, athletes, writers and other talented individuals.
522 - Photographers, graphic arts technicians and technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts		
5221 Photographers	Core Support	Photographers operate still cameras to photograph people, events, scenes, materials, products and other subjects. Photographers are employed by photographic studios, newspapers, magazines, museums and government, or they may be self-employed.
523 - Announcers and other performers, n.e.c.		
5232 Other performers, n.e.c.	Core Support	This unit group includes circus performers, magicians, models, puppeteers and other performers not elsewhere classified.
524 - Creative designers and craftspersons		
5243 Theatre, fashion, exhibit and other creative designers	Core Creative	Designers in this unit group conceptualize and produce designs for film, television, theatre and video productions, garments and textiles, displays and exhibits, and for other creative items such as jewellery and trophies.
5245 Patternmakers - textile, leather and fur products	Support	Patternmakers in this unit group create master patterns for the production of garments, footwear and other textile, leather or fur products.
634 - Specialized occupations in personal and customer services		

Occupation (NOC)	Function	Description
6342 Tailors, dressmakers, furriers and milliners	Support	Tailors, dressmakers and furriers make, alter and repair tailored clothing, dresses, coats and other made-to-measure garments. Milliners make, alter and repair hats. This unit group also includes alterationists who fit, alter and repair garments.
6343 Shoe repairers and shoemakers	Support	Shoe repairers repair footwear and shoemakers make specialized and custom shoes and boots.
6344 Jewellers, jewellery and watch repairers and related occupations	Support	Jewellers and related workers in this unit group fabricate, assemble, repair and appraise fine jewellery. Watch repairers and related workers in this unit group repair, clean, adjust and fabricate parts for clocks and watches.
944 - Machine operators and related workers in textile, fabric, fur and leather products processing and manufacturing		
9442 Weavers, knitters and other fabric making occupations	Support	Operators in this unit group operate machines to process yarn or thread into woven, non-woven and knitted products such as cloth, lace, carpets, rope, industrial fabric, hosiery and knitted garments or to quilt and embroider fabric.
9445 Fabric, fur and leather cutters	Support	Fabric cutters cut fabric to make parts for garments, linens and other articles. Fur cutters cut fur pelts to make parts for garments and other fur articles. Leather cutters cut leather to make parts for shoes, garments and other leather articles.
FILM		
012 - Managers in financial and business services		
0124 Advertising, marketing and public relations managers	Core Support	Advertising, marketing and public relations managers plan, organize, direct, control and evaluate the activities of establishments and departments involved in commercial, industrial and e-business advertising, marketing and public relations. They are employed by commercial and industrial establishments, government departments, and advertising, marketing and public relations firms or consulting businesses.
051 - Managers in art, culture, recreation and sport		
0512 Managers - publishing, motion pictures, broadcasting and performing arts	Core Support	Managers in this unit group plan, organize, direct, control and evaluate operations within publishing firms, film, theatre and record production companies and broadcasting facilities.
112 - Human resources and business service professionals		
1123 Professional occupations in advertising, marketing and public relations	Core Support	This unit group includes specialists in advertising, marketing and public relations who analyse, develop and implement communication and promotion strategies and information programs, analyse advertising needs and develop appropriate advertising and marketing plans, publicize activities and events, and maintain media relations on behalf of businesses, governments and other organizations, and for performers, athletes, writers and other talented individuals.
513 - Creative and performing artists		
5131 Producers, directors, choreographers and related occupations	Core Creative	This unit group includes producers, directors, choreographers and others who oversee and control the technical and artistic aspects of film, television, radio, dance and theatre productions.
5135 Actors and comedians	Core Creative	Actors and comedians perform roles in motion picture, television, theatre and radio productions to entertain a variety of audiences. They are employed by motion picture, television, theatre and other production companies.
5136 Painters, sculptors and other visual artists (Question: within Film and Visual Arts?)	Core Support	Painters, sculptors and other visual artists create original paintings, drawings, sculptures, engravings and other artistic works. They are usually self-employed.

Occupation (NOC)	Function	Description
522 - Photographers, graphic arts technicians and technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts		
5221 Photographers	Core Support	Photographers operate still cameras to photograph people, events, scenes, materials, products and other subjects.
5222 Film and video camera operators	Core Creative	Film and video camera operators operate motion picture and video cameras and related equipment to record news, live events, films, videos and television broadcasts.
5224 Broadcast technicians	Support	Broadcast technicians install, set up, test, operate and repair electronic equipment used to record and transmit live and taped radio and television programs and to produce audio and video streaming broadcasts for the Internet.
5225 Audio and video recording technicians	Core Support	Audio and video recording technicians operate equipment to record, mix and edit sound, music and videotape, for motion pictures, television and radio programs, videos, recordings and live events.
5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts	Core Support	This unit group includes a range of technical, co-ordinating and supervisory workers who co-ordinate and perform specific activities for television, radio and motion picture productions, news broadcasts, theatre and stage productions, and other live or recorded productions.
5227 Support occupations in motion pictures, broadcasting, photography and the performing arts	Core Support	This unit group includes workers who perform support duties related to broadcasting and to the production of motion pictures and the performing arts.
523 - Announcers and other performers, n.e.c.		
5231 Announcers and other broadcasters	Core Support	Announcers and other broadcasters read news, sports, weather, commercial and public service messages and host entertainment and information programs for broadcast on radio or television.
5232 Other performers, n.e.c.	Core Support	This unit group includes circus performers, magicians, models, puppeteers and other performers not elsewhere classified.
524 - Creative designers and craftspersons		
5242 Interior designers and interior decorators	Core Support	Interior designers and interior decorators conceptualize and produce aesthetic, functional and safe designs for interior spaces in residential, commercial, cultural, institutional and industrial buildings.
5243 Theatre, fashion, exhibit and other creative designers	Core Creative	Designers in this unit group conceptualize and produce designs for film, television, theatre and video productions, garments and textiles, displays and exhibits, and for other creative items such as jewellery and trophies.
947 - Printing equipment operators and related occupations		
9472 Camera, platemaking and other prepress occupations	Support	This unit group includes prepress technicians who operate various computer controlled systems to perform prepress activities and workers who operate graphic arts cameras and scanners, assemble film and negatives and prepare, engrave and etch printing plates or cylinders for various types of printing presses.
9474 Photographic and film processors	Core Support	Photographic and film processors process and finish still photographic film and motion picture film.
LIVE PERFORMANCE		
012 - Managers in financial and business services		
0124 Advertising, marketing and public relations managers	Core Support	Advertising, marketing and public relations managers plan, organize, direct, control and evaluate the activities of establishments and departments involved in commercial, industrial and e-business advertising, marketing and public relations. They are employed by commercial and industrial establishments, government departments, and advertising, marketing and public relations firms or consulting businesses.

Occupation (NOC)	Function	Description
051 - Managers in art, culture, recreation and sport		
0512 Managers - publishing, motion pictures, broadcasting and performing arts	Core Support	Managers in this unit group plan, organize, direct, control and evaluate operations within publishing firms, film, theatre and record production companies and broadcasting facilities.
112 - Human resources and business service professionals		
1123 Professional occupations in advertising, marketing and public relations	Core Support	This unit group includes specialists in advertising, marketing and public relations who analyse, develop and implement communication and promotion strategies and information programs, analyse advertising needs and develop appropriate advertising and marketing plans, publicize activities and events, and maintain media relations on behalf of businesses, governments and other organizations, and for performers, athletes, writers and other talented individuals.
513 - Creative and performing artists		
5131 Producers, directors, choreographers and related occupations	Core Creative	Announcers and other broadcasters read news, sports, weather, commercial and public service messages and host entertainment and information programs for broadcast on radio or television.
5132 Conductors, composers and arrangers	Core Creative	This unit group includes circus performers, magicians, models, puppeteers and other performers not elsewhere classified.
5133 Musicians and singers	Core Creative	This unit group includes musicians, singers and teachers of vocal and instrumental music.
5134 Dancers	Core Creative	This unit group includes dancers and dance teachers.
5135 Actors and comedians	Core Creative	Actors and comedians perform roles in motion picture, television, theatre and radio productions to entertain a variety of audiences. They are employed by motion picture, television, theatre and other production companies.
5136 Painters, sculptors and other visual artists	Core Support	Painters, sculptors and other visual artists create original paintings, drawings, sculptures, engravings and other artistic works. They are usually self-employed.
522 - Photographers, graphic arts technicians and technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts		
5224 Broadcast technicians	Support	Broadcast technicians install, set up, test, operate and repair electronic equipment used to record and transmit live and taped radio and television programs and to produce audio and video streaming broadcasts for the Internet.
5225 Audio and video recording technicians	Core Support	Audio and video recording technicians operate equipment to record, mix and edit sound, music and videotape, for motion pictures, television and radio programs, videos, recordings and live events.
5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts	Core Support	This unit group includes a range of technical, co-ordinating and supervisory workers who co-ordinate and perform specific activities for television, radio and motion picture productions, news broadcasts, theatre and stage productions, and other live or recorded productions.
5227 Support occupations in motion pictures, broadcasting, photography and the performing arts	Core Support	This unit group includes workers who perform support duties related to broadcasting and to the production of motion pictures and the performing arts.
523 - Announcers and other performers, n.e.c.		
5231 Announcers and other broadcasters	Core Support	Announcers and other broadcasters read news, sports, weather, commercial and public service messages and host entertainment and information programs for broadcast on radio or television.
5232 Other performers, n.e.c.	Core Support	This unit group includes circus performers, magicians, models, puppeteers and other performers not elsewhere classified.

Occupation (NOC)	Function	Description
524 - Creative designers and craftspersons		
5243 Theatre, fashion, exhibit and other creative designers	Core Creative	Designers in this unit group conceptualize and produce designs for film, television, theatre and video productions, garments and textiles, displays and exhibits, and for other creative items such as jewellery and trophies.
MUSIC		
012 - Managers in financial and business services		
0124 Advertising, marketing and public relations managers	Core Support	Advertising, marketing and public relations managers plan, organize, direct, control and evaluate the activities of establishments and departments involved in commercial, industrial and e-business advertising, marketing and public relations. They are employed by commercial and industrial establishments, government departments, and advertising, marketing and public relations firms or consulting businesses.
051 - Managers in art, culture, recreation and sport		
0512 Managers - publishing, motion pictures, broadcasting and performing arts	Core Support	Managers in this unit group plan, organize, direct, control and evaluate operations within publishing firms, film, theatre and record production companies and broadcasting facilities.
112 - Human resources and business service professionals		
1123 Professional occupations in advertising, marketing and public relations	Core Support	This unit group includes specialists in advertising, marketing and public relations who analyse, develop and implement communication and promotion strategies and information programs, analyse advertising needs and develop appropriate advertising and marketing plans, publicize activities and events, and maintain media relations on behalf of businesses, governments and other organizations, and for performers, athletes, writers and other talented individuals.
513 - Creative and performing artists		
5131 Producers, directors, choreographers and related occupations	Core Creative	Announcers and other broadcasters read news, sports, weather, commercial and public service messages and host entertainment and information programs for broadcast on radio or television.
5132 Conductors, composers and arrangers	Core Creative	This unit group includes circus performers, magicians, models, puppeteers and other performers not elsewhere classified.
5133 Musicians and singers	Core Creative	This unit group includes musicians, singers and teachers of vocal and instrumental music.
522 - Photographers, graphic arts technicians and technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts		
5224 Broadcast technicians	Support	Broadcast technicians install, set up, test, operate and repair electronic equipment used to record and transmit live and taped radio and television programs and to produce audio and video streaming broadcasts for the Internet.
5225 Audio and video recording technicians	Core Support	Audio and video recording technicians operate equipment to record, mix and edit sound, music and videotape, for motion pictures, television and radio programs, videos, recordings and live events.
5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts	Core Support	This unit group includes a range of technical, co-ordinating and supervisory workers who co-ordinate and perform specific activities for television, radio and motion picture productions, news broadcasts, theatre and stage productions, and other live or recorded productions.
5227 Support occupations in motion pictures, broadcasting, photography and the performing arts	Core Support	This unit group includes workers who perform support duties related to broadcasting and to the production of motion pictures and the performing arts.
523 - Announcers and other performers, n.e.c.		

Occupation (NOC)	Function	Description
5231 Announcers and other broadcasters	Core Support	Announcers and other broadcasters read news, sports, weather, commercial and public service messages and host entertainment and information programs for broadcast on radio or television.
5232 Other performers, n.e.c.	Core Support	This unit group includes circus performers, magicians, models, puppeteers and other performers not elsewhere classified.
524 - Creative designers and craftspersons		
5244 Artisans and craftspersons	Core Creative	This unit group includes those who use manual and artistic skills to design and make ornamental objects, pottery, stained glass, jewellery, rugs, blankets, other handicrafts and artistic floral arrangements. Makers of musical instruments are also included in this unit group.
VISUAL & APPLIED ARTS & MAKERS		
012 - Managers in financial and business services		
0124 Advertising, marketing and public relations managers	Core Support	Advertising, marketing and public relations managers plan, organize, direct, control and evaluate the activities of establishments and departments involved in commercial, industrial and e-business advertising, marketing and public relations. They are employed by commercial and industrial establishments, government departments, and advertising, marketing and public relations firms or consulting businesses.
021 - Managers in engineering, architecture, science and information systems		
0212 Architecture and science managers	Core Support	Architecture and science managers plan, organize, direct, control and evaluate the activities of an architecture, landscape architecture, scientific or statistical department, service or firm.
051 - Managers in art, culture, recreation and sport		
0511 Library, archive, museum and art gallery managers	Core Support	This unit group includes managers who plan, organize, direct, control and evaluate the activities of libraries, archives, museums, art galleries or departments within such institutions.
112 - Human resources and business service professionals		
1123 Professional occupations in advertising, marketing and public relations	Core Support	This unit group includes specialists in advertising, marketing and public relations who analyse, develop and implement communication and promotion strategies and information programs, analyse advertising needs and develop appropriate advertising and marketing plans, publicize activities and events, and maintain media relations on behalf of businesses, governments and other organizations, and for performers, athletes, writers and other talented individuals.
121 - Administrative services supervisors		
1213 Supervisors, library, correspondence and related information workers	Core Support	Supervisors in this unit group supervise and co-ordinate the activities of workers in the following unit groups: Library Assistants and Clerks (1451), Correspondence, Publication and Regulatory Clerks (1452) and Survey Interviewers and Statistical Clerks (1454).
215 - Architects, urban planners and land surveyors		
2151 Architects	Core Creative	Architects conceptualize, plan and develop designs for the construction and renovation of commercial, institutional and residential buildings.
217 - Computer and information systems professionals		
2174 Computer programmers and interactive media developers	Core Support	Interactive media developers write, modify, integrate and test computer code for Internet applications, computer-based training software, computer games, film, video and other interactive media.
2175 Web designers and developers	Core Creative	Web designers and developers research, design, develop and produce Internet and Intranet sites.

Occupation (NOC)	Function	Description
225 - Technical occupations in architecture, drafting, surveying, geomatics and meteorology		
2251 Architectural technologists and technicians	Core Support	Architectural technologists and technicians may work independently or provide technical assistance to professional architects and civil design engineers in conducting research, preparing drawings, architectural models, specifications and contracts and in supervising construction projects.
2252 Industrial designers	Core Creative	Industrial designers conceptualize and produce designs for manufactured products.
513 - Creative and performing artists		
5136 Painters, sculptors and other visual artists	Core Creative	Painters, sculptors and other visual artists create original paintings, drawings, sculptures, engravings and other artistic works. They are usually self-employed.
521 - Technical occupations in libraries, public archives, museums and art galleries		
5212 Technical occupations related to museums and art galleries	Support	This unit group includes workers who classify and catalogue museum artifacts and gallery works of art, construct and install exhibits and displays, restore, maintain and store museum and gallery collections, frame artwork, and perform other functions in support of curatorial and conservation activities.
522 - Photographers, graphic arts technicians and technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts		
5221 Photographers	Core Creative	Photographers operate still cameras to photograph people, events, scenes, materials, products and other subjects.
5223 Graphic arts technicians	Support	Graphic arts technicians assist in conceptualizing a project, interpreting design specifications or sketches, preparing the page make-up, lay-out and lettering, and preparing production materials for press, electronic or multimedia publishing.
5227 Support occupations in motion pictures, broadcasting, photography and the performing arts	Core Support	This unit group includes workers who perform support duties related to broadcasting and to the production of motion pictures and the performing arts.
524 - Creative designers and craftspersons		
5241 Graphic designers and illustrators	Core Creative	Graphic designers conceptualize and produce graphic art and visual materials to effectively communicate information for publications, advertising, films, packaging, posters, signs and interactive media such as Web sites and CDs.
5242 Interior designers and interior decorators	Core Creative	Interior designers and interior decorators conceptualize and produce aesthetic, functional and safe designs for interior spaces in residential, commercial, cultural, institutional and industrial buildings.
5244 Artisans and craftspersons	Core Creative	This unit group includes those who use manual and artistic skills to design and make ornamental objects, pottery, stained glass, jewellery, rugs, blankets, other handicrafts and artistic floral arrangements. Makers of musical instruments are also included in this unit group.
9472 Camera, platemaking and other prepress occupations	Support	
9474 Photographic and film processors	Core Support	
WRITTEN & PUBLISHED WORKS		
012 - Managers in financial and business services		
0124 Advertising, marketing and public relations managers	Core Support	Advertising, marketing and public relations managers plan, organize, direct, control and evaluate the activities of establishments and departments involved in commercial, industrial and e-business advertising, marketing and public relations. They are employed by commercial and industrial establishments, government departments, and advertising, marketing and public relations firms or consulting businesses.

Occupation (NOC)	Function	Description
051 - Managers in art, culture, recreation and sport		
0511 Library, archive, museum and art gallery managers	Core Support	This unit group includes managers who plan, organize, direct, control and evaluate the activities of libraries, archives, museums, art galleries or departments within such institutions.
0512 Managers - publishing, motion pictures, broadcasting and performing arts	Core Support	Managers in this unit group plan, organize, direct, control and evaluate operations within publishing firms, film, theatre and record production companies and broadcasting facilities.
112 - Human resources and business service professionals		
1123 Professional occupations in advertising, marketing and public relations	Core Support	This unit group includes specialists in advertising, marketing and public relations who analyse, develop and implement communication and promotion strategies and information programs, analyse advertising needs and develop appropriate advertising and marketing plans, publicize activities and events, and maintain media relations on behalf of businesses, governments and other organizations, and for performers, athletes, writers and other talented individuals.
121 - Administrative services supervisors		
1213 Supervisors, library, correspondence and related information workers	Core Support	Supervisors in this unit group supervise and co-ordinate the activities of workers in the following unit groups: Library Assistants and Clerks (1451), Correspondence, Publication and Regulatory Clerks (1452) and Survey Interviewers and Statistical Clerks (1454).
145 - Library, correspondence and other clerks		
1451 Library assistants and clerks	Support	Library assistants and clerks issue and receive library materials, sort and shelve books and provide general library information to users. They also perform clerical functions.
511 - Librarians, archivists, conservators and curators		
5111 Librarians	Core Support	Librarians select, develop, organize and maintain library collections and provide advisory services for users.
512 - Writing, translating and related communications professionals		
5121 Authors and writers	Core Creative	Authors and writers plan, research and write books, scripts, storyboards, plays, essays, speeches, manuals, specifications and other non-journalistic articles for publication or presentation.
5122 Editors	Core Support	Editors review, evaluate and edit manuscripts, articles, news reports and other material for publication, broadcast or interactive media and co-ordinate the activities of writers, journalists and other
5123 Journalists	Core Creative	Journalists research, investigate, interpret and communicate news and public affairs through newspapers, television, radio and other media.
521 - Technical occupations in libraries, public archives, museums and art galleries		
5211 Library and public archive technicians	Support	Library and public archive technicians assist users in accessing library or archive resources, assist in describing new acquisitions, participate in archive processing and storage, and conduct reference searches.

Appendix III: Programs by Institution and Completion numbers, 2014

Title	Institution	Award Level	Completions (2014)
Communication and media studies	McMaster University	Undergraduate program	106
Communication and media studies	McMaster University	Graduate program (second cycle)	21
Communication and media studies	Mohawk College of Applied Arts and Technology	Career, technical or professional training program	18
Design and applied arts	Mohawk College of Applied Arts and Technology	Career, technical or professional training program	24
Drama/theatre arts and stagecraft	McMaster University	Undergraduate program	18
Film/video and photographic arts	Mohawk College of Applied Arts and Technology	Career, technical or professional training program	30
Fine arts and art studies	McMaster University	Undergraduate program	30
Graphic communications	Mohawk College of Applied Arts and Technology	Career, technical or professional training program	57
Journalism	Mohawk College of Applied Arts and Technology	Career, technical or professional training program	21
Music	Mohawk College of Applied Arts and Technology	Career, technical or professional training program	49
Music	McMaster University	Undergraduate program	39
Public relations, advertising and applied communication	Mohawk College of Applied Arts and Technology	Post career, technical or professional training program	39
Public relations, advertising and applied communication	Mohawk College of Applied Arts and Technology	Career, technical or professional training program	36
Radio, television and digital communication	Mohawk College of Applied Arts and Technology	Career, technical or professional training program	104
Radio, television and digital communication	McMaster University	Undergraduate program	20
Visual and performing arts, other	McMaster University	Undergraduate program	3

MDB INSIGHT

City of Hamilton Creative Industries Sector Profile Study

Creative Industries Asset Mapping

June 2018

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Creative Industries Asset Mapping

Creative industries are increasingly recognized for the role they play in enhancing both social and economic development in cities. With this recognition has come the need for new tools and integration of databases and spatially locating these assets to track the industry's evolution. Asset mapping is one way to help understand patterns/trends and is increasingly being embraced as an essential economic (and cultural) development tool in cities internationally. Mapping is an ongoing process that provides insights into current conditions and provides benchmarks against which to assess progress.

Asset mapping is an emerging discipline with no consensus on how it is defined; it means different things in different jurisdictions. For purposes of the Hamilton Creative Industries Sector, asset mapping is defined as a "systematic approach to identifying, recording, classifying and analyzing a community's creative assets". In most cities employing mapping; it also involves spatially mapping creative industries using geographic information systems. Assets captured here include businesses in the six sub-sectors, identified as the focus of the study:

- Film
- Music
- Fashion
- Live Performance
- Visual and Applied Arts & Makers
- Written and Published Works

Notes to the Reader

The Asset Mapping is done as a two-step process. The first step involves creating a database of creative industries in Hamilton. The creative industries were defined by the City and included a wide variety of businesses in areas such as Fashion, Film, Live Performance, Music, Visual & Applied Arts & Makers and Written & Published Works. Individuals and businesses not listed in the public domain were not mapped. The mapping process should not be viewed for the number of assets but rather to examine the areas of creative concentrations.

1.1 Uses of Asset Mapping

Uses of cultural mapping fall into three categories.

1. Asset Mapping to Inform Planning

Identifying and mapping creative industries strengthen the base of information that can be employed to inform future planning and decision-making in any city relating to economic development and land use.

- **Economic development –** Mapping can help analyze strengths in creative industries and other cultural resources to help track growth or decline in these industries or occupations over time; support tourism strategies through a stronger knowledge base about local creative industry resources and cultural experiences; identify and strengthen value chain networks and relationships among creative enterprises.
- **Land use** – Mapping can support the identification, location, zoning policies, monitoring and protection of built heritage resources; help leverage different creative industries in support of downtown redevelopment and enhancement of the public realm.

2. Asset Mapping to Increase Community Awareness

- Mapping helps build consolidated databases of creative industries that in turn can be used to support marketing and promotion of these assets to current and future businesses, residents and, in some cases, visitors/tourists. A growing number of cities are building interactive web-based maps to broaden awareness and increase access to the community's creative resources.

3. Asset Mapping to Support Creative Industries Development

- The creative industries in most communities tend to be fragmented, with unnecessary and unproductive distinctions drawn between different disciplines and between not-for-profit and for-profit types of creative activity. Building a stronger base of information on creative industries supports sector development in some ways.
- Enabling cross-disciplinary connections – better information individuals and organizations working in different disciplines generates opportunities for collaboration and creative connections.
- Connecting not-for-profit and commercial creative activity – the creative industries in many communities continue to separate these two realms of activity, again missing opportunities for collaboration and mutual benefit.
- Supporting creative value chain connections – stronger information on individual and enterprises help connect individuals and organizations engaged in all aspects of the value chain of creation, production and manufacturing, distribution and support of creative products and services.

1.2 Cultural Mapping Findings

These mapping findings offer a solid starting point of creative industries mapping efforts in Hamilton that can not only be used from an economic development perspective but assist with the City's existing Cultural Plan. What the exercise does is to establish a solid baseline of data captured in a consistent set of categories that can be broadened or deepened over time.

The chart below summarizes the results of this baseline of creative industries across the six (6) categories. The numbers in brackets represent the total number of assets identified in each of the categories.

Table 1: Overview of Cultural Mapping Findings

Cultural Resource Framework (Number of assets)					
Fashion (114)	Film (114)	Live Performance (229)	Music (280)	Visual and Applied Arts & Makers (474)	Written & Published Works (80)

Asset mapping is not simply about creating databases of assets but also being able to map these assets spatially. A spatial analysis assists in understanding the concentration or clusters of creative industries. The analysis identifies areas of industry strength, communities that foster creative growth and gaps that can be addressed to encourage growth. Additionally, spatial analysis can be used to identify any land use or place-based patterns.

1.2.1 Creative Industries Overview

Two major clusters and a few minor clusters of creative industries were identified through the mapping process. The major clusters are along:

- James Street North between Barton and King
- Ottawa Street North from Dunsmure Road and Barton Street

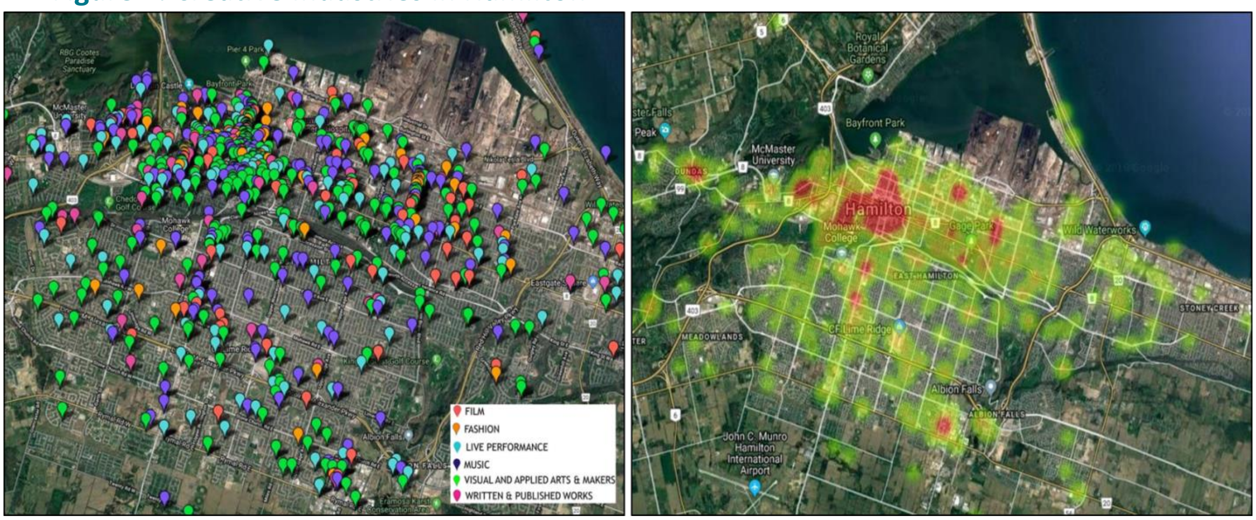
The minor cluster nodes were seen at

- Wentworth Street North and Sherman Avenue North
- Locke Street South
- Downtown Dundas
- Westdale

James Street is a well-known road that extends from the city's two prominent geographic features; the escarpment to the waterfront. The street is informally recognized as the James North Art District and is home to a monthly Art Crawl as well as many established non-profit arts organizations and independently run creative businesses. The district has experienced significant change and growth in the past 10 years with the addition of many new cafes, restaurants and retail shops. Businesses, organizations and events have chosen to invest and locate here over the course of the last ten (10) years for a wide range of reasons. The City has intentionally developed various financial incentive programs focused on specific geographic areas in the city such as the downtown and Business Improvement Areas to assist/encourage private sector investment.

Ottawa Street North, also informally recognized as the Fabric & Textile District is Hamilton's "Decor Destination", is home to many textile and fashion businesses. Over the last five years, this street (and the city as a whole) has seen an increase in a vibrant and diverse food scene. With an active BIA, the street is home to the annual "Sew Hungry" food truck festival and is growing area for independently run businesses including antique shops and restaurants.

Figure 1: Creative Industries in Hamilton

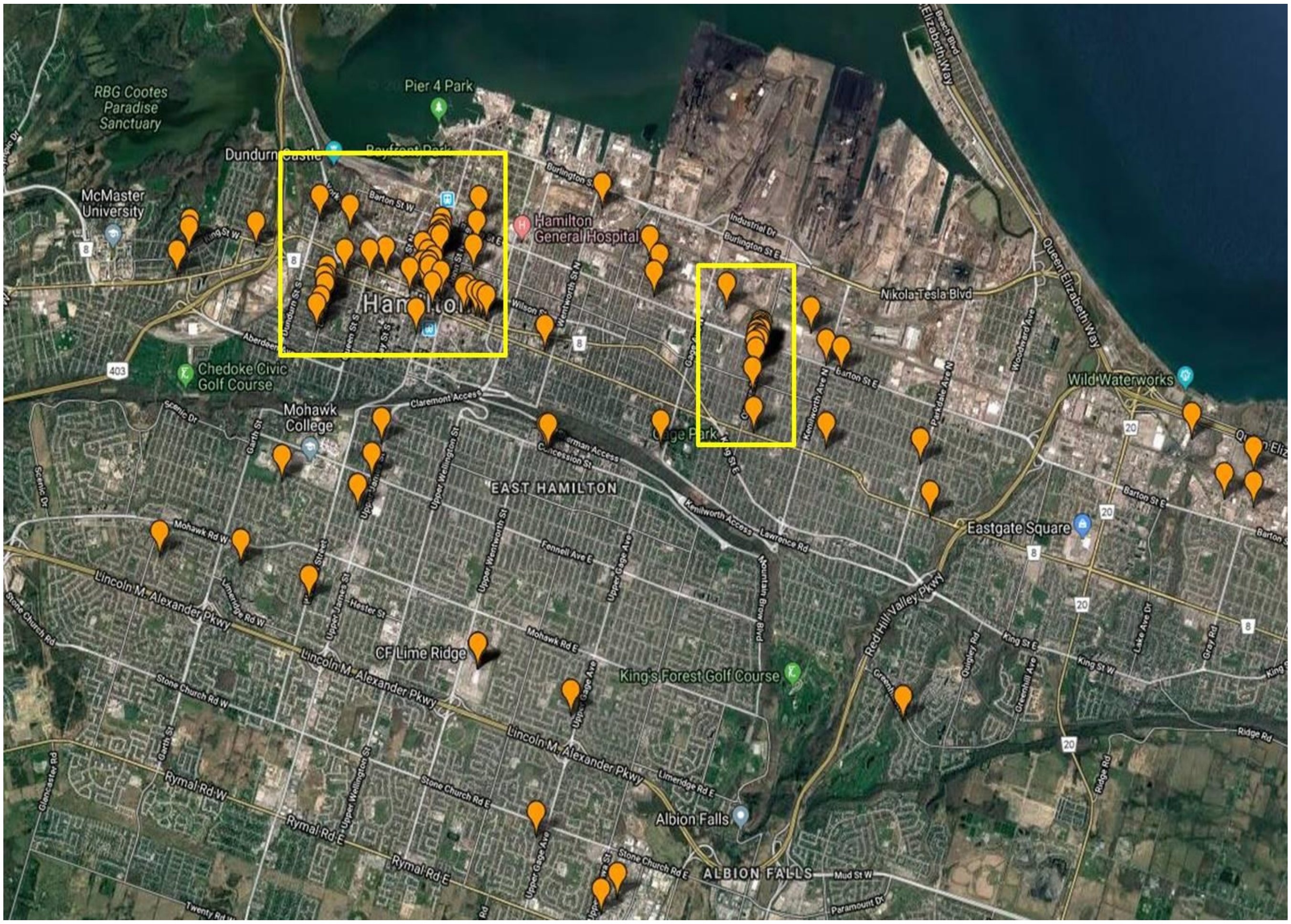


Source: MDB Insight. The image is zoomed in to show businesses around central Hamilton

1.2.1 Fashion Sector

The Fashion sector is seen to be clustered in two nodes, namely, James Street North and Ottawa Street North. Businesses in the sector are also seen along King Street East and Locke Street South. The James Street North cluster has several retail and designer shops and plays a predominant distribution role for the sector. The cluster seen in Ottawa street focuses predominantly on activities surrounding textile and fabric production, textile and fabric manufacturing and textile and fabric distribution. Businesses are also emerging near Mohawk College which might serve as an enabler of the sector or the creation element of the sector. Mohawk College provides continuing education courses in Fashion Design, Dressmaking and Sewing.

Figure 2: Creative Industries in the Fashion Sector

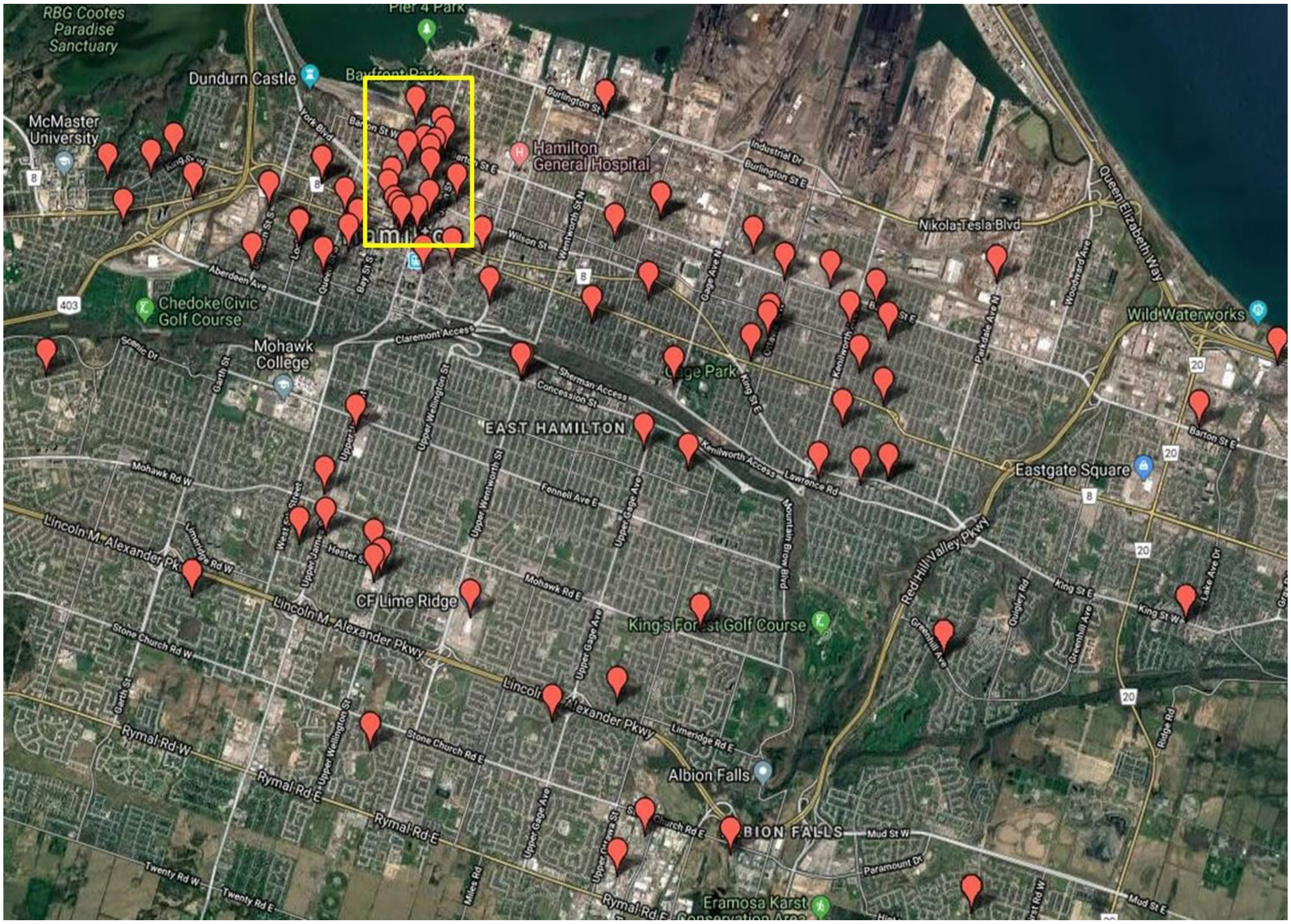


Source: MDB Insight

1.2.2 Film Sector

The asset mappings of creative industries in the Film sector shows businesses concentrated along and around James Street North at Barton Street. Film businesses are also seen in the area around central Hamilton at Queen St N, Locke St N and Dundurn St N and also along John St North. A few businesses are also seen near McMaster University, Lime Ridge Road and Kenilworth Avenue. The cluster near James Street North includes Red Canoe Productions and Factory Media Center. The city also has some clustering of film businesses (spaces and production studios) such as Digital Canaries and Steel Work Studios which are located in the city's north end and its industrial zones. Additional investment in the film sector includes renovations to Sherman Avenue Playhouse Theatre. The Playhouse Theatre started operations in 1913 showing silent films and vaudeville. When reopened, the theatre will be the oldest movie house in Hamilton and be a part of Hamilton's architectural heritage.

Figure 3: Creative Industries in the Film Sector

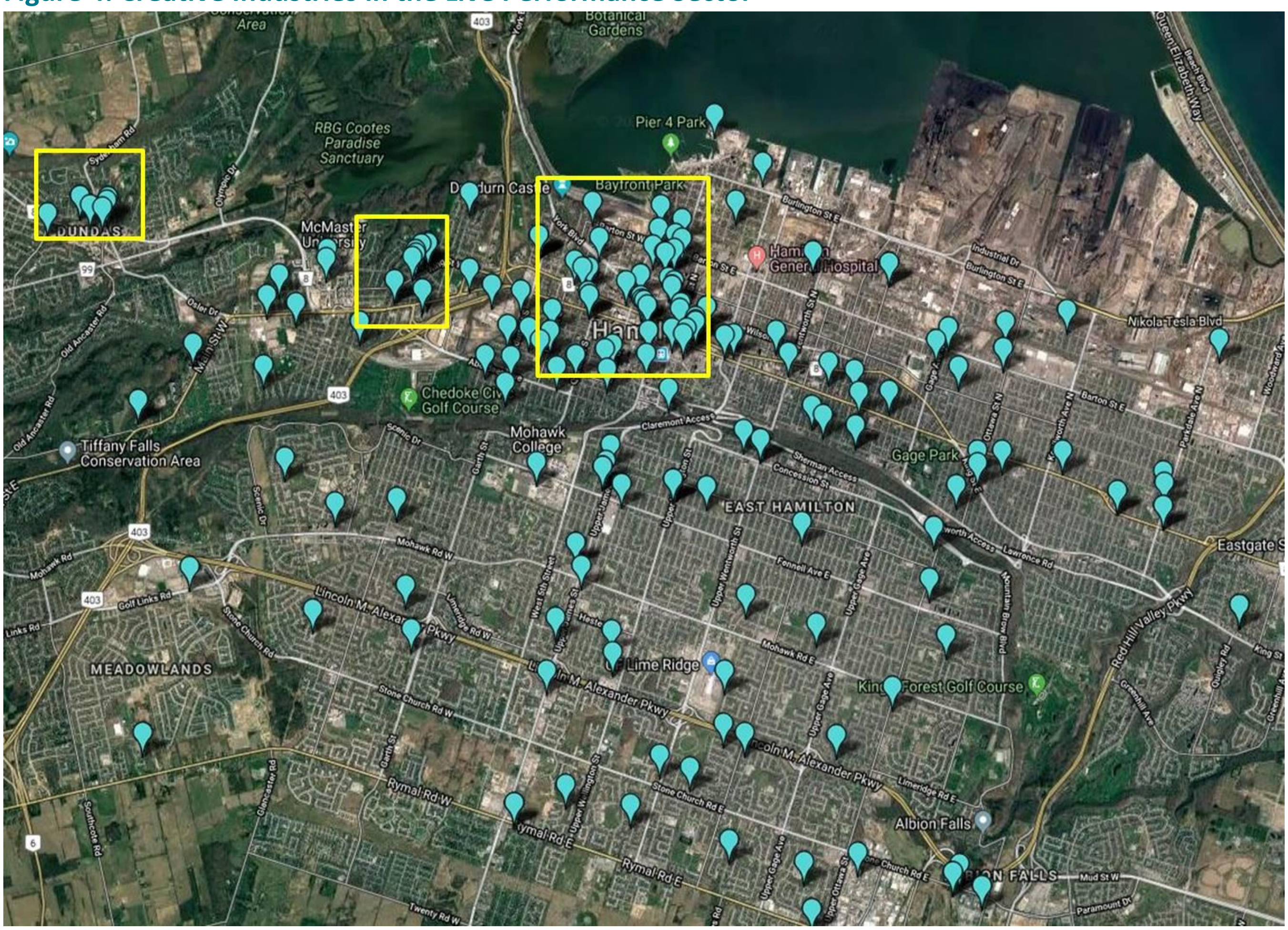


Source: MDB Insight

1.2.3 Live Performance Sector

Similar to the other sectors, creative industries in the Live Performance sector are centred along James Street. Other clusters include the Westdale neighbourhood and downtown Dundas. James Street North area is home to various performance venues and art companies including the Citadel Theater and the Hamilton Theatre Inc. The street hosts the annual Supercrawl festival that showcases local, regional and national artists and performers. The cluster in the Westdale neighbourhood is centred on the Westdale Theatre. The Westdale Theatre is a historical icon for the city and is currently under renovations to become a venue for live music, film and lectures. The cluster in Dundas and its downtown is represented by the Hamilton City Ballet and live performance festivals such as the Dundas International Buskerfest. In terms of popular locations in city-owned parks for festivals and events, the City identified parks at the waterfront, Gage Park, Gore Park and Dundas Driving Park as the most popular parks for people to hold events.

Figure 4: Creative Industries in the Live Performance Sector

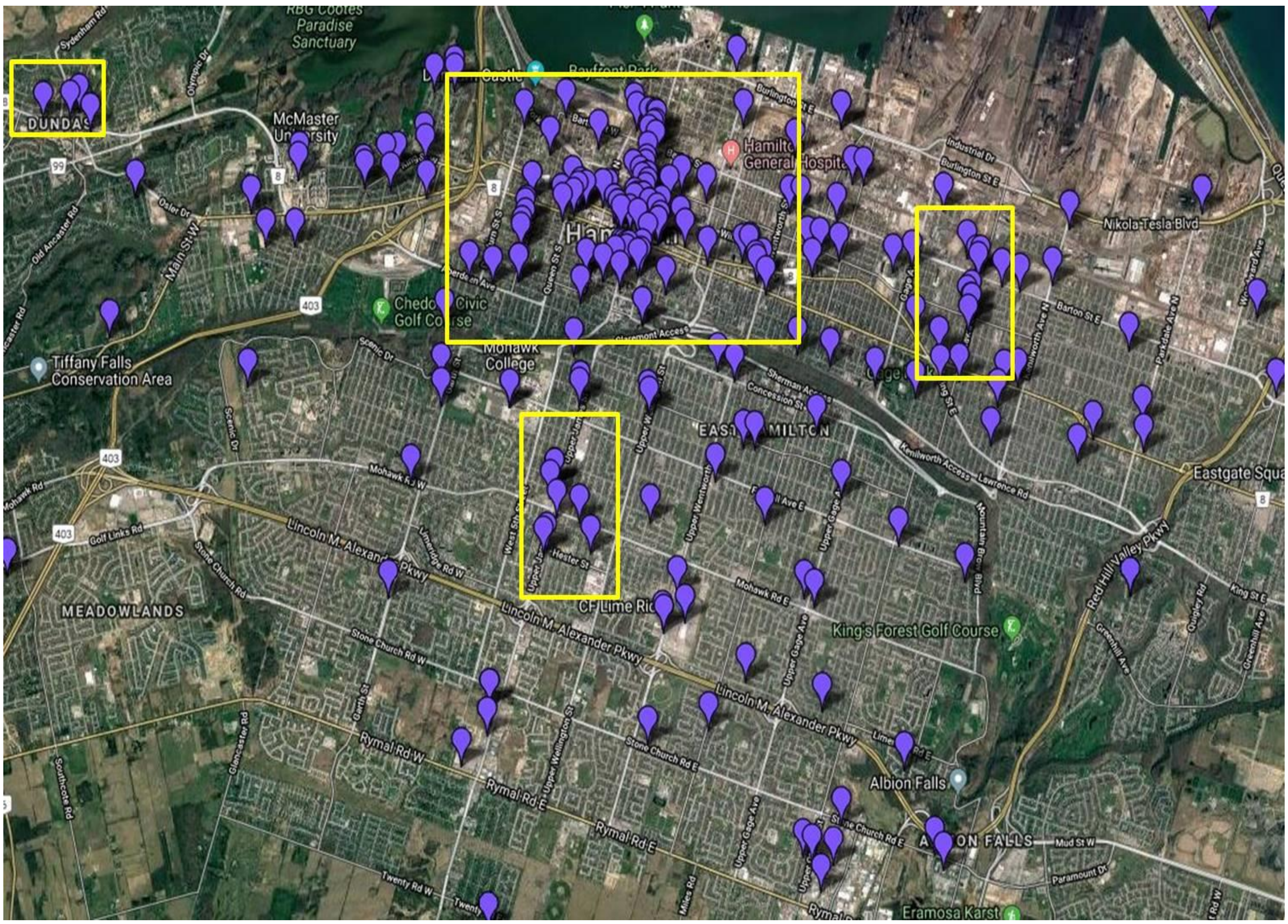


Source: MDB Insight

1.2.4 Music Sector

The creative industries in the Music sector in Hamilton are widely spread across the city. Three distinct clusters are seen in Central Hamilton, Ottawa St and Upper James St. The largest concentrations of creative industries are along James Street, Locke Street, Main Street West, Wentworth Street South, Ottawa Street, and the Westdale and Dundas neighbourhoods. The city is home to 20+ recording studios, many of which have been operational in Hamilton for over ten years. In addition, the city is also home to eight record stores. Business and facilities in this sector include ADS Media, Grant Avenue Studio, Bel Canto Strings Academy, Chamber Music Hamilton and the First Ontario Concert Hall among others.

Figure 5: Creative Industries in the Music Sector

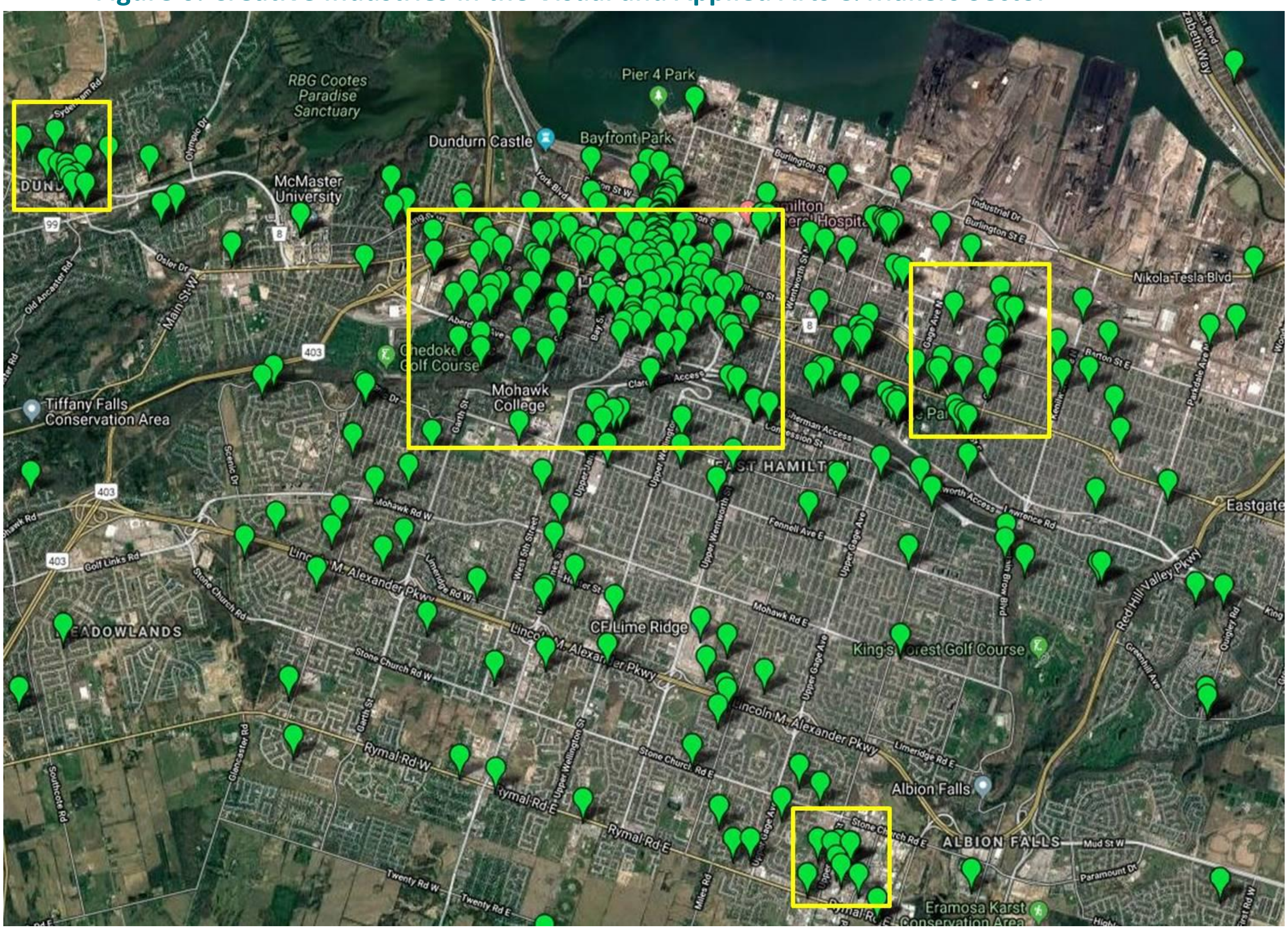


Source: MDB Insight

1.2.5 Visual and Applied Arts & Makers Sector

The Visual and Applied Arts & Makers sector of the creative industries includes the broadest range of businesses. The sector, as defined by the City, includes businesses in architecture, graphic design, visual arts and craft makers, digital animation and photographers among others. This sector has the largest number of businesses among all creative sectors and is centred around downtown Hamilton with James Street as the major conduit. Ottawa Street North also has a cluster which may have synergies with the established fashion cluster. The cluster in downtown Dundas is supported by a long-standing fine craft community with established organizations like Dundas Valley School of Art and Carnegie Gallery at the heart of downtown. A cluster is also seen at Rymal Road E and Upper Ottawa St and includes businesses in design and printing services (support businesses for this sector).

Figure 6: Creative Industries in the Visual and Applied Arts & Makers Sector



Source: MDB Insight

1.2.6 Written & Published Works Sector

Creative industries in the Written & Published Works sector in Hamilton are clustered along James Street, Locke Street and Westdale. These include businesses in publishing, newspapers, bookstores and local libraries. James Street includes large Written & Published Works businesses such as CBC Hamilton, while the Locke Street corridor includes the Hamilton Spectator (off of Frid St).

Figure 7: Creative Industries in Written & Published Works Sector

Source: MDB Insight

City of Hamilton Creative Industries Sector Profile Study

Telephone Survey Findings

June 2018

Background and Methodology

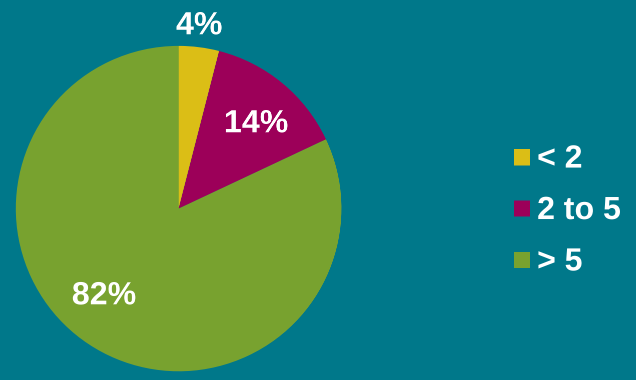
Methodology

- A total of 190 telephone interviews were conducted with business owners identified by Hoover's (a business directory firm) and the City of Hamilton.
- Data was collected in May 2018.
- Results are considered accurate =/- 6.6 per cent, 19 times out of 20.

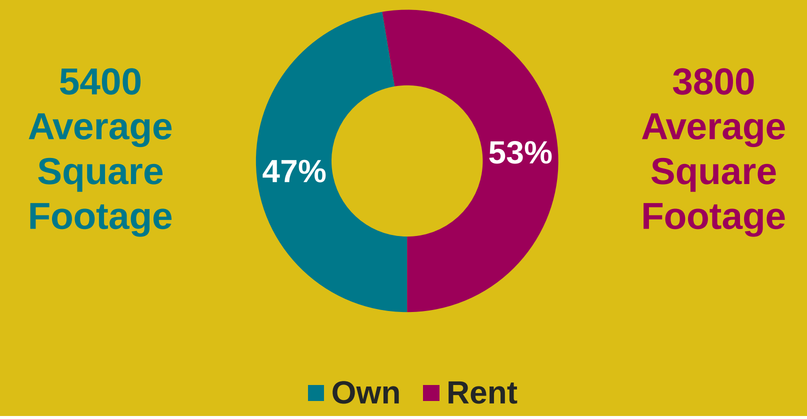
Key Findings

Company Profile

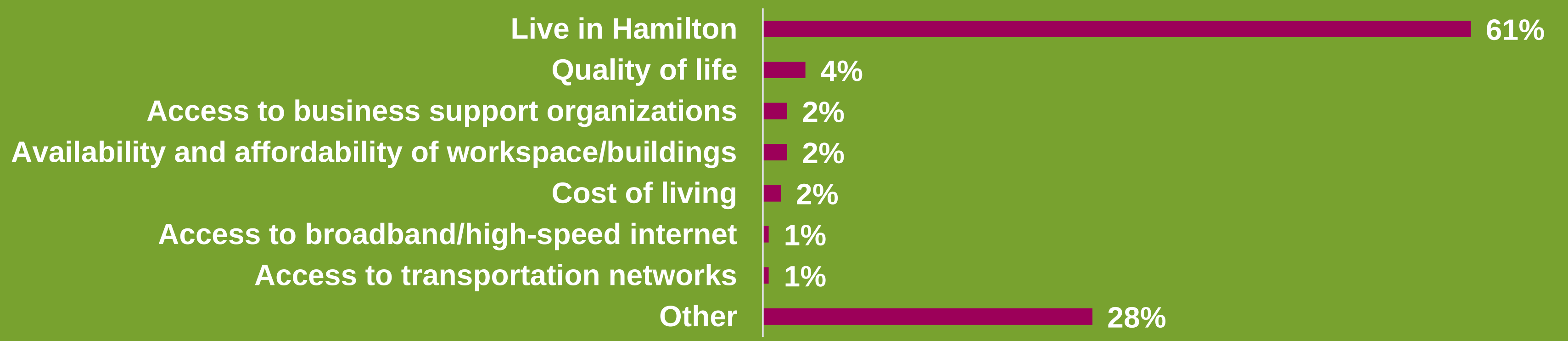
Years Operating in Hamilton



Own or Rent?



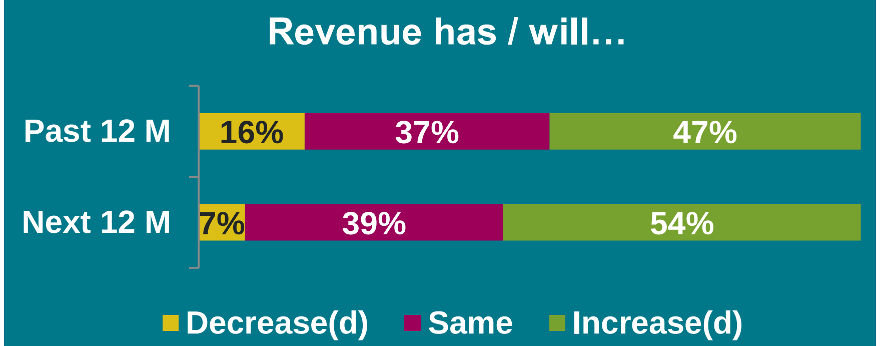
Primary reason for operating in Hamilton

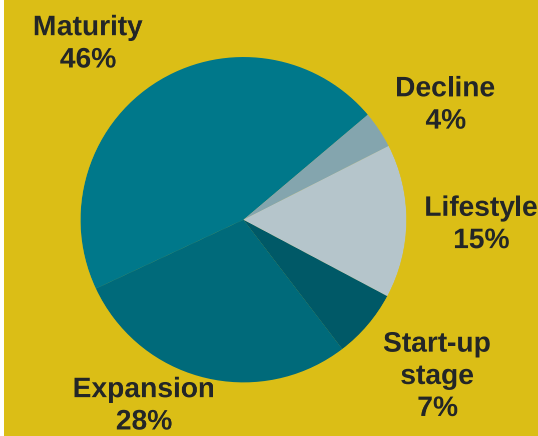


Respondents n=190

Company Profile

Average Revenue = $334K
Average Expense = $327K





Plans over next 3 yrs

Remain Same Size	49%
Expand / Renovate	41%
Downsize	4%
Relocate	4%
Close	3%

Primary Market

64%

Local

12%

GTA

10%

Provincial

7%

National

8%

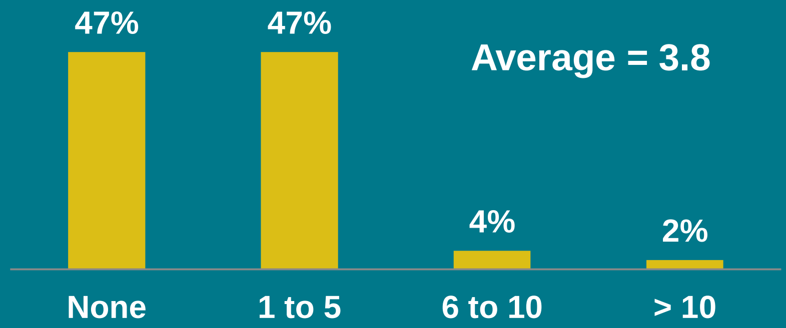
International

Respondents n=190

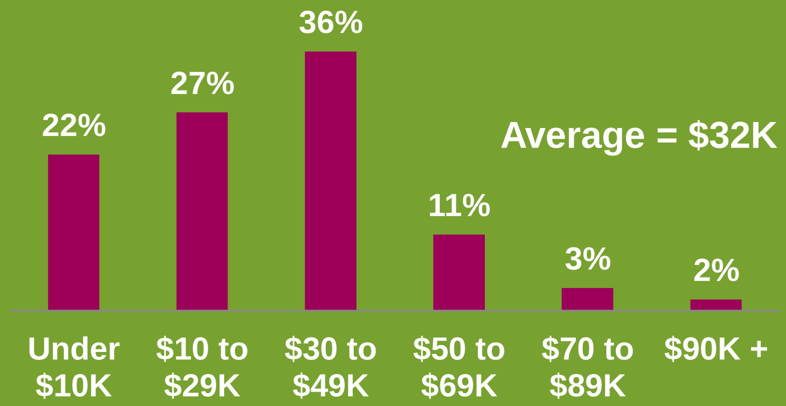
Employee Profile

Number of Employees

of employees plan to hire in the next 3 yrs.



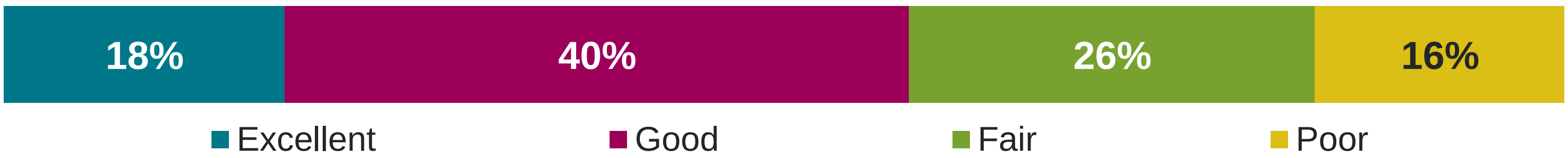
Average Income of employees



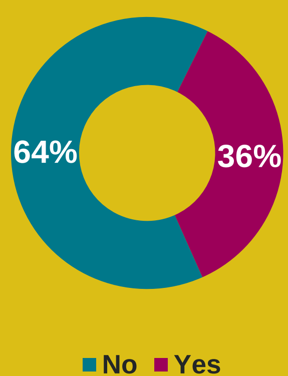
Respondents n=190

Labour Market Assessment

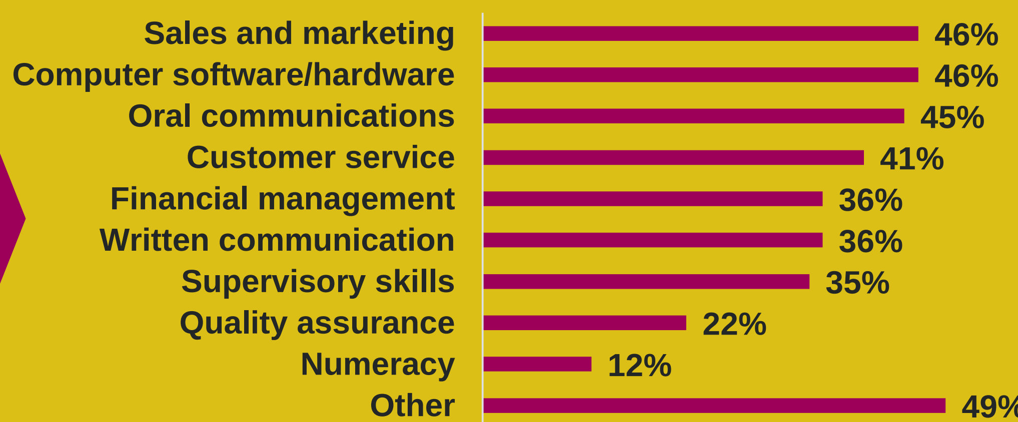
Availability of skilled workers in Hamilton to meet your business needs?



Interest in skills training for employees?

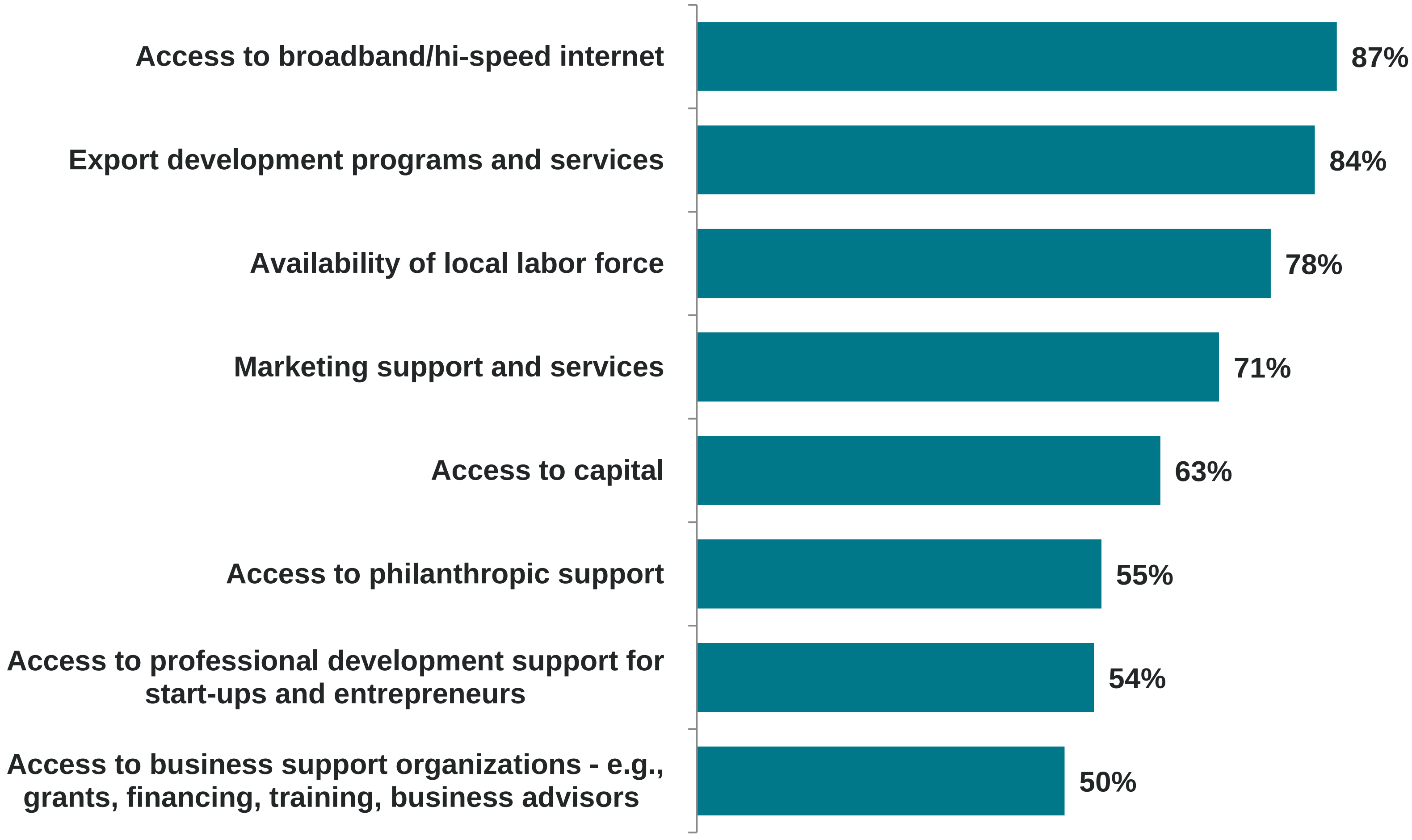


Type of Training



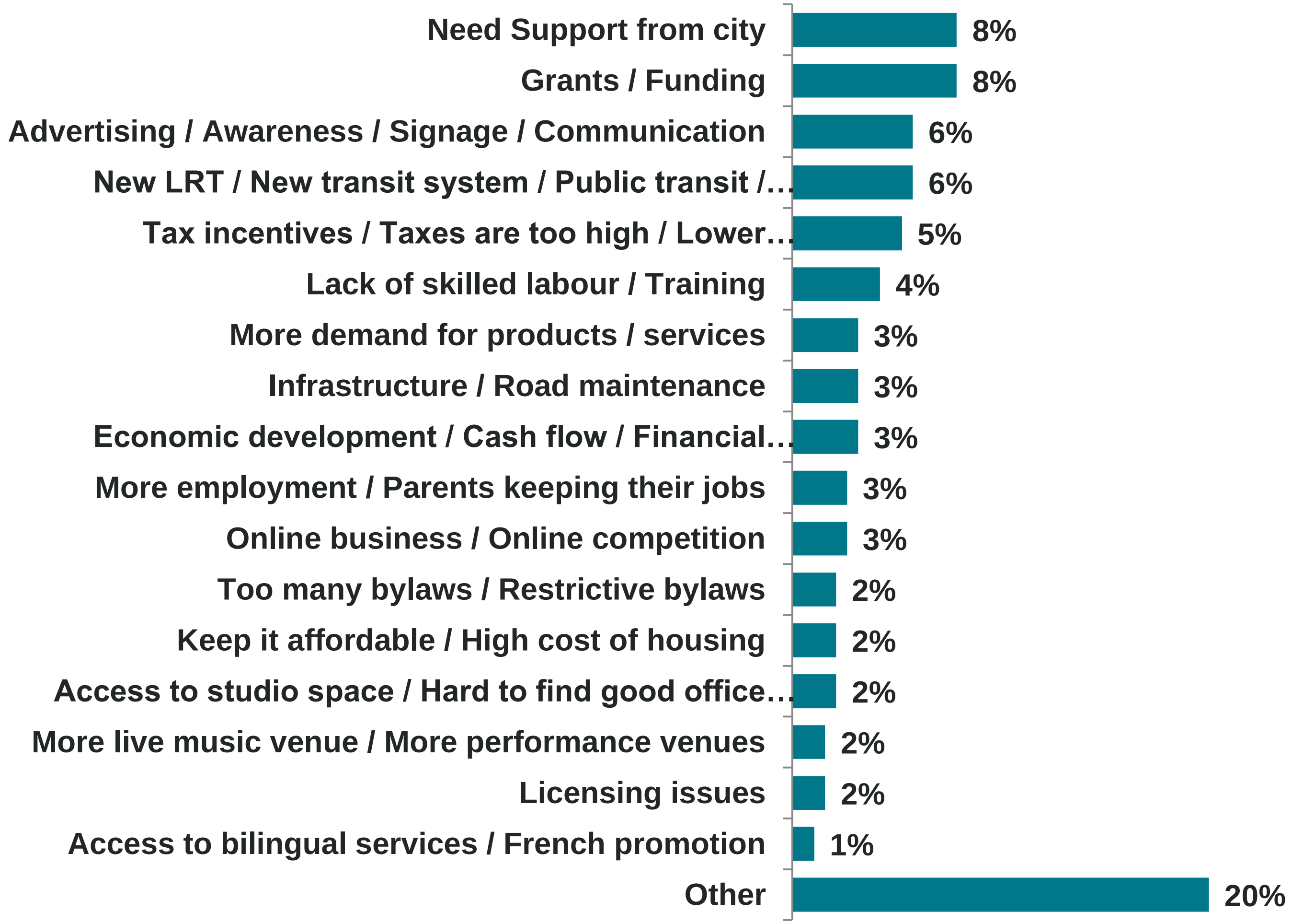
Respondents n=190

Satisfaction with Business Support



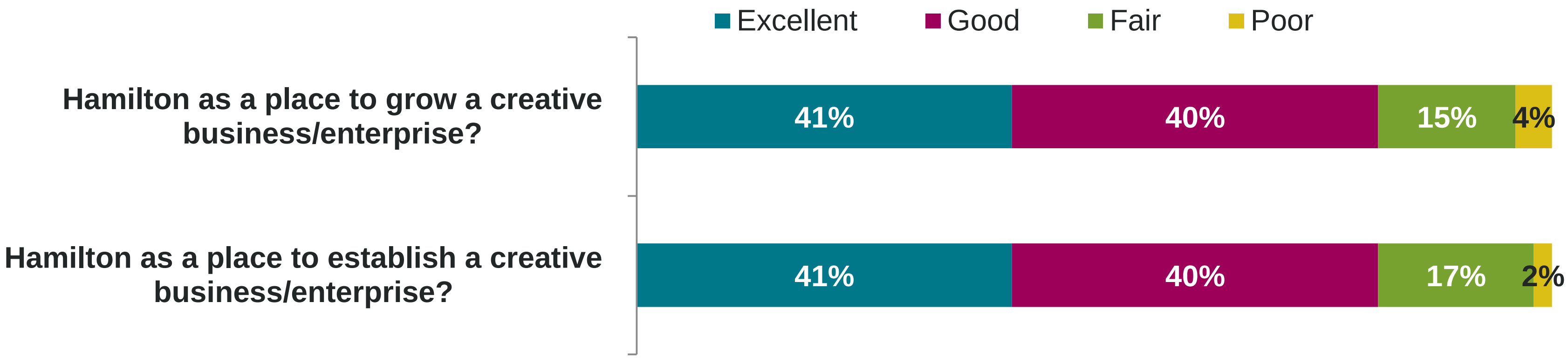
Respondents n=190 (note base sizes vary and excludes don't know)

Other Critical Factors to Business Success

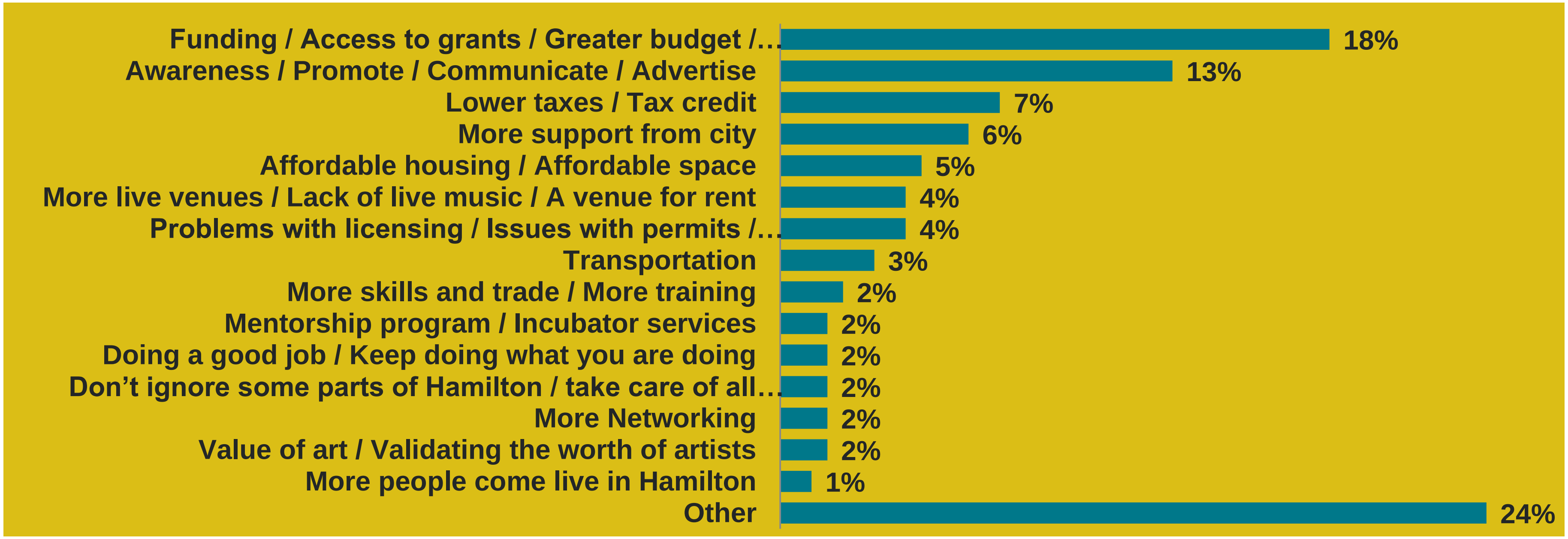


Respondents n=190

Evaluation of Hamilton as a Creative Centre



Most important Initiative to strengthen creative industry in Hamilton



Respondents n=190

Business Telephone Survey Responses

In reporting on survey findings, several questions had an “Other” category of response that included responses outside the clustered responses as captured in bar charts. Responses were tremendously diverse. There has been an attempt to categorize them but these categories are not perfect.

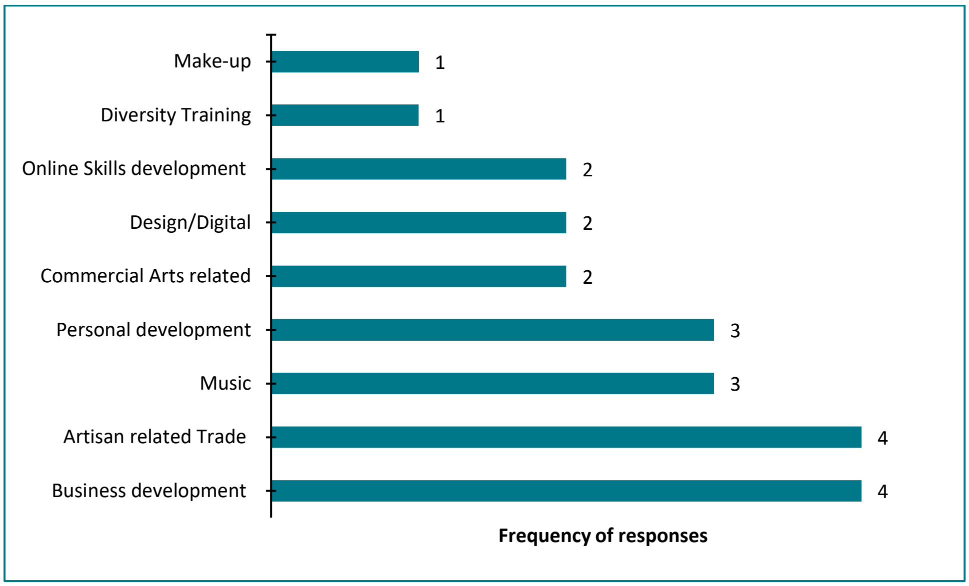
Question 3: Reason for Choosing Hamilton

Q3: Reason for Choosing Hamilton
Hamilton - Favorable location for business
CENTRAL TO MY CUSTOMER BASE. AROUND GOLDEN HORSESHOE AREA.
CONVENIENCE
EPI CENTER OF MY CLIENTS
GROWING AREA
I FELT THAT HAMILTON WAS A GOOD PLACE AND COULD USE MY TYPE OF BUSINESS.
I WAS WORKING IN NIAGARA FALLS AND I WANTED TO MOVE TO A LARGER CENTER AND DID NOT WANT TO GO TO TORONTO.
IT SEEMED LIKE THE RIGHT KIND OF COMMUNITY FOR WHAT I WAS DOING.
LOCATION
LOCATION IS CONVENIENT FOR MY CLIENTS AS WELL AS MY TRIPS, AND AFFORDABLE RENTS.
LOCATION IS EVERYTHING, THE PEOPLE ARE THERE.
LOST THEATRE IN TORONTO DUE TO CONDO DEVELOPER PURCHASING THE BUILDING SO MOVED TO HAMILTON. VERY NICE CITY IN HAMILTON SO WE CHOSE IT.
WE SAW THAT THERE WOULD BE GROWTH IN THAT AREA.
THERE WAS A LACK OF COMPETITION TO MY BUSINESS AT THAT TIME IN HAMILTON.
TO BE BETWEEN TORONTO AND NIAGARA WHERE I HAD BUSINESSES BEFORE.
PROXIMITY TO HIGHWAYS AND USA BORDER (ALOT OF SHIPPING TO THE USA).
THE CURRENT ECONOMIC SURGE AND GROWTH IN HAMILTON.
BECAUSE I HAVE AN OPPORTUNITY.
THE BUILDING WAS AVAILABLE.
Strong Network
THERE ARE A LOT OF MUSICIANS IN HAMILTON AND I THOUGHT IT WOULD BE A GOOD PLACE FOR MY BUSINESS.
MUSIC SCENE, MUSIC COMMUNITY
THERE IS AN EMERGING ARTS SCENE HERE.
Business Succession
I TOOK OVER A BUSINESS THAT I WAS AN EMPLOYEE OF.
I TOOK OVER FROM THE FIRST OWNER AND HE WAS WELL-ESTABLISHED AND WANTED TO CONTINUE ON WITH THE INUIT ART WORK.
I USED TO WORK FOR THE LADY WHO OWNED THE SHOP AND I BOUGHT IT FROM HER 10 YEARS AGO.
Dundas/Waterdown

Q3: Reason for Choosing Hamilton
BORN AND RAISED IN DUNDAS.
DIFFICULT TO ANSWER. WE HAD NO CHOICE. WE WERE FORCED TO BE PART OF HAMILTON. LOCATED IN FLAMBORA.
I LIVE IN WATERDOWN, WHICH IS PART OF HAMILTON-WENTWORTH. WE'RE AMALGAMATED INTO THE CITY OF HAMILTON.
MY BUSINESS IS IN DUNDAS.
Other
HAMILTON NEEDED A PRESENTER FOR INTERNATIONAL CHAMBER MUSIC ENSEMBLE, EVERY CITY HAS THAT.

Question 11 addressing types of skill training businesses identified as priorities could be categorized.

Q11: Other type of Training



Q13: Other Critical Factors to Business Success
Business Info/Access/Support
HOW TO ACCESS THE NICHE MARKET
IF THE GOVERNMENT WOULD INVEST IN SMALL BUSINESS, NOT WAIT FOR AMAZON TO SHOW UP. THEY SAY THEY ARE CREATING JOBS, BUT THEY ARE JUST WAITING FOR BIG COMPANIES LIKE AMAZON. THERE ARE MANY TALENTED PEOPLE WHO DON'T GET A LEG UP.
IF THERE IS NEW DEVELOPMENT IN DUNDAS THEN OUR BUSINESS WILL GROW ALSO.
FOR A SMALL BUSINESS MEDICAL INSURANCE WOULD HELP.
MORE BUSINESS IMPROVEMENT ASSOCIATIONS AND ACCESS TO THEM.
QUALITY OF BUSINESS WOULD HELP

Q13: Other Critical Factors to Business Success
THE MINIMUM WAGE ISSUE WILL HURT MY BUSINESS.
WE BENEFIT FROM THE FACT THAT WE ARE HST EXEMPT. WE BENEFIT FOR THE ABILITY TO RUN OUR BUSINESS FROM OUR HOUSE.
WE'RE NOT A VERY STANDARD BUSINESS; WE ONLY WORK FOR ONE TYPE OF CLIENT. WE SELL AND SERVICE PIPE ORGANS. WE DON'T REALLY MARKET OURSELVES; WE'RE IN THE BUSINESS PAGES.
Job Growth/Support
EXTEND THEIR JOB INTENTION
JOBS FOR CITIZENS WHO LIVE HERE.
OBTAIN MORE WORK
Community Development
DENSITY, NEED MORE PEOPLE DOWNTOWN.
DEVELOPMENT IN AREA UP THE MOUNTAIN
I AM IN A POORER AREA AND I FIND THAT THE CITY DOESN'T CARE ABOUT THE AREA - POTHOLES, NO GARBAGE CANS.
COMMUNITY COLLEGE HAVE NO MONEY FINANCIAL STABILITY OF FAMILIES
Other
HAVE TO BE A CHARITABLE ORGANIZATION TO GET A GRANT
HERITAGE HOLDING
PEOPLE WANTING TO MAKE OLD STUFF NEW.
PRICE POINT NOT THE SAME AS TORONTO
PROVINCIAL GOVERNMENT TO GIVE MONEY TO SCHOOLS NOTHING RECEIVED

Q16: Other important Initiative to strengthen creative industries in Hamilton
Business/Entrepreneurship Support
BETTER EDUCATION OF THE CITY OF HAMILTON'S CLERKS FOR SEAT APPLICATIONS, CITY EMPLOYEES NEED TO BE BETTER EDUCATED FOR PROVIDING PERMITS, THEY DON'T UNDERSTAND THAT THE PERMITS DON'T REFLECT WHAT THE BUSINESS NEEDS IN SOME CASES. THEY MAKE IT TOO DIF
I GUESS THE ADMINISTRATIVE INFRASTRUCTURE AT CITY HALL FOR CREATIVE BASED BUSINESSES ARE ANTIQUATED AND NEEDS TO BE SIGNIFICANTLY UPGRADED IN ORDER FOR CREATIVE BUSINESSES TO STRIVE.
MORE INDEPENDENT ENTREPRENEURSHIP. /P CONVINCING PEOPLE TO INVEST IN THEIR OWN BUSINESSES, RATHER THAN JUST GRANTS AND LOANS.
MY FIELD IS ALL BUSINESS RELATED. SO THERE IS NO SPECIFIC POLICY INITIATIVE THAT WOULD HELP. MAYBE CORPORATE TAXES BEING LOWERED.
PROVIDE BUSINESSMAN THAT GET HELP
STOP THE NOT FOR PROFIT, GOVERNMENT FUNDED, FROM COMPETING AGAINST THE SMALL ARTS BUSINESSES. (COMPETITION FROM ART GALLERIES, ART SCHOOLS COMPETING AGAINST PRIVATELY OWNED BUSINESSES OPERATING IN THE SAME INDUSTRY.)

Q16: Other important Initiative to strengthen creative industries in Hamilton
THE CREATIVE SECTOR IS PRETTY MUCH COVERED IN HAMILTON, BUT BUSINESSES IN THE CREATIVE SECTOR DON'T GET A FAIR SHAKE.
APPRECIATE THE LOCAL BUSINESSES, PEOPLE HAVE A TENDENCY TO GO OUTSIDE THE COMMUNITY TO HAVE WORK DONE.
Support for More Local Programs
COMMUNITY BUILDING.
A SORT OF EVENT AND CONFERENCE THAT BRINGS EVERYBODY TOGETHER FOR THE WEEKEND UNDER ONE ROOF.
GETTING THE BANKS ON BOARD, THEN THIS PUTS THE POLITICIANS IN THAT DIRECTION.
IF THERE WAS PEOPLE HOW DEAL WITH THE STUDY AND CITY WHAT ARE THE RULES PLEASE SHOW THEM
MAKE THE MORE ACCESSIBLE HAMILTON PLACE
MORE AVAILABLE TOURISM ADVERTISING.
PAINTING MORE MURALS
PROBABLY ENHANCE BROADBAND
WORKING TOGETHER AS AN ECO-SYSTEM.
CONSOLIDATED SERVICES
Talent/Resident Attraction
IT REALLY IS ABOUT ATTRACTING TALENT TO BRING THEM HERE.
PERSERVERANCE,THE CITY KEEPS CHANGING AND IMPROVING,WE NEED MORE PEOPLE TO COME AND LIVE IN HAMILTON.
RESOLVE THE BRAIN DRAIN
TRY TO GET MORE PEOPLE WITH MONEY TO LIVE HERE.
TRY TO KEEP PEOPLE TO SHOP IN HAMILTON
Arts Development
90% HAPPEN IN THE LOWER NOTHING HAPPENS THE SOUTH PART MOUNTAIN NONE OF CREATIVE INDUSTRY
ART DISTRICT TO TRUE FORM OF ART NO JUNK
HAVE A CALENDAR OF ART THAT WE CAN SEE
INCREASE MARKETING AVAILABILITY. ARTS, COMMUNITY AS A WHOLE. FOR EXAMPLE IF HE WANTS TO GO SEE A SHOW, MORE MARKETING TO WHAT IS AVAILABLE).
MAKING ANY KIND OF ARTIST PERFORM CITY IS BACK
MORE RESEARCH INTO THE CREATIVE INDUSTRIES MARKET. ECONOMIC IMPACT/RESEARCH. . GRANTING AGENCIES TO SPONSOR PARTNERSHIP TO ATTRACT INVESTMENTS.
OPEN SALES PERMIT FOR ARTISTS TO SELL THEIR WARES ON THE STREET/PUBLIC PARKS.
PROMOTION OF THE CITY GREAT INTEREST IN THE ARTS
RECOGNIZING FASHION AS ONE OF THE ARTS.
HAVE CREATIVE PEOPLE AT THE CITY OF HAMILTON
VISIBILITY CREATING MORE MULTI MEDIA

City of Hamilton Creative Industries Sector Profile Study

Economic Contribution Assessment

July 2018

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1. Creative Industries Sector Economic Contribution Assessment

1.1.1 Background

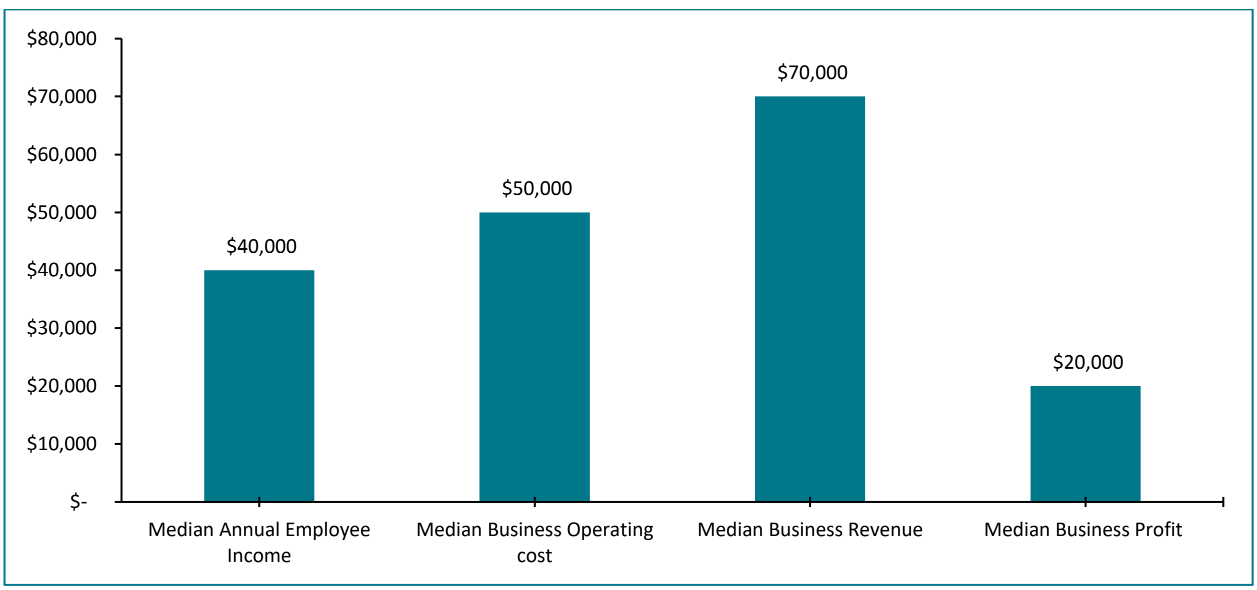
Unlike a typical impact analysis which examines the effect of an event on the economy in a specialized area and measures the changes in business revenue, business profits, personal wages and jobs, this analysis will look at the overall contribution of the creative industries sector to Hamilton's economy. Specifically, the number of employees and their wage, total operating costs of the creative industries sector, and revenues and profits. It has been referred to as an economic contribution as it is not an official economic impact analysis.

This economic contribution analysis was calculated using median numbers that were obtained through a business survey of 190 creative industry businesses in Hamilton. Businesses were asked several questions regarding the number of full-time and part-time employees, income of employees, the business' operating cost, and total revenue. These self-reported numbers were used in combination with Statistics Canada information regarding the total number of businesses in the creative industries sector in Hamilton, and the number of employees employed in the sector. This analysis gives an estimate of the economic contribution of the creative industries in Hamilton. It is important to note that these numbers are used from a median of self-reported numbers given in a telephone survey, are not exact, and are intended only for approximation purposes.

1.1.2 Analysis and Methodology

The figure below demonstrates the several attributed reported as a median for a business in the creative Industries sector as obtained through the business telephone survey.

Figure 1: Median Individual Business Results, 2017 (Based on Telephone Survey Results)



Source: CATI Survey, MDB Insight, 2017

Based on the information obtained through the survey, and the knowledge of total businesses in the creative industries sector, it is possible to extrapolate the economic contribution of the sector to the economy as a whole.

In 2017, there were total of 2,448 creative industries sector businesses in Hamilton[1]. Of the 2,488 creative industries sector businesses, 971 businesses were core creative, 305 businesses were core support, and 1,212 businesses were support activities in creative industries sector.

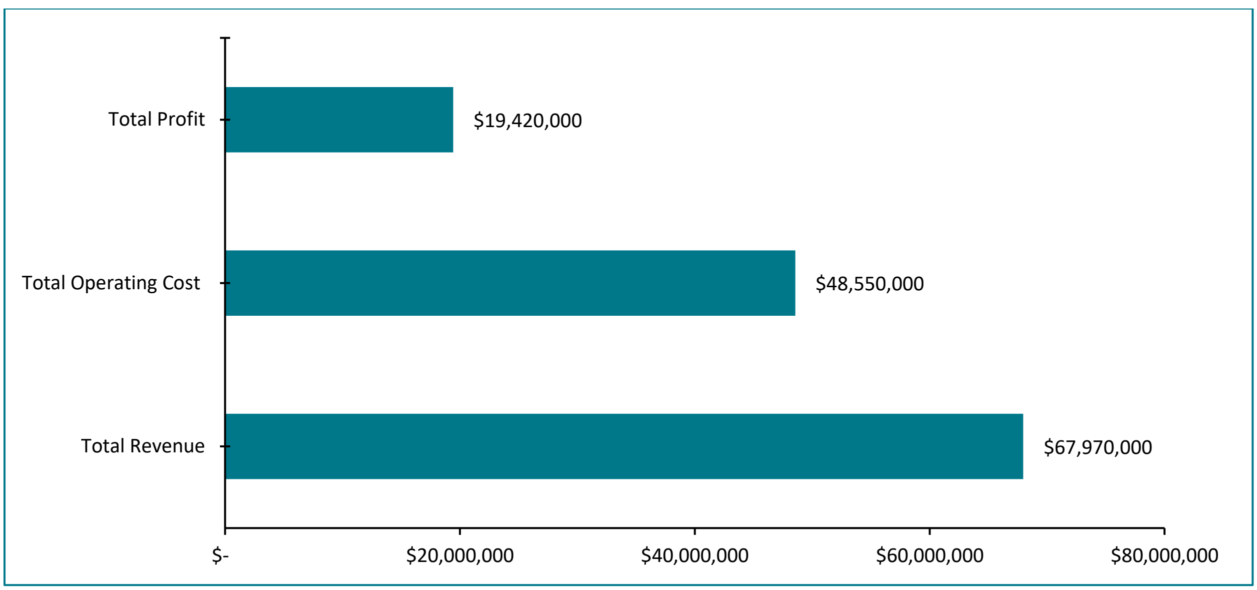
The median revenue was determined by multiplying the number of businesses in the core creative and core support functions with the median business revenue identified by the survey. The operating costs was determined by multiplying the number of businesses in the core creative and core support functions with the median business operating cost identified by the survey. The calculation does not account for the support activities in the creative industries sector as the economic contributions of these businesses would also reflect the rest of the economy. Based on the estimation, the median revenue and operating cost by business function are:

- Median revenue of the core creative industries sector was $67,970,000
- Operating cost of the core creative industries sector was $48,550,000
- Median revenue of the core support industries sector was $21,350,000
- Operating cost of the core support industries sector was $15,250,000

To determine the total profits made by the creative industries sector, the operating costs were subtracted from the median revenues. The outcomes of this process are:

- The total profit made by the core creative industries sector was $19,420,000
- The total profit made by the core support creative industries sector was $6,100,000

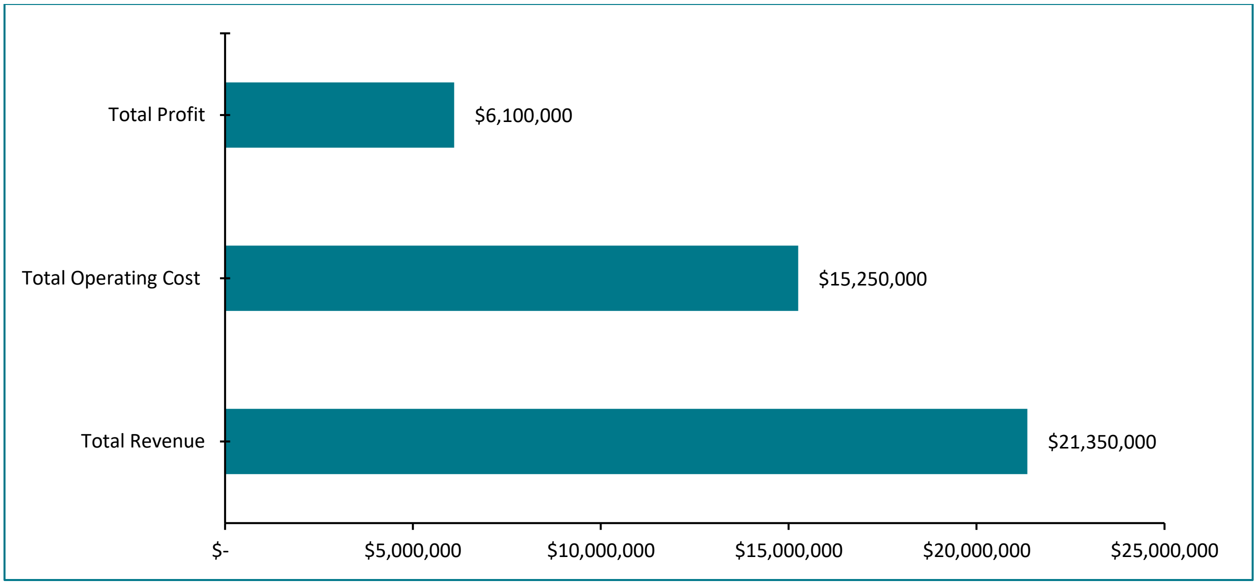
Figure 2: Economic Contributions of the Core Creative Industries Sector, 2017



Source: Statistics Canada, Census of Canada, 2016 and CATI Survey, MDB Insight, 2017

[1] Canadian Business Counts, 2017

Figure 3: Economic Contributions of the Core Support Creative Industries Sector, 2017



Source: Statistics Canada, Census of Canada, 2016 and CATI Survey, MDB Insight, 2017

As illustrated in Figure 2 and Figure 3, the core creative industries sector accounted for a total of $67,970,000 made in revenues across the creative industries sector, $48,550,000 spent in operating costs, and $19,420,000 made in profits. The core support creative industries sector accounted for a total of $21,350,000 made in revenues across the creative industries sector, $15,250,000 spent in operating costs, and $6,100,000 made in profits.

In 2016, Hamilton accounted for 29,790 creative industries sector employment. Figure 4 shows the employment in the creative industries sector by both function and class of employee. Employment in the creative industries sector was multiplied by the median annual income to obtain the total amount of wages paid to individuals in creative industries sector. Although indicated in Figure 4, the calculation does not account for the support activities in the creative industries sector as the economic contributions of these industry employments would also reflect the rest of the economy.

The following observations can be made in determining the total wages paid to core creative and core support industries sectors:

- There were approximately 8,000 employees in core creative industries sector. As indicated in Figure 1, approximately $40,000 was the median annual employee income. Thus, for 8,000 employees, the total amount of wages paid was $320,000,000 (8,000 employees * $40,000)
- There were approximately 2,830 self-employed in core creative industries sector employment. As indicated in Figure 1, approximately $40,000 was the median annual employee income. Thus, for 2,830 self-employed, the total amount of wages paid was $113,200,000 (2,830 self- employed * $40,000)
- There were approximately 7,380 employees in core support creative industries sector employment. As indicated in Figure 1, approximately $40,000 was the median annual employee income. Thus, for 7,380 employees, the total amount of wages paid was $295,200,000 (7,380 employees * $40,000)
- There were approximately 1,555 self-employed in core support creative industries sector employment. As indicated in Figure 1, approximately $40,000 was the median annual employee

income. Thus, for 1,555 self- employed, the total amount of wages paid was $320,000,000 (1,555 self- employed * $40,000)

Figure 4: Total Wages paid to Creative Industries Sector Employment by Function

Creative Industries Sector Employment by Function	Employment Type		Median Annual Income	Wages	
	Employee	Self-employed		Employee	Self-employed
Core Creative	8,000	2,830	$40,000	$320,000,000	$113,200,000
Core Support	7,380	1,555	$40,000	$295,200,000	$62,200,000
Support Activities	9,130	945	$40,000	$365,200,000	$37,800,000

Source: Statistics Canada, Census of Canada, 2016 and CATI Survey, MDB Insight, 2017

In 2016, Hamilton accounted for 271,990 employees by all industry categories. Of these, approximately 243,900 were employees and 28,090 were self-employed. Applying the calculations described above to all industry employment, the total wages paid to employees in all industry categories was $9,756,000,000 (243,900 employees * $40,000). Similarly, the total wages paid to those self-employed in all industry categories was $1,123,600,000 (28,090 self-employed * $40,000).

On extrapolating the total wages paid to creative industries sector as a factor of total wages paid to all industry employment in Hamilton, the following estimations can be made.

- The total wages paid to employees in the core creative industries sector accounts for 3% of wages paid to total industry employment ($320,000,000/$9,756,000,000)
- The total wages paid to those self-employed in the core creative industries sector accounts for 10% of wages paid to total industry employment ($113,200,000/$1,123,600,000)
- The total wages paid to employees in the core support creative industries sector accounts for 3% of wages paid to total industry employment ($295,200,000/$9,756,000,000)
- The total wages paid to employees in the core creative industries sector accounts for 6% of wages paid to total industry employment ($62,200,000/$1,123,600,000)

Figure 5: % of Wages paid to the Creative Industries Sector as a factor of Wages in total Industry Employment

Creative Industries Sector Employment by Function	% of Wages paid to the Creative Industries Sector as a factor of Wages in total Industry Employment	
	Employee	Self-employed
Core Creative	3%	10%
Core Support	3%	6%
Support Activities	4%	3%

Source: Statistics Canada, Census of Canada, 2016 and CATI Survey, MDB Insight, 2017

There is discrepancy between the total operating costs of the industries and the amount paid in wages, where the amount paid in wages exceeds the operating costs. The reason for this is that there are a disproportionate number of employees in the creative industries than there are businesses. Individuals who perform creative employment within companies are not necessarily employed by a business that is classified as a creative industry therefore this business would not be captured in the total business count of creative industries in Hamilton. An example would be a graphic designer working in auto manufacturing.

One can assume that the proportion of the amount that has been paid out in wages will be injected into the economy through local spending. One must also consider the percentage of the sector that employs a local workforce to have a better assessment of the percentage of wages that will be circulated back into the local economy. One can also assume that a percentage of the businesses operating costs are being spent through local spending. The higher the percentage of the needs that can be met locally for local businesses, the greater the percentage of spending from businesses in the community. It is also important to note the contribution the sector has made in employing local workforce; if these businesses did not exist individuals would likely seek employment outside the city causing further drainage to the economy.

1.1.3 Rationale

The median number was used as the basis for measurement as it best reflected the survey results. When looking at the survey responses, 74% of respondents indicated having 3 or less full-time staff, with 56% reporting themselves as being the only staff member. Therefore, the median number of full-time staff was reported at 1. By contrast, if the average was used, the average number of full-time staff is nearly 8. Evidently, the few businesses that have a large number of employees are skewing the average to be significantly higher than the norm. To compensate for this and give a more accurate depiction of results, the median has been used. Similar inconsistencies with using an average were encountered with the results of part-time staff, operating costs, revenues, and wages, and as such, the median has been implemented across all factors.

1.1.4 Other Economic Contributions of the Creative Industries Sector

When looking to determine the impact that the creative industries have on Hamilton's economy, there are several factors that can be considered. The most obvious of these factors is the monetary contribution. The amount paid in wages, the operating costs, revenues, and profits can be considered to determine an initial overall monetary impact.

Other factors such as quality of life must also be considered. Creative industries often carry a higher correlation to improved quality of life. There are also several spin-off effects associated with improved quality of life that help to advance the overall economy. Economic impact studies have proven that there is a strong link between the creative industries in a community and that community's economic development, job recruitment and tourism.[2]

Arts and culture also play an important role in attracting new business to a community. When companies are choosing where to locate, cultural assets and amenities can be very important in the decision-making process.[3] Corporations need to retain their employees, and quality of life, which includes the arts and culture opportunities and experiences, is a critical piece to this.[4]

The arts and culture are ranked in the top five drivers attracting people to communities, above jobs, the economy, and safety. Individuals consistently give a higher rating to elements that relate directly to daily quality of life.[5] Arts and culture can stimulate the economy and can play a major role in community development and redevelopment by creating new jobs as well as fostering an environment and amenities that attract talented young workers.[6]

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[2] "The arts and culture affect community's quality of life." 2013. Charles Matthews, Express-News.

[3] Ibid.

[4] Ibid.

[5] Ibid.

[6] Ibid.

The arts and creative industries are important for workforce development, workforce retention, revitalization and economic development and as such produce direct benefits from investment and growth.

MDB INSIGHT

City of Hamilton Creative Industries Sector Profile Study

SWOC Analysis and Gap Assessment

August 2018

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Introduction

The City of Hamilton undertook the Creative Industries Sector Profile Study to establish a clear and accurate description of the city's creative industries sector. In doing so, key gaps and opportunities, objectives, on-going measurements, and potential actions were identified to assist the City of Hamilton and its creative industry businesses and entrepreneurs to grow and support the creative industries.

As a sector profile study, the aim was not to build out a detailed creative industry strategy but rather to undertake the research and consultation that could establish the foundation from which to identify areas for more in-depth research and provide the city with a strategic lens to help make decisions moving forward with this sector.

Six sub-sectors were identified as the focus of the study:

- Live Performance
- Visual and Applied Arts & Makers
- Fashion
- Written and Published Works
- Film
- Music

The Study addressed cross-sectoral as well as sub-sector analysis and consultation.

This SWOC (Strengths/Weaknesses/Opportunities/Constraints) analysis draws together findings from a variety of sources including:

- *Review of the City of Hamilton's Existing planning documents & policies* – City plans and strategies relevant to sector development
- *Creative Industries Overview and Baseline Analysis* - a statistical analysis of the sector and sub-sectors
- *Benchmarking* – comparing Hamilton's creative industries sector against 10 comparator Canadian cities
- *Business Telephone Survey* – 190 responses to a survey of creative industry businesses and organizations
- *Stakeholder Interviews* – interviews with approximately 15 stakeholders in the sector as well as senior City of Hamilton staff
- *Three Consultation Workshops* - with stakeholders drawn from the Film, Music and Fashion sub-sectors
- *Economic Contribution Analysis* – establishing the monetary contributions of the sector to the city

Gaining an understanding of this or any other sector requires a review and consultation with the industry of its strengths, weaknesses, opportunities and constraints. Even though the collection of all four elements are essential for the development of a sector profile, identifying areas of continuous improvement or the gaps and opportunities is most important in maintaining and growing the sector.

Creative Ecosystems and Their Requirements

A useful frame of reference which offers one perspective on gaps in Hamilton's creative industries sector is that of *creative ecosystems*[1]. Creative ecosystems are a well-established set of ideas that evolved with input from researchers, policy makers and creative industries and wider cultural sector thought leaders. The idea evolved to understand the dynamics and conditions for sector health and resilience. Health and resilience are used deliberately rather than growth. While growth can be one element of sector health and resilience, it can disguise the dynamics of a sector in which many small enterprises have found a size and equilibrium that does not aspire to growth and expansion.

Creative ecosystems consist of interlinked creative cultural resources (e.g., facilities, spaces, festivals, makers, artists, designers, arts and heritage organizations, digital enterprises), human resources, policymakers, entrepreneurs, intermediaries and knowledge transfer channels, and also creative venues, workspaces and platforms either physical or digital.[2] Some operating principles of creative ecosystems include the following.

- Interaction and interdependency is essential in the creative ecosystem as often a cultural product, service or experience is the result of collaboration across a variety of creative individuals and skills and also across public, private and philanthropic funding.
- The interconnections and interdependencies make *knowledge and knowledge flow* the underlying dynamic and requirement of a creative ecosystem. Knowledge flow connects individuals across cultural disciplines, across public, private and non-profit sectors, from community-based to professional forms of creative expression and participation, among others.
- Physical interactions are a key factor for knowledge flow among creative individuals, more than other professionals. That is why the interconnections that occur in creative hubs – in urban centres and neighbourhoods are essential infrastructure for creative ecosystems.
- Bottom-up initiatives, initiated by individuals in the system, are needed to strengthen interconnection and networking, sometimes by organizing working groups to act more effectively and to react in the process of change.
- Attracting flagship creative investments as economic generators (catalysts) is an essential element of a creative ecosystem. This is often a single event or a specific flagship institutional investment which is seen as a major catalyst for urban development.

[1] Paraskevi Tarani, *Emergent Creative Ecosystems: Key Elements for Urban Renewal Strategies*
University of Thessaloniki, Department of Spatial Planning and Development.
[2] Ibid.

SWOC Analysis

Strengths

Location, Location, Location

The Greater Golden Horseshoe (GGH) extending west from Toronto through Hamilton to the region of Niagara is one of the fastest-growing regions in North America. It is projected that the GGH population is expected to grow from 3.7 million in 2001 to 11.5 million by 2031, accounting for over 80% of Ontario's population growth. The City of Hamilton is located at the western end of Ontario's Golden Horseshoe, in the centre of Canada's most densely populated corridor of economic activity[3].

Hamilton is strategically located and can reach 150 million people in major markets in Toronto, Montreal, New York, Boston, Philadelphia, Columbus, Dayton, Chicago, and Detroit. Additionally, Hamilton is located in close proximity to the GTA as a nucleus of economy activity in Southern Ontario, strengthening its presence as part of a regional economy[4].

The strategic location of the city with its proximity to Toronto was raised as a major attractor for the creative industries in Hamilton through the business survey, workshops and interviews. The City's location is also a magnet for people living in the city. These residents, in turn, launch and maintain creative industries. The business survey revealed that one of the top reasons for starting a business in Hamilton was because the business owner chose to live here.

Size

The city was described by sector stakeholders as being "big enough and small enough." It is big enough to have a critical mass of people and creative industries, but small enough to build and sustain relationships and get things done. The size of the city also contributes to the business community's ability to collaborate with one another. The geographic size and make-up of the city enhance accessibility for businesses while also taking advantage of the unique characteristics of neighbourhoods and business improvement areas as seen in some of the clustering and trends found in the asset mapping. The number of businesses across the sector and within the sub-sectors is also generally viewed as an advantage as many businesses are interested in being part of this stage of development within their sub-sectors to either maintain their growth or help stimulate further expansion within their own business or sub-sectors as a whole. (i.e. film and fashion sub-sectors have strong growth potential)

Housing Costs

Since 2010, home prices across the GTA west have increased between $270,000 - $400,000. The Hamilton-Burlington area had a housing price increase of approximately $272,100. However, comparatively, Hamilton-Burlington is still considered an affordable alternative to all other GTA west communities. On average, Hamilton-Burlington home prices in 2018 average

[3] Deloitte (2014). City of Hamilton: The Current and Future State of Hamilton's Advanced Manufacturing Sector, pg. 41

[4] Ibid.

about $186,000-$370,000 less than its competitors. In 2010, that range was $125,000-$250,000, indicating that despite the increase in housing prices across the GTA West, Hamilton-Burlington's increases in prices are still the most affordable community for artists and by a significant margin (approximately 40% cheaper than Greater Toronto and 25% cheaper than Oakville-Milton area).

Rental Rates

Similar to housing prices, residential rental rates across the GTA west from 2010 have increased between 18-23% (On average $221-316 increase). Hamilton had a monthly rental increase of approximately $221. However, comparatively, Hamilton is still considered an affordable alternative to all other GTA west communities. On average, Hamilton rents in 2017 average about $260-$378 less than its competitors. In 2010, that range was $234-$283, indicating that despite the same increase in rental rates across the GTA West, Hamilton's increases in rental prices are still the most affordable community for artists and by a significant margin (approximately 20-27% cheaper).

Strong and Consistent Growth: Hamilton as a Place to do Business for Creative Industries

In 2016, the creative industries sector employment in Hamilton accounted for 29,790 persons (11% of the total employment by industry). This proportion of creative industries employment in Hamilton is comparable to provincial and national rates at 13% (913,435 persons) and 12% (2,258,765 persons), respectively. The creative industries employment grew by 4,200 people from 2011 to 2016 (16% growth). The rate of growth is higher compared to provincial and national rates at 12% (100,950 persons) and 10% (210,635 persons), respectively. Additionally, the creative industries employment growth at 16% is comparably higher to the employment growth in the rest of industries in Hamilton at 11% (24,710 persons).

The creative industry occupations accounted for 5% (15,540 occupations) of total occupations in Hamilton and are comparable to provincial and national rates at 5% (328,440 occupations) and 4% (766,225 occupations), respectively. Creative occupations also saw growth of 13% (1,805 occupations) from 2011 to 2016 compared to provincial and national growth rates at 7% (22,145 occupations) and 8% (56,540 occupations), respectively.

In addition to creative industries employment and creative occupations, Hamilton is also seen to be a hub for creative businesses. As per the Canadian Business Counts, approximately 2,488 businesses (6% of total businesses) can be attributed to the creative sector in Hamilton. This compares to 6.5% (86,855 creative businesses) in Ontario and 6% (212,578 creative businesses) in Canada. Creative industry businesses in Hamilton saw 13% growth (283 businesses) from 2014 to 2017 compared to business growth of 5% (3,972 businesses) in Ontario and 4% (7,770 businesses) in Canada for the same period[5].

[5] It should be noted that the Canadian Business Counts data are best studied for each individual year rather than a change in business growth over time. Canadian Business Counts (previously called Canadian Business Patterns) provide the number of active businesses by industry classification and employment-size categories for Canada and the provinces and territories. Changes to the Canadian Business Counts methodology or business industrial classification strategies can bring about increases or decreases in the number of active businesses reported in the Canadian Business Counts. As a result, the data do not

The telephone survey also indicates that there is a stable base of 82% of creative enterprises existing in the city for over 5 years, with a healthy 18% established in the city in the past 5 years.

- There were relatively strong levels of satisfaction with available business support in the city
  - The highest scores were allotted to the quality of access to broadband, support in export development, access to the local labour force, and marketing support and services
- Hamilton is viewed as an excellent or good place to both establish and grow a business by 81% of respondents
- The combined percentage of skilled labour that was deemed either excellent or good is 58% compared to 42% judged either fair or poor

Established Cultural Institutions

A range of established institutions can be identified that play important roles in support of the creative industries and the wider cultural life of the community. These institutions include the Art Gallery of Hamilton, First Ontario Concert Hall, Theatre Aquarius, Cotton Factory, and Hamilton Arts Council, among many others.

Supportive City Infrastructure & Capacity Building

The City's policies and strategies aimed at developing support and infrastructure for creative industries have played an important role in the growth of the overall creative industries as well as the creative industry sub-sectors. Key initiatives include: the development and implementation of the City of Hamilton Cultural Plan; the Hamilton Music Strategy and facilitation support for the Hamilton Music Advisory Team (an advisory team of local music industry representatives that help guide the Music Strategy); focus and support of downtown(s) and Business Improvement Districts; the 2016-2020 Economic Development Action Plan recognition of the Creative Industry Sector; the long-standing relationship that the City's Film Office has built with the film industry; and the City Enrichment Fund (CEF).

City Enrichment Fund - While directed toward not-for-profit arts and heritage organizations, the City Enrichment Fund is supporting the overall creative and cultural ecology in the city necessary to growing the creative industries. Grants are available under the categories of Arts and Communities, Culture and Heritage. Funds include support for organizational capacity building, events and festivals, new projects. Funds are available to individual artists and provide operating funds for established arts organizations, among other categories.

Revitalized Downtown

The arts and creative industries have been major drivers in the revitalizations of the city's historic downtown. A major catalyst and an event that has, to a remarkable extent, helped rebrand Hamilton as a creative city is Supercrawl, an "art and indie" festival launched in 2009 out of a desire to expand on the promise of James Street North's potential. Today the event has

accurately represent changes in the business population over time. Statistics Canada recommends that users not use the data in time series analysis.

a spatial footprint of 17 city blocks. Over the past five years, the City has also been able to attract major national and provincial cultural events such as the JUNO Awards and the Canadian Country Music Awards.

The City of Hamilton has made major contributions to downtown revitalization through planning and economic development investments and initiatives, including zoning changes. Working with partner agencies including the Downtown BIA and Chamber of Commerce (both of whom have embraced creative industries and arts and heritage assets as significant elements of their mandates) initiatives have been undertaken to encourage reuse and repurposing of buildings for creative facilities, provision of site location assistance, support for festivals and street animation, and leverage cultural asset data to inform creative city-building.

Supportive Post-Secondary Institutions

The presence of supportive post-secondary institutions in McMaster University and Mohawk College are integral parts of the creative ecology in the city. These post-secondary institutions have specific programs and initiatives supporting the creative industries:

- Launched in 2014, The Forge is a start-up incubator and McMaster University's entrepreneurship initiative. Its incubator program is designed for anyone pursuing scalable, technology-based companies.
- McMaster University is also home to LIVE (Large Interactive Virtual Environment) Lab, a 106-seat Research Performance Hall designed to investigate the *experience of music, dance, multimedia presentations, and human interaction*. The performance space is used for professional purposes as well as research.
- At Mohawk College, the Continuing Education for Media and Creative Arts program is intended to support existing professionals to boost their skills in a variety of sectors. Also, there is the SURGE (Entrepreneurship) initiative that provides mentors for students and alumnae.

Both post-secondary institutions provide young adults in Hamilton with potential points of entry to the creative industries. Building the sector's capacity to retain youth in the city upon graduation must be a priority in Hamilton as it is in any city seeking to grow the creative industries and building a strong creative workforce.

Tax Incentives for Film Productions

The Government of Canada offers a range of tax incentives across several sub-sectors, with particular strength in film, television and interactive digital media as an acknowledged growth sector. These incentives are enhanced in Ontario by the Ontario Media Development Corporation (OMDC) and Film Fund and Ontario Film and Television Tax Credit (OFTTC). Under the OFTTC, a Regional Bonus exists for television production outside the GTA. The regional bonus is a great benefit. It translated into an additional 10 %of eligible labour expenditures for a total of 45 percent of labour expenditures (minimum of five location days in Ontario, 85 percent of which must be outside of the Greater Toronto Area).

Participants in the film consultation workshop pointed to the crucial importance of the regional bonus in supporting production in Hamilton. They attributed the growing trend of soleproprietorship and incorporated businesses to the tax credits.

Quality of Life and Cost of Living

The City of Hamilton is widely appreciated in offering a high quality of life and quality of place in a community that offers a reasonable (although rising) cost of living and cost of doing business. Costs of living and doing business in Hamilton, of course, compare favourably with neighbouring Toronto. Improvements to public transit were identified during consultation workshops as essential to sectoral growth and development. The presence and stability of creative industry businesses and organizations lend itself to establishing a healthy quality of life.

The authenticity of the city has also contributed to its success – often this comes down to the people, and the types of businesses found here and how they choose (for the most part) to proactively collaborate with one another. Many have indicated through various forms of feedback the desire to collaborate and increase their integration across the entire sector.

Certainly, Hamilton's wide variety of landscapes and built environment attract people to live here with its mix of historic and contemporary settings. The city offers a safe urban environment with access to strong social infrastructure in education, healthcare, the arts and culture, and recreation.

One element that makes up a city's quality of life is its festivals and events; led by those businesses and organizations in this sector. Hamilton offers a wide range of events from music festivals and lives music events (70+ live music events every month), Hamilton Film Festival, Fringe Festival, Dundas International Buskerfest, Arts Fest Waterdown, Winona Peach Festival, Ancaster and Binbrook Fairs, Grit Lit among many more.

Acknowledging all of the above, it is noteworthy that the telephone business survey revealed that only 4% of businesses interviewed identified quality of life as a reason for locating a business in Hamilton. However, 61% noted that the top reason they opened a business here is because they live here. Similarly, only 2% identified the cost of living as a factor. These findings are offset by 81% of businesses indicating that Hamilton was an excellent or good place to establish and to grow a business.

Economic Contribution of the Creative Industries Sector

NOTE: The calculation of the economic contribution of the creative industries sector used information gathered from businesses through the telephone survey in combination with Statistics Canada information regarding the total number of businesses in the creative industries sector in Hamilton, and the number of employees employed in the sector. It is important to note that these numbers are used from a median of self-reported numbers given in a telephone survey, are not exact, and are intended only for approximation purposes.[6]

Analysing Statistics Canada data by Industry NAICS, Hamilton accounted for 29,790 creative workers in 2016. The median employment income of creative workers was $36,657 compared to $38,953 for workers in all occupations. Although the median employment income of creative workers in Hamilton is lower than the rest of occupations, the income is still higher compared

[6] A fuller description of the methodology employed is set-out in the research report *Hamilton's Creative Industries' Economic Contribution Analysis completed as part of the study process.*

to $35,945 in Ontario and $33,746 in Canada. Employment income refers to total income received as wages and salaries, net income from a business and/or professional practice, and/or self-employment income.

Part of the research completed for the *Hamilton Creative Industries Sector Profile* was a calculation of the economic contribution of the overall sector to the city's economy. This was calculated based on data collected through the statistically valid telephone survey, combined with Statistic Canada data. Businesses were asked several questions regarding the number of full-time and part-time employees, the income of employees, the business' operating costs, and total revenue. These numbers were used in combination with Statistics Canada information regarding the total number of businesses in the creative industries sector in Hamilton, and the number of employees employed in the sector. This is an accepted methodology used to calculate the economic contribution of other economic sectors. Based on the estimation, there were a total of **$197,680,000 made in revenues** across the creative industries sector, **$141,200,000 spent in operating costs**, *and* **$56,480,000 made in profits.**

The total number of employees in the creative industries sector was also multiplied by the median annual salary paid to employees to obtain the total amount of wages paid to individuals in creative roles in 2017. Using this methodology, there was a total *of* **$726,800,000 paid in wages**.[7] One can assume that the proportion of the amount that has been paid out in wages will be injected into the economy through local spending. One can also assume that a percentage of the businesses operating costs are being spent through local spending.

Film Production:

In 2017, the City of Hamilton issued **539 filming permits** (an increase from 2016), which resulted in **$12,176,945 being spent by production companies** in Hamilton on items such as hotel stays and other accommodations, private or business location rental fees, products and services purchased from local Hamilton businesses, donations to BIAs and other community organizations, catering services, etc.[8]

Music Festivals and Events:

- **2015 JUNO Awards** hosted in Hamilton was estimated by CARAS to bring in as much as $13 million in economic spinoff, including hotel rooms and restaurant visits etc.
- **Supercrawl:** an annual three-day event estimated an *economic impact* of $16.5 million (calculated using the Ontario Ministry of Tourism, Culture & Sport's Tourism Regional Economic Impact Model).

[7] There is a discrepancy between the total operating costs of the industries and the amount paid in wages, where the amount paid in wages exceeds the operating costs. The reason for this is that there are many individuals who perform creative roles within companies are not necessarily classified as part of the creative industry sector and not counted as creative businesses.

[8] City of Hamilton, 2017 Film Review Report and quarterly stats

Attraction & Retention of Other Industries

Beyond the direct economic contributions of the sector to the city previously described, other factors such as the contribution of creativity and culture to quality of life and quality of place must also be considered. Improved quality of life helps to advance the overall economy. Economic impact studies have proven that there is a strong link between the creative industries and cultural amenities in a community and that community's economic development, job recruitment and tourism.[9]

A healthy and vibrant creative industry also plays an important role in attracting new business to a community. When companies are choosing where to locate, cultural assets and amenities can be very important in the decision-making process.[10] Corporations need to retain their employees, and quality of life, which includes the arts and culture opportunities and experiences, is a critical piece to this.[11]

Strong Sub-Sector Performance

Benchmarking individual sub-sectors against comparative regions demonstrated very strong performance in specific sub-sectors.

Each sub-sector was ranked according to[12]:

- The percentage of occupations in a particular sub-sector compared to the total creative industries occupations
- The percentage growth in occupations in that sub-sector during the 2011-2016 census period
- The percentage of businesses in a particular sector compared to overall creative businesses.

Qualitative findings for film, music and fashion set out below were based on stakeholder workshops held with each of these sub-sectors.

Film

- Film accounts for 45.7% of total creative industry occupations in Hamilton. In benchmarking this figure against 10 comparator cities
  - The Hamilton region **ranked 2nd** surpassed only by Toronto in Film occupations as a percentage of total creative occupations.
  - The region **ranked 3rd** behind Sudbury and Kitchener in growth in Film occupations between 2011 and 2016.

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[9] "The arts and culture affect community's quality of life." 2013. Charles Matthews, Express-News.

[10] Ibid.

[11] Ibid.

[12] Note about data: The Creative Industry Occupations and Creative Businesses were studied using 4-digit NOC and 6-digit NAICS respectively. Due to the standardized data classification system and the creative industries definition implemented by the City of Hamilton, various overlaps were identified when classifying sub-sector occupations and businesses. Due to these overlaps, it is best to study each sub-sector individually and only as a factor of the total creative industries sector.

- The Film workshop identified Hamilton's location - its easy access to Toronto without having to live or do business there - as one of the city's greatest strengths. Following closely behind regarding strengths is the wide variety of locations in the city available for filming. The group argued that momentum exists in the industry and there is strong potential for expanding the industry and Hamilton's reputations as a film centre.
- Hamilton is also the 2nd busiest city in Ontario, next to Toronto, for issuing film permits.
- Although the City has not developed any integrated strategy for film (comparable to the Music Strategy), the City's Film staff/operations has been supporting the growth and development of the sub-sector for many years. There were calls from the consultation workshop for a streamlining of the permit process (currently under review by city staff), but overall satisfaction expressed about the role of the Film Office.

Music

- Music accounts for 41.7% of total creative industry occupations in Hamilton. In benchmarking this figure against 10 comparator cities
  - The Hamilton region **ranked 1st** among all the comparator regions in terms of music occupations as a factor of total creative occupations.
  - The region **ranked 2nd** behind London in growth in Music occupations between 2011 and 2016.
- The music sub-sector has been a major focus for the City in growing the creative industries sector. Hamilton is identified as 7th in the world for the number of independent musicians per capita. The Hamilton's Musician Guild has more than 600 active members and is the fastest growing local of the American Federation of Musicians. The City has over 20 recording studios, 150 live performance venues and an average of 70 live music show across the city each month.
- Participants at the music workshop pointed to the city as an inclusive place characterized by a culture of collaboration. Venues in the industry were described as working together to ensure maximum use of these spaces. The work of the Hamilton Live Music Venue Alliance is one example of the sector working together. An initiative similar to Record Store Day in Baltimore which promotes independent record stores was proposed. The workshop group pointed to diversity in the industry (although this was not evident in workshop participants)

Fashion

- Fashion accounts for 31.7% of total creative industry occupations in Hamilton. In benchmarking this figure against 10 comparator cities
  - The region **ranked 3rd** among comparator cities below only Toronto and Regina.
  - From the standpoint of growth in occupations between 2011 and 2016, occupations in Fashion **ranked 4th**, below Sudbury, Kitchener and London.
- Workshop participants expressed optimism for the potential growth of the fashion in Hamilton. It pointed to a collaborative industry in which designers and retailers were working together for shared success. This meant the industry was less competitive than

elsewhere with a greater sense of community that was to a considerable extent rooted in pride in Hamilton.

- Supercrawl must be recognized and leveraged to support and promote all the creative industries in Hamilton. The workshop group pointed to good local resources (e.g. Ottawa Street – machine repair and specialists), good presentation opportunities (e.g. fashion shows, Glamour in the Hammer) and a strong local customer base of support.

While the other three sub-sectors did not rank as highly as a percentage of total creative industry occupations, a number ranked high in the increase in occupations over the 2011-2016 period.

Visual and Applied Arts & Makers

- Occupations in the Visual and Applied Arts & Makers accounted for **65.4%** of total creative industry occupations in the Hamilton region
  - However, the sub-sector does not perform as well as the other sub-sector against its comparators in other regions. The region **ranked 7th^th^** behind Ottawa, Kitchener, Toronto, Windsor, Regina and London in occupations as a percentage of total creative occupations.
  - In terms of growth in occupations from 2011 and 2016, the region **ranked 3rd** behind Sudbury and Kitchener.

Live Performance

- Live Performance accounts for 45.8% of total creative industry occupations in Hamilton. In benchmarking this figure against 10 comparator cities
  - The Hamilton region **ranked 2nd** surpassed only by Toronto in Live Performance occupations as a factor of total creative industry occupations.
  - The region **ranked 2nd** behind Sudbury (and tied with Kitchener) in the growth in Live Performance occupations between 2011 and 2016.

Written and Published Works

- Written & Published Works accounts for 36.8% of total creative industry occupations in Hamilton. In benchmarking this figure against 10 comparator cities
  - The region **ranked 5th** behind Regina, Edmonton, Ottawa and Sudbury of occupations as a percentage of total creative occupations.
  - The region **ranked 3rd** in percentage growth in occupations between 2011 and 2016 behind Kitchener, London and Toronto

Weaknesses

Perceptions of the City

Negative perceptions of the city rooted in its past industrial heritage continue to have a hold on perceptions of the city, both internally and externally and act as an impediment to the growth of the creative industries sector. The resilience of these perceptions undermines understanding of the degree to which creativity and culture are driving forces in the city's current realities and prospects. These same perceptions among youth and post-secondary students undermine appreciation of viable career paths in the creative industries in Hamilton. It is a significant deterrent to retaining youth in the city after graduation.

Demographics

Hamilton's overall demographics can be classified as a weakness for all industries. The city of Hamilton is underperforming (albeit modestly) when compared to the province as-a-whole on some key demographic indicators.

The city's *population growth* was 3.3% in the 2011 to 2016 census period compared to the province where the number of people rose 4.6% from 2011 to 2016. Ontario lagged behind Canada that saw a 5% increase during this same period (a decline from 5.8% from 2016-2011).

The *median household income* in Hamilton in 2016 was $69,024 compared to Ontario's $74,287. However, the Hamilton CMA witnessed an increase in total household median income of 5.3% compared to 3.8 for Ontario as a whole between 2005 and 2015 along with a noticeable drop in the city's poverty rate.[13] Hamilton also has a slightly older median age of 41 compared to the provinces at 39.8 years.

In 2016, the *median employment income* of creative workers in Hamilton was $36,657 compared to $38,953 for workers in all other occupations. Although the median employment income of creative workers in Hamilton is lower than the rest of occupations, the income is still higher compared to $35,945 in Ontario and $33,746 in Canada. Employment income refers to total income received as wages and salaries, net income from a business and/or professional practice, and/or self-employment income.

Outflow of Labour

Analysing the labour flow patterns shows that Hamilton experiences a significant outflow of workers to surrounding communities. While Hamilton accounts for 57,320 creative workers[14], approximately 20,900 of these residents travel outside Hamilton to work. Hamilton saw a net export of 11,905 creative workers. Taking into account the labour loss and labour gain, Hamilton sees a net loss of 8,995 creative workers. This may indicate that Hamilton may lack local job opportunities. However, it also indicates that creative workers still choose to live in Hamilton because of the quality of life it affords, regardless of where they may choose to work. Hamilton's creative workers travel to communities including Burlington, Toronto, Mississauga, Oakville, Brantford and Milton.

Lack of Understanding & Common Definition of the Sector

While the diversity in types and sizes of businesses and different occupations is a strength in this sector, the lack of understanding of who or what makes up this sector creates some challenges. For example, some participants in the workshops applauded a portrait of the creative industries sector being comprised predominantly of micro- or small enterprises, others

[13] Hamilton Spectator. September 2017. *Cities Income is Tops for Ontario's City*.

[14] The data is analysed at the 3-digit NAICS and hence includes both creative workers and workers in other occupations.

felt this perspective failed to convey the message that the sector also was made up of a significant number of large companies with significant revenues and employing large numbers of workers. A more balanced identity for the sector would assist in legitimizing the creative industries as a significant economic sector.

Underperforming in Sales and Marketing

This weakness for the creative industries was identified from several sources. It emerged as a theme in several of the sub-sector workshops and in interviews. It also emerged as a theme in the business telephone survey. When asked about priority training needs, business owners identified sales and marketing as their top priority.

Lack of or Limited Grants and Financial Support

One of the most consistent themes from the consultation workshops and interviews was a request for financial support from the City in the form of grants or tax incentives/credits. Philanthropic sources of funding were also identified as a need. In response to the question about the most important initiative to strengthen the creative industry in Hamilton was "Funding/Access to Grants/Greater budget."

Weak Projected Business Growth

One question in the telephone survey asked businesses to estimate growth plans over the next 3 years. Of all respondents, 60% indicated they expected to stay the same, downsize, relocate or close. A total of 41% indicated they had plans to expand or renovate. With the caveat that many businesses may feel they have reached an ideal size for their industry, the overall picture painted regarding sectoral growth is not strong and could warrant further study.

Lack of Diversity

A participant at the Music workshop stated that they believed the sector needed to be more open to ethno-cultural and racial diversity. The need to examine this issue was reinforced by the lack of diversity reflected in the participants at all three workshops. Evidence of lack of diversity is only anecdotal but potentially worthy of further study.

Sub-Sector Weaknesses

The following weaknesses were identified at the three consultation workshops.

Film

There appears to be a weak public awareness of the film industry in the city, which undermines its profile and impact. Audiences for screenings are limited (or at least not realizing their full potential).

Hamilton does not have a sound stage and has a shortage of facilities and spaces to support the film sector. There are also gaps in the supply chain for businesses who support productions that shoot in Hamilton including businesses such as film-focused catering, rental shops, equipment leasing shops, rental spaces, and insurance companies, among others.

The film workshop pointed to Hamilton's weakness in digital media specifically relating to talent and training. It is very challenging to find local talent and expertise, and Mohawk College graduates are not meeting sector needs. Hamilton should examine Montreal where a strong digital media scene has been created. The Innovation Factory was identified as a potential resource for developing digital media in the city.

Music

The need for more small and medium-sized venues was identified at the workshop. While some musicians managed their careers and livelihoods well, the need for stronger business and entrepreneurial skills for all musicians, and in particular young and emerging musicians, was identified as a challenge. The lack of ethno-cultural diversity in the music sector in Hamilton was felt to be a weakness. An increase in coordinated and more collaborative communication across this sub-sector was noted as an opportunity. The Hamilton Musician's Guild is working to build solidarity and increase membership.

Fashion

The sector suffers from the same low profile as the other sub-sectors; initiatives to improve sector profile and visibility are needed. Hamilton is not known for fashion. The sector, locally and internationally, struggles with a clear classification – it is seen as somewhere along a continuum of an art form, a craft, a commercial enterprise/industry. This makes the sector hard to promote and makes it difficult to access government grants.

Nationally the sector is facing a crisis of finding skilled sewers and trade specialists. An older generation has retired, and the schools are not producing graduates with the practical skills to work in the industry. They must come with basic competencies in these skills which can't be learned on-the-job.

The sector suffers from not having shared or collaborative spaces for design, mentoring, training, small to medium scale manufacturing and a space for larger scale production machinery. There is a potential for shared equipment and group buying that is not being pursued.

Opportunities

Education & Awareness - Continue to Invest in Shifting Perceptions of the City

The City has been actively working and investing in sharing the current story and realities of Hamilton as a vibrant and creative community, it appears (based on consultations) that there remains work to be done in this area especially in increasing awareness of those living or working outside of the city.

While the arts, culture and creative industries are used in marketing materials promoting the city to visitors and potential new residents and businesses, attention must also be directed toward current residents. One workshop participant argued Hamilton's image as a creative city was stronger outside the city than it was internally. Many inside the city do not appreciate the breadth and depth of creative industries and their impact on the local economy and civic life.

A repeated point made during the workshop consultations and interviews is that the City is leveraging culture and the creative industries to sell Hamilton, but not "reciprocating" by investing in the sector itself. The most frequently identified need across the entire creative industries sector was stronger promotion and awareness. The outcomes sought for this increased profile is enhanced awareness and legitimacy for the sector as an important component of the city's economic and civic life, and to increase audience awareness as a pre-condition for increased sales and revenue.

The opportunity is continued and expanded promotion to build awareness of the strengths of the city's creative industries. There is also an opportunity for the City to more strategically and proactively integrate its Tourism marketing efforts with Economic Development efforts. The benefits of increased collaboration between tourism and economic development are highlighted in a report by George Zimmerman *Destination Marketing and Economic Development: Creating a Singular Place Brand* that clearly shows that Tourism branding and marketing efforts directly assist with increasing a person or businesses' likelihood of living, working, opening a business or going to school in a city that they have visited.[15]

Implement Property Tax Reductions

Hamilton's property taxes for industrial and commercial land are higher than many of its competitors in the GTA. The City has an opportunity to assist in attracting and retaining creative industries in the city through property tax reductions. A strong precedent for such a step can be found in the City of Toronto's implementation of a 50% property tax reduction for concentrations of artists and creative enterprises in creative hubs or districts in the city.

In September 2018, Toronto City council has voted to reduce property taxes by 50 percent for some culture hubs and creative spaces. The high property values and the rising real estate market were cited as having a corresponding negative impact by driving creative industries out of the city in Toronto and other urban centres. This it was argued was a problem not just because the absence of arts and culture makes for an unlivable city, but more broadly the direct impacts it has on the local economy.

Increase Start-Up and Expansion Business Support and Entrepreneurship Training

Across the creative industries sector, there was a call for increased investment in skills building resources for individuals starting businesses, including building entrepreneurship skills and capacities. There was a call for the City to increase its commitments in this area, working in partnership with business and post-secondary partners.

Data from the telephone survey indicates that most businesses have been in business for more than five (5) years and are looking to expand but need assistance to get them to the next level. The City may want to consider a focus on their retention and expansion efforts.

Filling Specific/Key Gaps in the Sector

Consultation efforts and feedback across the sector aligned with the opportunity that the City has identified in its *2016-2020 Economic Development Action Plan.* The gaps/opportunities identified in the Plan included:

[15] http://longwoods-intl.com/destination-marketing-and-economic-development-creating-a-singular-place-brand/]

- A major film studio[16]
- An 800 to 1,200 seat multi-use performance centre
- Enhancing Hamilton's image as a Digital City by enabling access to broadband Internet speeds

An additional opportunity that emerged across the sector is multi-use spaces for this industry to work, receive training and perform and/or display/sell their work.

Digital Media

Digital media is a top priority for both the Government of Canada and the Government of Ontario. These agendas include interactive digital media such as video games. Digital media is one of the fastest growing segments of the creative industries, both as a sub-sector onto itself, and as a force transforming the creation and distribution of a wide range of cultural content (including music, fashion and film). There is an opportunity for the City to recognize digital media as a discrete sub-sector within the definition of creative industries. There is a potential for the City to increase its proactive approach to the support the development of digital media, in partnership with post-secondary and other partners.

Building Cross-Sectoral Connectivity and Awareness

All three workshops (in Film, Music and Fashion) called for greater cross-sectoral awareness and collaboration to overcome current fragmentation. There was a call for the City to play a convening role in bringing interested parties together in a variety of ways using a variety of different venues. One way of achieving this was to establish a creative industries district (or districts) where the different sub-sectors were in closer physical proximity. A designated creative industry or cultural district could begin to build a critical mass of businesses and activity such that people would know where they could go to find out more about the different creative industries.

There is an interest and opportunity for collaboration across the various sub-sectors in the creative industries in Hamilton.

Leveraging City-Owned Land and Spaces

A frequent call was made for the use of City-owned land or buildings as potential office or incubator spaces for the creative industries. One request was for the City to "protect" existing City-owned properties for future development as creative spaces or the inclusion of creative spaces in new development. Zoning provisions and/or potential property tax incentives were identified as tools at the City's disposal to achieve these outcomes.

Training

There are significant opportunities to enhance existing training programs and offerings and there has been positive steps and interest taken in filling this training gap from Mohawk College and McMaster University. The City's role, as is done for other sectors, would be to facilitate

[16] It should be noted that the film workshop did not believe a major studio was needed, placing greater emphasis on small- and medium-size studios.

conversations between post-secondary institutions and businesses and identify long and short-term solutions and/or programs.

The business survey revealed that the combined percentage of skilled labour that was deemed either excellent or good is 58% compared to 42% judged either fair or poor

Sub-Sector Opportunities

Film

There is an opportunity to promote Hamilton as a film centre and potentially to build a film and TV media hub in Hamilton. The City can be a catalyst, working with the sector to advance this agenda. Simply providing venues where people can come together would be a strong step. There was a call for increasing staff resources dedicated solely to the film sector.

The City has an opportunity to review the processes it uses to interact with the film industry through processes such as permitting to see if they could work better for the sector. In 2019 the City will be undertaking an operational review of its film permitting process to both improve service to the industry but also decrease impacts on residents.

There is an opportunity to enhance online presence for the industry – such as a possibility for producers to preview locations online (it was noted that the Ontario Media Development Corporation where Hamilton represents 11% of the Ontario library of locations) and decide on filming locations and dates. Another possibility is facilitating access to the workforce online.

Music

To increase the profile and combat fragmentation in the sector, the City coordinates the Hamilton Music Advisory Team (HMAT) which includes industry representatives from musicians, to music businesses, to the Chamber of Commerce, Mohawk College, Hamilton's Musicians Guild etc. HMAT advises the City on the Music Strategy and utilizes the Hamilton City of Music brand to promote a wide range of initiatives and activities such as Music Career Day (held at Mohawk College), Music Mondays that focuses on supporting local emerging musicians via a series of performances at City Hall, the annual Musician Entrepreneur Conference, etc.

The Hamilton Musician's Guild and Mohawk College Music Department are working together to build training and entrepreneurship opportunities for both emerging and established artists. Mohawk College also has marketing and finance programs that can be a resource. These resources can be better known and promoted.

There is an opportunity to provide greater support for emerging artists through channels such as the Hamilton Arts Awards and the programs and partnerships identified above.

Infrastructure needs and opportunities include

- The possibility of a coalition of recording studios
- Addressing a gap in venues by establishing a small, entry-level venues spaces (e.g. Baltimore House and Homegrown style), as well as a more medium sized 600-800 seat venue
- A better understanding of Hamilton's Music Industry economic impacts

Enhanced business development infrastructure should include improved knowledge of granting sources and more online information related to work in the sector and assistance in applying for funding.

Fashion

An opportunity and a priority for the City should be raising the profile of the fashion sector. Assistance in reaching wider regional and national media will help brand fashion as a vibrant part of the creative industries scene in Hamilton and help broaden the consumer base.

The City can also be an advocate for the sector to senior levels of government. The sector has specialized manufacturing needs that could be purchased if the sector acted collectively. However, to a greater extent than other sectors such as film and music, the fashion industry in Hamilton has very little capacity to organize itself for purposes of advocacy, training, mentorship, networking, etc. The City could play a very powerful role in convening the sector to help and enable the development of these capacities. Participants at the Fashion workshop identified the opportunity to establish an online information hub (a “Fashion Exchange”) to support individuals with start-ups and business development, as well as a forum for collaboration.

Constraints

Advancing Gentrification

Many of those consulted pointed to advancing gentrification bringing with it higher costs of living and doing business that will be a serious constraint to continued growth and development of the creative industries in Hamilton. The fear is that the same process that drove many artists and creative enterprises out of Toronto to Hamilton will be replicated and drive the sector to more affordable surrounding communities.

Transit

While the City was applauded for the investments being made in improving public transit inside Hamilton, there are still some challenges that need to be addressed to improve accessibility in all areas of the city. There is also the challenge of getting in and out of the city via public transit especially to the Toronto market that was seen as an existing and potentially even greater constraint on the growth of the sector in the years ahead.

Potential Non-Renewal of the Regional Tax Credit for Film and Television

Under the category of potential constraints participants in the Film Workshop raised concern about the renewal of Film Fund and Ontario Film and Television Tax Credit (OFTTC) that provides a Regional Bonus for television production outside the GTA. With the funding cycle due to expire in a year there was concern and uncertainly related to the priorities of a new Provincial government. The City must assist in advocacy efforts.

Lack of Diversity

While anecdotal, a number of those consulted pointed to the discrepancy between the city’s diversity and levels of diversity in the creative industries. Such a lack of diversity can act as a constraint on the creation, production and consumption of cultural products and services.

The Absence of a Central Information Hub(s)

Many felt that resources existed in the city to support the creative industries but remained unknown to many working in the sector. A creative industries hub or clearinghouse, if it were designed in a way to be self-populating (i.e., not the responsibility of any one agency) could improve access to information for those entering the field, as well as well-established individuals and enterprises. In citing the benefits of building an inventory of assets, several cited the LIVELab at McMaster University as a teaching and performance space not well enough known in the community.

Sub-Sector Constraints

Film

Much of the discussion related to constraints facing the film sub-sector focused on facilities and infrastructure. While there is no need for huge film studios in Hamilton, the industry is constrained by lack of access to small to mid-size studio space. Other constraints identified include

- Hamilton lacks an independent filmmaker culture
- There are few incentives for local production
- Local labour market and need to access labour outside the city

Music

The primary focus of constraints facing the music industry was the need for more coordination between stakeholders and groups in the industry to support overall growth. The formation of the Live Music Venue Alliance as an outgrowth of the Music Strategy was cited as an example of what is needed to strengthen the industry.

Other Constraints identified include the

- Many performance venues are in place in the city, but there is a lack of awareness of what exists
- The need for more business development services and infrastructure
- Improved access to grants

Fashion

The fashion workshop pointed to a crisis facing the industry nation-wide. An entire generation of sewers, pattern makers and other has either retired or is about to retire, and there are few skilled individuals to take their place. Students graduating from post-secondary programs do not bring the practical, “hands-on” skills needed in the industry as well as knowledge of the sector which is critical. The industry also faces production challenges with insufficient production capacity to respond to strong designers.

Growth and development in the sector are hampered by an “identity crisis” in which fashion is seen as an art form or a craft but rarely as an industry (unlike other sub-sectors examined in the current Study).

Sector Gaps

The SWOC Analysis has identified a series of Weaknesses and Constraints that relate directly to sectoral gaps. The gaps identified below can be considered overarching or 'meta-gaps' that emerge from the analysis and constitute a number of the most significant gaps or barriers to advancing the creative industries sector in Hamilton.

Fragmentation and Lack of Interaction and Knowledge Flow

One of the core principles identified in Creative Ecosystems and their Requirements set out at the beginning of this report is the core requirement of knowledge or information flow in the system. The point is made that this knowledge flow must occur in physical space (through creative hubs, incubators, shared work space facilities, etc.) as well as being supported through on-line platforms for exchange. Experience suggests that relationships must be established in physical space (face-to-face) before moving those conversations on-line; relationships must be built and this is best done in person.

Across all sub-sectors and the creative industries sector as a whole a primary gap in the creative industries system or sector in Hamilton was the lack of connectivity and networks both within and across sub-sectors. People felt the capacity exists in the sector to address systemic challenges of resourcing, awareness and promotion, skill development and capacity building, etc. but that none of these challenges can be addressed with individuals and enterprises acting alone. This gap relates directly to another principle of healthy creative ecosystems which is the requirement of interaction and interdependencies.

The City was called on to play a convening role, bringing stakeholders and sector partners (e.g., post-secondary institutions, Chamber of Commerce) to share knowledge, build relationships and generate collective solutions to shared challenges.

Gaps between the Reality of Hamilton as a Creative City and Perceptions of the City (Internally Externally)

Two types of gaps in perceptions were identified. The first is a gap in perception about the city itself with an identify still defined internally and externally by its industrial (traditional rather than advanced) past rather than the creative economy - widely defined as all knowledge-based industries, which have led the economy for many years. Some of those consulted believed that the City, in its investments and efforts to communicate and rebrand the city, have been more successful externally than internally. The gap between current and past economic realities influence the second gap or barriers, which is the perception that the creative industries are a small, relatively marginal part of Hamilton's economy and civic life.

The City, working with its business, post-secondary and community partners was called on to continue their efforts to promote a vision of the city in which the arts and creativity are defining elements. Many of the City's marketing efforts have (understandably) been focused outward to attract visitors as well as new residents and businesses. Somehow some of these efforts and investments must also be directed toward residents, who are also, it was pointed out consumers and customers for the creative industries sector.

Stronger Skills and Systems Needed to Support Marketing and Promotion.

This is a theme that requires further study but several sources of input to the study suggested that Hamilton's creative industries may be stronger in creation and production than in marketing/promotion and sales (and sales revenue). The theme emerged through consultation activities – especially interviews but can also be inferred from the topic priority of business support being grants (to offset insufficient revenues) and the priority given to marketing as a priority area of skills training and resource development for all businesses, including start-up and entrepreneurship capacities.

There was a call for the City to increase its commitments in this area, working in partnership with business and post-secondary partners.

Lack of Diversity in the Sector

Identification of the lack of diversity in the sector is based on anecdotal rather than empirical evidence. It was identified in workshop consultations and several interviews. The composition of participants at the engagement workshops is also consistent with this observation.

Further study is required on this issue as the gap may be lack of access to the established creative community and their resources and not a low level of diversity in the sector. This is potentially a major gap and loss of opportunity if the creative industries sector is not reflecting the diversity of the population. In some cities culture-specific creative industries are plugged into global diasporic networks of producers and consumers of cultural content. A more diverse creative industries sector could also contribute to enhancing the profile and impact of the sector in the city.

Lack of Recognition of Distinctive Digital Media Sub-Sector

The gap in formal recognition of digital media as a sub-sector places Hamilton at odds with the creative industry policies and investments of the Federal and Provincial governments for whom this is one of their top priorities. Enabled by digital media, the stark contrasts between non-profit and for-profit creative cultural enterprises are shrinking as both move towards digital media as platforms for the creation and distribution of cultural content.

Digital media is one of the fastest growing parts of the creative cultural industries, both as a sector onto itself, tied closely to gaming, and as a force transforming the creation and distribution of a wide range of cultural content. The fragmentation of the creative industries in Hamilton reflects the reality in most cities. Although traditionally the different industries have operated in silos, convergence and interaction have been growing, as new digital platforms act as common denominators for both the production and delivery of cultural products.

The City was called on to formally designate digital media as recognized sub-sector and identify best practices in digital sector development in Canadian cities and internationally.

Creative Industries Business Support Services Better Practices Research

August 2018

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1.0 Approach

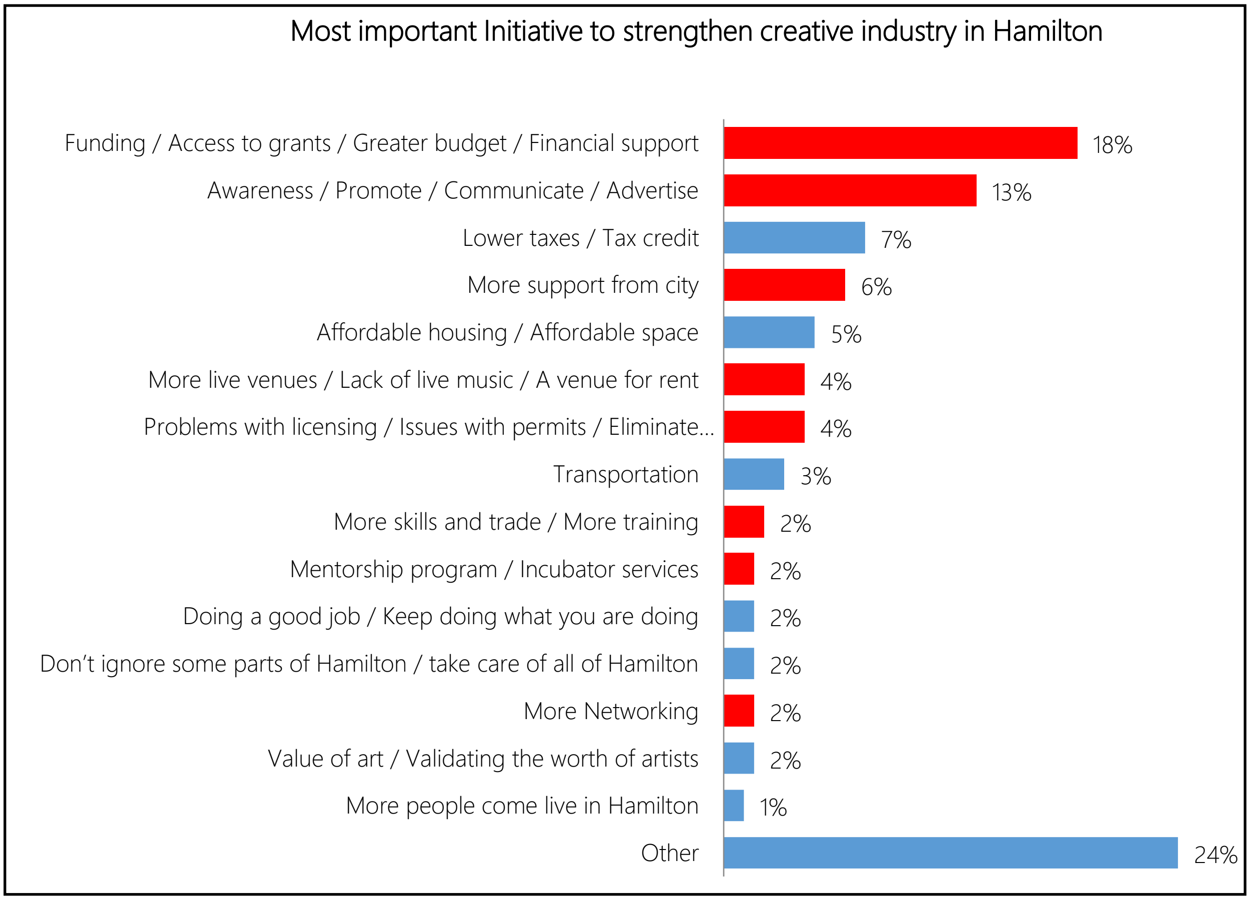
The approach taken to better practices research is informed by the following elements of the Sector Profile Study project.

- *Hamilton Creative Industry Sector Profile Study – Baseline Analysis*
- *Hamilton Creative Industries SWOC Analysis and Gap Assessment*
- *Hamilton Creative Industries Asset Mapping*
- *Hamilton Creative Industry Sector Profile Study – Sector Survey*
- *Hamilton Creative Industry Sector Profile Study – Sub-sector workshops*

Specific attention was paid to the results of the Sector survey and the outcomes of the sub-sector workshops, as well the SWOC Analysis and Gap Assessment.

Figure 1 below displays the responses from the survey to the question of what were the most important initiatives that could strengthen the creative sector in Hamilton.

Figure 1: Most Important Initiatives to Strengthen Sector[1]



The key responses were that access to funding, as well as improved awareness and promotion of the sector were most important. Other important initiatives related to the better practices research were increased support from the city, more live venues for music, addressing issues with permits and licencing, additional assistance with training and skills, mentorship programs and incubator services.

Feedback received at the sub-sector workshops reinforced some survey outcomes across sectors (highlighted in red in Figure 1), indicating the need for:

- Assistance from the City to smooth process of gaining permits, etc.
- Promoting Hamilton as a Creative City to raise profile of sector
- Assistance from the City to access grants / funding
- Assistance with cross-sectoral networking
- Assistance with cultivating creativity as a professional endeavour
- Assistance from the City to access skilled workers/specialized equipment

What emerged from this research was a noted desire across subsectors for assistance in terms of creative industry business resources and supports. Thus, four case studies that incorporate business support are reviewed here. Specifically:

1. **Cultural Enterprise Organization (CEO), Glasgow, Scotland** – This case study was selected because of its cross sectoral reach, it's blend of supports for business development at the start up, as well as mid-business level, and for its dedicated fashion incubator model. Additionally, the CEO is expanding its focus to the film industries in the near future.
2. **Flanders DC, Flanders, Belgium** – This case study demonstrates a focused effort at providing business supports for the creative sector. While it is regional in scale, it offers concrete examples of training and mentorship programs, as well as linking the regional creative industries sector into a larger global network.
3. **London Music Office, London, Ontario** – This example was selected as a local Ontario example. It is municipal in scale, and focused on one of the key creative industries sub-sectors assessed in the Sector Profile. Further, it demonstrates how to build upon existing local industry resources and stakeholders.
4. **QUT Creative Enterprise Australia (CEA), Brisbane, Australia** – This case study exemplifies links between educational institutions and the creative industries sector. Its emphasis is more on the provision of space, but also on supporting different subsectors through start-up capital and accelerator programming.

While three of these examples are regional in scope, they provide helpful insights for types of services and events that may be scaled appropriately locally. Additionally, section 6 of this report provide additional analysis and direction about how these examples can inform actions at the municipal level.

2.0 Cultural Enterprise Office (CEO) Scotland– Glasgow, Scotland

Cultural Enterprise Office (CEO) is Scotland's only dedicated business support organization for the Creative Industries. It is headquartered in Glasgow, a city with a population of almost 600,000 and a metro population of 1.75 million, but its mandate is to serve the broader Scottish creative industries sector.[2]

As of the end of 2016, there were 15,420 companies across Scotland's creative industries. Between them, they employ 73,600 people. The CEO supports a wide range of individuals and micro-businesses operating in creative industries, such as design, the arts, computer games, and writing services. It offers advice, information, programs, and events.[3]

Identified Skills Gap
A report on Scotland's Creative Economy noted that graduates from the creative disciplines are far more likely to be self-employed, freelancing or pursuing a portfolio career than those from non-creative disciplines. One study noted that 25 percent of graduates from practice-based art, design, crafts and media subjects were working on a self-employed or portfolio basis as compared to 10.8 per cent of Scotland's total working age population. Self-employment is a major ambition for creative graduates, with four in ten citing the ambition to run their own business. Thus, skills required for this career path include a strong component of Entrepreneurship Education. Additionally, a solid understanding of STEM skills is important to creatives given the increasing digital role in creative production.[4]

2.1 Programming and Spaces[5]

CEO Scotland offers a variety of programs and spaces in different locations for new creative entrepreneurs, as well as those looking to grow and expand their businesses.

Design Your Practice (DYP) is a program which allows creative freelancers to establish their practice. The program covers costing and pricing work, marketing services, planning and business structures and finance and administration.

Leaders in Transition is a coaching program for creatives. This is targeted at leaders who are mid-career and looking to make a change. A coach serves as an accountability partner who challenges clients to strategize and develop their goals, while aligning efforts toward achieving them.

Creative Mornings-GLA is a networking program co-hosted by CEO. On the last Friday of every month, creatives gather in Glasgow to celebrate local talent. The events also provide an open space to connect with like-minded individuals.

The Famous Grouse Ideas Centre (FGIC) is an incubator located in Perth and Kinross that supports exceptional creative business creation, development and growth through its own suite of dedicated support programs:

> The Pipeline program facilitates the early stages of researching and establishing a creative business idea, with a view to supporting self-employment. The program includes free workspace and access to equipment in the Maker Space at A K Bell Library in Perth, along with opportunities to learn from professionals already working in the Creative Industries.
>
> The FGIC Incubation Program is a one-to-one coaching program designed for entrepreneurs looking to create, scale and grow their creative business. It includes a unique toolkit of digital and live support through curated creative business resources, CEO's Support Hub, sessions with Business Experts and mentoring sessions with Scotland's leading creatives.
>
> The FGIC Accelerator is a fully funded intensive 12-week program geared to encourage existing creative businesses looking to grow. The Program covers a variety of entrepreneurial themes including establishing a business model, goal setting, identifying new markets and opportunities, vision, mission, and values, customer relationships, cash-flow and finance, intellectual property, pitching, scale and growth and exit strategy.

Glasgow's Fashion Foundry is a service of Scotland's Cultural Enterprise Office (CEO). The Fashion Foundry has worked with Scottish fashion businesses since 2012. Its purpose is to encourage the growth and development of start-up companies in the fashion industry. It aims to help designers gain greater understanding of industry and business best practices, and to access new markets. The overarching goal of the CEO's fashion program is to encourage growth in both the creative and textile manufacturing elements of the fashion industry.[6]

The Fashion Foundry is located in a 950 sq. ft. space in the South Block building in the heart of Glasgow's Merchant City. The South Block building is a 50,000 sq. ft. space dedicated to creative spaces and studios. It contains a gallery, events space, and various other amenities for creative industry professionals.[7]
The Fashion Foundry space includes a 762 sq. ft. studio with desk space for 5 designers, storage, rail space, and a large pattern cutting table. An additional 187 sq. ft. studio provides space for sampling and small batch production.

The physical space includes:[8]

- Studio space for five businesses at a time
- Four industrial sewing machines, an industrial overlocker, a pattern cutting table, and a steamer/ironing table
- Photography space
- Meeting space

Support Services – The Foundry provides educational, mentoring, as well as networking and promotional events. In terms of education, the Foundry hosts monthly workshops on a variety of subjects, including fashion production, business development, marketing, and fashion design. The Foundry also has an online resource centre, which provides information for designers on a wide range of topics.[9] All business participants in the Fashion Foundry are paired with a mentor who has significant industry experience. Participants in the Fashion Foundry have access to a variety of fashion and networking events. Past events include a member trip to Paris for a Trade Show mission and a fashion show for the designers as part of the Scotland Re:Designed Event.[10]

Programming - The Fashion Foundry programming offers a variety of programming options including its Emerging Designers program, [11] a 12 month incubator course for designers at the beginning of their careers, and its Changing Gear program[12] focused on designers who have established businesses but need help to continue growing their business. They receive four one on one mentoring sessions over a six month period.

2.2 CEO Partners[13]

The Cultural Enterprise Office is supported both by government and various industry partners including:

- Creative Scotland: Public entity that supports arts and creative industries
- Scotland Can Do: Government entrepreneurship and innovation promoter
- Social Enterprise Scotland
- Scottish EDGE
- Film City Futures
- Glasgow Chamber of Commerce
- Glasgow City of Science
- Green Arts Initiative
- Transmit Start-Ups
- Technology Scotland
- Venturefest

2.3 Organizational Structure and Funding

The Cultural Enterprise Office (CEO) is a not-for-profit organization associated with a variety of Scottish government organizations. The primary funding source of the CEO is Creative Scotland, a public agency of the Scottish government. The total CEO budget from Creative Scotland was £500,000 for the April 2016 to March 2017 period.[14]

3.0 Flanders DC – Flanders, Belgium

Flanders DC, or Flanders District of Creativity, is the single point of contact for entrepreneurs in the creative industries.[15] The creative industries in Flanders have been defined as the following 12 sectors: Audiovisual sector, Architecture, Communication, PR & Advertising, Cultural heritage & patrimony, Design, Digital media, Fashion, Games, Music, Performing arts, Printed media (literature & journalism), and Visual arts.

The sector provide an important contribution to the economy and are a source of employment. In a 2010 study, the employment breakdown of the sector included an estimated 53,477 self-employed people, 8,169 employers, 69,983 employees (FTE equivalents), which represents a 7.2 billion euro contribution to the regional economy. Based upon this analysis, creative industries represent 2.7 percent of Flanders' Gross Domestic (Regional) Product and 12.9 percent of all self-employed people in Flanders.[16]

Flanders DC was first created in 2004 to address concerns about the globalization of culture, and address entrepreneurship in the creative industries sectors. The organization merged with Design Flanders, and the Flanders Fashion Institute in 2016. While its' mandate is to serve the creative industries in Flanders, the northern, Dutch speaking region of Belgium, it is focused primarily on the fashion, design and gaming sub-sectors of the creative industries.

The goals of the organization are underpinned by strong sector research, as well as engagement within and outside the sector, specifically a sector-specific creative industries economic analysis conducted in 2010, followed by the development of a "Roadmap" for the creative industries in Flanders that emerged from "an intensive consultation process" focused on long terms strategies and recommendations for the success of the sector overall.[17]

Identified Skills Gap

As part of the development of a background report to help guide the efforts of the Flanders District of Creativity, themes were established to focus coordinated action by the sector and the government on the Creative Industries in order to help develop the sector. One theme, "Towards more enterprising Creative Industries," is focussed on developing business and entrepreneurial skills to not only help creatives gain access to financing, but to also help them to consolidate, and develop a creative/artistic activity.[18]

3.1 Programming

Flanders DC is physically located in three cities – Leuven, Brussels, and Antwerp. The organization's main functions are to:

- act as a resource and reference hub for creative businesses,
- provide advice, mentorship and coaching to creative professionals,
- facilitate collaboration and access to markets, regionally and internationally.

Flanders DC offers tools, advice and mentorship as well as promotion and networking events.

Tools - The tools developed and provided by Flanders DC are focused on assisting creative entrepreneurs strengthen their business. The tools include information guides on particular creative industry sub-sectors, toolkits for business management, as well as models for cross-sector collaboration.[19]

Advice - Flanders DC has a network of "advisors" within the creative sectors in Flanders to assist new entrepreneurs with questions related to business models and strategies, financing, marketing, among many others.

Promotion and Networking - With a focus on fashion, design and gaming, Flanders DC offers local events and awards, as well as access to international events via their District of Creative Network partners. Examples of events and activities hosted by Flanders DC include:

- Creativity World Forum – Annual conference bridging multiple fields in innovation and entrepreneurship to discuss themed approaches to the future. The 2018 Forum "SuperNova" is being held in Antwerp, and is focused on the impact of future technologies on business and daily life.
- Henry Van de Velde Awards[20] - National design awards given by Flanders DC that spans multiple sub-sectors of innovation and the creative industries, for example, design-led crafts, eco-design, among others.
- Fashion Talks[21] – Annual conference about the fashion industry.

3.2 Partners

Flanders DC is a member of the Districts of Creativity (DC) Network, an international network of creative regions founded in 2004 working to "share and develop practices on stimulating creativity in society to foster innovation and prosperity."[22]

3.3 Organizational Structure and Funding

Flanders DC is an independent non-profit organization, funded primarily by the Flemish Government.[23] It is touted as "the 'front office' of the government agency Flanders Innovation and Entrepreneurship, actively supporting creative entrepreneurs who want to build or grow their business."[24]

4.0 London Music Office – London, Ontario

The London Music Office is a division of the City of London, Ontario and exists to provide assistance toward the growth and development of the music industry in London, Canada.

London's Music Office is administered by a Music Industry Development Officer, who serves as the first point of contact for the music community. The Music Officer assists in providing guidance and the necessary steps to create live music events, attain proper licensing for music businesses and music related businesses. The London Music Office is located at London City Hall.

Identified Skills Gap
As part of the development of the City of London Music Strategy, a SWOT analysis was conducted to look a key gaps or weaknesses in the local music scene. As part of this, it was identified that a key weakness was the lack of skills of local artists in making proposals or selling their work to music publishers.[25]

4.1 Programming[26]

The London Music Office is the connector between the music industry and City Hall. The Music Development Officer assists in:

- Navigating City Hall
- Educating & Advocating
- Leading in Development & Implementation of Music Strategy
- Issue Management & Mediation
- Education / Networking Programming & Events

London Music Office provides information and assistance to access a number of resources including:

- Granting organizations (e.g. Ontario Arts Council, London Arts Council)
- Supporting organizations (e.g. Music Ontario, Music Canada)
- Links to educational institutions (e.g. Fanshawe, Western)
- Connecting to professional organizations (e.g. Actra, SOCAN)
- City of London Special Events (e.g. Booking Process for a public space)
- City Music By-Laws (e.g. Music on Patios, Noise By-Laws)
- Business Support (e.g. Small Business Centre, start up support)

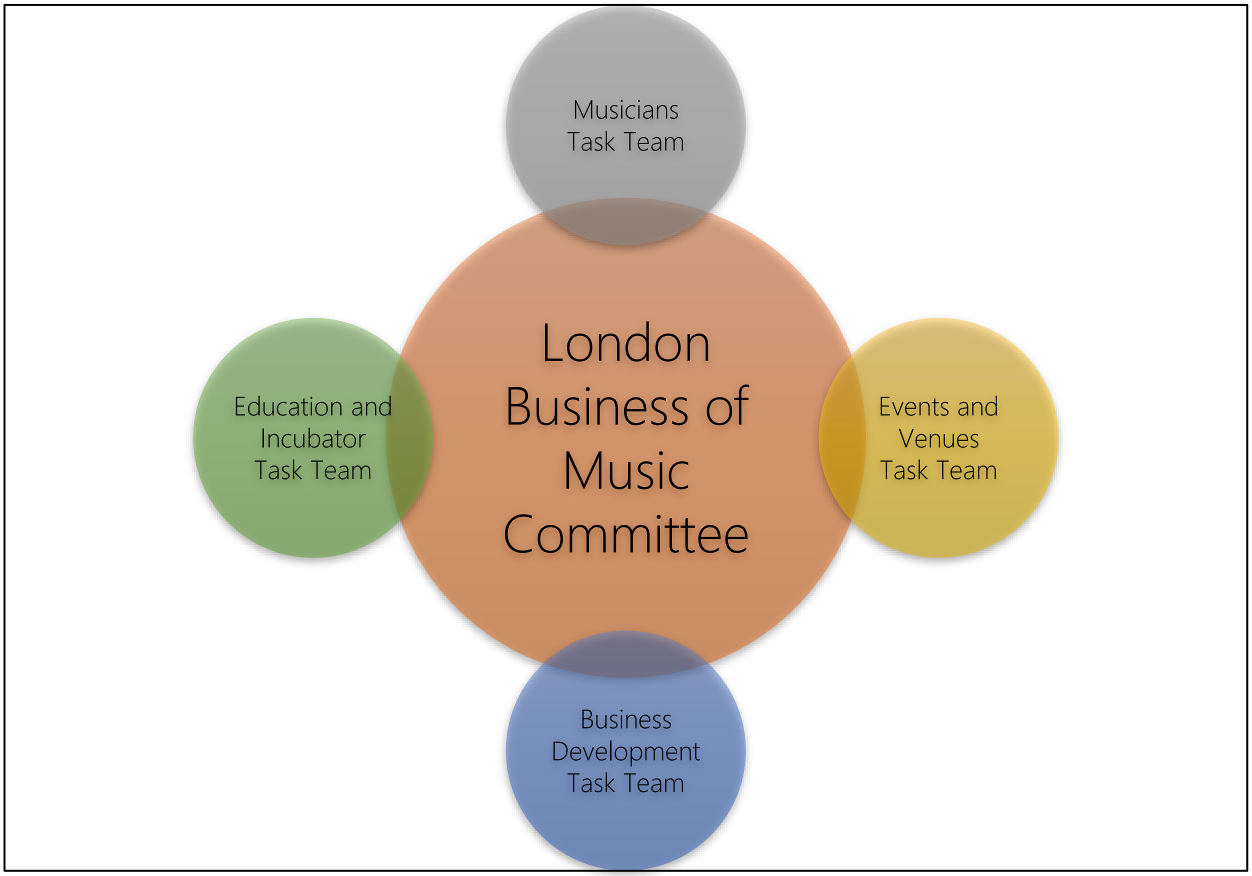
4.2 Organizational Structure and Partners[27]

The London Music Officer reports to the Manager of Culture, who is part of the City of London Community and Economic Innovation Division of the City Manager's Office. The London Music Officer is responsible for working with the London Music Oversight Committee composed of representatives from: the City of London Community and Economic Innovation Division of the City Manager's Office, Tourism London Inc. and the London Arts Council on implementation of the London Music Strategy. [28] The London Music Strategy was created by a Music Industry Task Force and approved by Council in September 2014.

Additionally, supporting the efforts of the London Music Office is the London Business of Music Committee. The purpose of the London Business of Music Committee is to assist the London Music Oversight Committee and London Music Industry Development Officer with the development of the London Music Strategy Implementation Plan and to support the implementation of its initiatives. The Committee provides a forum for the exchange of ideas, input and advice related to the music sector opportunities and challenges.

The London Business of Music Committee consists of a Chair and four "Task Teams":

Figure 2: London Business of Music Committee and Task Teams



The four "Task Teams" include members from the following areas:

<u>Musicians Task Team</u>

- Original Musicians - Musicians writing, recording, and touring original compositions
- Cover Artists - Musicians performing other artists music
- Artists Managers - Individual who represents musicians for a living

<u>Events and Venues Task Team</u>

- Venue - Venue operator
- Festival - Festival operator
- Promoter - Live music promoter

<u>Education and Incubation Task Team</u>

- Fanshawe - Representative from Fanshawe
- Western - Representative from Western
- Ontario Institute of Audio Recording Technology (OIART) - Representative from OIART
- Thames Valley District School Board (TVDSB) - Representative from T.V.D.S.B.
- Music Instructors - London Music Teachers
- Incubation - Leader from an incubation space

<u>Business Development Task Team</u>

- Manufacturing - Member of London's musical manufacturing sector
- Recording - Representative from the recording industry here in London
- Production - Audio / Video Production
- Hi-Tech - Active member of the tech sector
- Retail - Member focused on music retail (music store, record shop etc)
- Members at Large – Member at large from London's music community

4.3 Funding Model

The budget for the London Music Industry Development office is $150,000 per year. A strategic use of the Economic Development Reserve Fund was approved for use in 2018 and 2019 resulting in no impact to the tax levy.[29]

5.0 QUT Creative Enterprise Australia (CEA), Brisbane Australia

QUT Creative Enterprise Australia is a private company located on the Kelvin Grove campus of Queensland University of Technology. It "offers access to workspace, business mentoring, special events, networks, research expertise and capital to foster the growth of the creative industries in Australia. It was established to help provide 'real world' enterprise services to support the growth of creative industries.[30]

It is located in the Creative Industries Precinct on the QUT campus, and manages part of the Precinct space, coordinating events, and facilitating networking between different sectors.

Identified Skills Gap
QUT Creative Enterprise Australia grew out of earlier efforts that identified the need to establish a Creative Industries Enterprise Centre (CIEC) which would address a skills gap by providing entrepreneurial skills training, support, access to facilities and stimulating enterprise and industry development. More specifically, the skills gaps identified were in the areas of human capital and training with regards to business development, finance and marketing.[31]

5.1 Programming and Spaces

QUT CEA offers various spaces, services and programs structured around a business lifecycle, branded as Start, Grow, and Scale categories of spaces and services. Additionally, it offers networking events.

Start – Spaces and services aimed at supporting new and emerging businesses in the creative industries sector. The following are specific programs/spaces for this category.

- The Coterie is a co-working space designed to inspire entrepreneurial collaboration for creative professionals.
- Coterie 9 is a co-working space aimed at supporting creative tech entrepreneurs.

Grow – Spaces and services aimed at expanding and growing existing businesses or entrepreneurs. Specific programs include the following.

- Fashion 360 Accelerator is a six-month program designed to equip early-stage to emerging fashion entrepreneurs with all the essentials required to execute and sustain a growing business. It is comprised of weekly workshops and masterclasses covering a wide range of topics with industry experts. The program concludes with a fashion showcase, "Look this Way", where designers can pitch their business and collection to an exclusive panel of industry experts.[32]

- Fashion Stitch Lab - is a space within the Fashion Accelerator where product development takes place. Members of the Fashion Accelerator can access the Stitch Lab's cutting table and specialised industrial machines, and arrange to hire a pattern digitizing board and printer.[33]

- CEA Business Hub - A variety of studio spaces and flexible lease arrangements for growing businesses in the creative industries. The space currently hosts over 20 creative companies all at a key growth stage in their business development.[34]

- Collider Accelerator – Dubbed as the "home of creative tech", this accelerator is an intensive three month program tailored to the verticals of creative tech, followed by an optional two months of support for execution and growth.[35]

Scale – Specifically focused on the CEA Startup Fund, which was established as the first dedicated investment fund in Australia. It specializes in accelerating the growth of companies in the creative industries. The Fund is designed to generate a commercial return while helping creative businesses access much-needed capital for growth.[36]

Networking Events

- Look This Way - An annual fashion showcase and business pitch. Emerging Australian fashion entrepreneurs debut on the runway and present to a panel of industry experts in front of leaders in the fashion industry, entrepreneurs, retailers, media, and peers.

- Creative 3 – An annual forum that harnesses "the power of three – creativity, business and investment."[37] Creative3 helps both individuals and organizations building successful creative businesses. A key part of the event is the Creative3 Pitch, Australia's first pitching session for creative businesses. It is designed as a key platform to assist creative businesses become more competitive and help them secure investment.[38]

- Startup Weekend – An event focused on creative tech, it is a 54 hour event where creative tech workers and entrepreneurs can come together to pitch, develop and collaborate on new business ideas.[39]

5.2 Partners

- Advance Queensland
- Visual Arts and Craft Strategy, Australian Government
- Arts Queensland, Queensland Government
- BIGSOUND
- Brisbane City Council
- Brisbane Marketing
- Future Business Council
- HopgoodGanim Lawyers
- Pitcher Partners
- QUT Business School

5.3 Organizational Structure and Funding

QUT Creative Enterprise Australia is a commercial company owned by Queensland University of Technology (QUT) with an independent Board of Directors set up to help grow creative businesses.[40]

Many of the QUT CEA spaces, programs and events are provided for a fee. For example, the Fashion 360 Accelerator program costs $3,300 for the six month program.[41] Additionally, the Coterie is organized on a membership basis, ranging from casual ($110) to premium ($330) rates to rent a desk in the space for a month.[42]

6.0 Analysis

Informed by the survey, workshop and gap assessment, six categories were developed to compare the four case studies under review. Figure 3 displays a matrix of the case studies and how each meets the criteria of the six categories.

Figure 3: Comparison Matrix of Creative Industries Support Case Studies

	Scotland	Flanders	London	Australia
Funding Support/Access: This category references both programs for direct funding (e.g. Start-up funding) as well as providing assistance or help with applying for external grants and other funding.	○	○	◐	●
Awareness/Marketing: The focus of this category is on raising the profile of the sector including expanding customer base locally and regionally.	●	●	●	●
Skills Training/Mentorship: Skills training and mentorship programs are directly provided, or the case study connects to external or other skills training and mentorship programs and resources.	●	●	◐	●
Incubators/Venue Spaces: Provides actual physical space for growing business, whether incubators (e.g. fashion) or Venues (e.g. music). Additionally, whether a case study acts as resource or hub for existing external incubators or venue spaces.	●	◐	◐	●
Networking Support: The case study example hosts actual events to bring multiple sectors together, or specific sub-sector.	●	●	●	●
Municipal Government Support: The example assists with navigating City Hall, issues such as licensing, permits, bylaws to facilitate creative productions within the city. (e.g. film office, music, etc.).	○	○	●	○

○ Support is not provided

◐ Facilitates access to external or third party program or space

- Provides in house activities and or space

6.1 Comparison Matrix Summary

1. **Funding and Assistance with Funding** – Only two of the four case studies incorporate a level of funding support to the creative sector. The London Music Office provides resources to external funding bodies, like the Canada Council, as well as assistance and advice around grant writing. The QUT CEA in Brisbane recently created a Startup Fund for creative tech startup businesses.

2. **Sector Awareness and Marketing** – All four of the case studies provide some element of sector promotion and awareness, as well as marketing assistance. QUT CEA Brisbane hosts Fashion 360 events, Flanders DC hosts the Creative World Forum, CEO Scotland host many networking events around skills training (e.g. marketing skills, social media) as well as speaker series with leaders in different fields.

3. **Skills Training and Mentorship** – All four examples provide skills training and mentorship opportunities as access to external resources. The London Music Office provides access and information on external resources, while the other case studies directly provide this assistance, such as Flanders DC's set of Toolkits for creative entrepreneurs, or CEO Scotland's FGIC Incubation Program of the FGIC Accelerator, or QUT CEA's Fashion 360 Accelerator program.

4. **Incubator or Venue Spaces** – Two of the four examples have physical space in which they host sector incubators. CEO Scotland runs the Fashion Foundry, providing programs and services for those in this subsector to access creative space and machinery. QUT CEA in Brisbane hosts a number of incubator and co-working spaces in the Creative Industries Precinct, including the Coterie, and the Fashion 360 Accelerator.

5. **Networking Support** – All the examples host networking events that not only raise the profile of creative industries, but also allow for sector specific networking opportunities. CEO Scotland host Creative Mornings events bring together like minded creative professionals. QUT CEA in Brisbane hosts StartUp Weekends for creative tech entrepreneurs, while Flanders DC host the annual Fashion Talks event, among others.

6. **Municipal Government Support** – While three of the four examples are defined as connectors between governments and their agencies and the creative sector, only one, the London Music Office, provides direct support for navigating municipal government services, such as permits, licensing or zoning and bylaws.

6.2 Relevance for Hamilton

As is common with many other business sectors, the top concerns that arose in the research focused on the need for sector-specific business support. The challenges highlighted in the Hamilton sector profile research are found in other jurisdictions both regionally and internationally. The four case studies offer examples of how others are addressing these challenges at various scales, both locally and regionally. Hamilton can learn from these examples, specifically, how to build on existing business support infrastructure (e.g. Small Business Enterprise Center), to connect with existing collaborative makers' spaces and incubators, (e.g. the Cotton Factory, Steel City Studios, the Hamilton Public Library's Makerspaces[43]), and further develop existing networking initiatives such as the Creative Exchange.

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[37] “Creative 3.” QUT CEA. n/d. Retrieved from: http://qutcea.com/creative3/

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[39] “Startup Weekend.” QUT CEA. n/d. Retrieved from: http://qutcea.com/startup-weekend/

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[41] “Fashion360.” Retrieved from: http://qutcea.com/fashion360/

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MDB INSIGHT

City of Hamilton Creative Industries Sector Profile Study

Sub-Sector Profiles

September 2018

Table of Contents

1. Purpose of the Report

This sub-sector profile report provides a detailed examination of Hamilton's top three creative industries sub-sectors:

- Music
- Film
- Fashion

The sector profile includes analysis from a variety of sources including:

- *Review of the City of Hamilton's existing planning documents & policies* – City plans and strategies relevant to creative industries sector development
- *Creative Industries Sector Overview and Baseline Analysis* – a statistical analysis of the creative industries sector and sub-sectors
- *Creative Industries Sector Benchmarking Analysis*– comparing Hamilton's creative industries sector against ten comparator Canadian regions
- *Creative Industries Sector Asset Mapping* – spatial analysis to understanding the concentration or clusters of creative industries businesses
- *Creative Industries Sector Business Survey* – 190 responses to a survey of creative industries businesses and organizations
- *Creative Industries Sector Stakeholder Interviews* – interviews with approximately 15 stakeholders in the sector as well as senior City of Hamilton staff
- *Creative Industries Sector Consultation Workshops* - with stakeholders drawn from the Film, Music and Fashion sub-sectors
- *Creative Industries Sector SWOT Analysis and Gap Assessment* – address the Strengths, Weaknesses, Opportunities and Constraints of Hamilton's creative industries sector

1.1 Rationale

The creative industries sector baseline analysis provided a detailed picture of Hamilton's current creative industries performance. Also, the benchmarking analysis was completed to determine overall success in the growth of the sector and determine specific sub-sectors that are leading or lagging behind other regions. The results of the benchmarking analysis are:

- Music - Hamilton ranked FIRST among all other comparator regions in music occupations as a factor of total creative industries occupations.
- Film - Hamilton ranked SECOND among all other comparator regions in film occupations as a factor of total creative industries occupations.
- Live Performance - Hamilton ranked SECOND among all other comparator regions in live performance occupations as a factor of total creative industries occupations.

- Fashion - Hamilton ranked THIRD among all other comparator regions in fashion occupations as a factor of total creative industries occupations.
- Written and Published Works - Hamilton ranked FIFTH among all other comparator regions in written and published works occupations as a factor of total creative industries occupations.
- Visual and Applied Arts and Makers - Hamilton ranked SEVENTH among all other comparator regions in visual and applied arts and makers occupations as a factor of total creative industries occupations.

As a result of the benchmarking analysis, the music, film, live performance and fashion sectors were identified as sectors of strength for the city. The sub-sector profiles were developed for the music, film and fashion sector.

Although the live performance sector is a sector of competitive strength for the region, the profile for the sector is not presented as the live performance sector includes several overlaps in industry sectors, occupations and businesses with the film and music sub-sectors. Thus, it can be summarised that focussing on supporting the film and music sector will also benefit the live performance sector.

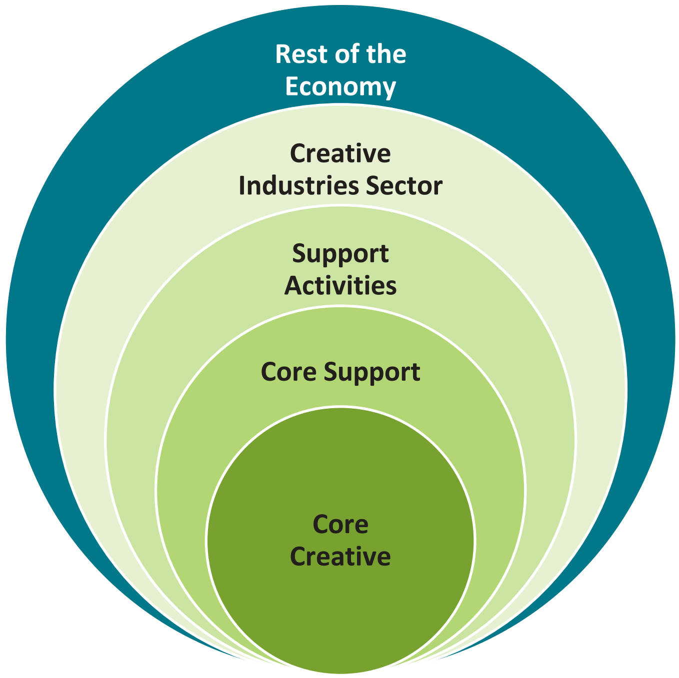
1.2 Methodology

The size, growth and nature of the creative industries sector were studied in terms of:

- **Creative Industries Employment** - identified based on the North American Industry Classification System (NAICS). These industry sectors refer to the general nature of the business carried out in the establishment where the person worked.
- **Creative Industries Occupations -** identified based on the National Occupational Classification (NOC). These refer to the kind of work performed by persons and closely relate to certain industry sectors.
- **Creative Industries Businesses** - identified based on the North American Industry Classification System (NAICS). Canadian business counts provide counts of active businesses by industry classification and employment-size.

Based on Hamilton’s creative industries sector definitions, this report classifies the sector in terms of the functions that are directly related to the sector. The definitions of the classifications are provided below:

- **Core Creative** – An industry, occupation or business that is critical to the creative industries sector. Without it, the creative industries sector would not exist.
- **Core Support** – An industry, occupation or business that exists predominantly to support the creative industries sector.
- **Support Activities** – An industry, occupation or business that occasionally supports the creative industries sector but does not rely on the growth of the creative industries sector to exist.



Notes to the Reader

Due to the standardized data classification system and the creative industries definition implemented by the City of Hamilton, the data captured has overlaps between creative workers and workers in the rest of the economy. Due to these limitations, it is best to interpret this data as a trend rather than drawing conclusions based on the numbers

Due to the standardized data classification system and the creative industries definition implemented by the City of Hamilton, various overlaps were identified when classifying employment according to the sub-sectors. For example, independent artists, writers and performers include independent visual artists and artisans, independent actors, comedians and performers and independent writers and authors. Thus, the NAICS is captured under Film, Live Performance, Visual & Applied Arts & Makers and Written & Published Works. Due to these overlaps, it is best to study each sub-sector individually as a total of the creative industries sector.

Data Sources

The Data Sources used for the study were

- 2016 and 2011 National Census
- 2011 National Household Survey
- 2017, 2016, 2015 and 2014 Canadian Business Counts
- Asset Mapping, MDB Insight, 2018

- CATI survey, MDB Insight, 2018
- Stakeholder Interviews, MDB Insight, 2018
- Focus groups, MDB Insight, 2018

2. Music Profile

The music industry consists of: the companies and individuals that create new songs and musical pieces; the singers, musicians, conductors and bandleaders who perform the music; the companies and professionals who create and sell recorded music and sheet music and those that help organise and present live music performances.

Hamilton is recognised as 7th in the world for independent musicians per capita. The Hamilton Musician Guild has more than 600 active members and is the fastest growing local of the American Federation of Musicians. The city has over 20 recording studios, 150 live performance venues and an average of 70 live music shows across the city each month[1]. In 2008, the City completed the *Building a Creative Catalyst Report* which identified that Hamilton's music industry is well positioned to be harnessed as a means to grow Hamilton's economy, re-activate the downtown area, improve the physical condition of buildings and neighbourhoods, and build pride in the community.

The Hamilton Music Advisory Team was created as a result of the *Hamilton Music Strategy* completed in 2013. The group has supported the implementation of 25 of the 30 recommended actions in the *Strategy*. These include better practice research, the formation of a Live Music Venue Alliance, development of Hamilton music branding (City of Music), and participation of 13,000 people in a music branding and marketing plan.

An update of the *Hamilton Music Strategy* was completed in 2016 to expand the mandate of the Advisory Team and launch marketing activities that support Hamilton as a City of Music. The Team seeks to create a local solution that incorporates better practices from leading music cities such as Toronto that leverage their industry, demonstrate economic impacts of the music industry, and strengthen and grow the sector to ensure its competitiveness and viability. Other recommendations of the *Strategy* include a budget enhancement of $25,000 to fund marketing efforts and the creation of a focused *Music Industry Business Plan.*

In addition to the above efforts, the City Enrichment Fund Arts programs provided approximately $809,425 in funds to support 24 music organizations, events, and musicians in Hamilton[2]. Furthermore, the Noise Control By-Law was amended to provide an exemption permit for entertainment on a commercial outdoor patio. The City also developed the Musicians Welcome Signs initiative to enable musicians to park and unload equipment in the loading zones without any encumbrances from law enforcement.

The City has developed amendments to Zoning By-law 05-200 to enable the addition of a production studio and associated warehousing, prop and set design and storage. It also allows the use of digital media such as an animation studio, and associated software development and processing.

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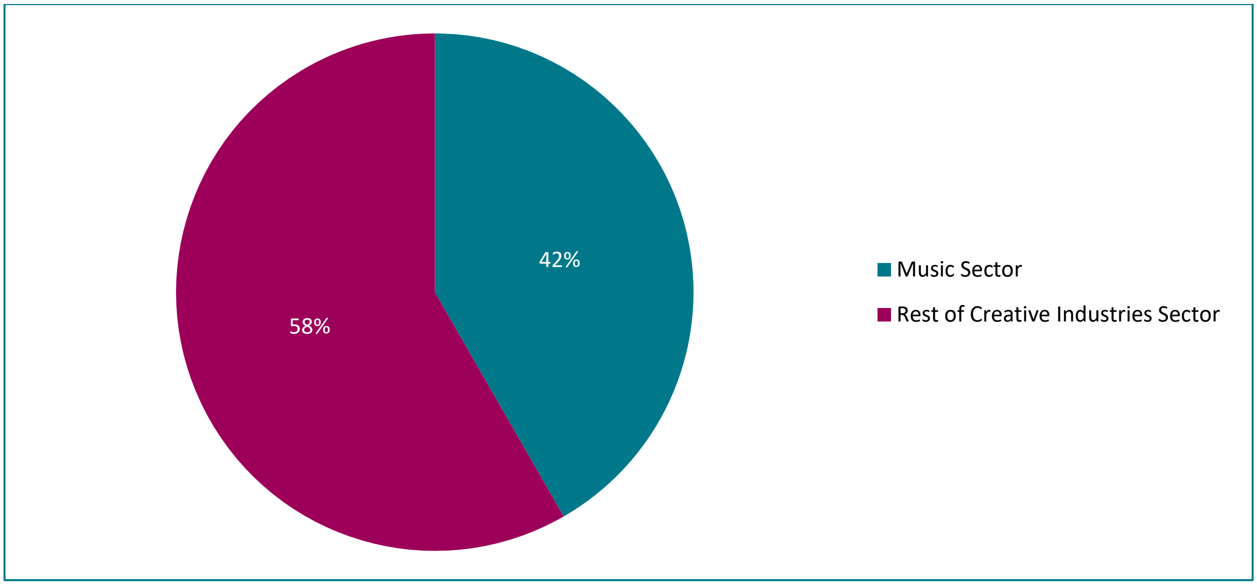
[1] http://www.investinhamilton.ca/key-industries/creative-industries/

[2] ibid

Music Workers Characteristics

In 2016, Hamilton accounted for approximately 6,840 music occupations. Music sector workers account for 1.7% of total occupations. As illustrated in **Error! Reference source not found.**, the music sector accounted for 42% of total creative industries sector occupations.

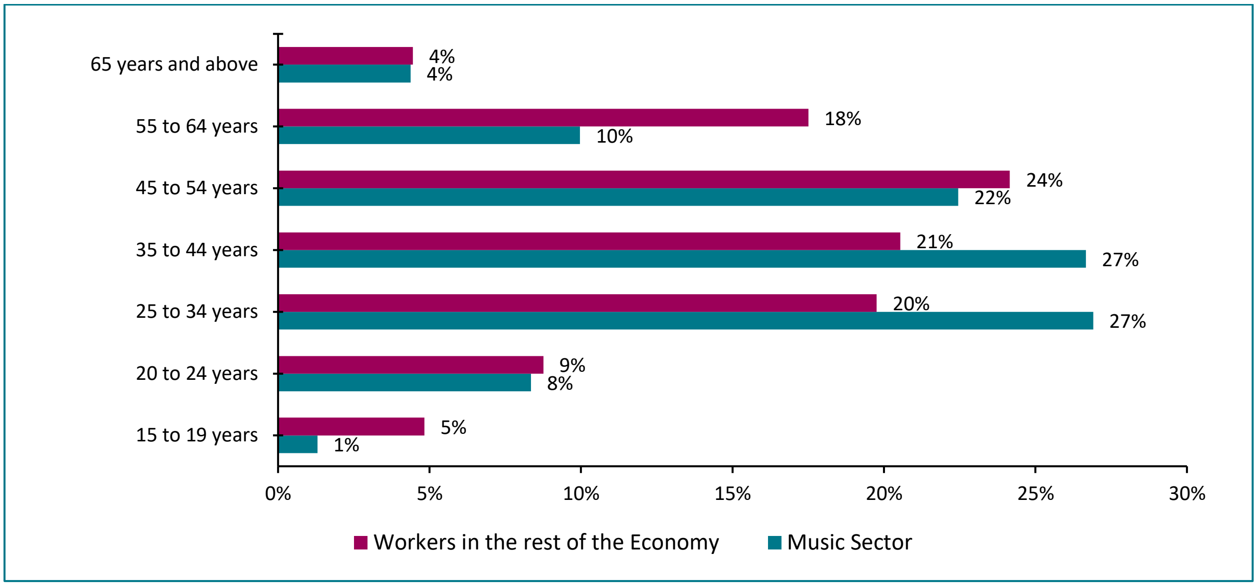
Figure 1: Proportion of Music Sector Workers, 2016



Source: Statistics Canada, Census of Canada 2016

The age cohorts for the employed labour force (aged 15 years and over) by occupation shows that the majority of music workers are from 25 to 34 years; approximately 1,660 workers making up 27% of Hamilton's music workers. The working-age statistics of music workers in Hamilton is comparable to provincial and national trends. Music workers are younger compared to workers employed in occupations in the rest of the economy.

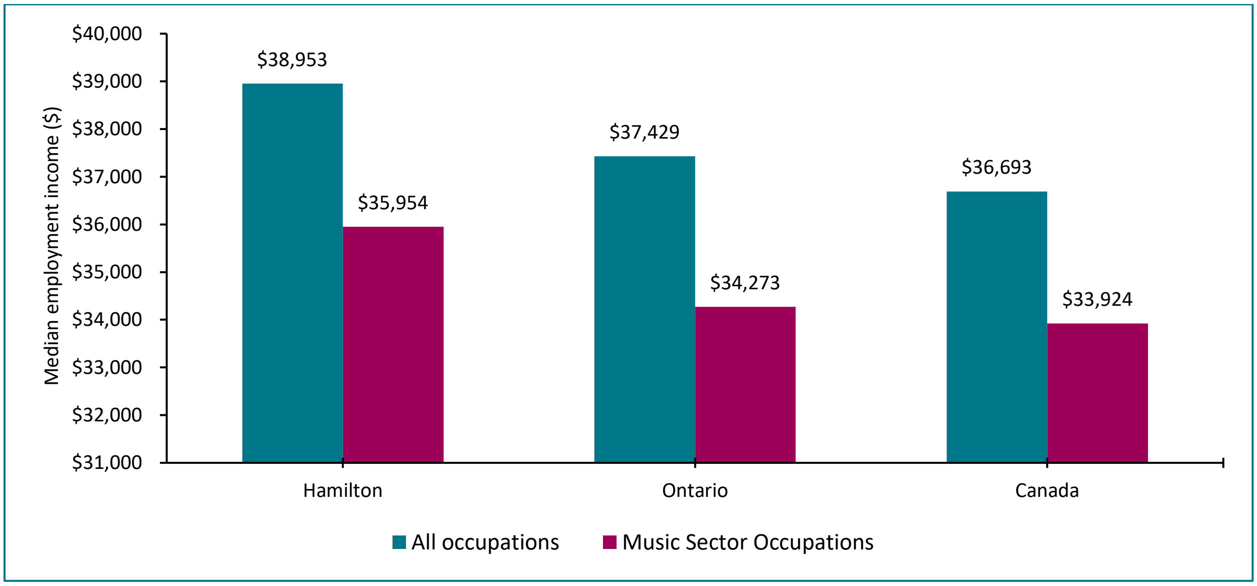
Figure 2: Labour force by Age for the Music Sector, 2016



Source: Statistics Canada, Census of Canada 2016

In 2016, the median employment income of music workers in Hamilton was $35,954 compared to $38,953 for workers in all occupations. The median employment income of music workers in Hamilton is higher than in Ontario at $34,273 and Canada at $33,924.

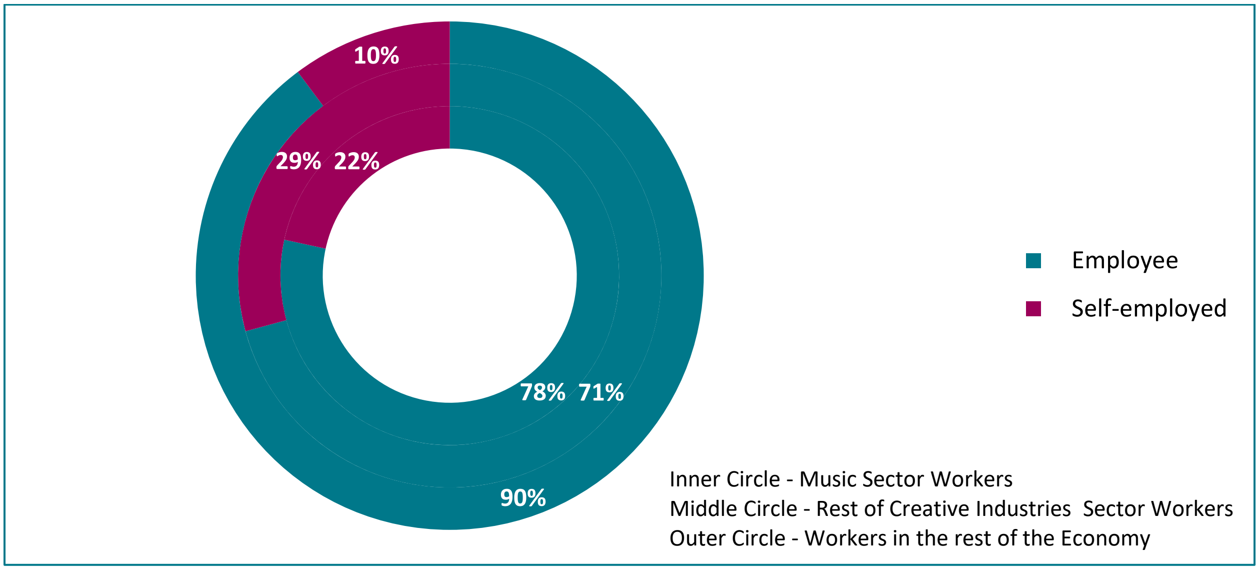
Figure 3: Employment Income of Music Sector, 2016



Source: Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016304.

Analysing occupations by class of worker, it was determined that the music sector workforce has a higher percentage of employed workers compared to the rest of the creative industries sector workers.

Figure 4: Class of Worker of Music Sector, 2016



Source: Statistics Canada, Census of Canada 2016

Music Education Profile

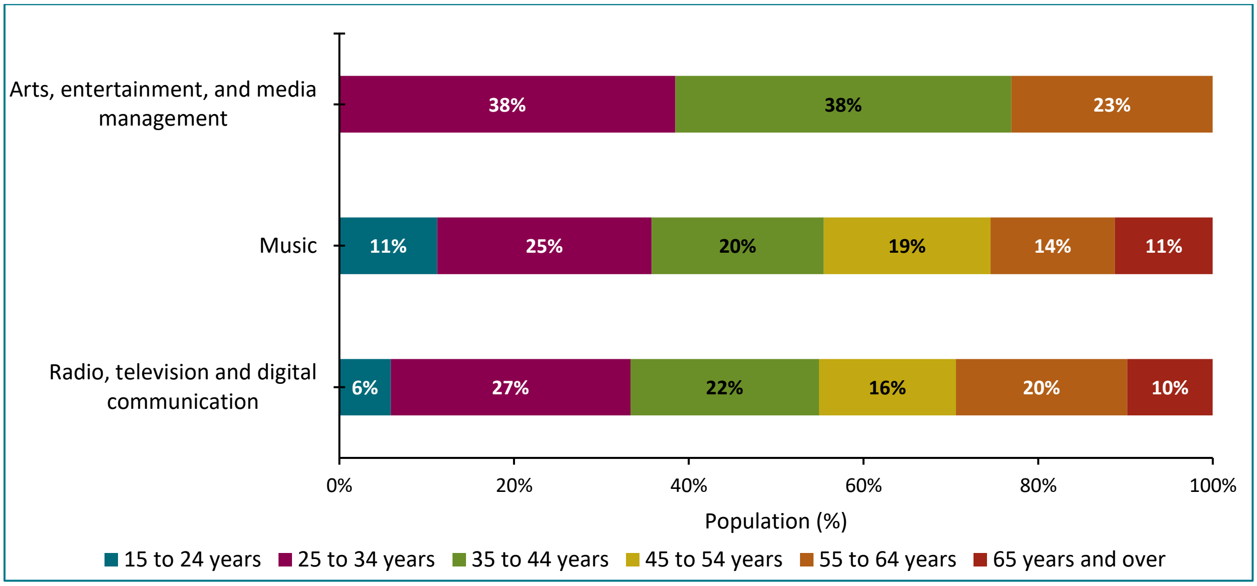
In 2016, approximately 332,950 residents aged 15 years and over had a postsecondary certificate, diploma or degree in Hamilton. Approximately 1,975 people (0.6% of the total population) had a postsecondary certificate, diploma or degree in music related courses. The proportion of music degrees in Hamilton is lower than provincial rates at 1.4% and higher than national rates, representing 0.2% of the total population. The proportions of the population with music-related degrees are listed below:

- *Music* – 1,650 people
- *Arts, entertainment, and media management* – 70 people
- *Radio, television and digital communication* – 255 people

The music education profile shows that 54% of graduates were males compared to 46% females. As shown in Figure 5, the majority of the population with music degrees were young graduates between the ages of 25 to 44 years. There are no graduates in arts, entertainment and media management in Hamilton between the ages of 15 to 24 years.

Based on the data analysed, Hamilton has a good pool of skilled candidates living in the city capable of participating in the labour force in the music sector. However, the limited incoming labour pool indicates a possible future skills gap for the sector.

Figure 5: Age of Population with a Postsecondary Certificate, Diploma or Degree in Music Sector, 2016



Source: Statistics Canada, Census of Canada 2016

Analysing the music sector programs available in Colleges in Ontario, it was determined that Mohawk College offer 12 music programs[3] in Hamilton. They are the:

- Applied Music (Classical Strings + Guitar)
- Applied Music (Classical Winds + Brass)
- Applied Music (Drums and Percussion)
- Applied Music (Contemporary Brass + Winds)
- Applied Music (Contemporary Guitar)
- Applied Music (Classical Piano)
- Applied Music (Contemporary Piano)
- Applied Music (Classical Voice)
- Applied Music (Contemporary Voice)
- Applied Music (Other)
- Applied Music (Bass)
- Applied Music Preparatory

[3] https://www.mohawkcollege.ca/program-theme/communication-arts-0/music-at-mohawk

Figure 6: Music Sector College Programs

College	Number of Courses related to Music
Algonquin	2
Boréal	9
Cambrian	2
Canadore	4
Centennial	3
Conestoga	3
Durham	1
Fanshawe	9
Humber	27
Mohawk	12
Seneca	7
Sheridan	7
St. Clair	1
St. Lawrence	2

Source: https://www.ontariocolleges.ca/en/programs

McMaster University also has dedicated music programs[4]. These include first-year courses and upper courses associated with each specialisation/degree option, including

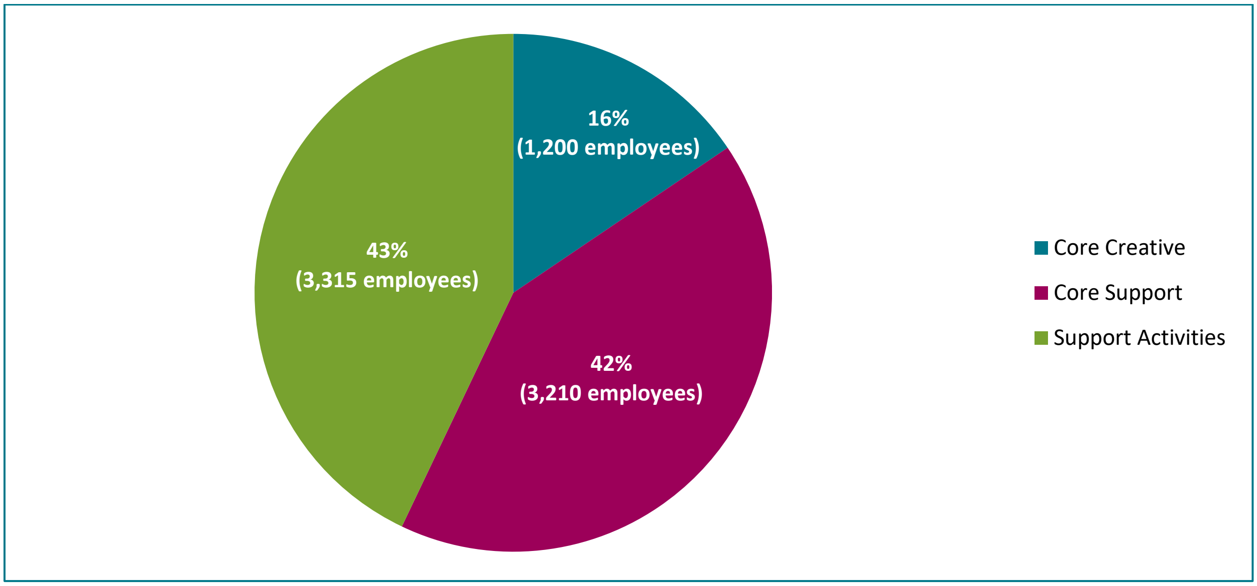
- Honours Bachelor of Music
- Honours Bachelor of Music (Music Cognition)
- Combined Honours Bachelor of Arts in Music
- Bachelor of Arts Music
- Minor in Music
- Diploma in Music Performance

Music Employment

In 2016, approximately 26% (7,725 employees) of Hamilton's creative industries sector employment was related to the music sector. In terms of function, 16% (1,200 employees) were in core creative music sector employment while 42% (3,210 employees) were in core support music sector employment and 43% (3,315 employees) were employed in support activities for the music sector.

[4] https://future.mcmaster.ca/programs/music/

Figure 7: Music Sector Employment by Function, 2016



Source: Statistics Canada, Census of Canada 2016

Figure 8 shows the top employing music sectors by function in 2016.

- **Core Creative** - *Radio and Television Broadcasting* was the top employing core creative music sector, representing 7% (570 employees) of all music sector employment
- **Core Support -** *Other schools and instruction*[5] was the top employing core support music sector, representing 20% (1,580 employees) of all music sector employment
- **Support Activities** - *Advertising, public relations, and related services* were the top employing support activities for the music sector, representing 15% (1,185 employees) of all music sector employment

Employment in the music sector grew by 14% from 2011 to 2016. The largest growing music sector employment by function was:

- **Core Creative** - the largest employment growth was *Performing arts companies*
- **Core Support** – the largest growth was in *Other schools and instruction*
- **Support Activities** – the largest growth was in *Advertising, public relations, and related services*

Employment in support activities for the music sector such as *consumer goods rental* and *electronics and appliance stores* declined from 2011 to 2016. The *consumer goods rental industry* includes consumer electronics and appliance rental and videotape and disc rental. The declining employment in this industry sector might affect the value chain for the sector.

[5] This industries group comprises establishments primarily engaged in providing instruction in fine arts; athletics and sports; languages; and other instruction (except academic, business, computer, management, and technical and trade instruction); and providing services, such as tutoring and exam preparation.

Figure 8: Music Sector Employment Growth, 2011-2016

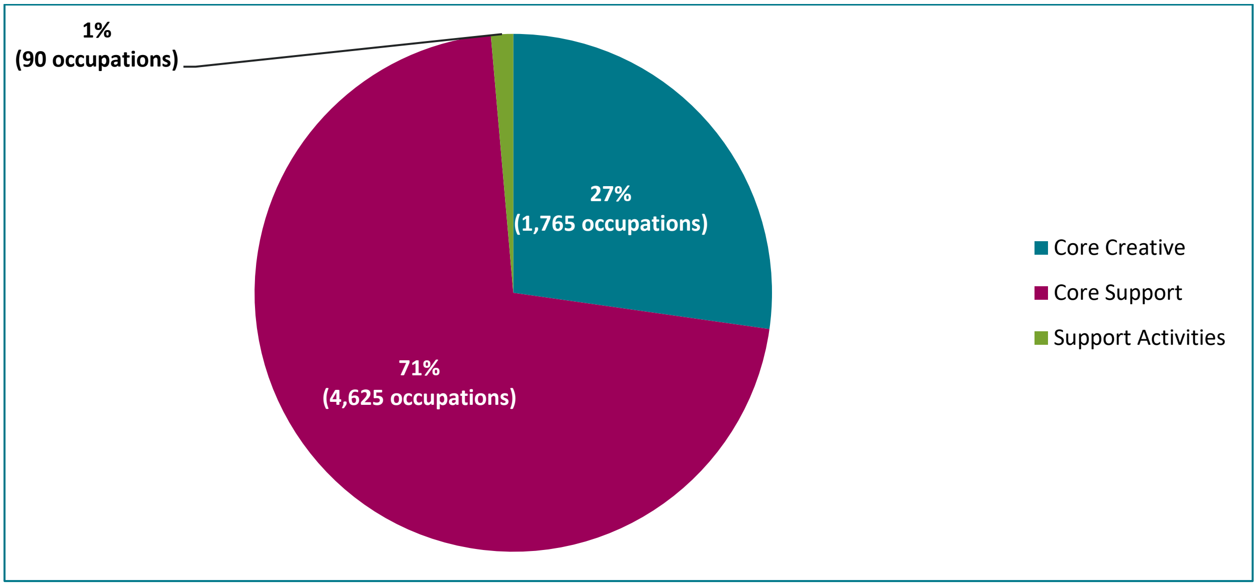
Music Sector Employment (NAICS)	Function	Employment by Year		Employment Change	
		2011	2016	Net Change	% Change
Total		6,750	7,725	975	14%
Radio and Television Broadcasting	Core Creative	435	570	135	31%
Performing arts companies	Core Creative	205	385	180	88%
Promoters (presenters) of performing arts, sports and similar events	Core Creative	175	175	-	0%
Agents and managers for artists, athletes, entertainers and other public figures	Core Creative	65	70	5	8%
Other schools and instruction	Core Support	1,340	1,580	240	18%
Sporting goods, hobby and musical instrument stores	Core Support	975	1,185	210	22%
Personal goods merchant wholesalers	Core Support	300	325	25	8%
Sound recording industries	Core Support	40	120	80	200%
Advertising, public relations, and related services	Support Activities	855	1,185	330	39%
Electronics and appliance stores	Support Activities	1,425	1,180	-245	-17%
Other miscellaneous manufacturing	Support Activities	640	775	135	21%
Consumer goods rental	Support Activities	295	175	-120	-41%

Source: Statistics Canada, Census of Canada 2016 & 2011 National Household Survey

Music Occupations

In 2016, approximately 42% (6,480 occupations) of Hamilton's creative industries sector occupations was related to the music sector. In terms of function, 27% (1,765 occupations) were core creative music sector occupations while 71% (4,625 occupations) were in core support music sector occupations and 1% (90 occupations) was support activities occupations for the music sector.

Figure 9: Music Sector Occupation by Function, 2016



Source: Statistics Canada, Census of Canada 2016

Figure 8 shows the top music sector occupations by function in 2016.

- **Core Creative** - *Musicians and singers* were the top core creative music sector occupations, representing 14% (875 occupations) of all music sector occupations
- **Core Support -** *Advertising, marketing and public relations managers* were the top core support music sector occupations, representing 31% (1,900 occupations) of all music sector occupations
- **Support Activities** - *Broadcast technicians* was the top support activities music sector occupations, representing 1% (90 occupations) of all music sector occupations

Occupations in the music sector grew by 19% from 2011 to 2016.The largest growing music sector occupations by function were:

- **Core Creative** - the largest growth was *Producers, directors, choreographers and related occupations*
- **Core Support** – the largest growth was in *Advertising, marketing and public relations managers*

The music sector with a Location Quotient (LQ)[6] of 1.06 indicates occupations on par with the province. On examining individual occupations in this sector by function, the highest LQ's were seen for:

[6] Location Quotient (LQ) indicates the concentration of occupations in Hamilton relative to the province. An LQ of over 1.25 suggests a high concentration of occupations in that sector. An LQ of over 1 suggests occupations on par with occupations in the province in that sector. An LQ of less than 0.75 suggests that the industry has low concentration and lower growth potential.

- **Core Creative** - *Artisans and craftspersons and Musicians and singers* showed the highest LQ of 1.43 and LQ of 1.35, respectively
- **Core Support -** *Advertising, marketing and public relations managers* and *support occupations in motion pictures, broadcasting, photography and the performing arts* showed highest LQ of 1.18 each
- **Support Activities** - *Broadcast technicians* showed the highest LQ of 1.65

Broadcast technicians with an LQ of 1.65 indicate a sector with a high concentration of occupations in Hamilton relative to the province. However, this sector saw a decline of 110 occupations from 2011 to 2016.

Figure 10: Music Sector Occupations Growth and Location Quotient (LQ), 2011 & 2016

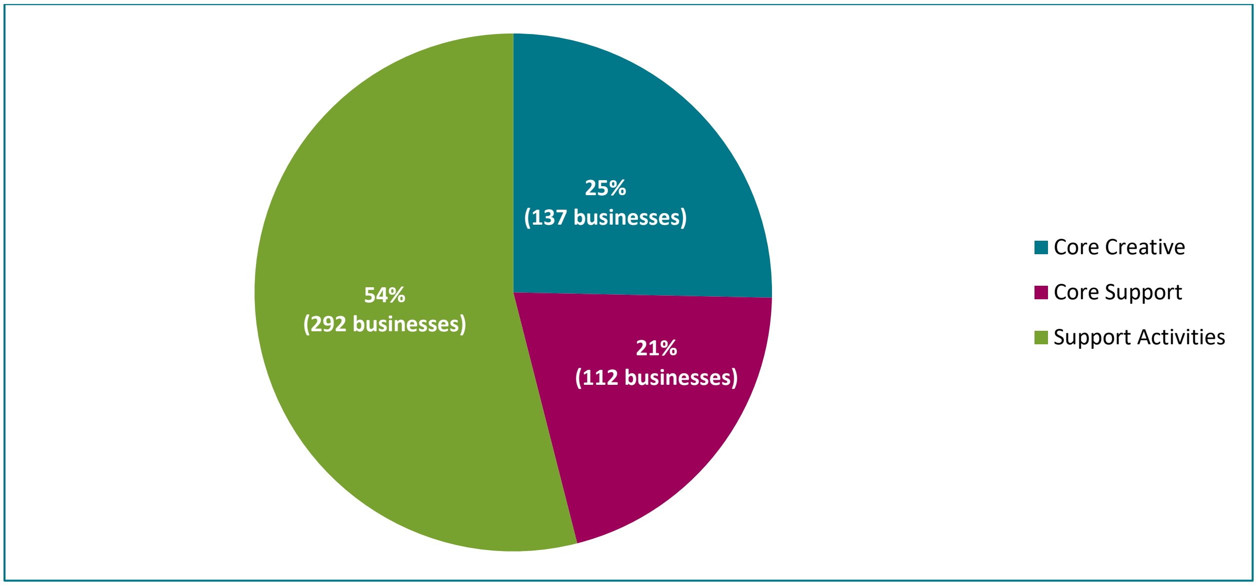
Music Sector Occupations (NOC)	Function	Occupation by Year		2011-2016 Occupation Change		LQ 2016
		2011	2016	Absolute Change	% Change	
Total		5,380	6,480	1,100	20%	1.06
Musicians and singers	Core Creative	705	875	170	24%	1.35
Producers, directors, choreographers and related occupations	Core Creative	295	470	175	59%	0.87
Artisans and craftspersons	Core Creative	230	350	120	52%	1.43
Conductors, composers and arrangers	Core Creative	75	70	-5	-7%	0.84
Advertising, marketing and public relations managers	Core Support	1,440	1,900	460	32%	1.18
Professional occupations in advertising, marketing and public relations	Core Support	1,535	1,765	230	15%	0.9
Audio and video recording technicians	Core Support	330	240	-90	-27%	1.1
Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts	Core Support	95	230	135	142%	1.01
Support occupations in motion pictures, broadcasting, photography and the performing arts	Core Support	105	200	95	90%	1.18
Managers - publishing, motion pictures, broadcasting and performing arts	Core Support	200	140	-60	-30%	0.86
Other performers, n.e.c.	Core Support	70	90	20	29%	0.82
Announcers and other broadcasters	Core Support	100	60	-40	-40%	0.64
Broadcast technicians	Support Activities	200	90	-110	-55%	1.65

Source: Statistics Canada, Census of Canada 2016 & 2011 National Household Survey

Music Businesses

In 2017, the music sector has a total of 541 businesses. In terms of function, 25% (137 businesses) were core creative music sector businesses while 21% (112 businesses) were core support music sector businesses and 54% (292 businesses) was businesses in support activities for the music sector.

Figure 11: Music Sector Businesses by Function, 2017



Source: Canadian Business Counts, 2017

In terms of employee type, the majority of businesses were self-employed establishments without employees. Approximately, 90 businesses had 1-4 employees, and 40 businesses had 5-9 employees. One business in this sector had at least 100 employees.

The top music sector businesses by function in 2017 were

- Core Creative - *Musical groups and artists* were the top core creative music sector businesses, representing 18% (98 businesses) of all music sector businesses
- Core Support - *Fine arts schools,* were the top core support music sector businesses, representing 11% (57 businesses) of all music sector businesses
- Support Activities - Advertising agencies was the top support activities music sector businesses, representing 16% (89 businesses) of all music sector businesses

Figure 12: Music Sector Businesses by Employee Type and Size of Establishment, 2017

Music Sector Businesses (NAICS) – Employee Type	Function	Total	Without Employees	Employees					
				1-4	5-9	10-19	20-49	50-99	100+
Total		541	375	90	40	22	11	2	1
Musical groups and artists	Core Creative	98	93	3	2	0	0	0	0
Radio broadcasting	Core Creative	12	3	1	3	2	3	0	0
Agents and managers for artists, entertainers and other public figures	Core Creative	10	4	6	0	0	0	0	0
Performing arts promoters (presenters) without facilities	Core Creative	7	5	2	0	0	0	0	0
Musical theatre and opera companies	Core Creative	5	5	0	0	0	0	0	0
Live theatres and other performing arts presenters with facilities	Core Creative	5	1	1	0	2	1	0	0
Fine arts schools	Core Support	57	34	11	3	6	2	0	1
Musical instrument and supplies stores	Core Support	17	10	7	0	0	0	0	0
Festivals without facilities	Core Support	13	11	0	0	1	1	0	0
Sound recording studios	Core Support	9	6	2	1	0	0	0	0
Other sound recording industries	Core Support	6	6	0	0	0	0	0	0
Music publishers	Core Support	5	4	1	0	0	0	0	0
Record production and distribution	Core Support	5	3	1	1	0	0	0	0
Sound recording merchant wholesalers	Core Support	0	0	0	0	0	0	0	0
Advertising agencies	Support Activities	89	55	21	11	2	0	0	0
All other miscellaneous manufacturing	Support Activities	75	49	12	7	5	1	1	0
All other services related to advertising	Support Activities	49	41	5	2	1	0	0	0
All other consumer goods rental	Support Activities	20	10	4	2	1	2	1	0
Display advertising	Support Activities	17	13	4	0	0	0	0	0
Advertising material distribution services	Support Activities	11	9	2	0	0	0	0	0
Audio and video recordings stores	Support Activities	10	2	4	2	2	0	0	0
Specialty advertising distributors	Support Activities	8	4	1	3	0	0	0	0

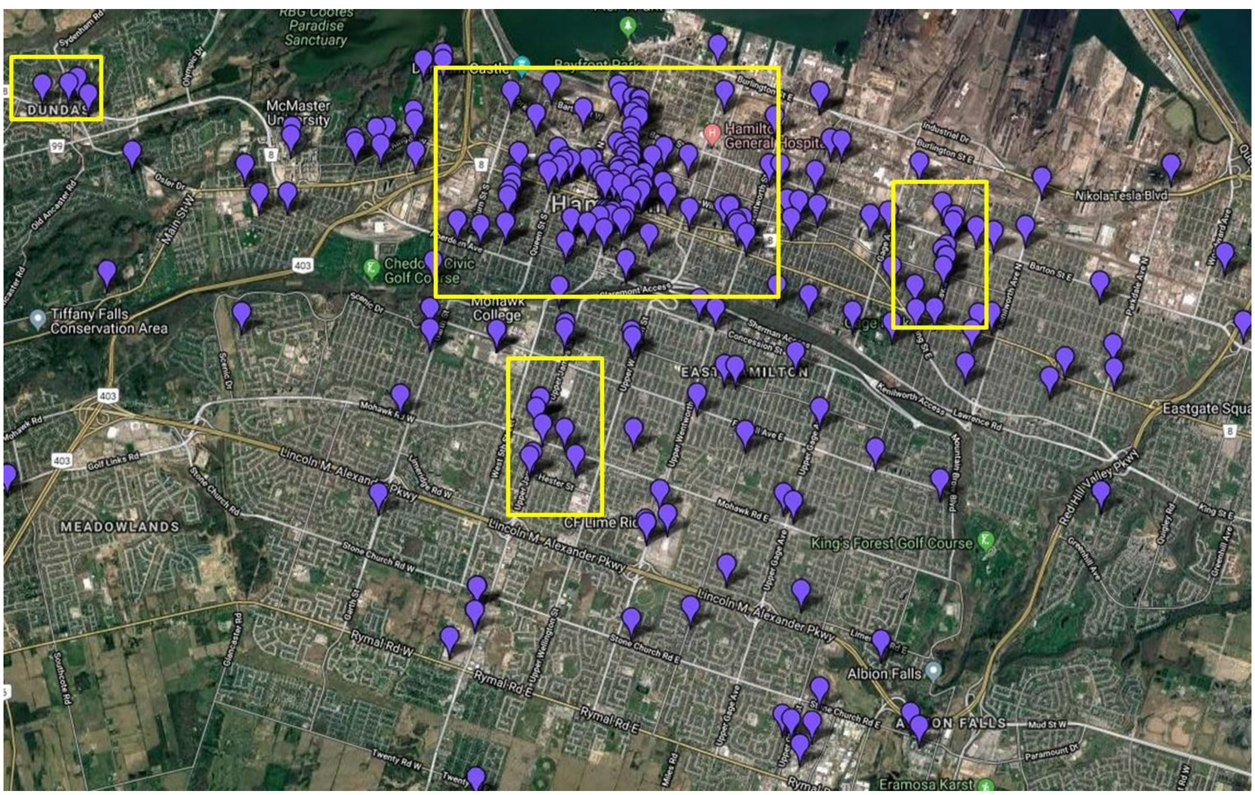
Music Sector Businesses (NAICS) – Employee Type	Function	Total	Without Employees	Employees						
				1-4	5-9	10-19	20-49	50-99	100+
Consumer electronics and appliance rental	Support Activities	7	2	2	3	0	0	0	0
Direct mail advertising	Support Activities	6	5	0	0	0	1	0	0

Source: Canadian Business Counts, 2017

Music Asset Mapping

The creative industries in the Music sector in Hamilton are widely spread across the city. Three distinct clusters are seen in Central Hamilton, Ottawa St and Upper James St. The largest concentrations of creative industries are along James Street, Locke Street, Main Street West, Wentworth Street South, Ottawa Street, and the Westdale and Dundas neighbourhoods. The city is home to 20+ recording studios, many of which have been operational in Hamilton for over ten years. In addition, the city is also home to eight record stores. Business and facilities in this sector include ADS Media, Grant Avenue Studio, Bel Canto Strings Academy, Chamber Music Hamilton and the First Ontario Concert Hall among others.

Figure 13: Creative Industries in the Music Sector, 2018



Source: MDB Insight, 2018

Music SWOC Analysis

Strengths

Music sector occupations rank 1st among all the comparator regions as a percentage of total creative industries sector occupations.

- The Music sub-sector has been a major focus for the City of Hamilton in growing the creative industries sector. Hamilton is identified as 7th in the world for the number of independent musicians per capita. The Hamilton's Musician Guild has more than 600 active members and is the fastest growing local of the American Federation of Musicians. The City has over 20 recording studios, 150 live performance venues and an average of 70 live music show across the city each month.
- While higher levels of collaboration are always possible, participants at the Music workshop pointed to the city as a place characterised by a strong level of collaboration. Venues in the industry were described as working together to ensure maximum use of these spaces. The work of the Hamilton Live Music Venue Alliance is one example of the sector working together. An initiative similar to Record Store Day in Baltimore which promotes independent record stores was proposed.

Weaknesses

The need for more small and medium-sized performance venues was identified at the workshop. While some musicians manage their careers and livelihoods well, the need for stronger business and entrepreneurial skills for all musicians, and in particular young and emerging musicians, was identified as a challenge. The lack of ethnocultural diversity in the music sector in Hamilton was felt to be a weakness. Communication between businesses in the industry can still improve. The Hamilton Musician's Guild is working to build solidarity and increase membership.

Opportunities

To increase the profile and combat fragmentation in the sector, the City supports the Hamilton Music Advisory Team (HMAT) which includes music industry stakeholders including musicians, music businesses, the Chamber of Commerce, Mohawk College, Hamilton Musicians Guild, among others. HMAT advises the City on the *Hamilton Music Strategy* and utilizes the Hamilton City of Music brand to promote a wide range of initiatives and activities such as Music Career Day (held at Mohawk College), Music Mondays that focuses on supporting local emerging musicians via a series of performances at City Hall, the annual Musician Entrepreneur Conference, among others.

The Hamilton Musician's Guild and Mohawk College Music Department are working together to build training and entrepreneurship opportunities for both emerging and established artists. Mohawk College also has marketing and finance programs that can be a resource. These resources can be better promoted and known.

There is an opportunity to provide greater support for emerging artists through channels such as the Hamilton Arts Awards and the programs and partnerships identified above.

Infrastructure needs and opportunities include

- The possibility of a coalition of recording studios
- Addressing a gap in venues by establishing a small, entry-level venues spaces (e.g. Baltimore House and Homegrown style), as well as a more medium-sized 600-800 seat venue
- A better understanding of Hamilton's Music Industry economic impacts

Enhanced business development infrastructure should include improved knowledge of granting sources and more online information related to work in the sector and assistance in applying for funding.

Constraints

The primary focus of constraints facing the Music sub-sector was the need for more coordination between stakeholders and groups in the industry to support overall growth. The formation of the Live Music Venue Alliance as an outgrowth of the *Hamilton Music Strategy* was cited as an example of what is needed to strengthen the industry.

Other Constraints identified include:

- Many performance venues are in place in the city, but there is a lack of awareness of what exists
- The need for more business development services and infrastructure
- Improved access to grants

3. Film Profile

The Film sub-sector or industry comprises the technological and commercial institutions of filmmaking - i.e., film production companies, film studios, cinematography, animation, film production, screenwriting, pre-production, post production, film festivals, distribution and actors, film directors and other film crew personnel.

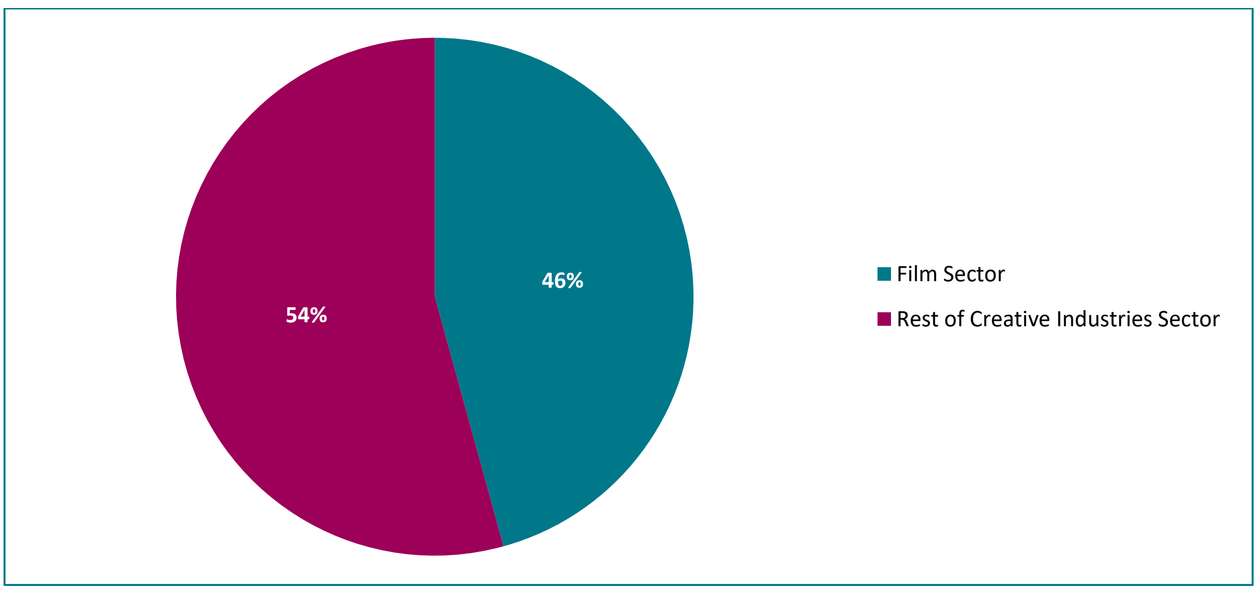
The Film industry continues to be a boon to Hamilton's economy. In 2017, the City issued 539 film permits, which resulted in $12,176,945 direct spend by production companies. Also, over 700+ unionised film workers live in Hamilton and include directors, technicians, writers, actors, hair and makeup specialists, and costume designers[7]. As per Hamilton's 2017 review and 2018 budget submission to city councillors, approximately 100 productions were filmed in Hamilton last year and that the direct spending added $12 million to the city's economy[8].

The development of a major film studio is identified as a "stretch target" in the *2016-2020 Economic Development Action Plan.* The City has developed amendments to *Zoning By-law 05-200* to enable the addition of a production studio and associated warehousing, prop and set design and storage. It also allows the use of digital media such as an animation studio, and associated software development and processing.

Film Workers Characteristics

In 2016, Hamilton accounted for approximately 7,105 film occupations. Film sector workers account for 1.9% of total occupations. As illustrated in Figure 14, the film sector accounted for 46% of total creative industries sector occupations.

Figure 14: Proportion of Film Sector Workers, 2016



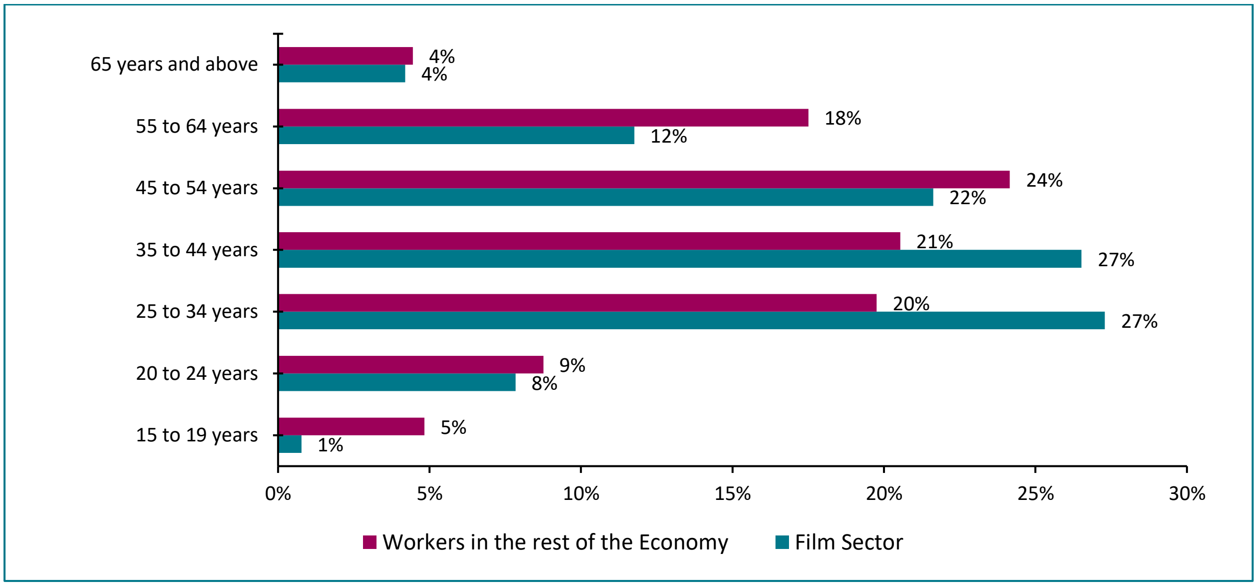
[7] http://www.investinhamilton.ca/key-industries/creative-industries/

[8] https://globalnews.ca/news/3996102/film-industry-delivers-12m-boost-to-hamiltons-economy/

Source: Statistics Canada, Census of Canada 2016

The age cohorts for the employed labour force (aged 15 years and over) by occupation shows that the majority of film workers are from 25 to 34 years representing approximately 1,895 workers making up 27% of Hamilton's film workers. The working-age statistics of film workers in Hamilton is comparable to provincial and national statistics. Film workers are younger compared to workers employed in occupations in the rest of the economy.

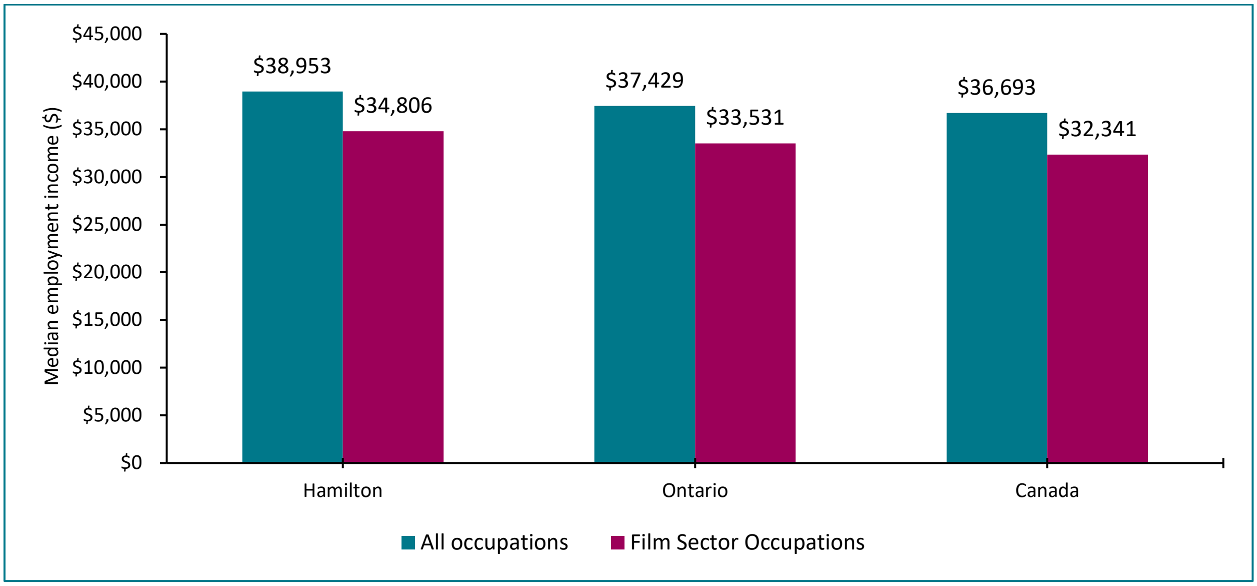
Figure 15: Labour Force by Age for the Film Sector, 2016



Source: Statistics Canada, Census of Canada 2016

In 2016, the median employment income of film workers in Hamilton was $34,806 compared to $38,953 for workers in all occupations. The median employment income of film workers in Hamilton is higher than the overall median income in Ontario at $33,531 and Canada at $32,341.

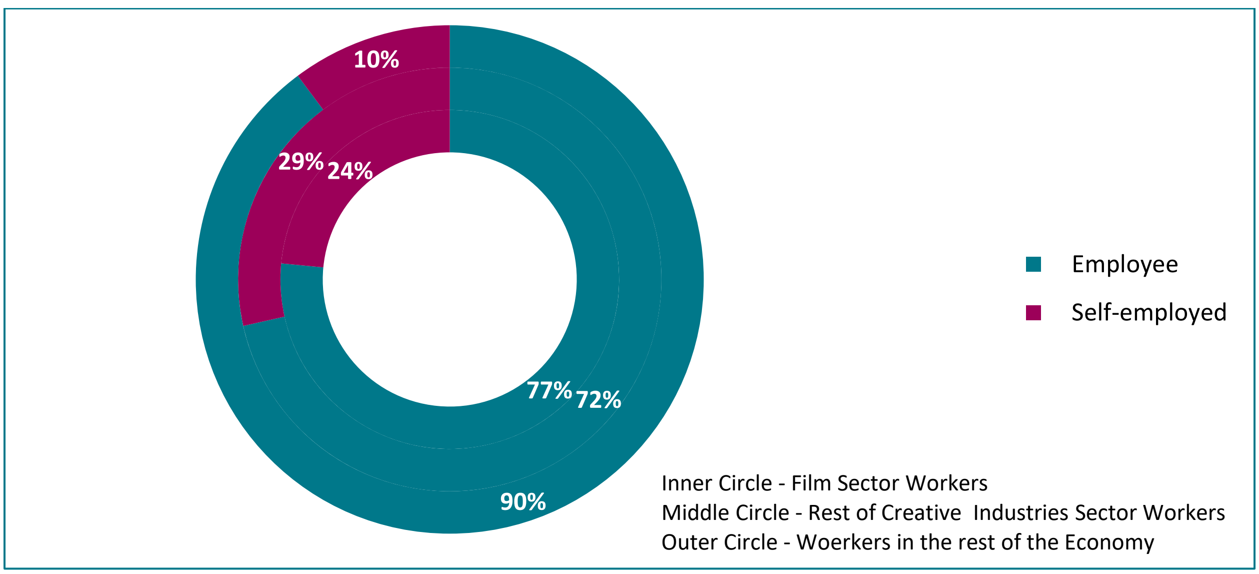
Figure 16: Employment Income of Film Sector, 2016



Source: Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016304.

Analysing occupations by class of worker, it was determined that the film sector workforce has a higher percentage of employed workers compared to the rest of the creative industries sector workers.

Figure 17: Class of Worker of Film Sector, 2016



Source: Statistics Canada, Census of Canada 2016

Film Education Profile

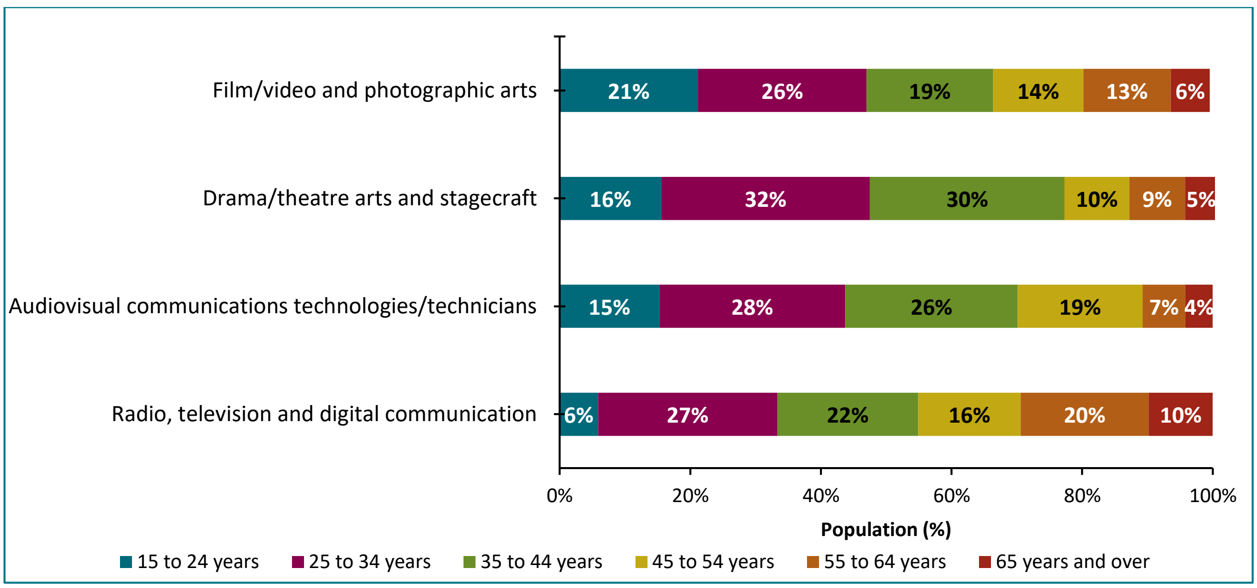
In 2016, approximately 332,950 residents aged 15 years and over had a postsecondary certificate, diploma or degree in Hamilton. Approximately 3,485 people (1% of the total population) had a postsecondary certificate, diploma or degree in film-related courses. The proportion of film degrees in Hamilton is lower than provincial rates at 2.5% and higher than national rates at 0.4% of the total population. The proportion of the population with film-related degrees is listed below:

- *Audio-visual communications technologies/technicians* – 1,440 people
- *Film/video and photographic arts* – 1,085 people
- *Drama/theatre arts and stagecraft* – 705 people
- *Radio, television and digital communication studies* – 255 people

The film education profile shows that approximately 61% of graduates were males compared to 39% of females. As shown in Figure 18, the majority of the population with film degrees were young graduates between the ages of 25 to 34 years. Approximately 21% of graduates with *film/video and photographic arts* were between 15 to 24 years.

Based on the data analysed, Hamilton has a good pool of skilled candidates capable of participating in the labour force in the film sector.

Figure 18: Age of Population with a Postsecondary Certificate, Diploma or Degree in Film Sector, 2016



Source: Statistics Canada, 2016 Census of Population

Analysing the Film sub-sector programs available in Colleges in Ontario, it was determined that Mohawk College offer two film programs in Hamilton. They are the:

- Creative Photography - Still and Motion
- Media Studies

Closed Caption for Media: An Introduction

Developing a Graphic Design Portfolio

Documentary Scriptwriting

Dramatic Scriptwriting

Drawing for Comics & Graphic Novels

Ensuring Successful Print Results

Graphic Design

Graphic Novels Introduction

Growing Up Digital-Living and Working In Canada

Introduction to Journalism

Media and Society

Media Discovered

Pro Tools Certification

Typography 1

Video Editing Introduction

World Cinema

Figure 19: Film Sector College Programs

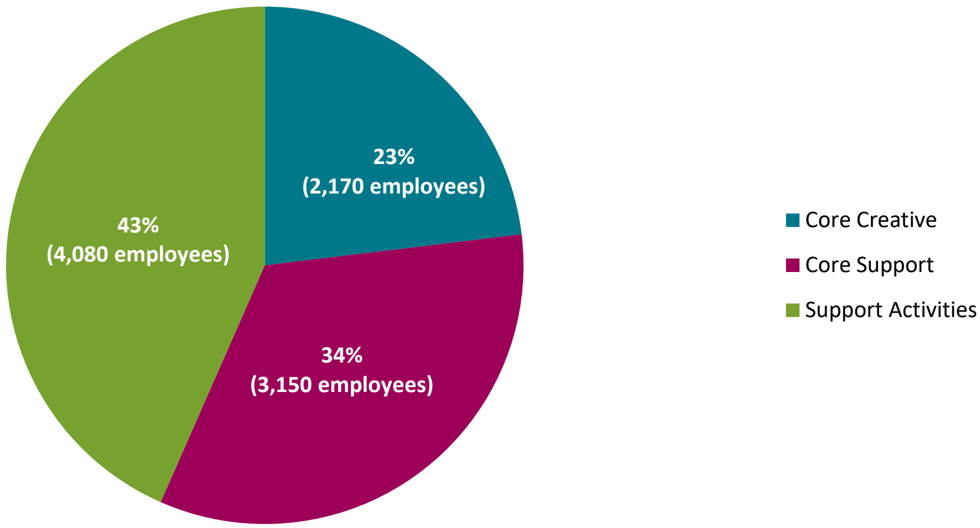
College	Number of Courses related to Film
Algonquin	1
Canadore	1
Centennial	3
Confederation	1
Durham	3
Fanshawe	2
George Brown	4
Humber	4
Loyalist	1
Mohawk	2
Niagara	3
Sault	1
Seneca	3
Sheridan	9

Source: https://www.ontariocolleges.ca/en/programs

Film Employment

In 2016, approximately 32% (9,400 employees) of Hamilton's creative industries sector employment was related to the film sector. In terms of function, 23% (2,170 employees) were in core creative film sector employment while 34% (3,150 employees) were in core support film sector employment and 43% (4,080 employees) were employed in support activities for the film sector.

Figure 20: Film Sector Employment by Function, 2016



Source: Statistics Canada, 2016 Census of Population

Figure 21 shows the top employing film sectors by function in 2016.

- **Core Creative** - *Motion picture and video industries* was the top employing core creative film sector, representing 9% (875 employees) of all film sector employment
- **Core Support -** *Other schools and instruction*[9] was the top employing core support film sector, representing 17% (1,580 employees) of all film sector employment
- **Support Activities** - *Other professional, scientific and technical services*[10] were the top employing support activities for the film sector, representing 14% (1,290 employees) of all film sector employment

Employment in the film sector grew by 10% from 2011 to 2016. The largest growing film sector employment by function was:

- **Core Creative** - the largest employment growth was *Independent artists, writers and performers*

[9] This industries group comprises establishments primarily engaged in providing instruction in fine arts; athletics and sports; languages; and other instruction (except academic, business, computer, management, and technical and trade instruction); and providing services, such as tutoring and exam preparation.

[10] This industry group comprises establishments such as marketing research and public opinion polling houses; photographic studios; translators and interpreters; and veterinary practices.

- **Core Support** – the largest growth was in *Advertising, public relations, and related services*
- **Support Activities** – the largest growth was in *Specialized design services*

Employment in support activities for the film sector such as *electronics and appliance stores, printing and related support activities* and *consumer goods rental* declined from 2011 to 2016. The *consumer goods rental industry* includes consumer electronics and appliance rental and videotape and disc rental. The declining employment in this industry sector might affect the value chain for the sector.

Figure 21: Film Sector Employment Growth, 2011-2016

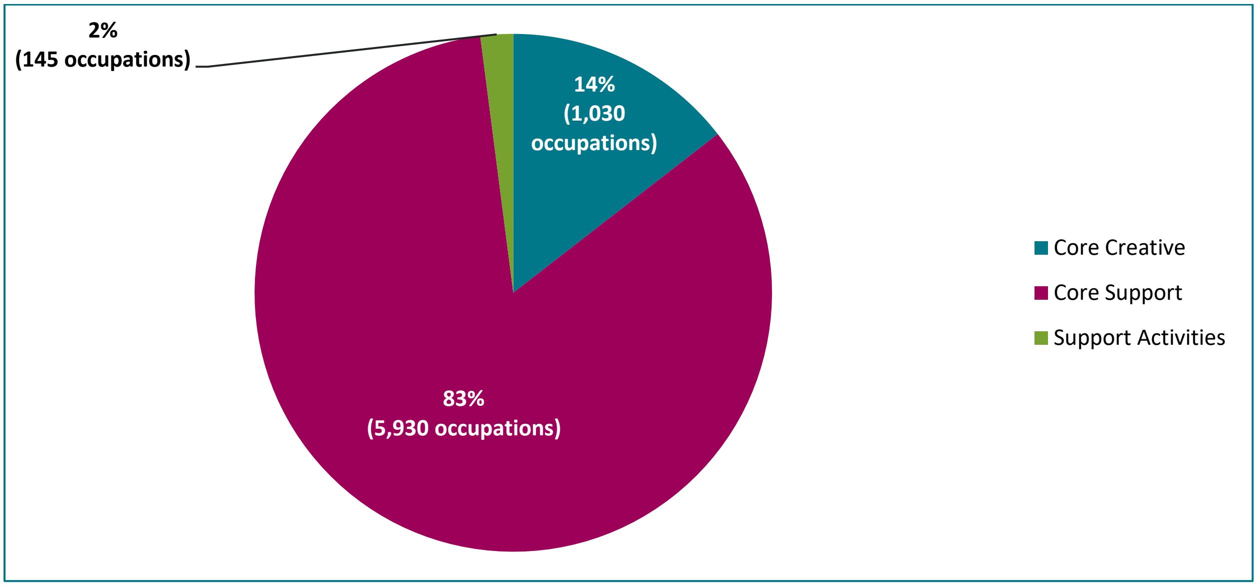
Film Sector Employment (NAICS)	Function	Employment by Year		Employment Change	
		2011	2016	Net Change	% Change
Total		8,575	9,400	825	10%
Motion picture and video industries	Core Creative	585	875	290	50%
Independent artists, writers and performers	Core Creative	360	655	295	82%
Radio and Television Broadcasting	Core Creative	435	570	135	31%
Agents and managers for artists, athletes, entertainers and other public figures	Core Creative	65	70	5	8%
Other schools and instruction	Core Support	1,340	1,580	240	18%
Advertising, public relations, and related services	Core Support	855	1,185	330	39%
Personal goods merchant wholesalers	Core Support	300	325	25	8%
Pay and Specialty Television	Core Support	90	60	-30	-33%
Other professional, scientific and technical services	Support Activities	1,320	1,290	-30	-2%
Electronics and appliance stores	Support Activities	1,425	1,180	-245	-17%
Specialized design services	Support Activities	745	780	35	5%
Printing and related support activities	Support Activities	760	655	-105	-14%
Consumer goods rental	Support Activities	295	175	-120	-41%

Source: Statistics Canada, Census of Canada 2016 & 2011 National Household Survey

Film Occupations

In 2016, approximately 46% (7,105 occupations) of Hamilton's creative industries sector occupations was related to the film sector. In terms of function, 14% (1,030 occupations) were core creative film sector occupations while 83% (5,930 occupations) were in core support film sector occupations and 2% (145 occupations) were support activities occupations for the film sector.

Figure 22: Film Sector Occupations by Function, 2016



Source: Statistics Canada, 2016 Census of Population

Figure 23 shows the top film sector occupations by function in 2016.

- **Core Creative** - *Producers, directors, choreographers and related occupations* were the top core creative film sector occupations, representing 7% (470 occupations) of all film sector occupations
- **Core Support -** *Advertising, marketing and public relations managers* were the top core support film sector occupations, representing 27% (1,900 occupations) of all film sector occupations
- **Support Activities** - *Broadcast technicians* was the top support activities film sector occupations, representing 1% (90 occupations) of all film sector occupations

Occupations in the film sector grew by 20% from 2011 to 2016.The largest growing film sector occupations by function were:

- **Core Creative** - the largest growth was *Producers, directors, choreographers and related occupations*
- **Core Support** – the largest growth was in *Advertising, marketing and public relations managers*

The film sector with Location Quotient (LQ)[11] of 1.02 indicates occupations on par with the province. On examining individual occupations in this sector by function, the highest LQ's were seen for:

[11] Location Quotient (LQ) indicates the concentration of occupations in Hamilton relative to the province. An LQ of over 1.25 suggests a high concentration of occupations in that sector. An LQ of over 1 suggests occupations on par with occupations in the province in that sector. An LQ of less than 0.75 suggests that the industry has low concentration and lower growth potential

- **Core Creative** - *Film and video camera operators* showed the highest LQ of 1.68
- **Core Support -** *Advertising, marketing and public relations managers* and *support occupations in motion pictures, broadcasting, photography and the performing arts* showed highest LQ of 1.18 each
- **Support Activities** - *Broadcast technicians* showed the highest LQ of 1.65

Broadcast technicians with an LQ of 1.65 indicate a sector with a high concentration of occupations in Hamilton relative to the province. However, this sector saw a decline of 110 occupations from 2011 to 2016.

Figure 23: Film Sector Occupations Growth and Location Quotient (LQ), 2011 & 2016

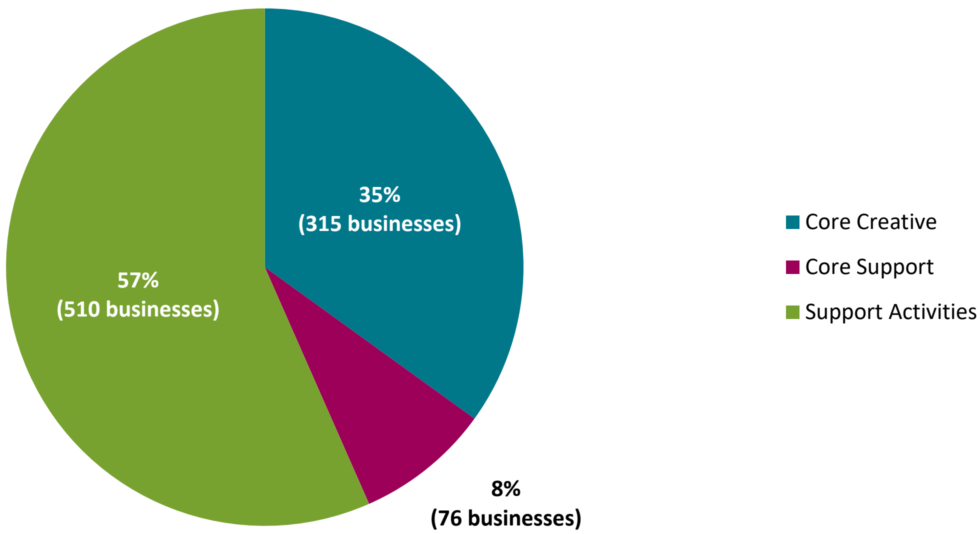
Film Sector Occupations (NOC)	Function	Occupation by Year		2011-2016 Occupation Change		LQ 2016
		2011	2016	Absolute Change	% Change	
Total		5,940	7,105	1,165	20%	1.02
Producers, directors, choreographers and related occupations	Core Creative	295	470	175	59%	0.87
Theatre, fashion, exhibit and other creative designers	Core Creative	190	240	50	26%	0.98
Actors and comedians	Core Creative	90	165	75	83%	0.81
Film and video camera operators	Core Creative	60	155	95	158%	1.68
Advertising, marketing and public relations managers	Core Support	1,440	1,900	460	32%	1.18
Professional occupations in advertising, marketing and public relations	Core Support	1,535	1,765	230	15%	0.9
Interior designers and interior decorators	Core Support	410	510	100	24%	1.03
Photographers	Core Support	360	395	35	10%	1.18
Painters, sculptors and other visual artists	Core Support	220	360	140	64%	1.06
Audio and video recording technicians	Core Support	330	240	-90	-27%	1.1
Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts	Core Support	95	230	135	142%	1.01
Support occupations in motion pictures, broadcasting, photography and the performing arts	Core Support	105	200	95	90%	1.18
Managers - publishing, motion pictures, broadcasting and performing arts	Core Support	200	140	-60	-30%	0.86
Other performers, n.e.c.	Core Support	70	90	20	29%	0.82
Announcers and other broadcasters	Core Support	100	60	-40	-40%	0.64
Photographic and film processors	Core Support	100	40	-60	-60%	0.94
Broadcast technicians	Support Activities	200	90	-110	-55%	1.65
Camera, platemaking and other prepress occupations	Support Activities	140	55	-85	-61%	0.93

Source: Statistics Canada, Census of Canada 2016 & 2011 National Household Survey

Film Businesses

In 2017, the film sector has a total of 901 businesses. In terms of function, 35% (315 businesses) were core creative film sector businesses while 8% (76 businesses) were core support film sector businesses and 57% (510 businesses) was businesses in support activities for the film sector.

Figure 24: Film Sector Businesses by Function, 2017



Source: Canadian Business Counts, 2017

In terms of employee type, the majority of businesses were self-employed establishments without employees. Approximately, 157 businesses had 1-4 employees, and 49 businesses had 5-9 employees. Five businesses in this sector had at least 100 employees. Of these two businesses are Motion picture and video exhibition, one fine arts school and two printing businesses.

The top film sector businesses by function in 2017 were

- Core Creative - *Motion picture and video production* was the top core creative film sector businesses, representing 18% (160 businesses) of all film sector businesses
- Core Support - *Fine arts schools,* were the top core support film sector businesses, representing 6% (57 businesses) of all film sector businesses
- Support Activities - *Photographic services* was the top support activities film sector businesses, representing 14% (128 businesses) of all film sector businesses

Figure 25: Film Sector Businesses by Employee Type and Size of Establishment, 2017

Film Sector Businesses (NAICS) - Employee Type	Function	Total	Without employees	Employees 1-4	5-9	10-19	20-49	50-99	100+
Total		901	653	157	49	17	14	6	5
Motion picture and video production	Core Creative	160	127	28	3	0	1	1	0
Independent actors, comedians and performers	Core Creative	112	97	13	1	0	1	0	0
Motion picture and video distribution	Core Creative	4	2	2	0	0	0	0	0
Motion picture and video exhibition	Core Creative	6	2	0	0	0	1	1	2
Post-production and other motion picture and video industries	Core Creative	17	12	4	0	0	1	0	0
Television broadcasting	Core Creative	6	3	2	0	0	0	1	0
Agents and managers for artists, entertainers and other public figures	Core Creative	10	4	6	0	0	0	0	0
Fine arts schools	Core Support	57	34	11	3	6	2	0	1
Media representatives	Core Support	9	9	0	0	0	0	0	0
Media buying agencies	Core Support	7	5	2	0	0	0	0	0
Video recording merchant wholesalers	Core Support	2	2	0	0	0	0	0	0
Pay and specialty television	Core Support	1	1	0	0	0	0	0	0
Photographic services	Support Activities	128	113	6	7	0	1	1	0
Interior design services	Support Activities	91	67	20	4	0	0	0	0
Advertising agencies	Support Activities	89	55	21	11	2	0	0	0
All other services related to advertising	Support Activities	49	41	5	2	1	0	0	0
Other printing	Support Activities	45	17	13	5	3	4	1	2
All other consumer goods rental	Support Activities	20	10	4	2	1	2	1	0
Display advertising	Support Activities	17	13	4	0	0	0	0	0
Industrial design services	Support Activities	15	10	3	1	1	0	0	0
Advertising material distribution services	Support Activities	11	9	2	0	0	0	0	0
Audio and video recordings stores	Support Activities	10	2	4	2	2	0	0	0

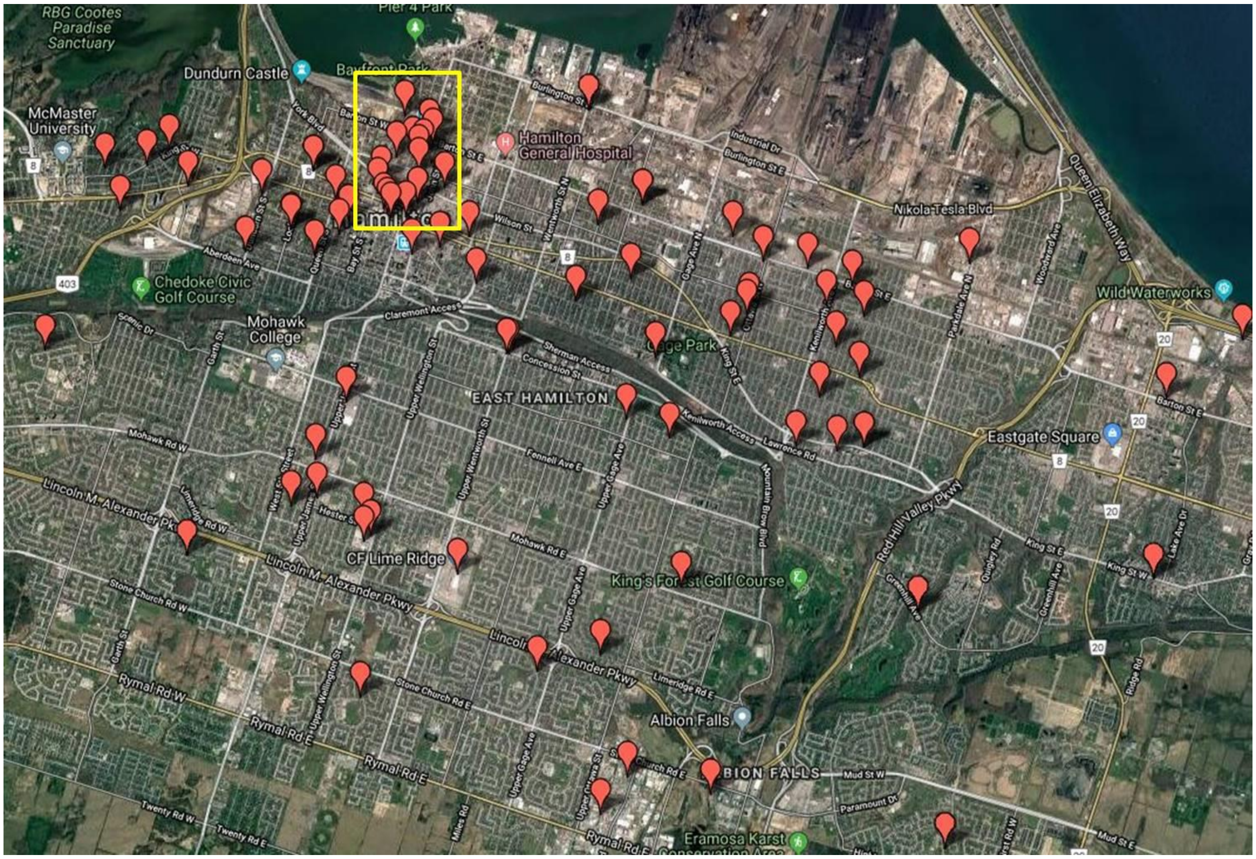
Film Sector Businesses (NAICS) - Employee Type	Function	Total	Without employees	Employees					
				1-4	5-9	10-19	20-49	50-99	100+
Commercial screen printing	Support Activities	8	6	2	0	0	0	0	0
Specialty advertising distributors	Support Activities	8	4	1	3	0	0	0	0
Consumer electronics and appliance rental	Support Activities	7	2	2	3	0	0	0	0
Direct mail advertising	Support Activities	6	5	0	0	0	1	0	0
Camera and photographic supplies stores	Support Activities	3	0	2	0	1	0	0	0
Photographic equipment and supplies merchant wholesalers	Support Activities	3	1	0	2	0	0	0	0

Source: Canadian Business Counts, 2017

Film Asset Mapping

The asset mappings of creative industries in the Film sector shows businesses concentrated along and around James Street North at Barton Street W and E. Film businesses are also seen in the area around central Hamilton at Queen St N, Locke St N and Dundurn St N and also along John St North. A few businesses are also seen near McMaster University, Lime Ridge Road and Kenilworth Avenue. The cluster near James Street North includes Factory Media Center and HAVN. The city also has some clustering of film businesses (spaces and production studios) such as Digital Canaries located in the city’s north end and its industrial zones. Additional investment in the film sector includes renovations to Sherman Avenue Playhouse Theatre. The Playhouse Theatre started operations in 1913 showing silent films and vaudeville. When reopened, the theatre will be the oldest movie house in Hamilton and be a part of Hamilton’s architectural heritage.

Figure 26: Creative Industries in the Film Sector, 2018



Source: MDB Insight, 2018

Film SWOC Analysis

Strengths

Film sector occupations in Hamilton rank 2nd among all the comparator regions as a percentage of total creative industries occupations.

- The Film workshop identified Hamilton's location - its easy access to Toronto without having to live or do business there - as one of the city's greatest strengths. Following closely behind regarding strengths is the wide variety of locations in the city available for filming. The group argued that momentum exists in the industry and there is a strong potential for expanding the industry and Hamilton's reputations as a film centre.
- Hamilton is also the 2nd busiest city in Ontario, next to Toronto, for issuing film permits.
- Although the City has not developed an integrated strategy for the film (comparable to the Hamilton Music Strategy), the City's Film Office has been supporting the growth and development of the sub-sector for many years. There were calls from the consultation workshop for a streamlining of the permit process, but overall satisfaction expressed about the role of the Film Office.

Weaknesses

There appears to be a weak public awareness of the film industry in the city, which undermines its profile and impact. Audiences for screenings are limited (or at least have not realized their full potential).

Hamilton does not have a soundstage and has a shortage of facilities and spaces to support the film sector. There are also gaps in the supply chain for businesses that have support productions shooting in Hamilton, including businesses such as film-focused catering, rental shops, equipment leasing shops, rental spaces, and insurance companies, among others.

The Film workshop pointed to Hamilton's weakness in digital media specifically relating to talent and training. It is very challenging to find local talent and expertise, and Mohawk College graduates are not meeting sector needs. Hamilton should examine Montreal where a strong digital media scene has been created. The Innovation Factory was identified as a potential resource for developing digital media in the city.

Opportunities

There is an opportunity to promote Hamilton as a film centre and potentially to build a film and TV media hub in the city. The City can be a catalyst, working with the sector to advance this agenda. Simply providing venues where people can come together would be a strong step. There was a call for increasing City staff resources dedicated solely to the film sector.

The City has an opportunity to review the processes it uses to interact with the film industry through processes such as permitting to see if they could work better for the sector. In 2019 the City will be undertaking an operational review of its film permitting process to both improve service to the industry but also decrease impacts on residents.

There is an opportunity to enhance online presence for the industry – such as a possibility for producers to preview locations and decide on filming locations and dates online. It was noted that the Ontario Media Development Corporation where Hamilton represents 11% of the Ontario library of locations. Another possibility is facilitating access to the workforce online.

Constraints

Much of the discussion at the Film workshop related to facilities and infrastructure. While there is no need for huge film studios in Hamilton, the industry is constrained by lack of access to small to mid-size studio space. Other Constraints identified include:

- Hamilton lacks an independent filmmaker culture
- There are few local incentives for production
- Local labour market and need to access labour outside the city

4. Fashion Profile

The Fashion sector is a highly diverse sector and includes fashion designers who design clothing, patternmakers to construct patterns based on the designer's specifications, retail buyers and merchandisers to buy the clothing and salespeople that work in retail stores. The sector also includes fashion models, marketing and advertising professionals, and other support staff[12].

Trade Data Online Statistics Canada estimates that the Canadian apparel industry is seen to be transitioning from big textile manufacturing firms to niche markets, as well as speciality and high R&D garments including performance apparel. The report also identifies that the lack of skilled labour is a key concern for Canadian apparel manufacturers. Emerging trends in the sector include automation throughout the supply chain, e-commerce and development of both an omnichannel and multichannel approach to sales[13]. Multichannel sales and marketing allow for the ability to interact with potential customers through print ads, websites, marketing events and retail location. Omnichannel sales allow for an integrated shopping experience where customers can shop online either through a desktop or mobile device[14].

Hamilton's fashion sector is well-positioned to capitalise on regional trends and grow its existing fashion scene[15]. The Fashion Zone at Supercrawl and Hamilton Fashion Week are identified as opportunities for growing the sector[16]. Recent developments in the sector include local representation in London (England) Fashion Week through partnerships with Toronto Fashion Incubator, the City of Toronto and The High Commission of Canada to the United Kingdom[17].

In working to develop this sector, the City researched the feasibility of establishing a Fashion Incubator in the former Eastmount School Site. In addition, *the Fashion Incubators as Economic Infrastructure: A Case Study Analysis*[18] reviewed four potential incubator models to inform decisions for the sector in Hamilton, based on research in other jurisdictions. The incubator models were (a): connecting to a University creative program, (b): a local fashion industry, (c): a co-working space or (d): one directly connected to government. While the study reported that the incubator by itself would not be a profitable enterprise, it is viewed as an essential foundation for entrepreneurs and small businesses to establish and grow the fashion sub-sector.

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[12] http://www.vault.com/industries-professions/industries/fashion-and-apparel.aspx

[13] https://www.ic.gc.ca/eic/site/026.nsf/eng/h_00070.html

[14] https://www.emarsys.com/en/resources/blog/multi-channel-marketing-omnichannel/

[15] https://tourismhamilton.com/hamilton-fashion

[16] ibid

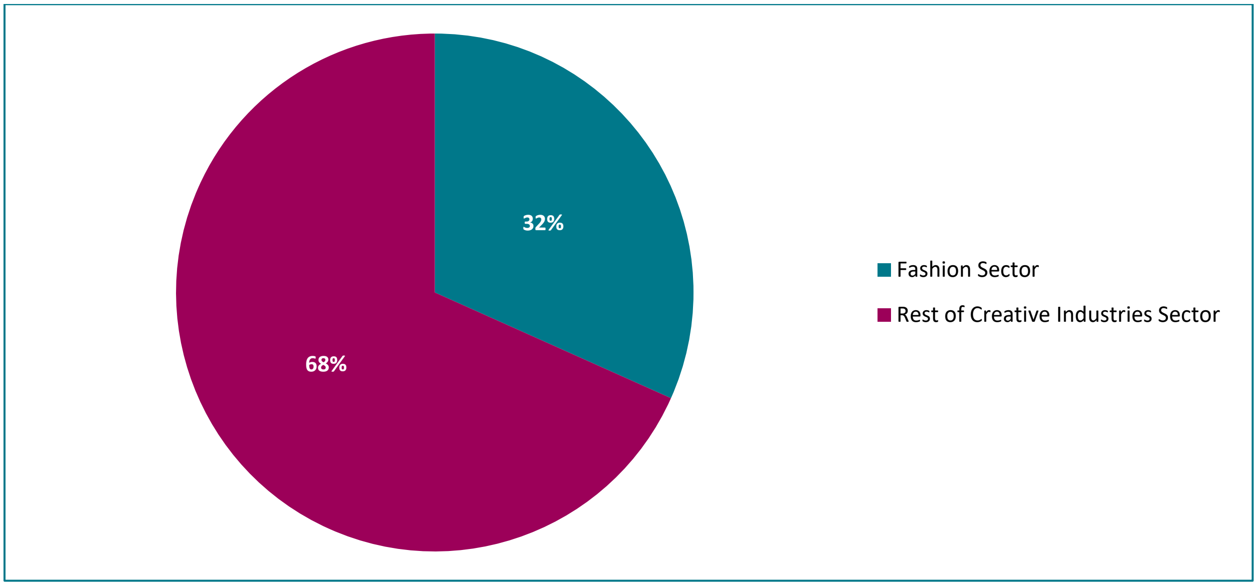
[17] https://www.cbc.ca/news/canada/hamilton/angela-demontigny-london-fashion-week-indigenous-designer-1.4530300

[18] Fashion Incubators as Economic Infrastructure – Case Study Analysis by Civic Plan

Fashion Workers Characteristics

In 2016, Hamilton accounted for approximately 4,925 fashion occupations. Fashion sector workers account for 1.3% of total occupations. As illustrated in Figure 14, the fashion sector accounted for 32% of total creative industries sector occupations.

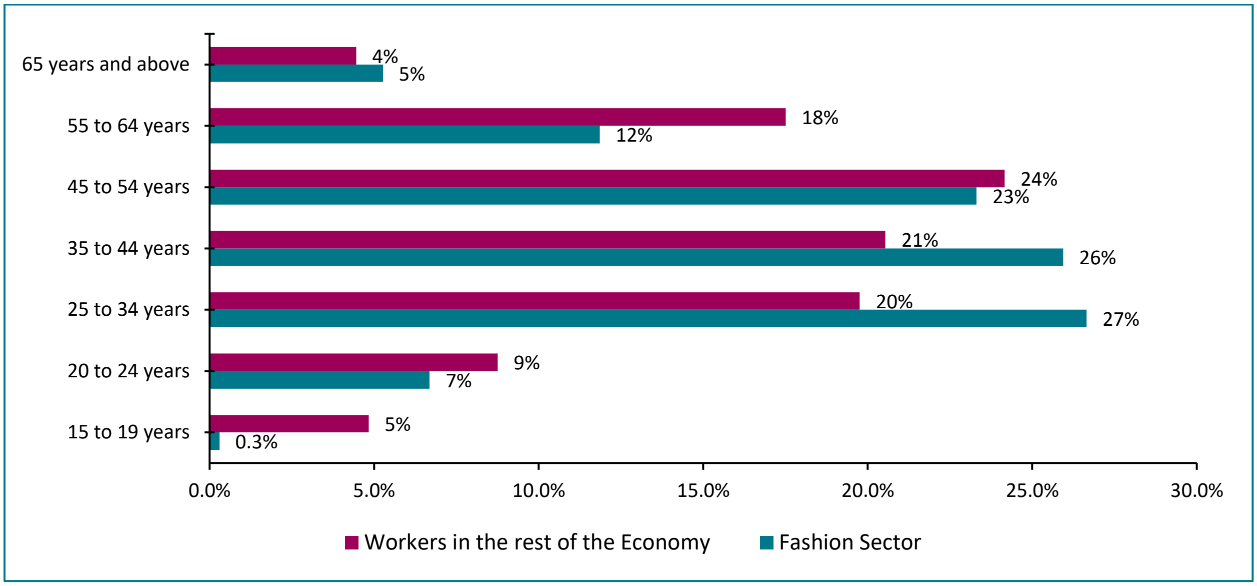
Figure 27: Proportion of Fashion Sector Workers, 2016



Source: Statistics Canada, Census of Canada 2016

The age cohorts for the employed labour force (aged 15 years and over) by occupation shows that the majority of workers are from 25 to 34 years of age; approximately 1,315 workers making up 27% of Hamilton's fashion workers. The working-age statistics of fashion workers in Hamilton is comparable to provincial and national trends. Fashion workers are younger compared to workers employed in occupations in the rest of the economy.

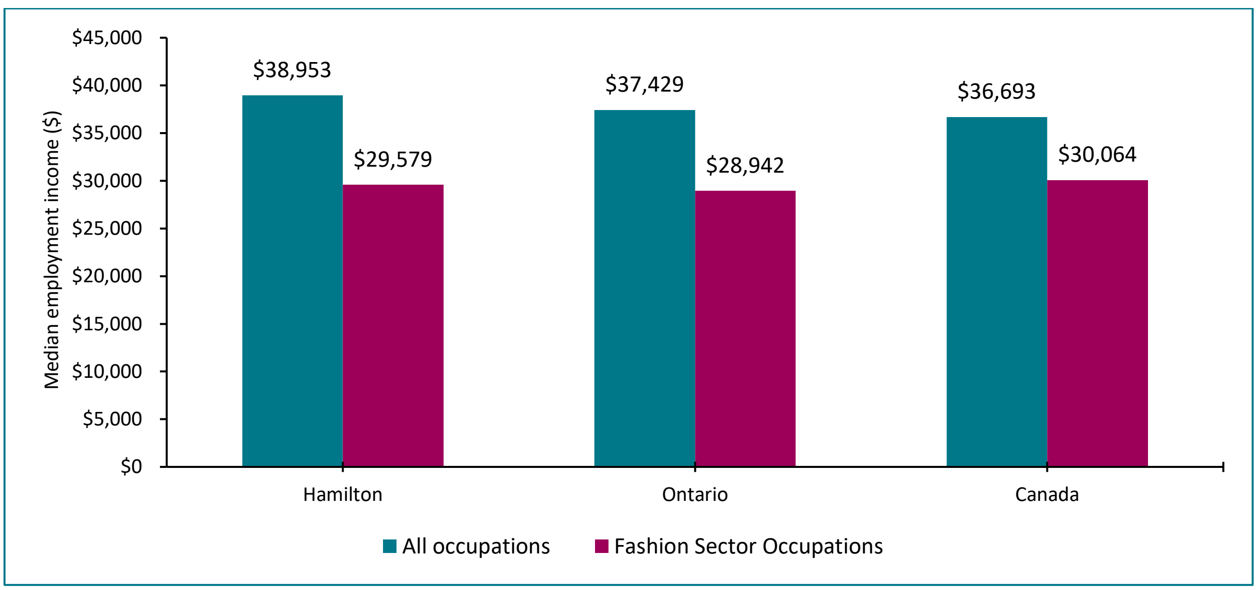
Figure 28: Labour force by Age for the Fashion Sector, 2016



Source: Statistics Canada, Census of Canada 2016

In 2016, the median employment income of fashion workers in Hamilton was $29,579 compared to $38,953 for workers in all occupations. The median employment income of fashion workers in Hamilton is slightly higher than the median employment income in fashion in Ontario at $28,942 and lower than national income at $30,064 in Canada.

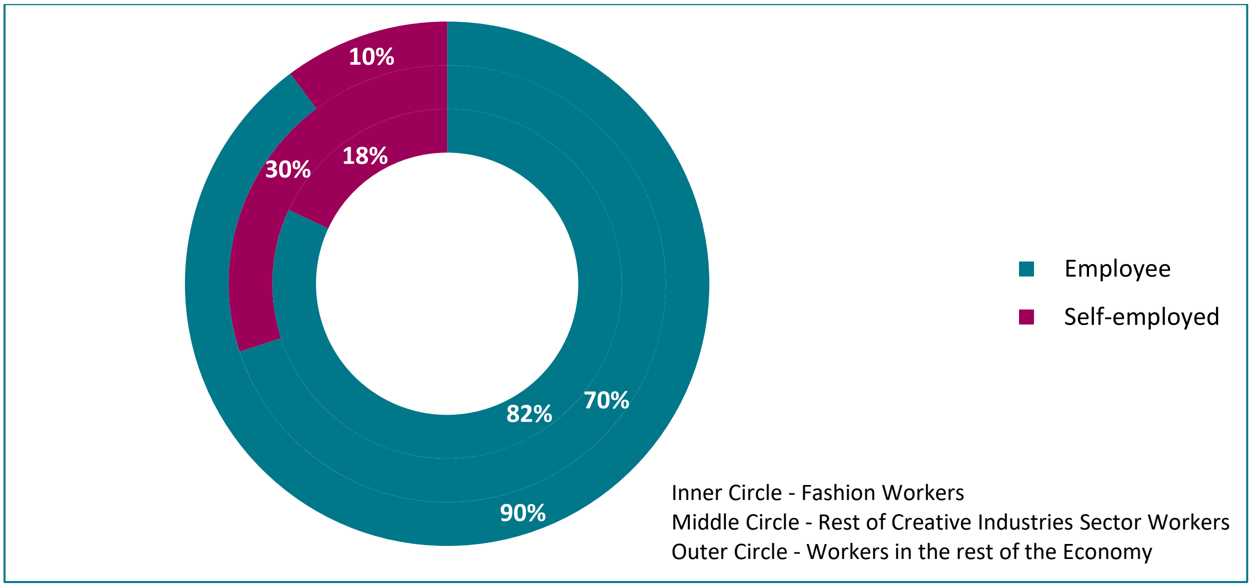
Figure 29: Employment Income of Fashion Sector, 2016



Source: Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016304.

Analysing occupations by class of worker, it was determined that the fashion sector workforce has a higher percentage of employed workers compared to the rest of the creative industries sector workers.

Figure 30: Class of Worker of Fashion Sector, 2016



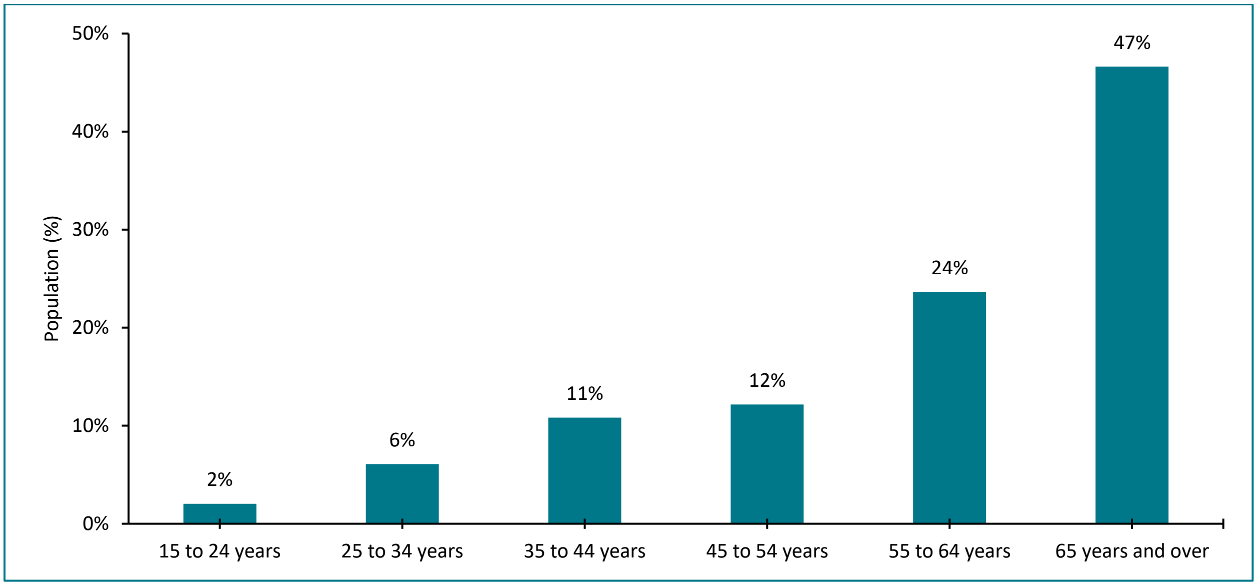
Source: Statistics Canada, Census of Canada 2016

Fashion Education Profile

In 2016, approximately 332,950 residents aged 15 years and over had a postsecondary certificate, diploma or degree in Hamilton. Approximately 740 people (0.2% of the total population) had a postsecondary certificate, diploma or degree in *Apparel and textiles*. The proportion of fashion degrees in Hamilton is slightly lower than provincial rates at 0.5% and higher than national rates of 0.1% of the total population.

The fashion education profile shows that approximately 80% of fashion graduates were females compared to 20% males. As shown in Figure 31, Hamilton has a very small proportion of young graduates with Fashion degrees. The majority of the population (345 people) with a fashion degree are 65 years and above while only 60 graduates are between the ages of 15 to 34 years. This lack of young graduates indicates a weak labour force and graduate pool, which will severely limit meeting the needs of the employer and fashion businesses in Hamilton. The skills gap will ultimately affect the ability of the sub-sector to remain competitive and advance economic growth.

Figure 31: Age of Population with a Postsecondary Certificate, Diploma or Degree in Fashion Sector, 2016



Source: Statistics Canada, Census of Canada 2016

Analysing the fashion sub-sector programs available in Colleges in Ontario, it was determined that Mohawk College offer two fashion programs in Hamilton. They are the:

- Dressmaking – Mohawk College Certificate
- Fashion Design – Mohawk College Certificate

Figure 32: Fashion Sector College Programs

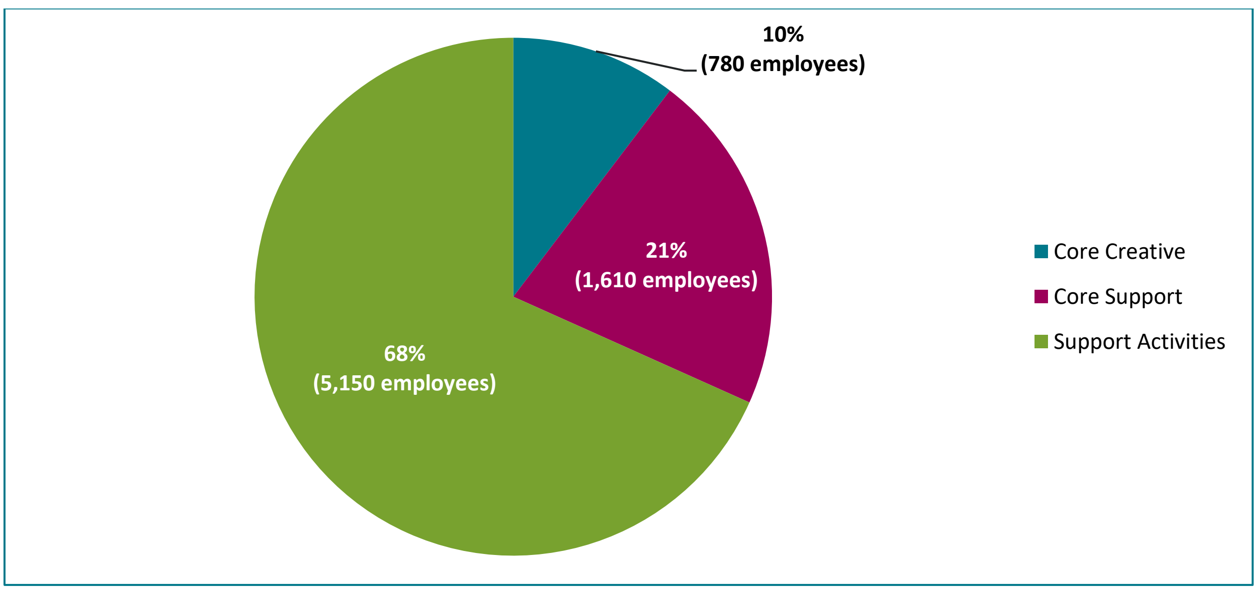
College	Number of Courses related to Fashion
Mohawk	2
Centennial	1
Conestoga	1
Fanshawe	5
George Brown	8
Humber	5
Seneca	6
Sheridan	4
St. Clair	1

Source: https://www.ontariocolleges.ca/en/programs

Fashion Employment

In 2016, approximately 25% (7,540 employees) of Hamilton's creative industries sector employment was related to the fashion sector. In terms of function, 10% (780 employees) were in core creative fashion sector employment while 21% (1,610 employees) were in core support fashion sector employment and 68% (5,150 employees) were employed in support activities for the fashion sector.

Figure 33: Fashion Sector Employment by Function, 2016



Source: Statistics Canada, Census of Canada 2016

Figure 34 shows the top employing fashion sectors by function in 2016.

- **Core Creative** - *Specialized design services*[19] were the top employing core creative fashion sector, representing 10% (780 employees) of all fashion sector employment
- **Core Support -** *Other miscellaneous manufacturing*[20] was the top employing core support fashion sector, representing 10% (775 employees) of all fashion sector employment
- **Support Activities** - *Clothing stores* were the top employing support activities for the fashion sector, representing 34% (2,580 employees) of all fashion sector employment

Employment in the fashion sector grew by 16% from 2011 to 2016. The largest growing fashion sector employment by function was:

- **Core Creative** - the largest employment growth was *Specialized design services*
- **Core Support** – the largest growth was in *Other textile product mills*
- **Support Activities** – the largest growth was in *Clothing stores*

Figure 34: Fashion Sector Employment Growth, 2011-2016

Fashion Sector Employment (NAICS)	Function	Employment by Year		Employment Change	
		2011	2016	Net Change	% Change
Total		6,495	7,540	1,045	16%
Specialized design services	Core Creative	745	780	35	5%
Other miscellaneous manufacturing	Core Support	640	775	135	21%
Other textile product mills	Core Support	140	315	175	125%
Cut and sew clothing manufacturing	Core Support	300	240	-60	-20%
Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing	Core Support	95	80	-15	-16%
Footwear manufacturing	Core Support	120	75	-45	-38%
Clothing knitting mills	Core Support	35	45	10	29%
Fabric mills	Core Support	30	40	10	33%
Textile and fabric finishing and fabric coating	Core Support	20	30	10	50%
Clothing accessories and other clothing manufacturing	Core Support	-	10	10	
Fibre, yarn and thread mills	Core Support	-	-	-	
Leather and hide tanning and finishing	Core Support	-	-	-	

[19] This industry comprises establishments such as interior design services, industrial design services, graphic design services and other specialized design services such as clothing design services, fashion design services shoe design services and textile design services

[20] This industry group comprises establishments in jewellery and silverware manufacturing, sporting and athletic goods manufacturing, Doll, toy and game manufacturing, Office supplies (except paper) manufacturing, Sign manufacturing and all other miscellaneous manufacturing

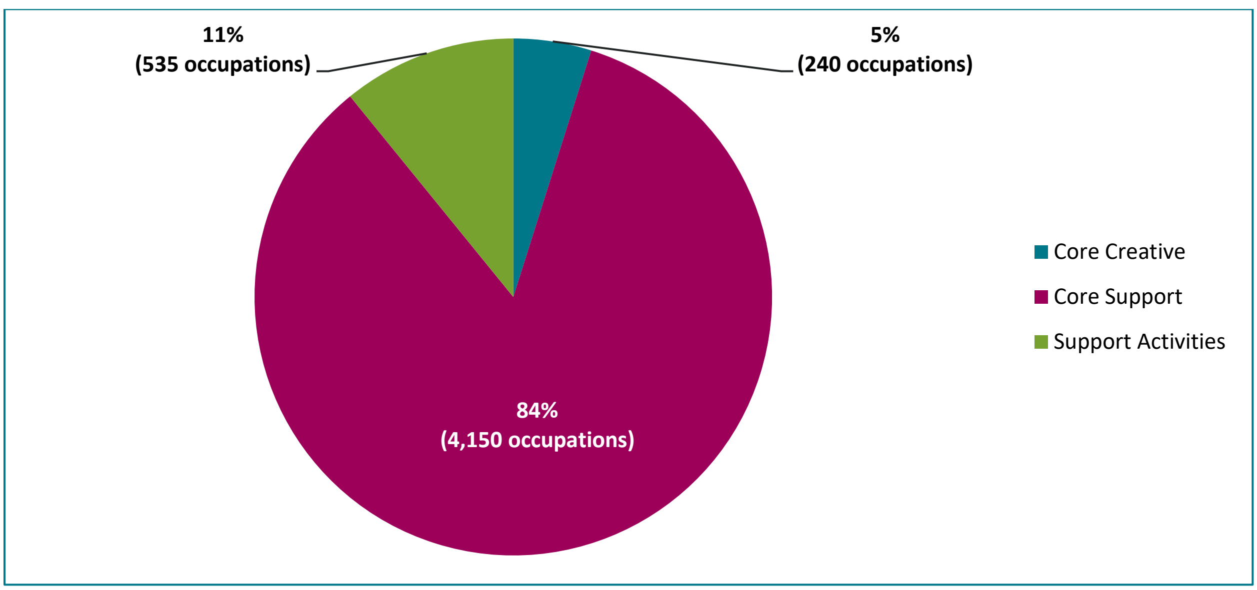
Fashion Sector Employment (NAICS)	Function	Employment by Year		Employment Change	
		2011	2016	Net Change	% Change
Other leather and allied product manufacturing	Core Support	-	-	-	
Clothing stores	Support Activities	2,160	2,580	420	19%
Sporting goods, hobby and musical instrument stores	Support Activities	975	1,185	210	22%
Shoe stores	Support Activities	340	460	120	35%
Jewellery, luggage and leather goods stores	Support Activities	410	390	-20	-5%
Personal goods merchant wholesalers	Support Activities	300	325	25	8%
Textile, clothing and footwear merchant wholesalers	Support Activities	185	210	25	14%

Source: Statistics Canada, Census of Canada 2016

Fashion Occupations

In 2016, approximately 32% (4,925 occupations) of Hamilton's creative industries sector occupations was related to the fashion sector. In terms of function, 5% (240 occupations) were core creative fashion sector occupations while 84% (4,150 occupations) were in core support fashion sector occupations and 11% (535 occupations) were support activities occupations for the fashion sector.

Figure 35: Fashion Sector Occupations by Function, 2016



Source: Statistics Canada, Census of Canada 2016

Figure 23 shows the top fashion sector occupations by function in 2016.

- **Core Creative** - *Theatre, fashion, exhibit and other creative designers* were the top core creative fashion sector occupations, representing 2% (240 occupations) of all fashion sector occupations
- **Core Support -** *Advertising, marketing and public relations managers* were the top core support fashion sector occupations, representing 12% (1,900 occupations) of all fashion sector occupations
- **Support Activities** - *Tailors, dressmakers, furriers and milliners* were the top support activities fashion sector occupations, representing 2% (330 occupations)) of all fashion sector occupations

Occupations in the fashion sector grew by 25% from 2011 to 2016.The largest growing fashion sector occupations by function were:

- **Core Creative** - the largest occupation growth was *Theatre, fashion, exhibit and other creative designers*
- **Core Support** – the largest growth was in *Advertising, marketing and public relations managers*
- **Support Activities -** the largest growth was in *Tailors, dressmakers, furriers and milliners*

The fashion sector with a Location Quotient (LQ)[21] of 1.04 indicates occupations on par with the province. On examining individual occupations in this sector by function, the highest LQ's were seen for:

- **Core Creative** - *Theatre, fashion, exhibit and other creative designers* showed the highest LQ of 0.98
- **Core Support -** *Advertising, marketing and public relations managers* and *photographers* showed the highest LQ of 1.18 each
- **Support Activities** - *Fabric, fur and leather cutter* showed the highest LQ of 1.34

[21] Location Quotient (LQ) indicates the concentration of occupations in Hamilton relative to the province. An LQ of over 1.25 suggests a high concentration of occupations in that sector. An LQ of over 1 suggests occupations on par with occupations in the province in that sector. An LQ of less than 0.75 suggests that the industry has low concentration and lower growth potential

Figure 36: Fashion Sector Occupations Growth and Location Quotient (LQ), 2011 & 2016

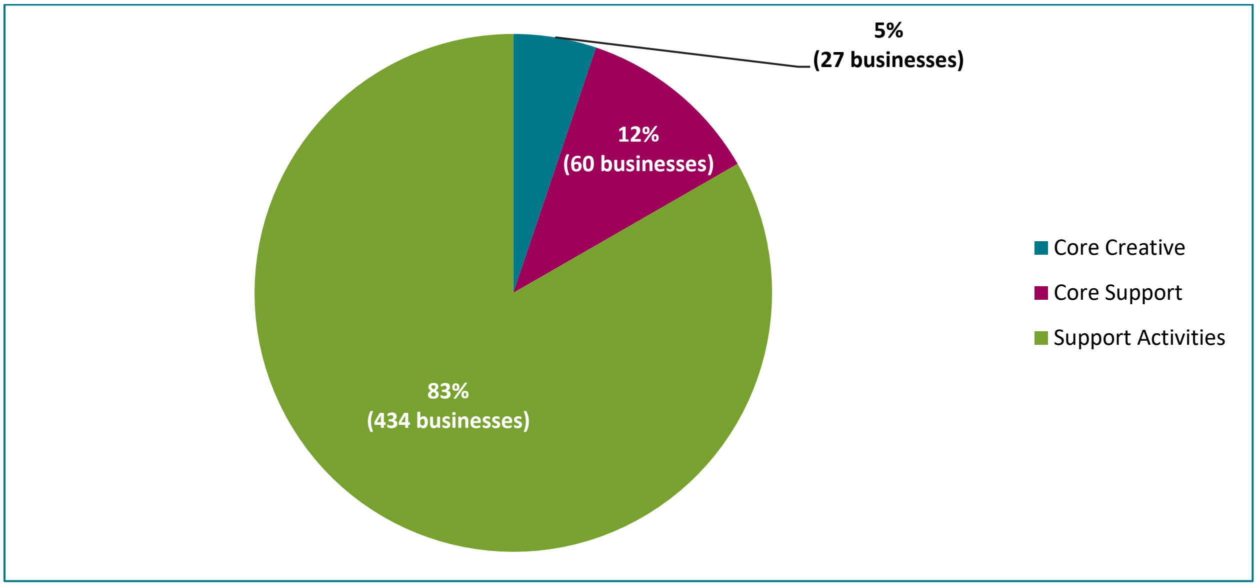
Fashion Sector Occupations (NOC)	Function	Occupation by Year		2011-2016 Occupation Change		LQ 2016
		2011	2016	Absolute Change	% Change	
Total		3,925	4,925	1,000	25%	1.04
Theatre, fashion, exhibit and other creative designers	Core Creative	190	240	50	26%	0.98
Advertising, marketing and public relations managers	Core Support	1,440	1,900	460	32%	1.18
Professional occupations in advertising, marketing and public relations	Core Support	1,535	1,765	230	15%	0.9
Photographers	Core Support	360	395	35	10%	1.18
Other performers, n.e.c.	Core Support	70	90	20	29%	0.82
Tailors, dressmakers, furriers and milliners	Support Activities	200	330	130	65%	1.2
Jewellers, jewellery and watch repairers and related occupations	Support Activities	45	95	50	111%	0.97
Weavers, knitters and other fabric making occupations	Support Activities	25	60	35	140%	0.95
Fabric, fur and leather cutters	Support Activities	50	40	-10	-20%	1.34
Patternmakers - textile, leather and fur products	Support Activities	10	10	-	0%	0.9
Shoe repairers and shoemakers	Support Activities	-	-	-		0

Source: Statistics Canada, Census of Canada 2016

Fashion Businesses

In 2017, the fashion sector has a total of 521 businesses. In terms of function, 5% (27 businesses) were core creative fashion sector businesses while 12% (60 businesses) were core support fashion sector businesses and 83% (434 businesses) was businesses in support activities for the fashion sector.

Figure 37: Fashion Sector Businesses by Function, 2016



Source: Canadian Business Counts, 2017

In terms of employee type, the majority of businesses were self-employed establishments without employees. Approximately, 100 businesses had 1-4 employees, and 94 businesses had 5-9 employees. Three businesses in this sector had at least 100 employees. These businesses are in *narrow fabric mills and Schiffli machine embroidery*, *textile product mills* and *men's and boys' cut and sew clothing manufacturing.*

The top fashion sector businesses by function in 2017 were

- Core Creative - *Other specialized design services* were the top core creative fashion sector businesses, representing 5% (27 businesses) of all fashion sector businesses
- Core Support - *All other cut and sew clothing manufacturing* was the top core support fashion sector businesses, representing 2% (8 businesses) of all fashion sector businesses
- Support Activities - *Women's clothing stores* were the top support activities fashion sector businesses, representing 16% (85 businesses) of all fashion sector businesses

Figure 38: Fashion Sector Business by Employee Type and Size of Establishment, 2017

Fashion Sector Businesses (NAICS) - Employee Type	Function	Total	Without employees	Employees					
				1-4	5-9	10-19	20-49	50-99	100+
Total		521	203	100	94	78	32	11	3
Other specialized design services	Core Creative	27	20	5	2	0	0	0	0
All other cut and sew clothing manufacturing	Core Support	8	7	0	0	0	1	0	0

Fashion Sector Businesses (NAICS) - Employee Type	Function	Total	Without employees	Employees					
				1-4	5-9	10-19	20-49	50-99	100+
Textile bag and canvas mills	Core Support	7	3	1	1	1	0	1	0
Cut and sew clothing contracting	Core Support	7	6	1	0	0	0	0	0
Jewellery and silverware manufacturing	Core Support	7	1	3	1	2	0	0	0
All other textile product mills	Core Support	6	2	1	0	1	1	0	1
Clothing accessories and other clothing manufacturing	Core Support	5	5	0	0	0	0	0	0
Footwear manufacturing	Core Support	4	0	1	2	0	0	1	0
Women's and girls' cut and sew clothing manufacturing	Core Support	3	2	1	0	0	0	0	0
Textile and fabric finishing	Core Support	2	1	1	0	0	0	0	0
Fur and leather clothing manufacturing	Core Support	2	2	0	0	0	0	0	0
Leather and hide tanning and finishing	Core Support	2	2	0	0	0	0	0	0
Narrow fabric mills and Schiffli machine embroidery	Core Support	1	0	0	0	0	0	0	1
Nonwoven fabric mills	Core Support	1	0	0	0	0	1	0	0
Fabric coating	Core Support	1	1	0	0	0	0	0	0
Other clothing knitting mills	Core Support	1	1	0	0	0	0	0	0
Men's and boys' cut and sew clothing manufacturing	Core Support	1	0	0	0	0	0	0	1
Infants' cut and sew clothing manufacturing	Core Support	1	0	0	0	0	0	1	0
Artificial and synthetic fibres and filaments manufacturing	Core Support	1	1	0	0	0	0	0	0
Fibre, yarn and thread mills	Core Support	0	0	0	0	0	0	0	0
Broad-woven fabric mills	Core Support	0	0	0	0	0	0	0	0
Knit fabric mills	Core Support	0	0	0	0	0	0	0	0
Hosiery and sock mills	Core Support	0	0	0	0	0	0	0	0
Other leather and allied product manufacturing	Core Support	0	0	0	0	0	0	0	0
Women's clothing stores	Support Activities	85	19	23	23	18	2	0	0
Jewellery stores	Support Activities	66	30	17	12	6	1	0	0
Family clothing stores	Support Activities	57	9	7	6	13	14	8	0
Shoe stores	Support Activities	57	11	8	21	15	2	0	0

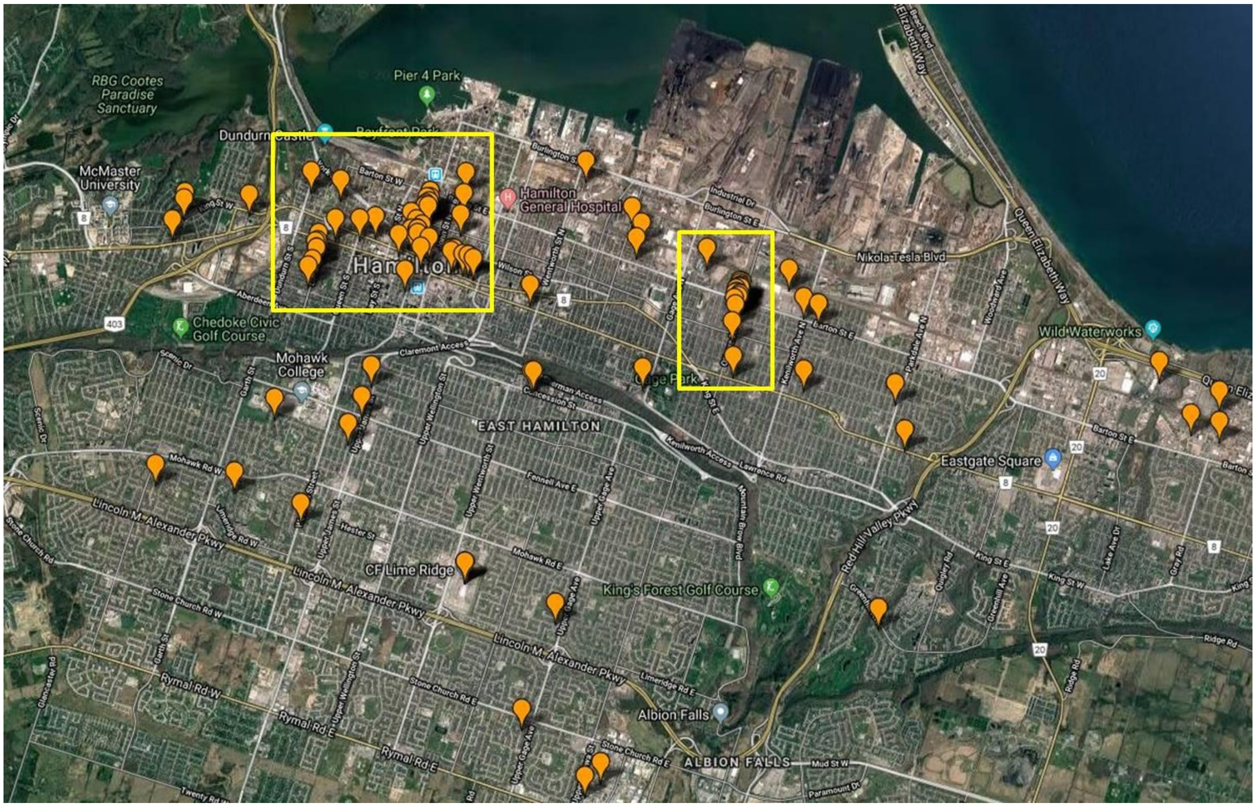
Fashion Sector Businesses (NAICS) - Employee Type	Function	Total	Without employees	Employees					
				1-4	5-9	10-19	20-49	50-99	100+
All other clothing stores	Support Activities	41	19	6	6	6	4	0	0
Sewing, needlework and piece goods stores	Support Activities	35	19	10	3	1	2	0	0
Clothing accessories stores	Support Activities	27	14	4	7	1	1	0	0
Clothing and clothing accessories merchant wholesalers	Support Activities	18	13	2	1	0	2	0	0
Children's and infants' clothing stores	Support Activities	16	5	2	1	7	1	0	0
Men's clothing stores	Support Activities	15	0	5	3	7	0	0	0
Jewellery and watch merchant wholesalers	Support Activities	10	8	1	1	0	0	0	0
Luggage and leather goods stores	Support Activities	4	1	0	3	0	0	0	0
Footwear merchant wholesalers	Support Activities	2	1	0	1	0	0	0	0
Fur stores	Support Activities	1	0	1	0	0	0	0	0

Source: Canadian Business Counts, 2017

Fashion Asset Mapping

The Fashion sector is seen to be clustered in two nodes, namely, James Street North and Ottawa Street North. Businesses in the sector are also seen along King Street East and Locke Street South. The James Street North cluster has several retail and designer shops and plays a predominant distribution role for the sector. The cluster seen in Ottawa Street focuses predominantly on activities surrounding textile and fabric production, textile and fabric manufacturing and textile and fabric distribution. Businesses are also emerging near Mohawk College which might serve as an enabler of the sector or the creation element of the sector. Mohawk College provides continuing education courses in Fashion Design, Dressmaking and Sewing.

Figure 39: Creative Industries in the Fashion Sector, 2018



Source: MDB Insight, 2018

Fashion SWOC Analysis

Strengths

Fashion sector occupations in Hamilton rank 3rd among comparator regions in terms of percentage of the overall creative industries occupations.

- Fashion workshop participants expressed optimism for the potential growth of the fashion industry in Hamilton. It pointed to a collaborative industry in which specific designers and retailers were working together for shared success. This meant that there is less competition among individuals business with a greater sense of community that was to a considerable extent rooted in pride in Hamilton.
- Supercrawl must be recognised and leveraged to support and promote all the creative industries in Hamilton. The workshop group pointed to good local resources (e.g. Ottawa Street – machine repair and specialists), good presentation opportunities (e.g. fashion shows such as Glamour in the Hammer) and a strong local customer base of support.

Weaknesses

The sector suffers from the same low profile as the other sub-sectors; initiatives to improve sector profile and visibility are needed. Hamilton is not known for fashion. The industry, locally and internationally, struggles due to lack of a clear definition or classification – i.e. it is seen as somewhere along a continuum of an art form, a craft, a commercial enterprise/industry. This makes the sector hard to promote and makes it difficult to access government grants.

Nationally, the sector is facing a crisis of finding skilled sewers and trade specialists. An older generation has retired, and the schools are not producing graduates with the practical skills to work in the industry. They must come with basic competencies in these skills which cannot be learned on-the-job.

The sector suffers from not having shared or collaborative spaces for design, mentoring, training, small to medium scale manufacturing and a space for larger scale production machinery. There is a potential for shared equipment and group buying that is not being pursued.

Opportunities

An opportunity and a priority for the City should be raising the profile of the fashion sector. Assistance in reaching wider regional and national media will help brand fashion as a vibrant part of the creative industries scene in Hamilton and help broaden the consumer base.

The City can also be an advocate for the sector to senior levels of government. The sector has specialised manufacturing needs that could be purchased if the sector acted collectively. However, to a greater extent than other sectors such as film and music, the fashion industry in Hamilton has the very little capacity to organise itself for purposes of advocacy, training, mentorship and networking. The City could play a very powerful role in convening the sector to help and enable the development of these capacities and relationships. Participants at the Fashion workshop identified the opportunity to establish an online information hub (a “Fashion Exchange”) to support individuals with start-ups and business development, as well as a forum for collaboration.

Constraints

The Fashion workshop pointed to a crisis facing the industry nation-wide. An entire generation of sewers, pattern makers and other has either retired or is about to retire, and there are few skilled individuals to take their place. Students graduating from post-secondary programs do not bring the practical, “hands-on” skills needed in the industry as well as knowledge of the sector which is critical. The industry also faces production challenges with insufficient production capacity to respond to a strong group of designers.

Growth and development in the sub-sector are hampered by an “identity crisis” in which fashion is seen as an art form or a craft but rarely as an industry (unlike other sub-sectors examined in the current Study).