CONVERGENCE CENTRES
BUILDING CAPACITY FOR INNOVATION

July 2009

Made possible with support of the Ontario Media Development Corporation on behalf of the Ministry of Culture
PUTTING CREATIVITY TO WORK IN TORONTO

Toronto’s identity has been re-energized over the past five years through cultural, political and community leadership. Our Cultural Renaissance began with new iconic museums, galleries and training institutions then gained further momentum through Nuit Blanche, Luminato and a host of other programs and events.

On the heels of this great adventure, a new wave of energy is building in the city’s cultural and creative sector. It could be said that the first wave of the Cultural Renaissance helped put “creativity on display” with greater panache than ever. The second wave in contrast is about putting "creativity to work" to build our city and grow our prosperity.

This report is intended to contribute to our city’s progress in generating a more sophisticated understanding and advancing a more strategic approach to growing the cultural and creative sector. The impetus for it grew out of an initiative that brought together cultural community leaders in 2005/6 called Strategies for a Creative City. Through that project, a group of directors from Toronto’s creative institutions realized that there was a groundswell of new infrastructure development that was happening below the radar. It included more than a dozen major new projects that shared an interesting characteristic – they were purposefully designed to optimize creative work by providing a platform for collaboration.

The Creative Convergence Project has revealed new ways that talent, space and collaboration are being combined and leveraged to fuel our capacity for innovation. It has already been successful in generating numerous collaborations, partnerships, and networks. We hope this work will also provide helpful insight for governments at all levels that are looking for new ways to stimulate the economy, create jobs and build infrastructure for the future. We would like to specially thank the Ontario Media Development Corporation’s Entertainment and Creative Clusters Partnership Fund for their lead role in funding this project as well as the hundreds of other partners, individuals, organizations, departments and agencies that contributed to it.

Creative Convergence Project Consortium
CREATIVE CONVERGENCE
PROJECT PARTNERS

PROJECT CONSORTIUM:

- Canadian Film Centre
- ARTSCAPE
- Toronto International Film Festival Group
- MaRS
- Ontario College of Art & Design
- Evergreen

PROJECT SPONSORS:

- Ontario Media Development Corporation
- Toronto Culture
- WATERFRONT Toronto
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**Lori Tesolin and Karol Murillo**
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EXECUTIVE SUMMARY

Considered globally as a driver of the knowledge economy, the Cultural and Creative sector is increasingly understood to play a crucial role in economic life, attracting talent and investment, building international reputation and catalyzing innovation across all sectors of the economy. Distinct from other knowledge economy industries in their reliance on origination of ‘expressive value’, this complex and evolving sector of artists, designers, engineers and entrepreneurs helps propel Toronto’s economy through their ability to generate both tremendous social and economic value.

As one of North America’s most significant regions for the Cultural and Creative sector, Toronto is emerging as a global player in many of the clusters that generate jobs, wealth and cultural vitality in the knowledge economy. Architecture and design, advertising, publishing, film and television, digital media, and the arts – each reflect areas in which the region has developed world-class capabilities.

However, the uncertainty of the current economic climate, in combination with aggressive measures employed by competing global regions, suggests that Toronto can not be complacent with its position. Competitive advantage in the globally significant Cultural and Creative sector requires more targeted development approaches that focus on aligning strategy, partnerships, and investment to deliver a more pervasive ‘culture’ of entrepreneurship, collaboration and innovation.

The Creative Convergence Centres – Building Capacity for Innovation report reflects a multi-partner study focused on advancing the understanding of spatial and entrepreneurial dynamics in the Cultural and Creative sector in order to enable the development and delivery of more cohesive policy and tactics in addressing key challenges and opportunities.
The research and engagement process points to a number of significant ‘macro’ challenges which are broadly shared across the sector to achieving this agenda:

- **Talent** - the challenge of cultivating entrepreneurial capacity, business skills and workforce development across the spectrum of creative enterprises

- **Space/Place** - the challenge of sustaining and developing infrastructure and urban environments which stimulate creativity and innovation

- **Collaboration** - the challenge of connecting creative people and assets across organizational, geographic and disciplinary boundaries

Toronto’s portfolio of ‘convergence centres’ reflect a new generation of institutions in the region that collectively provide a model for addressing these overarching challenges for the sector. Represented in part by the Creative Convergence Project (CCP) consortium members, facilities such as Canadian Film Centre’s Windfields Campus, Toronto International Film Festival Group’s Bell Lightbox, MaRS Centre, OCAD’s Digital Futures Centre, Evergreen’s Brick Works and the proposed Artscape ‘centre for creative sector enterprise’ illustrate a strategic interest and emerging capability in Toronto that has the potential to accelerate innovation across the Cultural and Creative sector.

For the purposes of this report, these convergence centres are defined as multi-dimensional and designed with explicit intent to build capacity for creativity and innovation. Through dedicated and specialised platforms for collaboration, these centres leverage investment at the intersection of place, culture, technology and entrepreneurship to generate multiple dividends of economic and social value. Located strategically to stimulate favourable clustering conditions, convergence centres align sector development opportunities and broader public policy objectives within a sustainable, not-for-profit business model.

While recognizing the different missions of these organizations, the report illustrates the common approaches to convergence – of values, leadership, partnerships, talent, networks and place – that has brought these unique enterprises together as a ‘community of practice’ focused on collaboration-based innovation.

These centres, and the organizations that manage them, reflect capabilities to purposefully translate serendipity to synergy, facilitating convergence in a number of important domains:
Values – the strategic intent of the centres reflect shared values that underpin effective collaboration at the intersection of diverse capabilities, perspectives and ideas. They are multi-dimensional in nature, fuelling innovation within and between economic and social spheres.

Leadership – the centres attract a range of cross-disciplinary leadership, formed around a common purpose of innovation. By connecting the necessary diversity of knowledge, entrepreneurship and expertise required to drive a values-based culture of innovation, the leadership teams developed for these centres are able to bring together different disciplines for constructive engagement.

Partnerships - the centres are established through an entrepreneurial, not-for-profit model that facilitate purposeful collaboration and provide a ‘neutral sandbox’ for the exchange of value, convening of ideas and shared risk among public, private and 3rd sector partners.

Talent - the centres seek to bring together different domains of knowledge, research and practice to build capacity for collaboration across a critical mass of individuals and enterprises. They are hybrid institutions where interaction can occur between multiple disciplines, enabling depth (within specific capabilities) and breadth (across disciplines) of skills and experience.

Networks - as conduits of knowledge and idea exchange, convergence centres function both as physical and virtual hubs that draw on and facilitate collaboration at multiple scales. Their footprints are both physical and virtual - they generate local ‘value engines’ and regional ‘buzz’ through propelling place-based interactions and often facilitate the development of global ‘pipelines’ that extend their connectivity internationally.

Place – these convergence centres are designed as a conscious aspect of the creativity and innovation strategy. As the physical manifestation of the organizations’ core values and strategic intent, these environments encourage flexibility, interaction, collaboration and permeability, connecting on multiple levels to their urban context.

These ‘domains’ of convergence reflect the critical role that this new generation of institution for collaboration provides in driving entrepreneurship, innovation and creativity.
The CCP consortium has proposed the following key recommendations to advance the development of convergence projects as strategic infrastructure for developing the Cultural and Creative sector in the Toronto region:

**PROVINCE OF ONTARIO**

- Adapt the definition of convergence centres articulated in this report for the purpose of designating projects for infrastructure programs
- Identify a lead Ministry or Department to act as the point of contact on requests for infrastructure support for convergence centres
- Coordinate access between departments, ministries or agencies for proponents of convergence centres
- Identify sources of funds and a process through which proponents of convergence centres can secure federal and provincial investment
- Provide financial support to the study of cultural and creative sector entrepreneurship development needs, resources and strategies for the GTA

**GOVERNMENT OF CANADA**

- Use provisions allowed under the Planning Act to fund, finance and incentivize development of convergence projects that address municipal objectives (e.g. including Section 37 agreements, Municipal Capital Facilities programs, Tax Increment Equivalent Grants, and Community Improvement Plans)
- Consider exempting convergence centre projects from development charges
- Support convergence centre projects as priorities for federal and provincial infrastructure funding
- Appoint a project coordinator and internal staff working teams to facilitate planning and approval processes for the development of convergence centres
- Work with sector organizations to identify gaps in support services provision
- Work with Invest Toronto and proponents of convergence centres to elevate their role in strategies for attracting international knowledge exchange and inward investment
- Enable further research of the cultural and creative sector’s entrepreneurship development needs and resources

**CITY OF TORONTO**

- Adapt the definition of convergence centres articulated in this report for the purpose of designating projects for municipal infrastructure investment programs
- Use provisions allowed under the Planning Act to fund, finance and incentivize development of convergence projects that address municipal objectives (e.g. including Section 37 agreements, Municipal Capital Facilities programs, Tax Increment Equivalent Grants, and Community Improvement Plans)
- Consider exempting convergence centre projects from development charges
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- Appoint a project coordinator and internal staff working teams to facilitate planning and approval processes for the development of convergence centres
- Work with sector organizations to identify gaps in support services provision
- Work with Invest Toronto and proponents of convergence centres to elevate their role in strategies for attracting international knowledge exchange and inward investment
- Enable further research of the cultural and creative sector’s entrepreneurship development needs and resources

**SECTOR SKILLS ORGANIZATIONS**

- Develop a working group of key training institutions to develop a
research framework to enhance the understanding of the entrepreneurship training needs of creative practitioners

- Develop an on-line inventory and web portal of entrepreneurship training resources for the GTA’s Cultural and Creative sector
- Work with sector partners towards a more coordinated promotion and delivery of entrepreneurship training services for the Cultural and Creative sector across the GTA
- Collaborate on establishing a convergence centre for creative sector entrepreneurship serving the GTA

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<td>- Convene regional proponents of convergence centres and incubators designed to strengthen the creative economy to further explore common issues, opportunities and collaborations</td>
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<td>- Develop a coordinated communications strategy that elevates the profile of Cultural and Creative sector incubators and convergence centres</td>
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A number of significant outcomes have emerged from the engagement and research process for this project that illustrates the multiple collaborations generated through the OMDC’s investment in the Creative Convergence Project.

As companion studies to the work undertaken for the Creative Convergence Project, two frameworks for advancing new convergence centres in Toronto districts have been produced. The proposed ‘Centre for Creative Entrepreneurship, a convergence centre partnership between the City of Toronto and Artscape, has been advanced through the production of a ‘Framework for Propelling Creative Enterprise in Liberty Village”. A preliminary scoping of potential models was provided in East Bayfront ICT District: Digital Media Convergence Centre Framework, produced for Waterfront Toronto. These frameworks situate the development of new convergence centres in two of Toronto’s most important districts for the Cultural and Creative sector.

The research undertaken throughout the study process has enhanced new knowledge partnerships with the City of Toronto, the Martin Prosperity Institute and the University of Toronto as well as a number of other educational institutions, government agencies, business and not-for-profit organizations. Formalized through the Placing Creativity working group, the initiative was established to advance understanding and practice in cultural mapping in support of sector development and cultural planning in Toronto.

The Creative Space Enablers Network was formed as a collective of arts agencies, funders, foundations and organizations dedicated to working together to respond to the growing
space crisis among Toronto and Ontario arts and cultural organizations. Members of the network are:

- ArtsBuild Ontario
- City of Toronto Culture Division
- Creative Trust
- Department of Canadian Heritage
- George Cedric Metcalf Foundation
- Ontario Arts Council
- Ontario Ministry of Culture
- Ontario Trillium Foundation
- Toronto Arts Council
- Toronto Artscape

The strategic value of supporting the development of convergence centres as a policy implementation tool has been formally recognized by the City of Toronto through their inclusion in eligibility criteria for the Tax Incentive Equivalent Grant Program (TIEG) approved by Council in 2008. As defined by the City of Toronto, the definition for convergence centres has been adopted as ‘a facility that must demonstrate by way of a business plan that it:

- includes an intentional focus/mandate on cluster or sector development

- provides programming for tenants focusing on business development, collaboration or networking
- uses the majority of its space for companies within the specific cluster or sector
- provides external stakeholder and/or public access to programming or space
- provides security of tenure for a cluster/sector development organization’.

Finally, the Creative Convergence Project has generated a partnership and idea platform for an international conference to be delivered in October 2009. The Creative Places + Spaces: The Collaborative City conference will be a forum to engage global perspectives on collaboration and connect them with local change-makers. It will encompass in-person and virtual exchange of ideas culminating in a 3-day conference in Toronto produced by Artscape in association with MaRs Discovery District, Martin Prosperity Institute, and City of Toronto.
PROJECT OVERVIEW

A consortium of leading institutions, non-profit enterprises, private sector organizations and government agencies has partnered to develop and promote a place-based approach to Cultural and Creative Sector development in the Toronto region.

Primary Partners:
- Canadian Film Centre (CFC)
- Toronto Artscape
- MaRS Discovery District
- Ontario College of Art & Design (OCAD)
- Toronto International Film Festival Group (TIFFG)
- Evergreen Foundation

Additional Partners:
- City of Toronto
- Toronto Economic Development Corporation
- Waterfront Toronto
- University of Toronto Cultural Economy Lab

Steering Committee:
- Tim Jones, Artscape – Chair
- Allison Bain, TIFFG
- Peter Caldwell, OCAD
- Geoff Cape, Evergreen
- Rick Sherman, CFC
- Ilse Treurnicht, MaRS

As described in the original proposal to the Ontario Media Development Corporation’s Creative Cluster’s Partnership Fund, the objectives of the Creative Convergence Project are to:
- develop a systematic needs analysis of the creative industries’ hard and soft infrastructure requirements
- produce a creative industries asset map in the City of Toronto
- maximize synergies between projects and foster collaboration and partnerships within and between sectors of Toronto’s creative economy
• enhance the long-term economic sustainability of convergence centre projects currently in development
• analyze the collective economic development impact of the projects and programs under study
• propose a strategy to advance and accelerate the development of creative convergence centres

**ENGAGEMENT METHODOLOGY**

In order to achieve those project objectives, the CCP consortium has undertaken comprehensive research to provide an ‘aerial view’ of the Cultural and Creative sector in Toronto with a focus on industry and workforce dynamics, followed by a broad engagement strategy with creative micro-enterprises to explore cluster relationships and infrastructure issues. The mapping and survey output informed more targeted and intensive engagement in particular districts with sector concentrations - and with individual consortium partners - that has provided a more sophisticated insight into the place-based conditions required to nurture, develop and sustain creativity, entrepreneurship and innovation.

**Survey (238 Participants)**

Individual artists, freelance entrepreneurs and Cultural and Creative sector enterprises from across the region were invited to complete a web-based survey during the months of October and November 2007. The intent of the survey was to generate detailed information about the infrastructure provision, quality and capacity of networks and production chain linkages, as well as overall place characteristics that support collaboration and innovation in the creative sector. The survey was analyzed to inform the broader final report as well as discussion themes for a series of ‘world café’ style focus groups in target districts.

**Interviews (22 Participants)**

The project’s research team interviewed a range of different sector leaders to gather important perspectives on the challenges and opportunities associated with collaboration across such a diverse and evolving sector. These included representatives from the Toronto Fashion Incubator, Interactive Ontario, Intelligent Waterfront, the City of Toronto, and the Martin Prosperity Institute. The team also convened a series of individual meetings with senior staff at the CCP consortium’s facilities.

**World Cafés (73 Participants)**

As part of the study’s broader engagement process, World Café-style events were held in four distinct zones that are characterized by a high
concentration of the Cultural and Creative sector during November 2007. The four zones were Liberty Village, King/Spadina, Queen West/Parkdale and Queen East/Leslieville. A range of creative enterprise and workers from sole traders and micro-businesses to medium and larger firms and organizations attended. The majority of participants in attendance were independent artists, freelancers or persons running micro firms, with most working in more than one discipline.

Charette (52 Participants)
Project partners and invited guests were brought together for a series of facilitated sessions in December 2007 that explored ideas for supporting the sector during an intense, creative and highly interactive afternoon of collaborative brainstorming. The event brought together leading city-builders and thought leaders with project partners, funding partners, the project team, and emerging leaders from the creative community. The event provided an early investigation and feedback loop for the analysis, conclusions and strategic directions of the project.

Policy Forum (189 Participants)
The Policy Forum was a 2-day event in November 2008 for practitioners and policymakers in the Cultural and Creative sector to work together on developing a stronger enabling environment for capital development in the region. The Forum explored how new models of infrastructure designed to foster collaboration and the challenges inherent in funding, building and managing them.
In the context of profound and relentless change in the 21st century, government, business, education and 3rd sector leaders in the Toronto region share an emerging global perspective that recognizes the strategic importance of stimulating broad-based creativity in developing the competitiveness and resiliency of cities.

Faced with intractable challenges, many cities have struggled to develop new ways of thinking, planning and acting that transform their diverse sources of latent creativity into innovations that deliver social and economic value. Deeply entrenched institutions, narrow perspectives, vested interests, and ‘silo’ approaches have all contributed to an underlying condition of rigidity and risk aversion that limits a region’s ability to capture and leverage the flows of people, capital and ideas that drive innovation.

There is a growing recognition that addressing the complexities of contemporary challenges in cities – whether social, cultural, economic or environmental in nature - requires much more dynamic capabilities to collaborate across organizational, geographic and disciplinary boundaries. In this context of rapid change and complexity, a region’s assets may not be sufficient – accelerating the capacity to innovate requires new ways of connecting and channelling them to drive higher levels of prosperity. It is a process that requires a cross-pollination of thinking, openness to risk-taking, nimble partnerships, new pathways for learning and compelling solutions that bridge the many traditional silos of city-building.
As one of North America’s most dynamic regions, Toronto has a unique opportunity to strengthen its competitive position and overall prosperity in the midst of this global economic transformation\(^1\). Embedded within the region’s broader knowledge-driven economy, the Cultural and Creative sector has emerged as a pivotal economic and social force that is at the forefront of this dynamic transition. By connecting its artists, designers, engineers and entrepreneurs in new ways to accelerate innovation across its Cultural and Creative sector, this vital ‘idea’ engine can be engaged to develop new capabilities that propel the region’s broader knowledge economy.

Developing the conditions that nurture and stimulate a strong culture of creativity, entrepreneurship and innovation must focus on developing Toronto’s human capital and the platforms for collaboration that connect and leverage it for greater prosperity. To achieve Toronto’s aspiration as a creative region for the 21\(^{st}\) Century, new approaches are required to fuel the dynamic intersections of place, talent, culture and technology. It is a strategy focused not only on attracting and retaining the right ‘ingredients’ for innovation, but more proactively focusing on developing the ‘recipe’ that connects creative people and other regional assets to trigger multiple social, economic and cultural dividends.

The fundamental challenge for the city is to mobilize and connect its creative assets to become greater than the sum of their parts. Strategically weaving together cutting edge creative enterprise, imaginative cultural organizations, agile knowledge institutions, new technology and dynamic urban environments has the potential to generate an unparalleled competitive advantage for the region. It is this imperative of collaboration-driven innovation that has brought the Creative Convergence Project consortium together.

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\(^1\) Martin Prosperity Institute, 2008, Ontario in the Creative Age
THE CULTURAL & CREATIVE SECTOR

DEFINING THE SECTOR

A large and growing body of international research, public policy development and practice has surfaced in recent years which seek to understand and leverage the social, cultural and economic dividend that investment in the Cultural and Creative sector brings to regions.

The popularized use of the terms ‘creative economy’ and ‘creative class’ has elevated the dialogue around the fundamental importance of generating and exploiting ideas in the knowledge economy. Among other economists and authors, John Howkins and Richard Florida have provided important insight into the broad role that creativity plays across many sectors and its critical relationship with cities. While recognizing this broader context, this report is intended to advance understanding of the needs, interests and opportunities around the more narrowly defined sector that is increasingly understood as playing a distinct role.

As an evolving concept that has emerged more prominently over the last two decades, the Cultural and Creative sector is a complex aggregation of industries that range from the traditional arts to magazine publishing, digital media to architecture.

The challenges in developing a coherent sector model reflect its production and consumption relationships; the resource flows across public, private and non-profit spheres; and the tensions that exist at the sector’s intersection of social, economic and cultural values. Equally, the lack of sufficient statistical data on the Cultural and Creative sector, particularly at the municipal/
regional level, is a significant barrier to gathering effective sector intelligence of the grain and scale to inform effective policy development in cities. As a result, many existing frameworks and strategies run the risk of not being pragmatic, delivering neither good economic policy, nor effective cultural policy.

While there is no broadly recognized definition of the breadth (i.e. industry and occupational composition) and depth (i.e. extent of the value chain) of the sector internationally, there is emerging consensus on the key industries that constitute its nucleus. For the purposes of this report, we have used a framework that builds from recent studies by the Works Foundation and National Endowment for Science, Technology and Arts in the UK. The framework provides a useful approach for differentiating the sector based on the ways in which commercial value is created and where this value is located. These industries are distinct in their reliance on origination of ‘expressive value’ - the symbolic, aesthetic or artistic nature of their products - and its successful commercialization through a range of interconnected production systems or networks.

Whether generating songs, advertisements, fashion designs or video games, creative entrepreneurs within these industries form complex, project-based ‘ecologies’ – overlapping networks that are embedded in specific places - that generate value throughout a myriad of production and exchange activity.

Comprising a few large-scale companies, a small number of intermediary mid-sized companies and a multitude of micro-enterprises and freelancers, the sector is structured around three interdependent layers of activity that reflect a continuum of expressive and functional value in their products and services:

- **Core Creative Fields** - focuses on the production of ‘originals’ (e.g. visual arts, artisan crafts, and designer-makers) and ‘experiences’ (e.g. live theatre, dance, and music as well as heritage). Generally produced as one-offs or part of limited production runs, the value of the first set of industries derives from their perceived cultural (or aesthetic) value, exclusivity and authenticity. The second set includes enterprises that sell access for consumers to view or participate in specific activities, performances or locations which are consumed at the time and place of performance – they focus on the production of ‘experiences’. There are dense

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5 Oakley and Sperry (2008) Fine Artists and Innovation
inter-linkages between the not-for-profit and for-profit cultural activities in the Creative Core in terms of talent, audiences, ideas and resources.

- **Cultural Industries** – focuses on the creative content producing industries, whether private or public, which exploits Intellectual Property (IP) through mass production (e.g. film and television production, broadcasting, record companies, book and magazine publishers, computer games and leisure software).
- **Creative Services** – based around providing creative services to clients, earning revenue through fee-for-service and providing IP that has a high degree of both expressive and functional value (e.g. design consultancies, advertising agencies, architecture practices and digital media firms).
SECTOR CHARACTERISTICS

Predominance of Micro-Scale Enterprises

Although the Cultural and Creative sector is comprised of a range of quite distinct sub-sectors as a whole, it is noticeable for displaying a very specific set of shared characteristics. Working within and across the public, private and third sectors - as funded artists, free-agents, social entrepreneurs, small businesses and global enterprises - the sector is dominated by flexible, contract-based and, at their best, nimble workers and innovative businesses. In many ways, these creative entrepreneurs are the ‘shock troops’ of the knowledge and innovation economy.

Across Canada and internationally, research confirms that the Cultural and Creative sector is dominated by a multitude of micro-enterprises and self-employed workers, a small number of medium sized firms and very few large firms. This has been described as an “hourglass” effect replicated across Europe and North America. The sector in the Toronto region is largely dominated by independent artists, makers, self-employed entrepreneurs and micro-businesses with less than 10 employees. Of the approximately 9,500 enterprises in the City, at least 77% have less than 10 employees with only 3% of employing more than 250 people.

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Source: 2007 Dunn and Bradstreet Data

Culture Human Resources Canada (CHRC) has described the sector workforce and industry structure in Canada as based on the “career self-employed”. In Canada, more than half of those in this sector’s occupations are self-employed. Rates rise significantly in some sub-sectors including film and television, visual arts and music production.

The reality is that most workers in the sector – and especially those engaged in the origination of “expressive value” - will experience job mobility, seasonal variation, interrupted and non-linear career development, short-term contracts, part-time working, extended working hours, a vocational ethos and multiple jobs. As a consequence, permanent employment in the sector can no longer be guaranteed, and most cultural workers will probably be active as micro-businesses at some point in their working lives. As a result, the

6 See Appendix III for database description
dominant characteristic of the sector’s labour force is one of adaptability.
The project’s research findings point to the underserved needs of these individual creators, independent creative professionals and micro-enterprises. These dense webs of creative talent are strategically important for a number of reasons:

- They are important service providers to larger creative enterprises and employers of creative talent
- They provide deep pools of freelance talent
- They create new ideas and innovations, start new companies with high growth potential
- They contribute to the rich fabric of the communities in which they live and work
- Their work is imbued with intrinsic value which makes an immeasurable contribution to the enrichment of quality of life

With a small number of medium sized businesses and a predominance of micro-businesses, the challenge for both public policy and the industry itself is to enable and encourage growth in a sector which does not conform to the norms of typical industry structure.

*Digitally Enabled*

The rapid pace of technological convergence and the emergence of digital culture continue to have a profound impact on the way creative practice is developed, creative content is being produced, exhibited or staged, distributed and consumed. The ‘Internet 2.0’ generation expects to participate in the creation of meaning: digital technology has created entirely new means to enable individuals to participate in and exchange the creation and recreation of cultural product.

Technology has revolutionized the dynamics of production and consumption in the cultural and creative sphere – and most notably in the creative economy. Consumers are becoming “prosumers” – as characterized by Price-waterhouseCooper’s (PWC) they are no longer passive “recipients of content” but rather “ubiquitous” participants in creation and the co-creation of value. PWC forecast that nearly half of all entertainment and media growth over the next five years will be in online and wireless technology and that consumer spending on ‘convergent’ platforms will add up to more than 70% of total entertainment and media spending growth after 2008. It is these platforms that enable anyone with access to the technology to create, co-create and share content.
Multidisciplinary and Collaborative

Emerging creative and cultural practice places increased emphasis on collaborative, cross-sector and multi-platform approaches to creation, production and distribution. Much of this is driven by the capabilities and potential of new “technologies of collaboration” and much also by the assumptions and life-styles of many new artists. This was reflected in recent research which identified the new models of practice being developed by the “next generation of artistic leaders”, notable for their multidisciplinary, collaborative and entrepreneurial approach.

The Canada Council’s recent paper The New Artistic Labour Force underpins these findings, identifying the key trends in creative and artistic practice as “inter and multi disciplinary” work, “collaborative and cross-sectoral” practice, “intergenerational and interdisciplinary dialogue”. Emerging new practice will require new approaches to strategic planning and the development of infrastructure that reflects the removal of boundaries between performance spaces, galleries and workspaces and the blurring of distinctions between amateur and professional, audience, participant and artist.

Clustered

As identified in recent research for the Ontario Ministry of Culture⁷, the sector also exhibits a number of common location characteristics, including:

- sharing a common pool of highly creative, specialized workers,
- commonality in important linkages to local customers and suppliers,
- tendency to agglomerate or cluster in particular places, and
- a predominantly urban character.

These types of urban districts accommodate a deep and diverse labour market, enable access to a range of suppliers and collaborators, and help diffuse knowledge through well developed formal and informal networks⁸. Particularly with creative enterprises, frequent face-to-face communication and social networks allows for building trust, maintaining relationships and exchanging complex knowledge. Recent primary research undertaken by the University of Toronto⁹ illustrates the importance of social networks among digital media and design entrepreneurs, as well as their mobile workforce:

- Executives of firms reported that they maintained contact with their corresponding number in other

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⁸ NESTA, Innovation and the City, 2007
companies to keep abreast of innovative services and emerging demand
• Freelancers who work with different firms on a project basis renew contacts and enrich the knowledge base in each case
• Co-production activities leads to the formation of teams from different firms and these promote the flow of creative and technical knowledge
• Mobility fosters circulation of knowledge about capability, reputation and reliability

STRATEGIC IMPORTANCE OF THE SECTOR IN TORONTO

Over the last 5 years, the Cultural and Creative sector in Toronto has gained prominence with all levels of government. The Department of Canadian Heritage has been the primary driver of new intelligence and policy development for the sector at the federal level, recently collaborating with the Conference Board of Canada to convene the International Forum on the Creative Economy in 2008. New media, in particular, has also been identified in the federal science and technology strategy10.

The Province of Ontario has also signaled a growing strategic interest in various components of the sector in Toronto. The Ministry of Finance’s report Toward 2025: Assessing Ontario’s Long-Term Outlook identified the ‘Entertainment and Creative Cluster’ as one of three high potential growth areas in the economy, the others being ‘ICT’ and ‘Business and Financial Services’. In its background research leading to the new Entertainment and Creative Cluster Partnership Fund, the Ministry of Culture identified Toronto as one of five nationally significant ‘creative, cultural and new media’ clusters in addition to Montreal, Vancouver, Ottawa-Hull and Calgary. The Ontario Media Development Corporation has also supported a number of recent sub-sector studies that have reinforced Toronto’s prominent role within the province and is in the process of developing a strategic plan that better aligns the agency’s capabilities with the challenges and opportunities of these ‘creative media industries’12.

More recently, the Martin Prosperity Institute was engaged by the Province to assess the changing composition of Ontario’s economy and workforce13. While focusing on the broader occupations and industries comprising

10 Industry Canada, Mobilizing Science and Technology to Canada’s Advantage, 2007.
13 Martin Prosperity Institute, 2008, Ontario in the Creative Age.
the knowledge economy, the Cultural and Creative sector make up a significant component of the ‘highly innovative creative industries’ that will contribute to Ontario’s distinctive advantage.

At the City level, Toronto’s Mayor has specifically called for creativity to “be at the heart of the city’s economic development strategy” — a mandate framed through the recent *Prosperity Agenda* and the associated *Creative City Planning Framework*. These documents not only recognise the value of the sector but also propose an integrated approach to advancing it as a central plank of sustainable economic development.

Translating this strategic framework into actionable tools has been initiated through a new incentive program focused on supporting large-scale infrastructure investments undertaken by the ‘imagination, manufacturing, innovation and technology’ sectors. New methods of resource mapping are also being developed by the City to better inform policy development by understanding the complex layers of the sector and their spatial relationship to the city.

In recent research undertaken by the University of Toronto, five Canadian regional clusters in the creative, cultural and new media industries were benchmarked against 20 US city-regions. Toronto was assessed for the

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**Growth of the Cultural and Creative Sector in Select Canadian and US cities, 1998-2005**

![Diagram showing growth of cultural and creative sectors in select cities](image)

*Source: University of Toronto, 2007*

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degree of concentration and specialism in creative establishments compared to the North American average (location quotient), annual growth rate in the period between 1998 and 2005 and actual number of establishments. As shown in the diagram below, Toronto is on the leading edge of the sector and compares favourably to its U.S. and Canadian counter-parts.

In recent global comparisons\(^{16}\), the Toronto region’s competitiveness in attracting talent and investment in Digital Media ranked first in terms of key quality dimensions. Benchmarked against comparable cities such as Bangalore, Boston, Frankfurt, Manchester, San Jose and Washington, Toronto was considered to have strong qualitative factors such as local potential to recruit skilled staff, presence of an existing industry/cluster, and overall living environment. Less competitive qualities, particularly in comparison to other North American cities, included infrastructure (e.g. quality and reliability of telecommunication, availability of public transport) and real estate (e.g. availability of fit-for-purpose industrial and office space).

Toronto is the major national concentration of economic activity in the Cultural and Creative sector with 25% of all sector jobs, or 6.1% of the regional labour force\(^{17}\). The Census Metropolitan Area (CMA) has the third largest labour force as a percentage of total labour force and is also the dominant cluster for major industries within the sector. The region, along with the Montreal CMA, is also notable for having a higher percentage of net inward migration of creative workers compared to the economy as whole, indicating the extent to which the region acts as a “magnet” for sector talent\(^{18}\).

The following highlights reflect national, provincial and regional metrics of the scope and scale of the growing sector that have been identified through recent studies:

- The industries that make up Canada’s culture sector employed about 616,000 people or 3.9% of national employment in 2003\(^{19}\).
- Taking into account direct, indirect and induced contributions to employment the Conference Board of Canada estimated that the culture sector accounted for 1.1 million jobs in 2007\(^{20}\).
- Just under half of all cultural workers are employed in non-culture sector industries\(^{21}\).

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\(^{17}\) CMAs as Culture Clusters, Statistics Canada, 2004

\(^{18}\) Ibid

\(^{19}\) Economic Contribution of the Culture Sector, Statistics Canada, 2004

\(^{20}\) Valuing Culture, Conference Board of Canada, 2008

\(^{21}\) Creative Input, Stats Canada, 2008
• Over all culture sector employment in all sectors grew 37.6% in the 1990s compared to 13% for all employment\textsuperscript{22}

• The Conference Board of Canada estimates that the culture sector generated a total economic footprint, including induced and indirect effects of $84.6 billion in 2007, 7.4% of total real GDP\textsuperscript{23}

• 1 in every 4 creative industry jobs in Canada is in the Toronto CMA\textsuperscript{24}

• Approximately 133,000 people worked in the culture sector in 2001 in the CMA, of whom approximately 86,000 resided in Toronto\textsuperscript{25}

• Ontario’s cultural sector constitutes 4% of total Ontario GDP and 46% of Canadian Culture GDP\textsuperscript{26}

\textsuperscript{22} Ibid
\textsuperscript{23} Valuing Culture, Conference Board of Canada, 2008
\textsuperscript{24} Imagine a Toronto, 2006
\textsuperscript{25} CMA as Culture Clusters, Statistics Canada, 2004
\textsuperscript{26} Economic Contribution of Ontario’s Culture Sector
The outcomes of the engagement process for this study - supported by significant work completed recently in Toronto, Ontario, nationally and internationally - points to three significant ‘macro’ challenges which are broadly shared across the sector that limit its potential to drive innovation:

• **Talent** - the challenge of cultivating entrepreneurial capacity, business skills and workforce development across the spectrum of creative enterprises

• **Space/Place** - the challenge of sustaining and developing infrastructure and urban environments which stimulate creativity and innovation

• **Collaboration** - the challenge of connecting creative people and assets across organizational, geographic and disciplinary boundaries

### TALENT

Despite the evidence of the growing contribution of the sector to the economy and the significant potential it offers for delivering high levels of innovation, a number of recent studies indicate that there has been limited response to addressing the sector’s small business and entrepreneurial skills development needs.

The project’s survey of entrepreneurs in the sector has pointed to a significant unmet demand for business support, particularly from small and micro-enterprises. The sector derives a significant amount of its technical, business and creative learning through peer networks (including industry events), on-the-job experience and institution-based training.

However, over 85% of survey respondents identified significant unmet demand for varying levels of business development support. The level
required by respondents ranged from low levels of support to enable more stability and ‘take another step’ (39%), medium levels of support to enter new product areas and new selling/exhibition opportunities (32%), and high levels of significant training and/or business development, employment of new staff, access to facilities, networks and/or resources (15%).

The top five areas of support identified by survey respondents were:

- **Marketing** – participation in collaborative marketing or their own marketing initiatives
- **Showcasing** – opportunity to promote and show work
- **Networking** – the chance to share ideas/work with others within their sector or across sectors
- **Finance** – funding to develop entry into new selling areas
- **Information** – access to a range of intelligence on project opportunities and market

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**Specific Business Support Areas in Demand, n=210**

![Chart showing specific business support areas in demand]
Consistent with this survey research, studies undertaken by the City of Toronto into key sub-sectors - ICT Toronto27, Ontario 201228, Making the Link29 and Bounce Back to Fast Forward30 - suggest that businesses and self-employed individuals are not yet being offered the sophisticated policy support and practical services at the level that addresses their particular needs either as a cohesive sector or as a series of interconnected, specialist sub-sectors.

At present, the City of Toronto has only one specialised Cultural and Creative sector business incubator - the Toronto Fashion Incubator (TFI). Regarded as a model of best practice and replicated elsewhere internationally, TFI has supported the emergence of talented fashion designers and successfully elevated Toronto’s capabilities to connect design school graduates to the highly competitive global industry. However, the stability of TFI’s operations is at risk as it is currently located at a temporary venue at Exhibition Place.

The Toronto Business Development Centre (TBDC) provides incubation services to start-up companies and entrepreneurs across all sectors of the economy. While delivering award-winning services and attracting creative entrepreneurs, the TBDC has potential for a significantly higher uptake from the Cultural and Creative sector, together with opportunities for enhanced collaboration and innovation that would flow from a more specialized provision of services and environment. Other examples of generic small business service centers exist across Toronto (e.g. Enterprise Toronto, Centennial College Centre for Entrepreneurship), however most are geographically, programatically and/or symbolically at some distance from the sector.

Reinforcing many of the conclusions reached through these Toronto-specific studies, research undertaken for the Cultural Human Resources Council (CHRC), and for Cultural Careers Council Ontario (CCCO) consistently indicates the need for creative workers to build their business and entrepreneurial skills in a sector where the dominant characteristic of labour focuses around flexible, freelance and contract based working31. In 2002 CHRC identified key gaps in business planning, financial management, tax, copyright and marketing skills across the sector and two years later reported that business and management skills

29 Making the Link Advancing Design as a Vehicle for Innovation and Economic Development, op cit.
30 Bounceback to FastForward, Strategic Plan for Toronto’s Screen Industry, TFB & City of Toronto, 2007.
31 Professional Development in Ontario’s Cultural Sector Phase 1, Qualitative Research Final Report, IPSOS Reid, 2008.
were now “critical” to the sector. These findings were reiterated in a series of national sub-sector specific Training Needs Analyses undertaken between 2004 and 2007.

CCCO’s 2006 research into training needs in the provincial workforce reinforces the national picture and adds that the Cultural and Creative sector had “few professional development opportunities such as private consultants and specialist training companies compared to other sectors...”

CCCO has recently completed and reported on a year long career ‘Development for Cultural Workers’ project, pointing again to the need for specialist business training for the sector’s workforce.

The challenges of developing more systematic approaches to supporting the entrepreneurial development of the Cultural and Creative sector has also recently been highlighted by the Canadian Conference for the Arts (CCA). In their 2008 Policy Framework for Creative Labour, the CCA reflects on the opportunities and challenges faced by free-agent, contract-based creative workers in an increasingly project-oriented economy and networked society. The study emphasizes that “the creator, performers and cultural workers of the new millennium are increasingly in need of multi disciplinary competencies ...which round out the tool box of skills, among them business skills...”

Additionally, research undertaken for the Canada Council for the Arts as part of its long term strategic planning process identified the new models of practice being developed by the “Next Generation of Artistic Leaders” notable for their multidisciplinary, collaborative and entrepreneurial approach. The study notes in particular the importance to this new generation of the following factors:

- mentoring and networks,
- professional communities (real and virtual),
- increasingly multi-disciplinary and collaborative creative practice,
- integration of technology, and
- access to global markets for goods, services and the exchange of ideas.

With no long term expectation of public sector support, their ambitions focus on seed funding and support in the fledgling stage of their creative business.

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33 CHRC and CCCO serve the following sub sectors: Film and Broadcasting, Heritage, performing Live Arts, Music and Sound Recording, New Media, Visual Arts and Crafts and Writing and Publishing.
Case Studies: Entrepreneurship Development Programs

There is a growing body of international practice in developing facilities and services - real and virtual - that explicitly seek to promote the conditions for successful Cultural and Creative sector entrepreneurship. Sophisticated and targeted programs of specialized business advisory services, training, networking and showcasing are designed and delivered in collaborative, collegial environments that aim to incubate innovation in practice through a stable, affordable and sector-specific facility. The international scan of agencies and services developed to support the sector includes:

- Creative Industries Development Services
  - The Cultural Enterprise Office (Scotland)
  - Creative Capital Foundation (USA)
  - The Arts Business Program (USA)
  - The Centre for Cultural Innovation (USA)
  - The Creative Industries Development Agency (England)
  - Manchester Creative Industries Development Service (England)
  - Wired Sussex (England)
  - ART Auckland (New Zealand)
  - Go! Das Gründungsnetzwerk (Germany)

- Sector Incubators
  - Houston Arts Incubator (USA)
  - The Arts Incubator of Kansas City (USA)
  - Arlington Arts Incubator Program (USA)
  - The Armoury Arts Village (USA)
  - Spike Island Centre of Contemporary Art and Design (England)
  - The Huddersfield Town and University Creative Business Incubation System (England)
  - The Lighthouse (Scotland)
  - Toronto Fashion Incubator (Canada)

- Higher Education–Based Projects
  - Design London (England)
  - The Enterprise Centre for the Creative Arts (England)

- Dedicated Business Development Tools & Services
  - City of Austin Creative Industries Loan Guarantee Program (USA)
  - City of Denver Creative Enterprise Revolving Loan Fund (USA)
  - The Creative Business Accelerator (England)
• Own It (England)
• The Creative Capital Fund (England)
• Advantage Creative Fund (England)
• Education, Training and Professional Development
  • Artslab, Minnesota (USA)
  • The Clore Leadership Program (UK)
  • Cultural Leadership Program (UK)

Based on both analysis of these diverse international precedents and a literature review of business incubation in Canada, four broad factors have been identified that are important to consider in the design and delivery of Cultural and Creative sector incubation and advisory services:
  • Strategic intent
  • Facilities and workspace provision
  • Services and programming
  • Management approach

**Strategic Intent**

Many of the international projects and programs reviewed are the direct result of public sector interventions that aim to serve local or regional economic development and/or physical regeneration policy agendas such as:
  • Creating jobs in the local economy
  • Building/accelerating the growth of a local cluster
  • Commercialising technologies/practice
  • Diversifying local economies
  • Fostering a community's entrepreneurial climate
  • Revitalizing a distressed neighbourhood
  • Supporting innovation/cross sector collaboration

The breadth of public policy dividends – economic and social - that are leveraged through investment in the Cultural and Creative sector is a distinctive factor in most precedents. The UK's well established *Creative Industry Development Agency* model provides access to both online and real-time advisory, training and networking services within a city-region and serves the additional function as a consolidated voice for the sector in local economic development. They have a particular focus on

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38 More detailed descriptions of the case studies are provided in Appendix III
diversifying the economic base, creating jobs and revitalizing communities in dramatically transforming regional economies. The Armoury Arts Village (Jackson, Michigan, USA) uses cultural and creative business workspace and business support services as an anchor for the regeneration of a 19th century state prison located on a 19-acre post industrial, blighted site.

The Arts Incubator of Kansas City is one example of a number of artist-led projects that reflect the emerging trend of artists seeking their own, entrepreneurial solutions to the need for both affordable secure workspace and appropriate business support.

Elsewhere, higher education is taking a lead in the development of Cultural and Creative sector incubator and start-up support in response to innovation and commercialization agendas. Design London is a collaboration between the Royal College of Art and Imperial College (London, UK) in a new international centre for design-led innovation. The center was developed in response to the influential Cox Review of Creativity in Business which recommended that higher education should play a distinctive role in improving the performance of British business innovation through centres of excellence that combine design, business, engineering and technology39.

Facilities and Workspace
A range of building-based infrastructure can be provided through managed workspace, arts hubs or incubators and is broadly similar to the range of facilities available in generic managed workspace and business incubators:

- Flexible, individual workspace including ‘hot desks’ or ‘pods’
- Meeting and conference rooms
- Member focused catering/canteen
- Public café/lounge
- Information and resource centre/library
- Reception area
- Shared administrative, business equipment and/or specialist equipment
- Shared workspace
- Showcasing space
- Exchange venue (live / exhibition / screening)
- Retail outlet


• Training space / classrooms

For the Cultural and Creative sector however, a key difference is the scope that facilities have to offer the basics - affordable and secure workspace supported by business administration facilities - but also the provision of social or networking spaces. Space for showcasing, exhibition, performance and or screenings and a sense of porousness between the facility and its tenants, the broader communities of practice and the wider public is also a defining feature.

The distinctive needs of the sector are also reflected in the potential scope of shared workspace and shared equipment which can be as diverse as workshop facilities for set-building, facilities for the creation of large scale artworks, furnaces and welding facilities, as well as new media labs, sound recording and video editing suites. For example, the Toronto Fashion Incubator provides shared cutting and design facilities alongside individual workspaces whilst the Arlington Arts Incubator program offers workshop facilities for prop and set making as well as costume design and storage.

**Services and Programming**

The range of services offered through the range of case studies encompasses a recognizable menu of small business, entrepreneurial and incubation support services:

• Information services and workshops/ seminars
• Networking opportunities
• Showcasing initiatives (events, exhibitions, performances)
• Lecture series/opportunities for critical discourse
• Administration/secretarial support
• Financial, legal, marketing and business advice and support
• Mentoring and sector-specific vocational training
• Brokerage/partnership development
• Facilitating collaboration and cross sector practice
• Access to investment opportunities/ fundraising support
• Funding/in-house investment opportunities
• IP management and commercialisation support

The critical emphasis is that services are developed for, and targeted at, the specific needs of the Cultural and Creative sector either as a whole (e.g. ART, Auckland, New Zealand and Go! Das Gründungsnetzwerk , Germany) or a specific sub-sector (e.g The Lighthouse, Scotland, which primarily serves the architecture and design
Evidence from the UK, which has perhaps the most comprehensive approach to the sector’s business and entrepreneurial support, indicates that this has arisen precisely because it was recognized that the sector was failing to take up existing traditional small business advisory services\textsuperscript{40}. The provision of networking and showcasing opportunities, alongside explicit initiatives for cross-sector engagement and discourse, are often promoted as critical to the success of the various programs.

**Management Approach**

The particular operational and management characteristics of any project may vary with respect to delivery models and more specifically to the local context. Depending on its mechanism for delivery (facility-based, virtual, service based or a combination of these), its geographic scope and its sector or sub-sector reach, a project may deliver its mandate in various ways:

- Strict or more open entry policy/processes
- Clear graduation processes
- Dedicated on-site management team
- Dedicated specialist advisors
- Services available to off-site businesses
- Higher education partner/delivery
- Flexible tenures
- Market rate and below-market rate facilities/services
- Range of virtual to real-time services
- Sub-sector specific or cross-sector
- Cluster or district-based focus
- City-wide, regional or national focus

Wired Sussex provides business advise, networking, intelligence and project development support to a member-based community from the new media cluster in Brighton and the wider region through both virtual and real time services, but with no facility base. On the other hand, The Houston Arts Incubator applies a strict selection process to select a small number of Houston-based cultural and creative organizations for a three year incubation program based at the Houston Arts Center. Other projects provide a single targeted service to support sector business growth through providing access to venture capital (e.g. Advantage Capital Fund) or highly specific advisory services (e.g. Own It - an intellectual property advisory service). These projects share a common sector focus and expertise supported by affordable service provision.
**SPACE/PLACE**

International research highlights the tendency of these small and micro-enterprises to cluster most successfully in areas of the city that demonstrate a distinctive ‘milieu’ where density, proximity and variety converge to generate both the raw material and the product of creative communities. A closer view of the distribution of the Cultural and Creative sector in the City of Toronto emphasizes the density of establishments co-locating in close proximity to the downtown core.

**City of Toronto CCS Enterprises**

<table>
<thead>
<tr>
<th>Distance from the Downtown Core</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rest of City</td>
<td>26%</td>
</tr>
<tr>
<td>5K - 10K</td>
<td>47%</td>
</tr>
<tr>
<td>5K</td>
<td>27%</td>
</tr>
</tbody>
</table>

The enterprises captured in this data set are densely clustered in the City of Toronto, with almost 75% of total creative sector establishments located within 10km of the downtown core. Nearly ½ of the micro and small creative firms and freelancers in the region are located in the dense, mixed-use districts within 5km of the financial core.

These types of urban districts accommodate a deep and diverse labour market, enable access to a range of suppliers and collaborators, and help diffuse knowledge through well developed formal and informal networks\(^\text{41}\). Particularly with creative enterprises, frequent face-to-face communication and social networks allows for building trust, maintaining relationships and exchanging complex knowledge. Recent primary research undertaken by the University of Toronto\(^\text{42}\) illustrates the importance of social networks among digital media and design entrepreneurs, as well as their mobile workforce:

- Executives of firms reported that they maintained contact with their corresponding number in other companies to keep abreast of innovative services and emerging demand
- Freelancers who work with different firms on a project basis renew contacts and enrich the knowledge base in each case
- Co-production activities leads to the formation of teams from different firms and these promote the flow of creative and technical knowledge

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41 NESTA, *Innovation and the City*, 2007
• Mobility fosters circulation of knowledge about capability, reputation and reliability

Through the study’s engagement process, creative entrepreneurs commented on the importance of density and diversity to their location choices. Participants were attracted to neighbourhoods that offer a diverse, critical mass of other like-minded individuals and businesses, in addition to amenities/infrastructure that both connect people to people and to necessary resources. Important amenities mentioned included restaurants, gathering spaces (e.g. galleries, public spaces), supply shops, retail, and business services (e.g. printers).

According to the survey, 50-72% of goods and services bought and sold by businesses in the sector are in the Downtown and central areas. Similar levels of concentration were identified in the location of collaborating firms and peers. The conditions that comprise this intensely local ‘milieu’ are described by survey respondents through a number of key network, place and space attributes that were ‘essential/important’ to their location decisions:

• Connectivty
  ▪ Proximity to buyers/clients/markets
  ▪ Proximity to suppliers

• Close to business support services (e.g. banking, printing, etc)
• Part of a supportive community
• Close to other creative practitioners
• Close to competitors/collaborators

• District
  ▪ Close to public transit
  ▪ Close to downtown core
  ▪ Sense of safety
  ▪ Close to major transportation routes
  ▪ Close to home
  ▪ Proximity to green/public space, active street life and independent restaurant/retail

• Space
  ▪ Affordable units
  ▪ Natural light
  ▪ Broadband/wireless
  ▪ Raw, workable space with room to expand
  ▪ Design/architecture

The concentration of the sector in the Downtown and central areas suggests that place matters in nurturing, developing and sustaining the complex production networks that drive it’s competitiveness. Visual arts in West Queen West, film production in South Riverdale, digital media in King-Spadina - these areas represent a pattern of agglomeration that is evident in other large, cosmopolitan cities across the world.
Pairing this high level of enterprise density with significant urban concentrations of the workforce who are in creative occupations\(^43\) suggests that the intensity and diversity of this ‘arc’ of creativity is an unparalleled strategic asset for Toronto.

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\(^{43}\) Including authors and writers; conductors, composers and arrangers; musicians and singers; dancers; actors and comedians; painters, sculptors and other visual artists; other performers; artisans and craftspersons; patternmakers, textile, leather and fur products; editors; journalists; producers, directors, choreographers and related occupations; announcers and other broadcasters; interior designers; theatre, fashion, exhibit and other creative designers; graphic designers and illustrators; photographers; web designers and developers; architects; landscape architects; and industrial designers.
**Cultural and Creative Sector Location and Employment Size, 2007**

Source: 2007 Dunn & Bradstreet Business Data, Toronto Arts Council Grant Database, City of Toronto Cultural Facilities Database

**Concentration of Toronto’s Creative Labour Force, 2001**

Source: Statistics Canada, 2001 Census
While certain components of the sector require large, single-purpose facilities (e.g. film studios, theatre and performance halls, museums, etc.), Toronto’s portfolio of medium-rise, multi-tenant office/studio buildings have become the backbone of vibrant creative production systems. With freelancers and micro-enterprises (i.e. less than 10 employees) representing over 85% of the total creative businesses in Toronto, these facilities provide critical infrastructure for supporting the dense networks that underpin the sector.

Recognizing the sector as an important niche market, a distinct property development community has evolved to address the demand for unconventional work space near the downtown core. Approximately half of the total office inventory in the areas adjacent to the financial core (estimated at 13.3 million s.f.44) is comprised of light industrial structures – most of which has been retrofitted as historic ‘brick and beam’ workspaces. Specialized property development and management organizations such as Allied Properties Real Estate Investment Trust, York Heritage Properties, WTF Group, and Lifetime Urban Development Group have responded with a distinct model of work space provision that has attracted substantial uptake from the Cultural and Creative sector due to their unique value proposition, including:

- proximity to the central business district in areas well served by public transit,
- distinctive internal and external environments that assist tenants in attracting, retaining and motivating employees, and
- significantly lower overall occupancy costs than those that prevail in the central business district.

Active throughout the Downtown and core areas, these unique property developers have provided the space, amenities, management and brand that has provided the physical foundation for much of the enterprises that form the ‘arc’ of creativity.

**Allied Properties REIT**

A publicly-traded Real Estate Investment Trust, Allied focuses its investment strategy on turn-of-the-century ‘brick and beam’ properties in Toronto, Montreal (including the recent purchase of *la Cite Multimedia*), Winnipeg, Kitchener and Quebec City. At the end of 2008, Allied owned 2.65 million ft² in downtown Toronto, representing 51% of their national portfolio. Their properties have strong presence in some of the city’s most important cultural production and consumption districts, however most of Allied’s spaces are geared towards larger, established companies that require full-

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floor or multi-floor tenancies. With 55 properties throughout the Downtown and central districts, Allied has become a major space provider for a broad spectrum of Media and Entertainment, ICT and Business Services tenants, including:

- magazine publishing (e.g. St. Joseph Media),
- film and television production (e.g. Rhombus Media Inc.),
- advertising (e.g. Cossette Communications),
- satellite radio broadcasting (e.g. Sirius Canada)
- gaming software (e.g. Transgaming),
- architecture (e.g. Ark Inc.)
- digital animation (e.g. Nelvana, Starz Animation Toronto),
- commercial gallery (e.g. Nicholas Metiver Gallery), and
- interactive media (e.g. Blast Radius).

**York Heritage Properties**

Focused on the adaptive reuse of historical complexes, York Heritage Properties has 6 projects throughout the central area. Redeveloped as its flagship property, the Toronto Carpet Factory is a 310,000 ft² “centre of creativity”⁴⁵, comprising eight heritage buildings located on a full city block in Liberty Village. The complex was redeveloped in the early 1990s, setting the bar in the district for fibre optic network access and server co-location facilities, flexible workspace, and ground floor amenities (e.g. murals, cafes, restaurants, and wayfinding). Quarterly newsletters highlighting tenant achievements and regular social events are used to build stronger self-awareness among companies within the complex. The Toronto Carpet Factory manages the tenant mix strategically, providing office space ranging from 330 ft² that accommodates small start-ups to more mature firms utilizing over 5,000 ft² - over 60% of their tenants have under 1,500 ft² of space. The campus-style complex accommodates over 146 businesses, nearly 60% of which are comprised of creative enterprises including:

- interactive media (e.g. Marblemedia),
- interior design (e.g. II by IV Design Associates Inc.),
- advertising (e.g. Digital Cement Inc.),
- publishing (e.g. Littlefield Publishing Group),
- commercial photography (e.g. Garth Grosjean Photography Ltd.)
- software (e.g. Adobe Systems, Inc.),
- visual art (e.g. Michael Snow Artworks)
- industrial design (e.g. Cooler Solutions),
- film/tv production (e.g. Geneva Film Company),
- broadcasting (e.g. DMD Broadcast Services Inc.), and
- graphic design (e.g. Frost Creative Inc.).

⁴⁵ www.yorkheritage.com
Lifetime Urban Development Group
The Liberty Market Building is a former munitions factory that has over 300,000 ft² of repurposed retail, office and studio space in Liberty Village. Accommodated through unit sizes ranging from 600 ft² to 18,000 ft² (larger floor plates were moved to upper floors that could accommodate mezzanines), Lifetime has retrofitted and marketed the Liberty Market Building towards the Cultural and Creative sector. The building is outfitted with a wi-fi enabled tenant lounge, common areas such as meeting and event rooms, as well as a café and roof top garden (yet to be constructed). These ‘3rd spaces’ are intended to nurture a broader range of social interaction among the mix of tenants. A related live-work condominium project adjacent to the site is currently being developed and heavily marketed towards the young, educated workforce of the sector. Current tenants include:

- interior and fashion design (e.g. munge//leung: design associates, Studio NAFA),
- advertising (e.g. Pinnacle Communications),
- animation (e.g. Hatch Studios),
- interactive media (e.g. Radiant Core Inc.),
- non-profit culture (e.g. Liaison of Independent Film Makers) and
- broadcasting (e.g. S-VOX).

The Distillery District
Redeveloped by Cityscape Holdings Inc. and managed in partnership with Dundee Realty Corporation, the Distillery District is positioned as a “burgeoning creative zone, providing a forum for artists and creative industries and a platform where ideas can be performed, displayed and developed”46. While recognized for its tourism and entertainment role in the city, the Distillery District has become an important creative production node, accommodating a diverse mix of enterprises over 44 buildings including:

- interior design (e.g. Corktown Design),
- theatre (e.g. Soulpepper Theatre Company),
- advertising (e.g. Dream It),
- galleries (e.g. Sandra Ainsley Gallery),
- artist/designer-maker (e.g. Dish Gallery + Studio),
- education (e.g. George Brown Theatre School),
- interactive media (e.g. Groove Games),
- film/tv post production (e.g. Distillery Post), and
- publishing (e.g. SPORT Classic Books).

While the ‘brick-and-beam’ format is not unique to Toronto, their strategic location in relation to affordable neighbourhoods, distinct built form, design and amenity quality, complementary tenant

46 www.thedistillerydistrict.com
composition, and varying degrees of supportive management practice of these multi-tenant buildings represent a dense asset base that distinguishes Toronto’s Downtown and core districts as important habitats that support the broader creative ecology across the city.

In many cases across Toronto’s urban districts however, the affordability of these spaces for creative individuals and micro enterprises is diminishing. While currently more affordable than the commercial rates in the downtown core, the high cost of operating ‘brick and beam’ properties, combined with growing demand, has escalated average lease rates to $25 - $35 per ft² (semi-gross)\(^4\).

Exacerbating the space challenge is the strong market for urban, residential condominiums in downtown Toronto. The higher return on investment for residential in the current development climate is increasing the attractiveness of work space conversion - a critical challenge in maintaining creative production areas.

The City of Toronto’s Employment Lands Strategy\(^4\) identifies the pressures faced by the City in achieving the employment growth forecasts set out in Places to Grow\(^4\) and the Official Plan\(^5\). Identified

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\(^4\) Estimated average rental rate determined by a scan of commercial listings as well as interviews with property management staff of Liberty Market Building, York Heritage Properties and Allied Properties


\(^6\) Places to grow Better Choices Brighter Future; Growth Plan for the Greater Golden Horseshoe, MPR, 2006

\(^7\) City of Toronto Official Plan, consolidation of the Official Plan policies in effect as of September 2007.
in the City of Toronto’s *Profile Toronto – How Does the City Grow?* (April 2007), applications to convert employment lands to residential use were prevalent during the period between Council adoption of the *Official Plan* and its approval by the Ontario Municipal Board (July 2006). Since November 1, 2002 there have been 27 projects proposed for residential uses in the Employment Districts. Residential conversions and encroachment on Employment Districts have placed considerable pressure on workspace availability and affordability.

Increasingly these places face very real challenges and considerable instability which, if not addressed, has the potential to destabilize the function of these communities and the sustainability of the wider creative economy of the city. The revitalization of undervalued, affordable downtown neighbourhoods, former industrial and heritage properties by creative practitioners is well documented. From Dublin’s Temple Bar, Manhattan Island and London’s East End in the 1990’s to Toronto’s West Queen West and Vancouver’s Downtown Eastside today, the pressure of gentrification on sustaining creative communities is intense.

Mission-driven property developers such as Urbanspace Property Group and Artscape Inc. have emerged to address space affordability for the Cultural and Creative sector by providing a range of multi-tenant work spaces that have broader community-building and social innovation objectives woven into their projects. Based more on a cost-recovery or cross-subsidy operating model, these developers position their buildings more explicitly as collaboration spaces, particularly among arts, cultural and social enterprises.

With a focus on providing affordable and stable premises, flexible tenures, active tenant engagement, and community-oriented programming, these unique developers have taken a more proactive approach to generating work space for a more diverse cross-section of the cultural and creative sector. Providing similar ‘hard’ infrastructure as the more commercially-oriented developers, these space providers have more explicitly addressed value-based ‘soft’ infrastructure required to propel collaboration and interaction.

**Artscape Inc.**

As a not-for-profit urban development enterprise, Artscape develops and leases over 230,000 ft² of affordable space to professional artists of all disciplines as well as not-for-profit organizations in six different Toronto neighbourhoods. Facilities under Artscape management include artist work and live/work spaces, designer/maker retail studios, and offices, production, performance and
exhibition facilities for arts, cultural and environmental organizations. Artscape’s Liberty Village location accommodates 45 work-only units, 77% of which are under 500 ft² leased out at below-market rates. Artscape provides affordable and raw space to a variety of artistic disciplines and organizations throughout all of their buildings, including:

- furniture design (e.g. Akroyd Furniture),
- theatre (e.g. Caliban Theatre),
- dance (e.g. Canadian Network of Dance Producers),
- music presentation (e.g. Array Music),
- photography (e.g. Canadian Association of Photographers and Illustrators in Communications),
- film (e.g. Moving Pictures Festival),
- animation (e.g. Toronto Animated Image Society)
- gallery (e.g. Red Eye Studio Gallery), and
- photography (e.g. Studio Four Gallery)

**Urbanspace Property Group**

Urbanspace has developed two properties in the King-Spadina area that reflects different applications of their core philosophy to “foster the development of an inspiring bridge between commerce, culture and community”⁵¹. 401 Richmond, a 200,000 ft² work space in the King-Spadina area, is home to over 130 cultural producers and micro enterprises, supported by an active management team. Newsletters, a ground floor café, an arts-enriched early learning centre, community courtyard and roof garden as well as small business forums/seminars illustrate the substantial investment in community-building resources. The rich tenant mix includes:

- textile art (e.g. Contemporary Textile Studio Co-operative),
- jewellery design (e.g. Green Shag Clother and IBAI design)
- theatre (e.g. Theatre Columbus),
- music and video production (e.g. Q Music),
- film production (e.g. Wild Zone Films),
- architecture (e.g. Hilditch Architect),
- graphic design (e.g. Saman Design),
- animation (e.g. Loopmedia Inc.),
- publishing (e.g. Musicworks Magazine),
- festivals (e.g. Inside Out Toronto Lesbian and Gay Film and Video Festival) and
- video production (e.g. Trinity Square Video).

While not specifically positioned towards the cultural and creative sector, Urbanspace’s Robertson Building has been developed as a home for a community of businesses, non-governmental and social mission organizations, including:

- marketing (e.g. Comet Art + Design),

⁵¹ <www.urbanspace.org>
• performing arts (e.g. Creative Trust),
• film/tv and new media (e.g Copter Productions Inc.),
• publishing (e.g. Cormorant Books),
• literary arts (e.g. Professional Writers Association of Canada), and
• visual art (e.g. Canadian Art Foundation),
• theatre (e.g. Theatre Ontario).

Urbanspace partnered with one of their key tenants - the 215 Centre for Social Innovation - to expand an existing collocation facility to an 18,000 ft² hub of work spaces, meeting spaces and learning spaces that “where creativity and social conscience ignite each other”52. The Centre provides private offices, permanent desk spaces, ‘hot desks’ and an array of shared services, equipment and amenities to over 25 tenants from different social, environmental and cultural sectors.

As a core element of Toronto’s creative infrastructure, existing commercial and mission-driven work spaces signal a growing responsiveness to the types of hard and soft infrastructure required to support the complex production ecologies that comprise the ‘arc’ of creativity.

52 www.socialinnovation.ca
Case Study: A Creative Enterprise District in Liberty Village

Development Path

Situated west of Toronto’s Downtown financial core, Liberty Village is a distinctive 12 square block employment district that anchors one end of the King Street corridor, one of the most concentrated urban landscapes for Toronto’s knowledge-based economy. Historically, Liberty Village was one of the city’s key manufacturing sites, accommodating the operations of companies such as Massey-Ferguson and Inglis. Today, it is home to over 500 businesses and 7,500 employees, many of which are critical engines of Toronto’s prosperity in the 21st Century.

The emergence of Liberty Village as an attractive location for knowledge-based industries was triggered by a confluence of factors that redefined it’s role as an urban employment district. Faced with a rapidly declining manufacturing base and recession in the early 1990s, the City of Toronto established a more liberalized zoning framework for the adjacent King-Spadina and more easterly King-Parliament areas to mobilize reinvestment in their former factory and warehouse buildings. The new planning approach promoted flexibility, density, synergy of uses, and authenticity in design to generate a mixed-use environment conducive to the needs of Toronto’s emerging knowledge-based economy.

Buoyed by improved market conditions, property owners and developers were provided the latitude to co-locate light industrial, commercial, entertainment, retail, residential and live/work uses. At the same time, they were encouraged by the City to convert existing buildings and restore their historic industrial architecture. The legacy of ‘brick-and-beam’ buildings that accommodated the textile manufacturers, printing/lithograph firms, and warehouses of the 20th century was well-suited to the non-traditional, open office environments in demand from many of Toronto’s knowledge-based industries, particularly ‘new media’ firms. The flexibility afforded by the structural characteristics of these buildings, as well as their historic and industrial aesthetic, facilitated a wave of retrofits by developers who positioned their properties to the types of companies driving the ‘dot-com’ boom.

Further west from King-Spadina, Liberty Village was experiencing a similar transition, though with a slightly different trajectory. Traditionally a location for large manufacturers, the area’s decline as an industrial district facilitated the beginnings of a
creative one, as pioneering artists established a small concentration of studios and illegal live/work lofts through the 1980s. The low-rent, flexible warehouse spaces provided the necessary infrastructure for a growing community of visual and performing artists - including large-scale or industrial art - who ignited the early transformation of Liberty Village. As the economy recovered however, many of these artists were evicted or priced out of the market for space. Recognizing the importance of sustaining artists in Downtown’s transitioning communities, affordable work-only studios were established in 1991 through a partnership between Artscape, a not-for-profit development enterprise, and Toronto Economic Development Corporation.

Capitalizing on the regeneration triggered by the artist community in Liberty Village, new property owners began to reinvest in many of the former industrial warehouses. While not provided the same degree of zoning flexibility as the King-Spadina/King-Parliament areas, Liberty Village property owners were allowed a broader range of commercial/office uses within a light industrial zone. Demand for these adaptable spaces was being fuelled by both small and large technology and ‘new media’ companies looking for unique locations that would reflect their corporate culture, accommodate their desire for open concept layouts and attract the young technical and creative workers that their business relied upon.

Affordable residential neighbourhoods adjacent to the district also provided opportunities for a creative workforce to reside in close proximity to the companies located there. At the height of the ‘dot-com’ boom in late 1999 and early 2000, King-Spadina and Liberty Village accommodated the city’s most extensive concentrations of ‘new media’ enterprises.

In addition to the companies who clustered in these areas, various capacity-building initiatives were established between private sector, not-for-profit organizations and government to build stronger networks, foster business growth, attract investment and develop talent in the area. Spadina Bus - a tech-focused business association – was funded in its start-up phase through the Province of Ontario to facilitate mentoring, learning and best practices through social networking events, workshops and professional development opportunities in the King-Spadina area. Also supported by the Province, the 10,000 s.f. Liberty Village New Media Centre was set up by a partnership of York Heritage Properties Inc., the City of Toronto and SMART Toronto to foster growth in the ICT and new media cluster, establishing Liberty Village as a major
hub for collaborative initiatives in the emerging technology sector. In addition to these industry-based organizations, Canada’s first non-retail Business Improvement Area (BIA) was established by property and business owners in Liberty Village to enhance the district’s industrial-grade public realm through safety, streetscaping and advocacy initiatives.

The ‘dot-com’ bubble’s rapid collapse early in the decade impacted the economic makeup of the entire King Street corridor, including the demise of the New Media Centre and Spadina Bus. However, Liberty Village showed considerable resiliency, rebounding successfully after shedding nearly 1,500 jobs and nearly 150 firms between 2001 and 2003. Seeded by an artistic community over two decades ago, Liberty Village has now emerged as a dense landscape of industries that thrive on a dynamic intersection of culture, economy and technology.

**Employment Dynamics**

The economic profile of the district is shown below through a special tabulation of data from the City of Toronto’s Annual Employment Survey. Three key dimensions are tracked in a Growth-Share Matrix that illustrates important dynamics of industries in the district:

- total employment of the sub-sector (size of bubble);
- compound annual growth of employment over a 10 year period (x-axis); and
- relative concentration of the sub-sector compared to the city average (indicated with a red line at 1.00) using a location quotient (y-axis).

Highly concentrated and growing, the Cultural Industries represent the largest employment source in Liberty Village with companies such as Corus Entertainment, Nelvana, S-Vox, Marlemedia, Studio City, Jazz FM, SIRIUS Canada Inc. and many smaller specialized media production and publishing firms. These enterprises tend to require larger floor plates, unobstructed ceiling spans and substantial fibre optic accessibility to accommodate much of their production and post production activity.

The Creative Services provide an equally substantial presence with employment growth generated by advertising and interactive digital media firms but also through a broad base of photographers, architect firms and design companies. Digital Cement, Softchoice, Tucows Inc., Fuel Advertising Studio, II by IV Design Associates and Forrec represent the breadth of service capabilities located in Liberty Village.
An array of national, provincial and region-based sector organizations in the Cultural Industries and Creative Services has also located in the district including Interactive Ontario, Computer Animation Studios of Ontario, Toronto Animated Image Society, Canadian Recording Industry Association, the Fashion Design Council of Canada and Liaison for Independent Filmmakers of Toronto – each are important hubs of sector-based networks that converge, both physically and virtually, on Liberty Village.

While not a major employment source, individual professional artists and performers, small theatre companies, and festival organizations remain an integral component of the economic and social diversity of the district. In addition to the independent visual artist community in local studios, organizations such as Word on the Street Festival, Arraymusic, Small World Music Society, Toronto Dance Theatre, Danny Grossman Dance, Canadian Bookbinders and Book Artists Guild have found office locations in more affordable units, primarily in Artscape’s below-market building. As in many artist-infused communities, Liberty Village’s public space has also been visually transformed through murals and public art, commissioned by individual property owners and the BIA. Another indicator of the district’s prominent relationship with the Core Creative Fields is the recent establishment of Liberty Village as a key programming site for Nuit Blanche, a major contemporary art festival held in public spaces across the city.
The Downside Effect of Regeneration

Connected to the overwhelming presence of the Cultural and Creative sector, the economic profile of Liberty Village also reflects the final stages of one transformation and the beginning of yet another. Manufacturing and warehousing activity continues to decline in the area, though Canada Bread – a substantial employer in the area - remains as one of the last vestiges of the large-scale industrial uses that once prospered in the district. On the other hand, the increasing frequency of new retail, health, entertainment and service businesses that are established on the ground-floors of work spaces signals the start of another, more recent transition.

With expansive new residential development occurring adjacent to the district and a young, affluent workforce, Liberty Village has become a more attractive location for independent furniture, lifestyle, personal services, restaurant, and café uses as well as the more prolific branch banks, Starbucks and chain grocery stores. While these consumer-focused businesses contribute to day- and night-time street-level activity and provide attractive amenities that benefit both the local work force and surrounding neighbourhoods, they also remove existing and potential work and studio space from the overall portfolio in the area.

It is also clear that there is a considerable up-market force behind the equation. Similar to areas further east along King Street, the affordability of the district’s work spaces for creative individuals and micro-enterprises is diminishing. While currently more reasonable than the rates closer to the Downtown financial district, the high cost of operating ‘brick and beam’ properties, combined with growing demand from higher-value tenants (e.g. boutique law firms), has escalated asking net rates to $18 – $25 per ft² in the King Street corridor and Liberty Village.

The recent move of Sony BMG in 2008 from the area to a suburban location in Markham was, in part, a result of the area’s higher property-related costs. Corus Entertainment, with over 900 employees currently in the district, will also be leaving Liberty Village in 2009 to consolidate its locations across the city into a new, purpose-built facility on the central waterfront. Other substantial companies such as Radiant Core (acquired by a larger Canadian software company) and Brookshire Media (a U.S.-based firm) have either recently relocated or ceased operations in Liberty Village. A portion of those losses have been recouped through the additions of EMI Music Canada and a feature film production studio of IMAX Corporation, however the current global economic uncertainty
will generate ongoing instability as the sector adapts to an increasingly complex business climate.

While the momentum of broader revitalization delivers an increasingly mixed-use urban character in Liberty Village, the district’s diverse composition of creative talent, cohesion as a unique ‘campus’-style work environment and function as an affordable incubator to a broad range and tenure of creative enterprises will become increasingly at risk. As the Downtown and central areas of Toronto continue to absorb the expansive residential development that has occurred over the last 5 years, considerable pressure is being exerted on the conditions that have positioned Liberty Village a successful landscape for supporting Toronto’s Cultural and Creative sector.
COLLABORATION

Regions around the world are mobilizing to develop and grow industry clusters by intelligently combining existing resources in new ways to generate greater prosperity. According to the Toronto Region Research Alliance53, “creating a successful regional dynamic involves breaking down the barriers between sectors and the institutions and organizations within them, and finding new ways to work together. This requires new forms of association and innovative organizations that can catalyze the latent potential in a region by introducing new synergies across disciplines, professions and sectors, uniting diverse but necessary ingredients for innovation and eliminating barriers to collaboration”.

Various sector reports and strategic documents54 prepared over the last five years have identified the importance of fostering stronger collaboration and synergies between the various components of the Cultural and Creative sector, particularly around the critical relationships between knowledge institutions, industry and government. These have focused on several key themes:

- Entrepreneurial support for start-up and emerging companies
- Financial incentives for R&D and production
- Upgrading technical and business skillsets
- Stronger collaboration with Universities around innovation and commercialization
- Industry co-location to foster synergies
- Leading edge sector intelligence
- Sophisticated marketing and communications
- Enhanced broadband infrastructure
- Cross-industry partnerships.

The Cultural and Creative sector is a hybrid concept that is an especially challenging and fluid environment, not only for creative entrepreneurs and practitioners to navigate within but also for public policy makers seeking to reap the social and economic dividends possible as an outcome of developing the sector.

Sector Networking

Although one of the defining features of the Cultural and Creative sector is the crossover of people, talent and skills55, it tends to be dominated by sub-sector specific policy and identity and, as a result, networking and investment streams. While sub-sector based

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53 Toronto Region Research Alliance, Engaging Innovation, 2005

55Approximately half of all respondents to our survey (56%) work in more than one area of practice of these more than half have their primary area of practice in the Creative Core and a quarter are in Creative Services.
strategies – such as design, screen-based media, visual arts, etc. - may serve specific needs, they also tend to reinforce these silos and limit the cross-fertilization that is at the foundation of the sector’s vitality.

The collision of artistic and technological creativity has been identified as a key dimension of Toronto’s knowledge economy for quite some time\textsuperscript{56}, however the opportunity for practitioners across sub-sectors to come together or to connect with other knowledge-based industries to network and explore the potential for collaboration is rarely facilitated.

At a region-wide level, a small number of advisory committees in film, design and fashion have been supported by the City of Toronto as tools for planning sub-sector specific development, including the Design Industry Advisory Committee, Fashion Industry Liaison Committee and the Film Board. However, these initiatives have no common forum nor is there any opportunity for industry leaders to share practice, policy issues and concerns on a cross-sector basis. Despite this challenge, existing project driven or informal mechanisms which bring together the region’s Cultural and Creative sector leadership have played, and continue to play, an important role in advocating for particular projects and/or policy approaches. However, there is now an opportunity to build on these informal and project-based approaches to explore the potential of much more sophisticated and broader collaboration to support the growth of the sector within the knowledge economy.

\textit{Government}

Evidence from recent studies points to a lack of policy integration, inter-departmental and cross-sector collaboration which is limiting the effectiveness of the public sector’s response to the needs and opportunities of the Cultural and Creative sector. Effective and widespread public sector partnership models are challenging to navigate, both politically and operationally. However, collaboration within and between the public sector, its agencies and the wider community and business spheres through more effective ‘joined-up’ governance, the development of local partnerships, place-based policy-making and the production and design of services with the public is becoming a critical capability for regions globally.

Collaboration offers government the potential to address its social and economic ambitions in a more consensual way - it acknowledges the complexity of issues facing it and seeks to widen the pool of problem-solving resources available. A recent review of local government in the U.K. called for local

\textsuperscript{56} City of Toronto Economic Development Strategy, City of Toronto, 2000
government to act as “strategic place-shapers”\textsuperscript{57}, organizing but not necessarily leading collaboration across whole localities. In its review of public sector collaboration and partnership, the think tank Demos recently suggested collaboration should become “a basic design tool for government”.

With the recent launch of the \textit{Prosperity Agenda}, the City of Toronto has acknowledged the benefits of developing a greater depth of policy integration and collaborative service delivery. The Interdepartmental Economic Growth Team is now working across disciplines and departments to develop both enabling services and to inform economic development strategy.

Policy integration at the municipal level will also play a key role in facilitating enhanced cross-departmental collaboration and improved enabling services between and within all three tiers of government. The recent \textit{Entertainment and Creative Clusters Strategy for Ontario}\textsuperscript{58} sets out the need for improved inter-departmental collaboration at a provincial level, as well as between the Province and third sector funding organizations and service agencies to respond to the needs and opportunities associated with the sector. The importance of building dialogue and shared policy frameworks between the City and the Province is highlighted by the sheer dominance of the Toronto region within Ontario’s Cultural and Creative sector.

Over the last few years, all levels of government and a broad constituency of sector leaders have elevated the policy dialogue and proposed new strategy frameworks through which collaboration can be encouraged and intensified to deliver the social and economic innovations that will contribute to greater prosperity in Toronto. A number of increasingly sophisticated, not-for-profit enterprises have emerged to address the opportunities and challenges of this collaboration-based approach. Through various types of platforms, these organizations are explicit in their focus on the cross-sector nature of innovation in the knowledge economy generally and, in some cases, the Cultural and Creative sector specifically.

\textsuperscript{57} Lyons Inquiry: \textit{National Prosperity, Local Choice and Civic Engagement}, HMSO, 2006

\textsuperscript{58} \textit{Entertainment and Creative Cluster Strategy for Ontario}, Ministry for Culture, 2006
Case Studies: Convergence Centres

As discussed in previous sections, Toronto’s existing infrastructure to support Cultural and Creative sector entrepreneurs is underpinned by a large portfolio of commercial workspaces. As illustrated in the stylized diagram below, convergence centres represent a new generation of facilities that are differentiated from commercial co-location spaces that accommodate significant absorption from sector enterprises as well as more industry-specific incubator models, such as the Toronto Fashion Incubator.

The important distinction comes from three key operating characteristics:

- Level of vertical integration among elements of the sector’s value chain that connects creation, production and exchange (Y-axis)
- Intensity of cross-sector collaboration that drives synergies across complementary disciplines (X-axis)
- Scope of program platforms that accelerate collaboration and interaction (size of bubble)

A number of convergence centres have been identified for the purposes of this report that reflect a new generation of institutions for collaboration, including:

- Canadian Film Centre’s (CFC) Windfields Campus
- Toronto International Film Festival Group’s (TIFFG) Bell Lightbox
- Ontario College of Art and Design’s (OCAD) Digital Futures Centre
- MaRS Centre
- Evergreen Brickworks
These centres, and the organizations that manage them, reflect capabilities to purposefully translate serendipity to synergy, facilitating convergence in a number of important domains:

- **Values** – the strategic intent of the centres reflect shared values that underpin effective collaboration at the intersection of diverse capabilities, perspectives and ideas. They are multi-dimensional in nature, fuelling innovation within and between economic and social spheres

- **Leadership** – the centres attract a range of cross-disciplinary leadership, formed around a common purpose of innovation. By connecting the necessary diversity of knowledge, entrepreneurship and expertise required to drive a values-based culture of innovation, the leadership teams developed for these centres are able to bring together different disciplines for constructive engagement

- **Partnerships** - the centres are established through an entrepreneurial, not-for-profit model that facilitate purposeful collaboration and provide a ‘neutral sandbox’ for the exchange of value, convening of ideas and shared risk among public, private and 3rd sector partners.

- **Talent** - the centres seek to bring together different domains of knowledge, research and practice to build capacity for collaboration across a critical mass of individuals and enterprises. They are hybrid institutions where interaction can occur between multiple disciplines, enabling depth (within specific capabilities) and breadth (across disciplines) of skills and experience

- **Networks** - as conduits of knowledge and idea exchange, convergence centres function both as physical and virtual hubs that draw on and facilitate collaboration at multiple scales. They generate local ‘value engines’ and regional ‘buzz’ through propelling place-based interactions and often facilitate the development of global ‘pipelines’ that extend their connectivity internationally - their footprints are both physical and virtual

- **Place** – these convergence centres are designed as a conscious aspect of the creativity and innovation strategy. As the physical manifestation of the organizations’ core values and strategic intent, these environments encourage flexibility, interaction, collaboration and permeability, connecting on multiple levels to its urban context

These domains of convergence reflect the critical role that this new generation of institutions for collaboration provides in driving entrepreneurship, innovation and creativity.
Canadian Film Centre
Windfields Campus

Values
Founded in 1988 by internationally acclaimed Toronto filmmaker Norman Jewison, the Canadian Film Centre (CFC) is Canada’s largest and most respected institution for advanced training in film, television and digital media. A federally registered charitable institution, the CFC mission is to offer the most advanced and innovative training and mentorship; creative joint ventures with leading industry practitioners; promote the distribution of talent and work; provide resources for development, production and marketing; embrace and promote cross-cultural vision and talent; be entrepreneurially motivated and fiscally responsible.

Leadership
A centre of excellence for the future of entertainment, the CFC is led by an award-winning management team, and governed by a diverse range of influential individuals in the screen entertainment production and service industry. Board members include:
- Filmmakers – Norman Jewison, David Cronenberg, Sturla Gunnarsson
- Producers and Broadcasters – Shaftesbury, Decode Entertainment, NBC Universal
- Distributors – Cineplex Entertainment, Empire Theatres
- Finance and Legal – AGF Funds, Goodmans LLP

Partnerships
The CFC forges innovative talent and content initiatives for a rapidly evolving entertainment landscape, through private and public sector support including:
- Corporate – Astral Media, BBC Worldwide, Canwest, CTVglobemedia, Cineplex
Entertainment, CityTV, NBC Universal, Rogers, TMN, TELUS

- Private Foundations – The Brian Linehan Charitable Foundation, The Norman and Margaret Jewison Charitable Foundation
- Government Departments and Agencies – Telefilm Canada, NFB, CBC TV, Ontario Ministry of Culture, Ontario Media Development Corporation, Ontario Arts Council, Ontario Arts Foundation, City of Toronto, Toronto Arts Council

**Talent**
Through an immersive and integrated curriculum, from concept to production and post, the CFC offers hands-on experience in the art and commerce of storytelling. The CFC’s alumni network consists of 1,200 writers, directors, producers, editors, and digital media content creators. 92% are employed in the industry. CFC alumni have formed 57 production companies. As a snapshot of their economic footprint: 60% of CFC alumni are based in Toronto, where 79 TV specials, 89 TV series, 9 Movies Of the Weeks, and 33 features were produced in 2008 with $500 million in production spending. Notable alumni include: Sarah Polley, Clement Virgo, Tassie Cameron, Jeremy Diamond, Charles Officer, Julia Kwan, Shawn Micallef, Don McKellar, Michael Ondaatje, Christina Jennings, Peter Raymont, Vincenzo Natali.

**Film**
- The Film Program is a lab-based series that develops filmmakers’ technical, collaborative and business skills, while developing project slates and refining their artistic expression.
- The Short Dramatic Film Program (SDF) is focused on development, production and post-production filmmaking experience, bringing together directors and their creative teams to deliver short films.
- CFC Features is a comprehensive development and production focused mentorship program for emerging Canadian feature filmmakers.
- The Feature Documentary Program is focused on developing successful original feature documentaries for international cinema audiences.
- The Actor’s Conservatory offers actors advanced on-screen performance training focused on the technical and business side of screen-acting while generating a significant body of produced work.
- CFC-Tribeca All Access provides culturally diverse Canadian filmmakers with exclusive networking and pitch opportunities at the prestigious Tribeca Film Festival.
Television

- The Prime Time Television Program provides a team-based approach to TV series development for writers.
- The Pilot Program focuses on the development and marketing of new series for webcast, culminating in the production of a half-hour pilot episode.
- The Content Creator Program offers mentoring and workshops for writers with original concepts; creators emerge with a complete package to pitch NBC Universal.
- The GO WEST Project Lab is facilitated by the Whistler Film Festival and is aimed at western-based content producers.
- The CFC-BBC Co-Production Incubation initiative is a collaborative effort between creative teams from Canada and the UK to develop and produce TV content.

Digital Media

- The Interactive Art & Entertainment Program is Canada's first post-graduate training and production program based on a team-based, self-directed and project-driven approach.
- The Interactive Narrative Features Program experiments with the creation, development, production, financing, marketing and distribution of interactive feature films.
- The Multi-Platform Matchmaking and Production Program provides investment, creative strategy, production support, mentorship, and knowledge sharing to companies who are interested in developing and implementing a multi-platform strategy from the outset of project development.
- The Institute of Future Entertainment (IFE) focuses on three strategic areas: workplace transformation and company creation; 21st Century content creation; applied R&D.

In addition to these streams, the CFC has developed important exhibition, financial, and distribution opportunities, including:

- CFC Distribution, a boutique distributor and sales agent exclusively for short films produced through the SDF
- TELUS Innovation Fund, a production financing tool that supports a small number of projects per year
- Worldwide Short Film Festival, one of only three festivals in Canada accredited by the Academy of Motion Picture Arts and Sciences, the WSFF is a premier Toronto attraction and the leading marketplace in North America for short films
Networks
Located within Canada’s largest cluster of screen-based media, the CFC has become a vital hub for an extensive domestic and international network of content professionals, broadcasters, studios and other key organizations in the entertainment industry. The CFC fosters long term relationships among its residents, alumni, faculty and industry partners through member-based virtual platforms, high profile industry events and international exhibition opportunities. CFC also undertakes outreach to film schools, training centres, film co-ops and other creative associations across the country. In recent years, the CFC has collaborated with the Banff New Media Institute and L’institut national de l’image et du son in Montreal to establish the Bell Globemedia Content Innovation Network - a national digital, education, production, research and development network.

Place
The CFC is located on the Windfields Estate in north Toronto. The property was purchased in 1932 by Canadian industrialist, philanthropist and horseman E.P. Taylor and developed as the principal residence for his family. Taylor bequeathed the property to the municipality in 1968. With the family’s assistance, a 4.4 acre portion was dedicated for the establishment of the CFC in 1988. Windfields is designated as an Ontario heritage property. In addition to its cultural and heritage significance, the CFC is part of a cluster of educational centres situated along the north Toronto, Bayview Avenue corridor including the Crescent School, Toronto French School, The Junior Academy, Bob Rumball School for the Deaf, and York University’s Glendon Campus.

Within this context, the CFC has sensitively adapted a complex of seven heritage buildings—including Main House, Gatehouse, Stable, and Cottages—for use as an intimate campus for its film, television and new media program and support activities.

The facilities currently comprise 24,000 ft² of flexible workshop and meeting spaces, hi tech and low tech labs, dedicated post-production suites, administrative offices, and a purpose-built 55-seat theatre. As work environments, they are designed to be conducive to the intensive interaction of creative teams.

Surrounded by formal and informal open space comprising the remainder of the
estate—gardens, orchard, parkland—the pedestrian-oriented site provides a human scale, stunning view sheds, and comfortable working environment that is influential in recruiting and inspiring talented practitioners and renowned guests. While physically remote from the more intensive concentrations of media activity in Toronto’s Downtown and core areas, the CFC’s Windfields Campus provides a focused and distinct environment for successful collaboration.

Ontario College of Art & Design
Digital Futures Centre

Values
The Ontario College of Art & Design (OCAD) is Canada’s “university of the imagination.” Since 1876, OCAD’s specialized, studio-based programs have inspired students, faculty and alumni to push the boundaries of art and design — analytically, conceptually and strategically. Today, the university combines the strength of that tradition with new approaches to learning and research that emphasize collaboration, innovation and the integration of emerging technologies. Explicit in the principles underpinning its academic curriculum and cultural programming, “OCAD attracts a unique community of students, educators and practitioners who share values around accessibility, cultural diversity, equitable global citizenship, art and design advocacy, aesthetic and formal excellence, sustainability and entrepreneurship”[59]. The Digital Futures Centre will be home to various components of the Digital Futures Initiative, a set of cross-disciplinary programs, research and innovation activities that are addressing the need for highly qualified and creative leaders to strengthen Ontario’s research capacity in digital media and information and communications technologies.

Leadership
President Sara Diamond leads a multidisciplinary university that includes visionary leaders from academia, industry and the cultural sector in its ranks of academic and administrative staff. At the board level, OCAD’s Board of Governors includes corporate representation from the following sectors:
- Visual and performing arts (Margaret Priest, RJ Deverell Productions)
- Information and Communications Technology (Xerox Research Centre of Canada, Numeric Answers)
- Design (Designwerke, Adams + Associates Design Consultants)
- Media (Achilles Media Ltd.)
- Entertainment law (Fogler, Rubinoff LLP and Michael Peter Haddad Professional Corporation)
- Not-for-profit (Toronto Community Foundation)

Partnerships
The Digital Futures Initiative (DFI) is highly collaborative in nature, engaging industry and public institutions. Through the DFI, OCAD is linked to global innovators in digital media and ICT. Partners include international corporations, small and medium enterprises, and public partners such as other universities, colleges, hospitals, think tanks and government agencies. Industry and public partners ensure that the DFI drives and leads current industry needs and initiates the development of new kinds of enterprise. The DFI has a broad array of funding, sponsorship and programming partners, including:
- Academic institutions: University of Toronto Faculty of Information Studies, York University, Ryerson University, University of Ontario Institute of Technology, George Brown College, Sheridan Institute of Technology and Advanced Learning, Seneca College, Centennial College, Durham College, and La Cité collégiale
- ICT: Adobe Systems Canada, Apple Canada, Autodesk Canada, Cisco Systems, Epson Canada, GestureTek, GTAnet, IBM Canada, Mahindra & Mahindra, Microsoft Research, Motorola Canada, Sun Microsystems of Canada, QuickPlay Media, XEROX Canada
- Public-private research networks: ORION (Ontario Research and Innovation Optical Network), ORANO (Optical Regional Advanced Network of Ontario), SHARCNET (Shared Hierarchical Academic Research Computing Network), VROC

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60 Comprised of The Daniels Corporation and filmmaker Ivan Reitman and the Reitman Family
(Virtual Researcher on Call)

- Multi-platform broadcasters/publishers: Alliance Films, Astral Media, CTVglobemedia, Yahoo! Canada
- Digital media production: DECODE Entertainment, ecentricarts, JWT Canada
- Design: Design Exchange, Yield Integrated, Design Industry Advisory Committee, Manifest Communications, MARC Canada
- Health sciences: Baycrest
- Government: Ontario Ministry of Culture, Ontario Ministry of Research and Innovation
- Sustainability: Zerofootprint

**Talent**

As home to the DFI, the Digital Futures Centre will bring together industry, government and not-for-profit organizations with OCAD researchers, faculty, and students in a facility with special-purpose facilities, such as:

- Digital Media Research + Innovation Institute (DMRII): Phase 2 of the DMRII will enable cross-disciplinary research, outreach and commercialization activities
- Mobile Experience Innovation Centre: A specialized research environment focused on the role of mobile user experience and usability design, and the commercialization of advanced mobile and embedded services and content
- Immerse! Laboratory and Studio: A black-box digital-media lab for investigation, pedagogy and presentation of virtual reality and interactive experience
- Interact! Gallery and Café: An interactive café that will showcase digital media and interactive art and design

The Digital Futures Centre will also include programs to accelerate the development of new kinds of business strategies and applications through a number of collaborative platforms that link digital media, art and design to emerging technologies.

**Networks**

As a collaborative institution, OCAD is a complex knowledge node for networks that connect researchers, designers, artists and entrepreneurs at multiple scales. Through its involvement in academic–industry research networks such as ORION (Ontario Research and Innovation Optical Network), SHARCNET (Shared Hierarchical Academic Research Computing Network), CONCERT (Consortium on New Media, Creative, and Entertainment R&D in the Toronto Region) and CANARIE, OCAD is a hub for cutting-
edge research. OCAD has strategic relationships with key players across the country and around the world. The Digital Futures Centre will house many of the projects and initiatives that result from collaborations and partnerships with leading digital studies programs, including Goldsmiths (University of London), Bristol University, SMARTlab (University of East London), the Interactive Telecommunications Program at New York University’s Tisch School of the Arts, Sweden’s Malmö University, India’s National Institute of Design, and China’s Central Academy of Fine Arts.

**Place**

The Digital Futures Centre will be situated in one of Canada’s most high-density precincts of cultural, entertainment, and knowledge activity, in close proximity not only to OCAD’s existing campus beside the Art Gallery of Ontario, but also to the Toronto International Film Festival Group’s Bell Lightbox, the CBC’s Canadian Broadcasting Centre, the National Film Board of Canada’s Mediatheque, the Canadian Opera Company’s Four Seasons Centre for the Performing Arts, and CTVglobemedia. The Digital Futures Centre will be a hybrid facility, providing research laboratories and studios, spaces for industry–university collaboration and an incubator for start-up companies to commercialize student and faculty research. Cross-disciplinary environments will be provided through a cluster of special-purpose infrastructure, including:

- Ambient-experience laboratory
- Mobile-experience and screen-based technologies laboratory
- Cross-industry innovation centre
- Prototyping laboratory and business-development centre
- Predictive-science visualization and simulation facility
- Wearable-technologies and ubiquitous-computing laboratory
- Social-media and collaborative-systems laboratory
- Innovation and technology-transfer centre

A terrace at the junction of the existing building and the new addition will provide access to an outdoor work space adjacent to program spaces. The roof of the new addition will feature green-roof technology, as well as a useable green terrace for small-scale events.

Other public components of the Digital Futures Centre include a digital canopy.
wrapping around the building’s north and west sides. The canopy will be an interactive canvas animated by user-programmed digital work. Together with the Interact! Gallery and Café, the canopy will showcase the best of Canadian digital-media art, design, research and innovation to passersby in one of downtown Toronto’s most pedestrian-heavy neighbourhoods.

Toronto International Film Festival Group
Bell Lightbox

Values
As a charitable not-for-profit organization, the Toronto International Film Festival Group (TIFFG) brings together Canadian and international filmmakers, industry professionals, academics and the public to explore the power and influence of the moving image. Focused on propelling filmmaking as an art form, industry and social document, TIFFG’s goal is to provide “more access to more films for more people” by encouraging learning, discovery and creative expression through a broad range of exchanges between creators and audience.

Leadership
With a strong vision to ‘lead the world in building markets and audiences for Canadian work and to foster creative discovery through the moving image’, TIFFG has mobilized an extensive leadership team around the scope of its international festival, year-round programs and development of a dedicated venue, the Bell Lightbox. Many of Toronto’s and Canada’s highest profile artists, filmmaking visionaries and cultural industry leaders have been engaged, including:

- Canadian filmmakers (Norman Jewison, David Cronenberg, Atom Egoyan, Paul
• Gross, Don McKellar, Deepa Mehta, Sarah Polley and Ivan Reitman
  • Multi-platform broadcasting (NBC Universal Canada, Rogers Communication Inc., TVoNtario, Milestone Radio Inc., Alliance Atlantis Communications Inc., CTV Globemedia, CHUM Ltd.)
  • Information and Communication Technology (Bell Canada)
  • Media production and distribution (Cinema Strategy Group, Goldspin Productions Inc., Canadian Film Centre, Canadian Motion Pictures Distributors Association, Copyright Collective of Canada, CORE Feature Animation, Universal Studios Canada Ltd., CinemaVault)
  • Film exhibition (Cineplex Odeon Corporation)
  • Design and communications (Endeavour Marketing, Sonar Communications Group Inc, Justin Poy Agency)
  • Music production and distribution (Somerset Entertainment)

**Partnerships**

The breadth of experience, skills and connections of the leadership team have been critical to developing the extensive government, industry, philanthropic and corporate partnerships that are required to deliver on TIFFG's ambitious international and domestic programming. Some of the key sector partners include:

  • Multi-platform broadcasting (CTV, CityTV, MTV, Discovery Channel, Space Channel, Paramount, A&E Television Networks)
  • ICT (Apple, IBM Canada Ltd, Motorola, Bell)
  • Music production and distribution (EMI Music Canada, HMV Canada Inc.)
  • Media (Globe and Mail, Now Magazine, Maclean’s Magazine, Inside Entertainment Magazine)
  • Film exhibition (Cineplex Odeon Corporation)
  • Federal government partnerships (Telefilm Canada, Department of Foreign Affairs and International Trade, Canadian Heritage, Human Resources and Social Development Canada, Canada Council for the Arts)
  • Provincial government partnerships (Ontario Media Development Corporation, Ministry of Ontario Tourism, Ontario Arts Council, Ontario Arts Foundation)
  • Municipal government partnerships (Toronto Arts Council, City of Toronto)
Long-standing collaborations and resource-sharing with other cultural centers, film groups and film festivals to present exhibitions of Canadian and international cinema have also been nurtured locally and nationally. Most recently, TIFFG is an active collaborator in Toronto on projects with the Art Gallery of Ontario, Art Gallery of York University, Art Metropole, CONTACT Festival, Human Rights Watch, Images Festival, Liaison of Independent Filmmakers of Toronto, Luminato, Nuit Blanche, OzFlicks and the Royal Ontario Museum.

**Talent**

TIFFG has a strong commitment to developing and supporting the Canadian film industry through its strategic focus on building markets and audiences for Canadian cinema (e.g. Cinematheque Ontario, Sprockets Toronto International Film Festival for Children), but also through a number of innovative networking events, panels, discussions and development programs delivered primarily through the Toronto International Film Festival (TIFF).

TIFF is widely recognized as the most important film festival after Cannes and the most successful public film festival in the world. Program and services provided to industry participants during the Festival are designed to address issues that are critical to the industry while providing open and accessible learning opportunities for professionals. In addition to the numerous screenings and informal social events, TIFFG’s *Industry Initiatives* provide an intensive networking and professional development program that connects Canadian artists and filmmakers with international colleagues and business opportunities. includes:

- The Match Club which offers global networking opportunities for filmmakers and creates links between Canadian artists and the international business community
- Meet With... series comprised of informal information sessions featuring guest speakers and offering insight on the fundamentals of the business and art of filmmaking from seasoned industry professionals
- Talent Lab is a four-day intensive program that offers artistic-development opportunities to emerging Canadian filmmakers.
- Telefilm Canada PITCH THIS provides an opportunity for participant teams to pitch their feature-film idea to an audience of over 250 industry professionals
- The Canadian Film and Television Production Association Producer’s Award is presented during TIFF and acknowledges the vision and entrepreneurship of an
independent Canadian producer with a Canadian feature at the festival

- Doc Roundtables which provides an opportunity for documentary filmmakers to meet leading industry figures – distributors, festival programmers, sales agents and consultants
- International Financing Forum which is a feature film co-financing event at the TIFF that brings together selected producers to network with international sales agents, distributors, funders, agents, and executive producers

Aside from the festival, TIFFG’s core programming includes several community-focused exhibition and audience engagement initiatives such as Film Circuit, Reel Talk, Youth Learning, Student Film Showcase and Reel Comfort. An important resource for both audience and industry, the Film Reference Library holds the world’s most extensive English language collection of Canadian film-related material.

**Networks**

TIFFG connects extensive networks of international and domestic industry representatives at many levels through their diverse array of programming platforms. As an intensive networking event, TIFF brings together key components of the film industry including producers, talent, sales agents, buyers, programmers, filmmakers, promotional agencies and other industry professionals. Key relationships with national film promotion agencies reflect the global scale of the film industry networks that TIFFG facilitates, including:

- South America (Cinema Do Brazil, Instituto Nacional De Cine Y Artes Audiovisuales,
- Europe (Norwegian Film Institute, Danish Film Institute, Film Italia, Finish Film Foundation, German Film, Instituto de la Cinematografía y de las Artes Audiovisuales, Icelandic Film Institute, Swedish Film Institute and Unifrance)
- North America (Instituto Mexicano De Cinematografia)
- Asia (Korean Film Council)
- Africa (Nigerian Film Corporation, National Film and Video Foundation)

Illustrative of its national and provincial networks, TIFFG has contributed to the development of a strong network of film festivals in communities across Canada through its *Film Circuit* program, including:

- Ontario (Reel Cinema for a Real Cause, Cinéfest Sudbury International Film Festival, Owen Sound Reel Festival, All Canadian North Bay Film Festival, Barrie
Reel Stories, NFS Film Festival, Aultsville Film Festival, Club Canadien français de Thunder Bay, Shadows of the Mind Film Festival, People of the Peaks Film Festival, Collingwood Film Festival, Kingston Canadian Film Festival, NOSFA’s Northwest FilmFest)

• Quebec (Les Rendez-vous du cinéma québécois et francophone)
• Nova Scotia (Atlantic Film Festival)
• Alberta (Calgary International Film Festival and Edmonton International Film Festival)
• B.C. (Whistler Film Festival, Powell River Film Festival, Shuswap International Film Festival)

Through its annual Student Film Showcase, TIFFG works with a network of film schools to showcase a diverse range of emerging student work including animation, documentary, fiction and experimental films. The ‘Film School Consortium’ is a national group of fifteen universities and colleges that include Concordia University, Confederation College, Humber College Institute of Technology and Advanced Learning, Langara College and Emily Carr Institute of Art + Design, NSCAD University, Ontario College of Art & Design, Queen's University, Ryerson University, Sheridan Institute of Technology and Advanced Learning, University of British Columbia, University of Regina, Capilano College, University of Toronto, and York University.

**Place**

Serving as the dynamic hub for a number of TIFFG’s initiatives and programs, the Bell Lightbox is the physical embodiment of their vision to encourage learning, discovery and creative expression in film through innovative cross-media exhibitions, lectures, and film-related education opportunities. Developed in partnership with King and John Festival Corporation in Toronto’s entertainment district, Bell Lightbox is structured within a five-storey podium building at the base of a residential condominium project. The 150,000 ft² facility is designed to accommodate:

• Five state-of-the-art cinemas ranging from 80 to 550 seats for TIFFG’s programs and a broad range of other domestic and international screenings
• A two-storey atrium, café-restaurant and a lounge to provide a porous meeting place
• Three gallery spaces to accommodate curated collections and touring exhibits
• Three learning studios for workshops, masterclasses, and professional panel discussions as well as expanded school programs, delivering arts curriculum to
children

- A student and scholar centre for expanded archives and Special Collections, publicly exhibiting TIFFG's own collection
- A display space for special exhibitions
- Office space for TIFFG's staff and a home for other film festivals and cultural activities

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**Evergreen
Brick Works**

**Values**

Evergreen is a national charity that is focused on the relationship between nature, culture and community in urban spaces. As its national headquarters, Evergreen Brick Works project is intended to be a physical expression of these values of environmental, social and economic sustainability, enabling innovation through a collaborative approach to engaging and educating the community.

**Leadership**

Evergreen has brought together a multi-disciplinary leadership team who reflect the breadth of expertise required for the significant expansion phase that the organization is undertaking to develop the Brick Works project, including:

- Real estate and planning (Urban Strategies Inc., Viger DMC International, Sorbara Development Group)
- Environmental law (Blakes Law, Saxe Law Office)
- Financial services (Kerr Financial Corporation, RBC, CIBC)
• Exhibitions (Telus World of Science, no. 9 Contemporary Art, AGO, Institute without Boundaries, Habitat for Humanity)
• Academia (University of Toronto, Toronto District School Board, Royal Roads University)
• Social entrepreneurship (Social Capital Partners, Good Capital, AutoShare, Social Innovation Generation)

**Partnerships**
Evergreen’s programmatic partnerships in relation to the Brick Works are founded on a common purpose to engage and educate the community with diverse experiences. Evergreen is collaborating with a range of not-for-profit organizations and socially conscious businesses to deliver innovative programming that connects ideas around urban ecology, industrial heritage, health and wellness, geology and food:
• Food experiences (Jamie Kennedy, Slow Food Toronto, Merchants of Green Coffee, The Healthy Butcher and various local farmers and producers)
• Education and Youth experiences (Toronto District School Board, University of Toronto, York School, YMCA of Greater Toronto, Moorelands Community Services, Eva’s Phoenix, Outward Bound Canada)
• Urban Issues and Industrial Heritage (Ontario Heritage Trust, City of Toronto Archives, Toronto Hydro, Toronto City Summit Alliance, Canadian Urban Institute)
• Art and culture experiences (No. 9, Gardiner Museum of Ceramic Art, Don Valley Art Club, City of Toronto Culture, various artists)
• Health experiences (Bridgepoint Health, University of Toronto, various community organizations)
• Natural heritage experiences (City of Toronto Parks Department, Toronto and Region Conservation, )

**Talent**
Through Evergreen’s collaborative programming, the Brick Works is intended to provide a supportive and dynamic environment for nurturing and scaling up social entrepreneurship. Aside from the extensive learning opportunities provided to the public, Evergreen and its partners will:
• Offer employment and skills training opportunities for at-risk youth
• Showcase “best-in-class” green technology / design for residential and commercial application (energy, water and waste management, transportation and buildings)
• Support small-scale artisan businesses,
• Host visiting chefs along with students from various culinary schools
• Conference and meeting facilities as well as various exhibition spaces.
• Nurture the development of a community of practice specializing in environmental, urban design, ecological restoration, health, youth and arts-related programming.

**Networks**
While the Brick Works co-location strategy provides the foundation for bridging an intensive network of organizations, educators and practitioners in Toronto, its most significant impact will be its role as Evergreen’s national hub for urban sustainability. The Brick Works will connect and advance the regional and national networks that Evergreen and its partners connect, including a wide range of social service agencies, schools, community gardening organizations, faith groups, residents’ associations and business improvement associations.

**Place**
Located on a significant natural, archeological and industrial heritage site in the Don River Valley, the Brick Works is proposed as a large scale environmental discovery centre that is intimately connected at many levels to its context. Consisting of 16 heritage buildings and an adjacent 11.5-hectare public park, the Brickworks provides 184,000 ft² of uniquely designed and programmed spaces. Specific to the focus of this report, the proposed Centre for Urban Sustainability provides a 55,000 ft² meeting place where ‘innovators, educators and leaders in social and environmental thought come together to bring about positive change’. As the only new building on-site, the Centre will showcase leading edge environmental technologies including an ever evolving canvas of moveable screens, window boxes and large scale art installations that are attached to the façade of the building.
MaRS Discovery District
MaRS Centre

Values
MaRS is a non-profit innovation centre connecting science, technology and social entrepreneurs with business skills, networks and capital to stimulate innovation and accelerate the creation and growth of successful Canadian enterprises. At the core of this ‘vertical science park and incubator’ is a fundamental understanding of fostering collaboration to maximize the economic and social impact of Canadian innovation.

Leadership
A group of Toronto public and private sector visionaries established the MaRS ‘College of Founders’ to capitalize on the region’s research strengths and position Canada as a research innovation leader. MaRS is governed by a board of directors that includes representation from:

- Leading universities and research institutions (University of Toronto, University of Alberta)
- Financial institutions (RBC, National Bank of Canada)
- Law (McCarthy Tétrault)
- Information and Communications Technology (DuPont Canada)
- Investment funds (Roy-L Capital Corporation, RBC Ventures, Stilco Corp., Belvedere1 Investments, Mandukwe Inc.).
- Leadership also comes from MaRS’ “advisors and mentors” who bring financial, operational, technological, and management experience to the operations of the centre.

Partnerships
The mission of the MaRS Centre is being propelled by an extensive public-private
partnership strategy. Established as a Centre of Excellence for Commercialization and Research, one of MaRS’ most significant partnerships is with 15 other Toronto-based institutions focused on accelerating the commercialization of promising research.

At the regional level, MaRS is actively engaged in partnerships with organizations such as:

- Greater Toronto Area (Centre for Social Innovation, City of Toronto Economic Development, Greater Toronto Marketing Alliance, Toronto Biotechnology Initiative, Toronto Board of Trade, Toronto Region Research Alliance)
- Golden Horshoe (Social Innovation Generation at Waterloo, Communitech, University of Guelph, Ontario Agri-Food Technologies, Golden Horseshoe Bioscience Network, TechAlliance)
- Ottawa (Ottawa Life Sciences Institute, Ottawa Centre for Research Innovation)

Provincially, MaRS has developed partnerships with the Council of Ontario Universities, Ministry of Research and Innovation, Ministry of Economic Development and Trade, Ontario Commercialization Network, Ontario Research and Innovation Council, and Ontario Science Centre.

At a national scale, strategic partnerships include:

- Technology transfer and commercialization initiatives (Alliance for the Commercialization of Canadian Technology, Health Technology Exchange Canadian Foundation for Innovation, National Research Council, and the Network for Centres of Excellence)
- Industry associations (Canada’s Venture Capital and Private Equity Association, CATA Alliance, BIOTECanada, Information Technology Association of Canada, Rx&D)
- Social innovation foundations (McConnell Foundation, Schwab Foundation, TIDES Foundation)

**Talent**

MaRS Centre co-locates and connects the often isolated world of scientific research with business, financial, technological, and other sectors. The Centre houses leading research groups, technology transfer offices, professional services, venture capitalists and networking organizations. Scientists, entrepreneurs and organizations are supported through provision of specialized facilities, equipment, tools and capital to
promote the commercialization of ideas and establish new firms.

MaRS provides a number of business support and mentorship programs and services, including:

- **MaRS Advisors** that provide support on venture capital financing, strategic management, market intelligence, channel strategies, mergers and acquisitions, institutional commercialization
- **Entrepreneurs in Residence** that are a networked team of successful technology and social entrepreneurs throughout Ontario to assist start-up social and technology companies accelerate their business growth
- **CIBC presents Entrepreneurship101 program**, a set of conferences, workshop and lectures that encourage collaborative education and networking
- **Market Research** that provides access to leading proprietary databases to deliver critical insights into market opportunity and industry trends
- **Financial support** including business projects and early-stage seed funding as well as connections to angel investment

**Networks**

Structured networks that connect and enhance the MaRS community of businesses, researchers and entrepreneurs are both physically anchored in the MaRS Centre and extend virtually through the MaRS Portal and other knowledge exchange platforms.

Nationally, MaRS is connected to a broad range of research and innovation networks including Social innovation Generation (SiG) which links the J.W. McConnell Family Foundation with the MaRS Centre, the University of Waterloo and the BC-based PLAN Institute for Caring Citizenship to address funding, technology and leadership opportunities designed to spur social innovation across Canada.

MaRS is also focused on building a network of global partnerships with groups such as “Global Connect”, an international network of technology incubators launched by the University of California San Diego, the Karolinska Institute (Sweden), Medicon Valley (Sweden/Denmark), the OECD and Biolink Canada-Ireland.

**Place**

Situated within a dense institutional landscape and in close proximity to Toronto’s financial district, Phase I of MaRS Centre covers 700,000 ft² over three buildings, including the adaptive reuse of the 1913 Toronto General Hospital. Over 600,000 ft²
of state-of-the-art lab space is provided, including 35,000 ft² of rent-capped space for the MaRS Incubator - a physical location and shared resource for early-stage life sciences and information technology companies. These spaces are designed for flexibility and embody the ‘spirit’ and corporate values of organizations working within them.

The main ‘collision room’ of the Centre is the large scale, publicly accessible atrium - a space that accommodates a range of performances, exhibitions, lectures and receptions. A 15,000 ft² conference and multimedia facility is also programmed to animate the complex, providing a high tech and flexible space for knowledge sharing. The second phase of MaRS, yet to be built, includes at least 800,000 ft² of additional space.
As described in this report, convergence centres are a new generation of collaborative institutions that provide an immense opportunity to build capacity for innovation in Toronto’s cultural and creative sector. The challenges that the CCP consortium has experienced in developing their multi-dimensional projects suggests that a more proactive approach is required to:

- Build awareness of what convergence centres are and evidence of what benefits they can deliver
- Streamline access to government support/ investment and remove barriers to accelerating development
- Advance a strategy to coordinate entrepreneurial training for Toronto’s creative sector

In response, the CCP consortium has assessed their experience in delivering these complex projects and has provided recommendations intended to create a more effective enabling environment for the development and operation of convergence centres in Ontario. The following recommendations are proposed to advance the three core objectives above and are directed to governments, sector skills organizations and proponents of convergence centres.

**GOVERNMENT PARTNERS**
The multi-sector nature of convergence centres means that they can respond to the public policy agendas of multiple departments, ministries and agencies at all levels of government. It also means that they are not readily located within a single mandate when it comes to policy support and funding.

The Government of Canada often provides matching funds for provincial infrastructure investment but also manages its own funding programs. A key group of federal departments include Department of Canadian Heritage, Infrastructure Canada. Industry Canada,
Human Resources Services Canada, and others.
Increasingly, the Province of Ontario plays a leading role in directing federal and provincial investments in infrastructure. Convergence centre projects can help several ministries and agencies of the Province deliver on their public policy agenda including Ministry of Energy and Infrastructure, Ministry of Culture, Ministry of Research and Innovation, Ministry of Small Business and Entrepreneurship among others.

Municipalities also play an important role in the development of convergence centres as the government level with oversight of the planning process and local economic and cultural development agendas.

As identified by the CCP consortium, challenges for proponents of these projects related to funding include:
- Understanding what support is available
- Coordination of funding across multiple departments, ministries and agencies
- Government department’s fears about co-mingling funds from different programs
- Narrow focus of funders on single components can skew their analysis of the bigger picture

These challenges make it difficult for proponents of convergence centre projects to secure government funding for their development.

**To better enable the development of convergence centres, it is recommended that:**

I. The Province of Ontario and Government of Canada:
- Adapt the definition of convergence centres articulated in this report for the purpose of designating projects for infrastructure programs
- Identify a lead Ministry or Department to act as the point of contact on requests for infrastructure support for convergence centres
- Coordinate access between departments, ministries or agencies for proponents of convergence centres
- Identify sources of funds and a process through which proponents of convergence centres can secure federal and provincial investment
- Provide financial support to the study of entrepreneurship development needs, resources and strategies for the GTA
II. City of Toronto

- Adapt the definition of convergence centres articulated in this report for the purpose of designating projects for municipal infrastructure investment programs
- Use provisions allowed under the Planning Act to fund, finance and incentivize development of convergence projects that address municipal objectives (e.g. including Section 37 agreements, Municipal Capital Facilities programs, Tax Increment Equivalent Grants, and Community Improvement Plans)
- Consider exempting convergence centre projects from development charges
- Support convergence centre projects as priorities for federal and provincial infrastructure funding
- Appoint a project coordinator and internal staff working teams to facilitate planning and approval processes for the development of convergence centres
- Work with sector organizations to identify gaps in support services provision
- Work with Invest Toronto and proponents of convergence centres to elevate their role in strategies for attracting international knowledge exchange and inward investment
- Enable further research of the cultural and creative sector’s entrepreneurship development needs and resources

SECTOR SKILLS ORGANIZATIONS

There are many players involved in entrepreneurship development in the GTA including colleges, universities, Toronto Business Development Centre, Fashion Incubator, and a wide range of service organizations. However, evidence gathered in the preparation of this report from surveys and focus group indicates a lack of entrepreneurship training and development focused on the Cultural and Creative sector.

While a preliminary analysis of GTA-based services has been undertaken through this study, it remains unclear where overlaps and gaps in these services exist and what ‘ladders’ of provision are positioned towards the specific needs of early-stage entrepreneurs in the Cultural and Creative sector.
More analysis and engagement with training providers and business support services is required to better understand and respond to this gap. To this end, the following steps are recommended:

- **Develop a working group and analysis framework to better understand the entrepreneurship training needs of creative entrepreneurs and available resources in the GTA**
- **Develop an on-line inventory and web portal of entrepreneurship training resources for the GTA’s Cultural and Creative sector**
- **Work with sector partners towards a more coordinated promotion and delivery of entrepreneurship training services for the Cultural and Creative sector across the GTA**
- **Collaborate on establishing a convergence centre for creative entrepreneurship serving the GTA**

**CONVERGENCE CENTRES**

The Creative Convergence Project has helped strengthen relationships between consortium members and a broader group of creative space and entrepreneurship training providers. A number of new collaborations have already emerged as a result of the Entertainment and Creative Clusters Fund investment. There is substantial awareness of the individual convergence centre projects, however there is an opportunity to generate greater awareness of the centres’ collective role in building capacity for innovation in the creative economy. To develop a broader understanding of the strategic importance of convergence centres as a model for cluster development and policy implementation, it is recommended that:

- **The CCP consortium convene regional proponents of convergence centres and incubators designed to strengthen the creative economy to further explore common issues, opportunities and collaborations**
- **The regional network develop a coordinated communications strategy that elevates the profile of Cultural and Creative sector incubators and convergence centres**
APPENDIX I – SURVEY TABLES

Map 1 - Survey Participants by Postal Code (n=238)
Table 1 – Establishment Status by Years in Operation

<table>
<thead>
<tr>
<th></th>
<th>Less than two years</th>
<th>3-5 years</th>
<th>6-15 years</th>
<th>&gt; 16 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freelance/Sole Proprietorship (N = 153)</td>
<td>20%</td>
<td>21%</td>
<td>29%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Table 2 – Establishment Status by Annual Revenue

<table>
<thead>
<tr>
<th></th>
<th>Less than two years</th>
<th>3-5 years</th>
<th>6-15 years</th>
<th>&gt; 16 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freelance/Sole Proprietorship (N = 153)</td>
<td>20%</td>
<td>21%</td>
<td>29%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Table 3 – Employee Size by CCS Category

<table>
<thead>
<tr>
<th></th>
<th>Creative Core</th>
<th>Cultural Industries</th>
<th>Creative Services</th>
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<tbody>
<tr>
<td>Enterprises - fte &amp; pte (N = 215)</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>&gt;50 (N = 6)</td>
<td>17%</td>
<td>50%</td>
<td>33%</td>
</tr>
<tr>
<td>&gt;10 (N = 10)</td>
<td>20%</td>
<td>20%</td>
<td>60%</td>
</tr>
<tr>
<td>1 - 9 (N = 199)</td>
<td>61%</td>
<td>13%</td>
<td>26%</td>
</tr>
</tbody>
</table>
### Table 4 – Years in Operation by Annual Revenue

<table>
<thead>
<tr>
<th>Years in Operation</th>
<th>14%</th>
<th>38%</th>
<th>9%</th>
<th>20%</th>
<th>6%</th>
<th>14%</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt; 16 years (N = 88)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6-15 years (N = 57)</td>
<td>26%</td>
<td>33%</td>
<td>18%</td>
<td>11%</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>3-5 years (N = 51)</td>
<td>39%</td>
<td>31%</td>
<td>14%</td>
<td>10%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Less than two years (N = 35)</td>
<td>51%</td>
<td>34%</td>
<td>6%</td>
<td>9%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Under $10K
- $10K-$50K
- $51K-$100K
- $101K-$500K
- $501K - $1 Million
- Over $1 Million

### Table 5 – Years in Operation by Employee Size

Entreprises - fte & pte (N = 216)

<table>
<thead>
<tr>
<th>Employee Size</th>
<th>17%</th>
<th>83%</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;50 (N = 6)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&gt;10 (N = 10)</td>
<td>30%</td>
<td>70%</td>
</tr>
<tr>
<td>1 - 9 (N = 200)</td>
<td>17%</td>
<td>23%</td>
</tr>
</tbody>
</table>

- Less than two years
- 3-5 years
- 6-15 years
- > 16 years
### Table 6 – Total Floor Space by Net Rent per month

| Less than 500 sq. ft. (N = 45) | 40% | 49% | 11% |
| 501-800 sq. ft. (N = 18) | 6% | 50% | 33% | 6% | 6% |
| 801-1200 sq. ft (N = 16) | 6% | 25% | 31% | 13% | 25% |
| 1200-1600 sq. ft (N = 11) | 9% | 18% | 9% | 36% | 27% |
| More than 1600 sq. ft (N = 14) | 14% | 21% | 64% |

| $\leq 500 per month | $500-$1000 per month | $1001-$1500 per month | $1501-$2000 per month |

### Table 8 – Level of Business/Organizational Support by Years in Operation

- **High level - significant training and/or business development, employment of new staff (N = 32)**
  - 25% 22% 25% 28%

- **Medium level - support to enter new product areas and new selling/exhibition opportunities (N = 68)**
  - 10% 22% 24% 44%

- **Low level of support - to enable more stability and take another step (N = 85)**
  - 19% 25% 28% 28%

- **No Support - quite satisfied with performance and potential (N = 29)**
  - 7% 21% 28% 45%

- Less than two years 3-5 years 6-15 years Over 16 years
Table 9 – Level of Business/Organizational Support by Annual Revenue

- **High level - significant training and/or business development, employment of new staff (N = 31)**
  - Under $10K: 42%
  - $10K-$50K: 26%
  - $51K-$100K: 10%
  - $101K-$500K: 13%
  - $501K-$1 Million: 6%
  - Over $1 Million: 6%

- **Medium level - support to enter new product areas and new selling/exhibition opportunities (N = 65)**
  - Under $10K: 29%
  - $10K-$50K: 37%
  - $51K-$100K: 9%
  - $101K-$500K: 12%
  - $501K-$1 Million: 8%
  - Over $1 Million: 8%

- **Low level of support - to enable more stability and take another step (N = 83)**
  - Under $10K: 23%
  - $10K-$50K: 35%
  - $51K-$100K: 12%
  - $101K-$500K: 18%
  - $501K-$1 Million: 6%
  - Over $1 Million: 6%

- **No Support - quite satisfied with performance and potential (N = 29)**
  - Under $10K: 21%
  - $10K-$50K: 34%
  - $51K-$100K: 17%
  - $101K-$500K: 17%
  - $501K-$1 Million: 10%
  - Over $1 Million: 10%

Table 12 – Level of Business/Organizational Support by CCS definitions

- **Creative Core (N = 126)**
  - Low level of support - to enable more stability and take another step: 37%
  - Medium level - support to enter new product areas and new selling/exhibition opportunities: 35%
  - High level - significant training and/or business development, employment of new staff: 17%
  - No Support - quite satisfied with performance and potential: 11%

- **Cultural Industries (N = 32)**
  - Low level of support - to enable more stability and take another step: 44%
  - Medium level - support to enter new product areas and new selling/exhibition opportunities: 38%
  - High level - significant training and/or business development, employment of new staff: 9%
  - No Support - quite satisfied with performance and potential: 9%

- **Creative Services (N = 55)**
  - Low level of support - to enable more stability and take another step: 45%
  - Medium level - support to enter new product areas and new selling/exhibition opportunities: 20%
  - High level - significant training and/or business development, employment of new staff: 13%
  - No Support - quite satisfied with performance and potential: 22%
### Table 10 – Areas of Business Support by Years in Operation

<table>
<thead>
<tr>
<th>Area</th>
<th>Less than two years</th>
<th>3-5 years</th>
<th>6-15 years</th>
<th>Over 16 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology (N = 54)</td>
<td>9%</td>
<td>26%</td>
<td>24%</td>
<td>41%</td>
</tr>
<tr>
<td>Access to equipment/new technology (N = 59)</td>
<td>10%</td>
<td>24%</td>
<td>17%</td>
<td>49%</td>
</tr>
<tr>
<td>Marketing (N = 106)</td>
<td>14%</td>
<td>12%</td>
<td>26%</td>
<td>47%</td>
</tr>
<tr>
<td>Information - access project opportunities (N = 82)</td>
<td>15%</td>
<td>26%</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Skill training (N = 58)</td>
<td>16%</td>
<td>22%</td>
<td>33%</td>
<td>25%</td>
</tr>
<tr>
<td>Show casing (N = 120)</td>
<td>16%</td>
<td>25%</td>
<td>28%</td>
<td>32%</td>
</tr>
<tr>
<td>Access to Finance (N = 87)</td>
<td>17%</td>
<td>22%</td>
<td>30%</td>
<td>31%</td>
</tr>
<tr>
<td>Networking (N = 102)</td>
<td>20%</td>
<td>25%</td>
<td>23%</td>
<td>33%</td>
</tr>
<tr>
<td>Community and Education (N = 70)</td>
<td>20%</td>
<td>19%</td>
<td>21%</td>
<td>40%</td>
</tr>
<tr>
<td>Links to suppliers (N = 28)</td>
<td>21%</td>
<td>25%</td>
<td>21%</td>
<td>32%</td>
</tr>
<tr>
<td>Trade/export assistance (N = 39)</td>
<td>21%</td>
<td>26%</td>
<td>21%</td>
<td>33%</td>
</tr>
<tr>
<td>Workforce and hiring (N = 45)</td>
<td>22%</td>
<td>9%</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>Business Support (N = 69)</td>
<td>22%</td>
<td>28%</td>
<td>23%</td>
<td>28%</td>
</tr>
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</table>
### Table 11 – Areas of Business Support by Annual Revenue

<table>
<thead>
<tr>
<th>Area</th>
<th>Under $10K</th>
<th>$10K-$50K</th>
<th>$51K-$100K</th>
<th>$101K-$500K</th>
<th>$501K-$1 Million</th>
<th>Over $1 Million</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to equipment/new technology (N = 58)</td>
<td>19%</td>
<td>4%</td>
<td>19%</td>
<td>12%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Workforce and hiring (N = 43)</td>
<td>6%</td>
<td>33%</td>
<td>5%</td>
<td>9%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Technology (N = 52)</td>
<td>25%</td>
<td>37%</td>
<td>10%</td>
<td>17%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>Networking (N = 99)</td>
<td>26%</td>
<td>35%</td>
<td>15%</td>
<td>11%</td>
<td>14%</td>
<td>7%</td>
</tr>
<tr>
<td>Community and Education (N = 70)</td>
<td>26%</td>
<td>37%</td>
<td>11%</td>
<td>8%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>Trade/export assistance (N = 35)</td>
<td>29%</td>
<td>40%</td>
<td>6%</td>
<td>16%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Skill training (N = 56)</td>
<td>29%</td>
<td>43%</td>
<td>14%</td>
<td>7%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Marketing (N = 122)</td>
<td>30%</td>
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<td>8%</td>
<td>8%</td>
<td>9%</td>
<td>4%</td>
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<tr>
<td>Links to suppliers (N = 26)</td>
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<td>50%</td>
<td>9%</td>
<td>4%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Access to Finance (N = 84)</td>
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<td>37%</td>
<td>7%</td>
<td>15%</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Information - access project opportunities (N = 77)</td>
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<td>39%</td>
<td>0%</td>
<td>8%</td>
<td>3%</td>
<td>8%</td>
</tr>
<tr>
<td>Business Support (N = 66)</td>
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<td>11%</td>
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<td>15%</td>
<td></td>
</tr>
<tr>
<td>Showcasing (N = 116)</td>
<td>36%</td>
<td>36%</td>
<td>2%</td>
<td>9%</td>
<td>35%</td>
<td></td>
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</tbody>
</table>
Table 12 – Areas of Business Support by CCS definitions

<table>
<thead>
<tr>
<th>Area</th>
<th>CCS1</th>
<th>CCS2</th>
<th>CCS3</th>
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<tr>
<td>Workforce and hiring (N = 43)</td>
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<td>28%</td>
</tr>
<tr>
<td>Business Support (N = 68)</td>
<td>54%</td>
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<td>29%</td>
</tr>
<tr>
<td>Skill training (N = 57)</td>
<td>56%</td>
<td>12%</td>
<td>32%</td>
</tr>
<tr>
<td>Information - access project opportunities (N = 82)</td>
<td>56%</td>
<td>11%</td>
<td>33%</td>
</tr>
<tr>
<td>Links to suppliers (N = 27)</td>
<td>56%</td>
<td>11%</td>
<td>33%</td>
</tr>
<tr>
<td>Networking (N = 101)</td>
<td>57%</td>
<td>12%</td>
<td>31%</td>
</tr>
<tr>
<td>Trade/export assistance (N = 39)</td>
<td>59%</td>
<td>15%</td>
<td>26%</td>
</tr>
<tr>
<td>Technology (N = 52)</td>
<td>60%</td>
<td>17%</td>
<td>23%</td>
</tr>
<tr>
<td>Access to equipment/new technology (N = 58)</td>
<td>60%</td>
<td>14%</td>
<td>26%</td>
</tr>
<tr>
<td>Marketing (N = 125)</td>
<td>66%</td>
<td>10%</td>
<td>24%</td>
</tr>
<tr>
<td>Community and Education (N = 69)</td>
<td>68%</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>Showcasing (N = 119)</td>
<td>69%</td>
<td>6%</td>
<td>25%</td>
</tr>
<tr>
<td>Access to Finance (N = 87)</td>
<td>70%</td>
<td>15%</td>
<td>15%</td>
</tr>
</tbody>
</table>

- Creative Core
- Cultural Services
- Creative Services
Table 13 – Close to competitors/collaborators by CCS definitions

<table>
<thead>
<tr>
<th>Category</th>
<th>Not Important (N = 80)</th>
<th>Essential (N = 16)</th>
<th>Important (N = 47)</th>
<th>Desirable (N = 85)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>56%</td>
<td>60%</td>
<td>60%</td>
<td>65%</td>
</tr>
<tr>
<td></td>
<td>16%</td>
<td>25%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>28%</td>
<td>19%</td>
<td>28%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Table 14 - Employee Size by Annual Revenue

Entreprises - fte & pte (N = 198)

<table>
<thead>
<tr>
<th>Revenue Range</th>
<th>&gt;50 (N = 5)</th>
<th>&gt;10 (N = 9)</th>
<th>1 - 9 (N = 184)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>29%</td>
<td>100%</td>
<td>30%</td>
</tr>
<tr>
<td></td>
<td>80%</td>
<td>1%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Table 15 - Respondents by Primary Area of Practice

<table>
<thead>
<tr>
<th>Area of Practice</th>
<th>Creative Core</th>
<th>Cultural Industries</th>
<th>Creative Services</th>
<th>Support Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>13%</td>
<td>19%</td>
<td>56%</td>
<td>12%</td>
</tr>
</tbody>
</table>
Table 16 - Respondents Working in Multiple Disciplines by Primary Area of Practices (56% of total)

- Creative Core: 57%
- Cultural Industries: 25%
- Creative Services: 11%
- Support Services: 7%

Table 17 - Establishment Status

- Freelance (self-employed): 42%
- Sole proprietorship: 22%
- Partnership (general or limited): 14%
- Incorporation: 2%
- Not-for-profit/charitable: 14%

Table 18 - Stage of Production Chain (multiple answer)

- Creation / content origination (e.g. design): 81%
- Production / Manufacturing (e.g. art supply, instruments): 26%
- Reproduction / Distribution (e.g. printing, broadcasting): 12%
- Exchange (e.g. exhibition, retailing): 26%
- Support services (e.g. industry association, education institution, grant making / finance): 15%
### Table 19 - Number of Years at Current Location

<table>
<thead>
<tr>
<th>Years</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;16 years</td>
<td>14%</td>
</tr>
<tr>
<td>6-15 years</td>
<td>23%</td>
</tr>
<tr>
<td>3-5 years</td>
<td>26%</td>
</tr>
<tr>
<td>Less than two years</td>
<td>37%</td>
</tr>
</tbody>
</table>

### Table 20 - Space & Site Characteristics (Creative Core)
### Table 21 - Space & Site Characteristics (Cultural Industries)

<table>
<thead>
<tr>
<th>Feature</th>
<th>Essential / Important</th>
<th>Desirable</th>
<th>Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordability</td>
<td>92%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Natural Light</td>
<td>68%</td>
<td>23%</td>
<td>10%</td>
</tr>
<tr>
<td>Raw, workable space</td>
<td>58%</td>
<td>24%</td>
<td>18%</td>
</tr>
<tr>
<td>Supportive Landlord</td>
<td>47%</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Broadband / Wireless</td>
<td>40%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Ground Floor Occupancy</td>
<td>34%</td>
<td>20%</td>
<td>46%</td>
</tr>
<tr>
<td>Sound proofing</td>
<td>34%</td>
<td>37%</td>
<td>29%</td>
</tr>
<tr>
<td>Design/Architecture</td>
<td>33%</td>
<td>43%</td>
<td>24%</td>
</tr>
<tr>
<td>Opportunities to Show case</td>
<td>32%</td>
<td>25%</td>
<td>43%</td>
</tr>
<tr>
<td>On-site parking</td>
<td>31%</td>
<td>29%</td>
<td>41%</td>
</tr>
<tr>
<td>High Ceilings</td>
<td>26%</td>
<td>38%</td>
<td>36%</td>
</tr>
<tr>
<td>Room to expand</td>
<td>23%</td>
<td>42%</td>
<td>35%</td>
</tr>
<tr>
<td>History of building</td>
<td>20%</td>
<td>35%</td>
<td>45%</td>
</tr>
<tr>
<td>Unique location</td>
<td>20%</td>
<td>26%</td>
<td>54%</td>
</tr>
<tr>
<td>Amenity space</td>
<td>19%</td>
<td>36%</td>
<td>44%</td>
</tr>
<tr>
<td>Similar practitioners in building</td>
<td>17%</td>
<td>26%</td>
<td>58%</td>
</tr>
<tr>
<td>Open floor concept</td>
<td>16%</td>
<td>32%</td>
<td>53%</td>
</tr>
<tr>
<td>Reinforced floor</td>
<td>14%</td>
<td>21%</td>
<td>64%</td>
</tr>
<tr>
<td>Visibility from major street</td>
<td>14%</td>
<td>19%</td>
<td>67%</td>
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<tr>
<td>Property development potential</td>
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<td>13%</td>
<td>74%</td>
</tr>
<tr>
<td>Share services/equipment</td>
<td>9%</td>
<td>30%</td>
<td>61%</td>
</tr>
<tr>
<td>Feature</td>
<td>Essential/Important</td>
<td>Desirable</td>
<td>Not Important</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>---------------------</td>
<td>-----------</td>
<td>--------------</td>
</tr>
<tr>
<td>Affordability</td>
<td>93%</td>
<td></td>
<td>7%</td>
</tr>
<tr>
<td>Broadband/Wireless</td>
<td>79%</td>
<td>10%</td>
<td>10%</td>
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<tr>
<td>Raw, workable space</td>
<td>52%</td>
<td>21%</td>
<td>28%</td>
</tr>
<tr>
<td>Room to expand</td>
<td>52%</td>
<td>21%</td>
<td>28%</td>
</tr>
<tr>
<td>Natural Light</td>
<td>48%</td>
<td>38%</td>
<td>14%</td>
</tr>
<tr>
<td>Design/Architecture</td>
<td>45%</td>
<td>31%</td>
<td>24%</td>
</tr>
<tr>
<td>Supportive Landlord</td>
<td>41%</td>
<td>17%</td>
<td>41%</td>
</tr>
<tr>
<td>History of building</td>
<td>36%</td>
<td>18%</td>
<td>46%</td>
</tr>
<tr>
<td>On-site parking</td>
<td>31%</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>Amenity space</td>
<td>28%</td>
<td>34%</td>
<td>38%</td>
</tr>
<tr>
<td>Sound proofing</td>
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<td>31%</td>
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<tr>
<td>Open floor concept</td>
<td>21%</td>
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<td>45%</td>
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<tr>
<td>Similar practitioners in building</td>
<td>21%</td>
<td>41%</td>
<td>38%</td>
</tr>
<tr>
<td>High Ceilings</td>
<td>21%</td>
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<td>34%</td>
</tr>
<tr>
<td>Ground Floor Occupancy</td>
<td>21%</td>
<td>24%</td>
<td>55%</td>
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<tr>
<td>Unique location</td>
<td>17%</td>
<td>34%</td>
<td>48%</td>
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<tr>
<td>Property development potential</td>
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<tr>
<td>Visibility from major street</td>
<td>10%</td>
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<td>79%</td>
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<tr>
<td>Opportunities to showcase</td>
<td>10%</td>
<td>48%</td>
<td>41%</td>
</tr>
<tr>
<td>Reinforced floor</td>
<td>7%</td>
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<td>68%</td>
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<td>Shared services/equipment</td>
<td>7%</td>
<td>38%</td>
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</table>

- **Essential / Important**
- **Desirable**
- **Not Important**
<table>
<thead>
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<th>Feature</th>
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<th>Desirable</th>
<th>Not Important</th>
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</thead>
<tbody>
<tr>
<td>Affordability</td>
<td>90%</td>
<td>10%</td>
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</tr>
<tr>
<td>Natural Light</td>
<td>83%</td>
<td>18%</td>
<td>10%</td>
</tr>
<tr>
<td>Broadband / Wireless</td>
<td>73%</td>
<td>18%</td>
<td>10%</td>
</tr>
<tr>
<td>Raw, workable space</td>
<td>60%</td>
<td>28%</td>
<td>13%</td>
</tr>
<tr>
<td>Design/Architecture</td>
<td>58%</td>
<td>34%</td>
<td>8%</td>
</tr>
<tr>
<td>Room to expand</td>
<td>53%</td>
<td>35%</td>
<td>13%</td>
</tr>
<tr>
<td>On-site parking</td>
<td>47%</td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td>Sound proofing</td>
<td>41%</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td>High Ceilings</td>
<td>33%</td>
<td>49%</td>
<td>18%</td>
</tr>
<tr>
<td>Opportunities to Showcase</td>
<td>33%</td>
<td>26%</td>
<td>41%</td>
</tr>
<tr>
<td>Ground Floor Occupancy</td>
<td>31%</td>
<td>10%</td>
<td>59%</td>
</tr>
<tr>
<td>Unique location</td>
<td>28%</td>
<td>41%</td>
<td>31%</td>
</tr>
<tr>
<td>History of building</td>
<td>28%</td>
<td>30%</td>
<td>43%</td>
</tr>
<tr>
<td>Open floor concept</td>
<td>23%</td>
<td>40%</td>
<td>38%</td>
</tr>
<tr>
<td>Supportive Landlord</td>
<td>21%</td>
<td>49%</td>
<td>31%</td>
</tr>
<tr>
<td>Property development potential</td>
<td>20%</td>
<td>28%</td>
<td>53%</td>
</tr>
<tr>
<td>Amenity space</td>
<td>15%</td>
<td>36%</td>
<td>49%</td>
</tr>
<tr>
<td>Visibility from major street</td>
<td>13%</td>
<td>26%</td>
<td>62%</td>
</tr>
<tr>
<td>Share services/equipment</td>
<td>13%</td>
<td>23%</td>
<td>65%</td>
</tr>
<tr>
<td>Similar practitioners in building</td>
<td>13%</td>
<td>35%</td>
<td>53%</td>
</tr>
<tr>
<td>Reinforced floor</td>
<td>10%</td>
<td>30%</td>
<td>60%</td>
</tr>
</tbody>
</table>
Table 23 - Neighbourhood Characteristics (Creative Core)

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Essential/Important</th>
<th>Desirable</th>
<th>Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close to public transit</td>
<td>84%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Sense of safety</td>
<td>81%</td>
<td>16%</td>
<td>3%</td>
</tr>
<tr>
<td>Close to major transport routes</td>
<td>70%</td>
<td>21%</td>
<td>9%</td>
</tr>
<tr>
<td>Close to downtown core</td>
<td>69%</td>
<td>19%</td>
<td>12%</td>
</tr>
<tr>
<td>Close to home</td>
<td>68%</td>
<td>24%</td>
<td>8%</td>
</tr>
<tr>
<td>Proximity to green and/or public space</td>
<td>59%</td>
<td>34%</td>
<td>8%</td>
</tr>
<tr>
<td>Active street life</td>
<td>58%</td>
<td>32%</td>
<td>11%</td>
</tr>
<tr>
<td>Tolerant of lifestyles &amp; activities</td>
<td>53%</td>
<td>32%</td>
<td>15%</td>
</tr>
<tr>
<td>Proximity to independent restaurants/retail</td>
<td>45%</td>
<td>44%</td>
<td>11%</td>
</tr>
<tr>
<td>Mix of economic activity</td>
<td>41%</td>
<td>34%</td>
<td>24%</td>
</tr>
<tr>
<td>Close to cultural/recreational amenities</td>
<td>40%</td>
<td>39%</td>
<td>20%</td>
</tr>
<tr>
<td>Existing creative community</td>
<td>40%</td>
<td>34%</td>
<td>27%</td>
</tr>
<tr>
<td>Ethno-cultural diversity</td>
<td>39%</td>
<td>39%</td>
<td>21%</td>
</tr>
<tr>
<td>Socio-economic diversity</td>
<td>38%</td>
<td>39%</td>
<td>23%</td>
</tr>
<tr>
<td>24-hour activity</td>
<td>31%</td>
<td>31%</td>
<td>38%</td>
</tr>
<tr>
<td>Close to schools &amp; day care</td>
<td>24%</td>
<td>17%</td>
<td>60%</td>
</tr>
<tr>
<td>Close to employees</td>
<td>23%</td>
<td>29%</td>
<td>48%</td>
</tr>
<tr>
<td>Close to academic/research institution</td>
<td>23%</td>
<td>26%</td>
<td>50%</td>
</tr>
<tr>
<td>Historic industrial neighbourhood</td>
<td>14%</td>
<td>33%</td>
<td>52%</td>
</tr>
<tr>
<td>Trendy area</td>
<td>13%</td>
<td>23%</td>
<td>64%</td>
</tr>
<tr>
<td>Not a trendy area</td>
<td>6%</td>
<td>12%</td>
<td>82%</td>
</tr>
</tbody>
</table>
### Table 24 - Neighbourhood Characteristics (Cultural Industries)

<table>
<thead>
<tr>
<th>Feature</th>
<th>Essential / Important (%)</th>
<th>Desirable (%)</th>
<th>Not Important (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close to public transit</td>
<td>93%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Sense of safety</td>
<td>89%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Close to downtown core</td>
<td>75%</td>
<td>21%</td>
<td>4%</td>
</tr>
<tr>
<td>Close to major transport routes</td>
<td>75%</td>
<td>18%</td>
<td>7%</td>
</tr>
<tr>
<td>Proximity to green and/or public space</td>
<td>68%</td>
<td>21%</td>
<td>11%</td>
</tr>
<tr>
<td>Close to home</td>
<td>64%</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>Active street life</td>
<td>61%</td>
<td>36%</td>
<td>4%</td>
</tr>
<tr>
<td>Proximity to independent restaurants/retail</td>
<td>61%</td>
<td>29%</td>
<td>11%</td>
</tr>
<tr>
<td>Close to cultural/rec amenities</td>
<td>50%</td>
<td>32%</td>
<td>18%</td>
</tr>
<tr>
<td>Tolerant of lifestyles &amp; activities</td>
<td>46%</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Mix of economic activity</td>
<td>46%</td>
<td>32%</td>
<td>21%</td>
</tr>
<tr>
<td>Ethno-cultural diversity</td>
<td>43%</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>Socio-economic diversity</td>
<td>43%</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>Close to employees</td>
<td>39%</td>
<td>32%</td>
<td>29%</td>
</tr>
<tr>
<td>Existing creative community</td>
<td>37%</td>
<td>30%</td>
<td>33%</td>
</tr>
<tr>
<td>Close to academic/research institution</td>
<td>36%</td>
<td>21%</td>
<td>43%</td>
</tr>
<tr>
<td>Historic industrial neighbourhood</td>
<td>21%</td>
<td>25%</td>
<td>54%</td>
</tr>
<tr>
<td>24-hour activity</td>
<td>21%</td>
<td>39%</td>
<td>39%</td>
</tr>
<tr>
<td>Close to schools &amp; daycare</td>
<td>14%</td>
<td>18%</td>
<td>68%</td>
</tr>
<tr>
<td>Not a trendy area</td>
<td>4%</td>
<td>18%</td>
<td>79%</td>
</tr>
<tr>
<td>Trendy area</td>
<td>4%</td>
<td>33%</td>
<td>64%</td>
</tr>
</tbody>
</table>
Table 25 - Neighbourhood Characteristics (Creative Services)

<table>
<thead>
<tr>
<th>Neighbourhood Characteristic</th>
<th>Essential / Important</th>
<th>Desirable</th>
<th>Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close to downtown core</td>
<td>83%</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Close to public transit</td>
<td>88%</td>
<td>12%</td>
<td>5%</td>
</tr>
<tr>
<td>Close to home</td>
<td>81%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Sense of safety</td>
<td>78%</td>
<td>15%</td>
<td>7%</td>
</tr>
<tr>
<td>Close to major transport routes</td>
<td>73%</td>
<td>23%</td>
<td>5%</td>
</tr>
<tr>
<td>Proximity to independent restaurants/retail</td>
<td>68%</td>
<td>24%</td>
<td>7%</td>
</tr>
<tr>
<td>Active street life</td>
<td>66%</td>
<td>24%</td>
<td>10%</td>
</tr>
<tr>
<td>Proximity to green and/or public space</td>
<td>57%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Tolerant of lifestyles &amp; activities</td>
<td>54%</td>
<td>32%</td>
<td>15%</td>
</tr>
<tr>
<td>Close to cultural/recreational amenities</td>
<td>49%</td>
<td>39%</td>
<td>12%</td>
</tr>
<tr>
<td>Close to employees</td>
<td>41%</td>
<td>22%</td>
<td>37%</td>
</tr>
<tr>
<td>Mix of economic activity</td>
<td>39%</td>
<td>37%</td>
<td>24%</td>
</tr>
<tr>
<td>Ethno-cultural diversity</td>
<td>37%</td>
<td>34%</td>
<td>29%</td>
</tr>
<tr>
<td>Existing creative community</td>
<td>34%</td>
<td>41%</td>
<td>24%</td>
</tr>
<tr>
<td>Socio-economic diversity</td>
<td>34%</td>
<td>34%</td>
<td>32%</td>
</tr>
<tr>
<td>Trendy area</td>
<td>31%</td>
<td>31%</td>
<td>38%</td>
</tr>
<tr>
<td>Historic industrial neighbourhood</td>
<td>30%</td>
<td>25%</td>
<td>45%</td>
</tr>
<tr>
<td>24-hour activity</td>
<td>22%</td>
<td>37%</td>
<td>41%</td>
</tr>
<tr>
<td>Close to schools &amp; daycare</td>
<td>22%</td>
<td>15%</td>
<td>63%</td>
</tr>
<tr>
<td>Close to academic/research institution</td>
<td>15%</td>
<td>32%</td>
<td>54%</td>
</tr>
<tr>
<td>Not a trendy area</td>
<td>6%</td>
<td>11%</td>
<td>83%</td>
</tr>
</tbody>
</table>

☐ Essential / Important ☐ Desirable ☐ Not Important
### Table 26 - Local Social & Business Network Characteristics (Creative Core)

<table>
<thead>
<tr>
<th></th>
<th>Essential / Important</th>
<th>Desirable</th>
<th>Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close to business support service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Part of a supportive community</td>
<td>41%</td>
<td>41%</td>
<td>19%</td>
</tr>
<tr>
<td>Close to creative practitioners</td>
<td>39%</td>
<td>39%</td>
<td>22%</td>
</tr>
<tr>
<td>Close to buyers/clients/markets</td>
<td>36%</td>
<td>39%</td>
<td>25%</td>
</tr>
<tr>
<td>Close to competitors/collaborators</td>
<td>26%</td>
<td>38%</td>
<td>36%</td>
</tr>
<tr>
<td>Close to suppliers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Close to creative practitioners</td>
<td>39%</td>
<td>46%</td>
<td>30%</td>
</tr>
<tr>
<td>Close to business support service</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Table 27 - Local Social & Business Network Characteristics (Cultural Industries)

<table>
<thead>
<tr>
<th></th>
<th>Essential / Important</th>
<th>Desirable</th>
<th>Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close to business support service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Part of a supportive community</td>
<td>45%</td>
<td>31%</td>
<td>24%</td>
</tr>
<tr>
<td>Close to creative practitioners</td>
<td>31%</td>
<td>48%</td>
<td>21%</td>
</tr>
<tr>
<td>Close to suppliers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Close to competitors/collaborators</td>
<td>28%</td>
<td>31%</td>
<td>41%</td>
</tr>
</tbody>
</table>
### Table 28 - Local Social & Business Network Characteristics (Creative Services)

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Essential/Important</th>
<th>Desirable</th>
<th>Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close to buyers/clients/markeets</td>
<td>58%</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>Close to suppliers</td>
<td>45%</td>
<td>38%</td>
<td>17%</td>
</tr>
<tr>
<td>Part of a supportive community</td>
<td>33%</td>
<td>55%</td>
<td>13%</td>
</tr>
<tr>
<td>Close to creative practitioners</td>
<td>32%</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>Close to business support service</td>
<td>31%</td>
<td>38%</td>
<td>31%</td>
</tr>
<tr>
<td>Close to competitors/collaborators</td>
<td>28%</td>
<td>33%</td>
<td>40%</td>
</tr>
</tbody>
</table>

### Table 29 - % of Goods/Services Sold to Client/Buyer’s by Location

<table>
<thead>
<tr>
<th>Location</th>
<th>Creative Core</th>
<th>Cultural Industries</th>
<th>Creative Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outside GTA</td>
<td>3%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Rest of GTA</td>
<td>13%</td>
<td>17%</td>
<td>20%</td>
</tr>
<tr>
<td>Rest of City Toronto</td>
<td>22%</td>
<td>18%</td>
<td>38%</td>
</tr>
<tr>
<td>Downtown Toronto</td>
<td>33%</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>Immediate Neighbourhood</td>
<td>22%</td>
<td>12%</td>
<td>21%</td>
</tr>
</tbody>
</table>

### Table 30 - % of Goods/Services Bought at Supplier’s Location
Table 31 - % of Collaborative Work Relationships by Locations
CREATIVE INDUSTRIES DEVELOPMENT AGENCIES

SCOTLAND

The Cultural Enterprise Office
CEO is Scotland’s specialist business support and development service for cultural and creative businesses and individuals. CEO operates across Scotland with a “hub” in Glasgow and “satellite” offices in Aberdeen, Dundee and Edinburgh. CEO’s website complements its core services – advice, information and events with extensive information and learning tools. Cultural and creative business have free access to specialist advisors at each office plus access to business, financial, and legal resources. CEO also offers free training events, seminars and workshops, including:

- Mentor Exchange is a new pilot project which responds to the increasing mobility of talent across traditional sector boundaries and seeks to link individuals and businesses with mentors in other areas of creative practice in order to share information, good practice and support innovation
- Common Turf seeks to develop a meaningful on-line network for creative people, again with a focus on inter-sector collaboration and development

There has been longstanding investment in research and strategic development in cultural and creative industries in Scotland through the Scottish Arts Council but most significantly through Scottish Enterprise, Scotland’s main economic, enterprise, innovation and investment agency. CEO is one manifestation of this.

www.scottishenterprise.com
www.culturalenterpriseoffice.co.uk

USA

Creative Capital Foundation
A New York City-based not-for-profit organization, CCF acts as a catalyst for
the development of imaginative ideas by supporting artists who pursue innovation in form and/or content in the performing and visual arts, film and video, and in emerging fields. CCF is committed to working in partnership with the artists it funds, providing advisory services and professional development assistance along with multi-faceted financial aid and promotional support throughout the life of each Creative Capital project, including:

- Grants for Individual Artists - in order for artists to succeed [in the current environment in the US], they need to acquire skills and tools that can complement their artistic talent and enable it to flourish. Creative Capital offers the artists it funds a range of services and opportunities to learn how to be more in command of their own careers, and therefore, thrive though a four part system of support:
  - Initial grant award ($10,000)
  - Strategic Financial Support of $5,000 is reserved for each project and has assisted in the purchase of equipment, creation of promotional materials, and hiring of assistants.
  - Special Opportunities Funding, generally $2,500 or less, is often used to help artists travel to attend conferences and festivals or to maximize an opportunity such as an exhibit or festival presentation.
  - Follow-Up Project Support awards additional funding for post-production needs.

- Showcasing is provided on the website and through other media communications

- Artists Services Program - artists are also offered opportunities to develop proficiency in strategic planning, fundraising, public relations, and marketing through a program that includes an initial project-planning meeting with each grantee and offers a number of other useful resources

- Professional Development Program - offers the career-building component of Creative Capital's Artist Services Program to a broader community of artists. The program is designed to help empower artists to better manage their professional paths by providing them with the training and tools they need to thrive in the marketplace, and features a comprehensive menu of workshops that include a Weekend Retreat, as well as Day and Evening-long Workshops.

- Creative Capital's Artist's Toolbox - is a resource-bank for artists, an annotated collection of career-resource sites.

Since 1999, Creative Capital has committed almost $5 million of direct financial support to 242 artists' projects,
representing 297 artists, with services to artists valued at nearly $5 million.
www.creative-capital.org
www.toolbox.creative-capital.org/

The Arts Business Program
Run by the Arts Council of New Orleans, the Arts Business Program provides a centralised source of accessible, practical business assistance for local artists, arts organisations and arts businesses. Started in 1991 the program provides a place where individuals and organisations can grow their businesses and exchange ideas and creative energy. In 1999 it was recognised as a national model when the US National Business Incubation Association awarded it ‘Business Incubator of the Year’. The program offers organisations and businesses the following services:
- Full Arts council membership
- Group health insurance and Credit Union Services
- Technical Assistance through workshops on business planning, marketing, fundraising, legal issues etc
- Grant opportunities
- Assistance for individual artists:
  - Full arts council membership
  - Entrepreneurial training for artists
  - Group health insurance
  - Credit Union Services
- Consultations with program staff to review arts business plans, assist with resources and networking
- Technical Assistance, reviewing business plans, marketing, web design, IP issues etc
- Legal Assistance through Louisiana Lawyers for the Arts program
- Fundraising assistance
- Slide registry service
www.artscouncilofneworelans.org

The Centre for Cultural Innovation
CCI was founded in California in 2001 with the aim of promoting knowledge sharing, networking and financial independence for individual artists and creative entrepreneurs. Workshops programs include:
- “Tune-Up” – A travelling arts information workshop for artists and small budget organisations
- Workshop program – marketing plans, health insurance for artists, presentation skills, etc.
- “Business of Art” course – their “signature” course of entrepreneurial training for artists offering a combination of classes and one to one counselling
- Funding programs:
  - LA Arts Loan Fund
  - Loan ( both capital and operating) :offering bridging loans, performance loans (i.e. against projects sales) and enterprise loans (capacity building or against specific opportunities)
  - Investing in Artists
• Grants for the purchase of equipment/tools
• Grant for presenting and marketing products/services
• Access to group discounts for artists including on office supplies and equipment, legal and financial services etc.

CCI is also currently working to open an Arts Incubator in San Francisco to foster creative innovation and risk taking and is partnering with the City of San Jose to develop a strategic approach to cultural sector entrepreneurship.61

www.cciarts.org

ENGLAND

The Creative Industries Development Agency

CIDA aims to provide “the most accessible cultural and creative industries support in London”. In addition to the up-to-date information, advice, tools and directories provided through the website and e-bulletin, CIDA offers:

• Business support and professional development: through workshops and one to one advice with specialist advisors and industry experts

• Networking and showcasing: cultural and creative industry networking events and network development. Showcasing events include promoting the annual East London Cultural and Creative industries Expo.

• Resource Library

CIDA serves a hugely complex, dense and layered part of London – on the periphery of the City of London and encompassing the East End’s artist community (understood to be the largest concentration of artists in Europe) and the old and new media businesses located in the City Fringe. This is also one of the most ethnically and culturally diverse and economically disadvantaged places in Europe. CIDA started as a local project which grew in response to the regeneration of London’s Docklands and has long been considered expert at articulating the social and economic benefits to the local community of investing in Cultural and Creative sector development. CIDA has played a significant role in supporting the emergence and growth of sector organisations and businesses from the East End’s diverse ethnic communities. CIDA now serves a core group of Inner East End boroughs but many of its projects and services reach the wider sector in London.

www.cida.co.uk

61 San Jose Creative Entrepreneurship Project:
CCI is working with the San Jose Office of Cultural Affairs on a year long project to identify and pilot responses to the needs of individual artists. This includes an online baseline assessment survey (in progress), pilot training workshops and up to 30 career planning and professional development grants ($500-$1000) with a long term view to develop strategies and resources to support creative entrepreneurship. www.sanjoseculture.org
Manchester Creative Industries Development Service

CIDS grew out of a strategic focus on creative economy development by the City of Manchester in the late 1990’s and has subsequently also been supported by the Regional Economic Development Agency. In many ways, CIDS has become the model for Cultural and Creative sector development agencies in the UK – especially in the Midlands, North and Northeast where many similar agencies – modeled on CIDS have emerged in recent years. Its services include:

- The Loop – education and networking seminars
- The Loop Academy – advanced business support for high growth companies in a seminar series
- Loop Plus – quarterly “masterclass” (a dinner with 15 people and expert guests)
- Focal Point – network and social get-together
- Focal Point Gallery – 8 x 5 minute presentations from Cultural and Creative businesses to highlight their work focused on new services/products/test ideas, etc.
- Creative Focus- one day workshop for new and emerging companies
- Focal Point Start – for pre-start-ups with a business plan, a package of support that includes workshops, one to one advice sessions, access to tools etc
- Creative Times – Online and Hard copy Trade Journal for the creative Industries distributed free to 6000 business in Manchester and greater Manchester
- Manchester Creative Annual
- The Tool Kit – online advice and information for cultural and creative start-ups

CIDs also undertakes research and partners with other organisations, local government, etc. to build support for the sector.

www.cida.co.uk
www.creativeties.co.uk
www.thetoolkit.co.uk

Wired Sussex

Wired Sussex is one of the oldest (16 years +), most connected and stable creative industry support agencies in the UK and a replicable model of practice within its own sub-sector (digital and new media) and more broadly across the Cultural and Creative sector. A not-for-profit, membership-based organisation, Wired Sussex works with digital media companies of all sizes and types in Brighton, Sussex and the wider South East.

In addition to its extensive website (including information, business directory, office and workspace and jobs boards etc), Wired Sussex offers a range of events, training and projects which include:

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62 See also Huddersfield, below
• Creative Catapult – workshops and seminars series
• Annual Job Fair
• BIP – Brighton internship program – offers 20+ 6 week paid internships for graduates in digital media companies
• Digital Horizons – in partnership with key industry associations and Sector skills councils – a year long course for 40 to train producers and developers in the digital content and screen industries.
• BANG – Brighton Animateurs Network
• BELA – Brighton E-Learning Alliance, working with UK’s leading E-learning businesses (based in Brighton) to support and improve the conditions for further growth and innovation in this significant industry cluster.

Wired Sussex’s location in Brighton is no accident – Brighton is a longstanding major hub for digital and new businesses in the UK - located less than 60 minutes from London’s West End and 25 minutes from London’s Gatwick International Airport with a major research University and a strong tradition in creative innovation.

www.wiredsussex.com

NEW ZEALAND

ART Auckland
ART is an art and creative industries development agency initiated in 2000 to provide programs that develop capacity and capability in Auckland’s creative sector. ART has three core programs targeted at different stages of creative enterprise maturity, all of which are intended to be responsive to the individual participant’s business development needs.

• ART Enterprise – focuses resources on key organisations in the city region to enable them to engage a skilled creative entrepreneur to lead the development and delivery of creative enterprise projects and strategies based on a partnership between ART and the client organisation.
• ART Venture – an acceleration program bringing together the arts, business, education and investment communities to back high achieving creative entrepreneurs. The program targets experienced creative entrepreneurs and supports up to ten participants a year with a customized development program which includes:
  ▪ Professional business and career assessments
  ▪ Group workshop program
  ▪ Individual Creative entrepreneur plan
  ▪ Investment fund – a pool of funding available as seed funding capital to enable participants to leverage opportunity, a contact, a funding source etc to accelerate their business development
  ▪ Coaching and mentoring
• ART Source – a mentoring and development program that mentors and nurtures emerging creative and cultural entrepreneurs which includes:
Individual Mentoring and support
Individual development programs
Group development program - networking and events

GERMANY

Go! Business Start-up Networks
Go! Das Gründungsnetzwerk (Go! Business Start-up Networks) – North Rhine Westphalia (Germany)
The aims of the Go! program are to increase the number of business start-ups, to strengthen the development of existing businesses and to promote a new culture of being self-employed. Go! offers the following services:

- Information: business start-up intelligence
- Initial advice: business plan review and development advice
- Handling formalities: support with registration, permits, etc.
- Access to venture capital through 'Business Angels'
  - Free coaching: personal advices for people that have just started or are going to start a business
- Special events and seminars

Created in 1995, Go! is a collaborative initiative of all partners promoting business start-ups including the State government, Chambers of Industry and Commerce, Chambers of Handicrafts, municipal authorities and economic development agencies, banks and savings institutions, employment offices, professional associations, unions, schools, universities and technology centres, senior coaches and Business Angels. The Go! Project has seven targeted categories of business which it seeks to support, one of which is creative business. There is a special support program for creative entrepreneurs, especially those in the design business, and includes literature, performing arts, media and film.

For the creative industries specialist, cultural start-up centres (Kulturelle Gründerzentren) give advise on business skills development, provide help with finding grants, encourage partnerships between entrepreneurs and regular business partners, and support the development of marketing strategies for creative entrepreneurs.

Sources: Ministerium fur Wirtschaft, Millelstand und Energie des Landes NRW; Go! Website (www.go.nrw.de)
National Policies for Creative Industries © EURICUR 2007

SECTOR INCUBATORS

USA

Houston Arts Incubator
Houston Arts Incubator is based in the Houston Centre for the Arts and run by The Houston Arts Alliance (HAA) whose mission is to nurture, fund and promote
participation in the arts in Houston and Harris County. HAA provides financial support, technical assistance and specialized services to artists, arts and civic organizations, and public institutions to ensure that citizens and visitors access to broad and diverse cultural programs and offers funding programs, technical assistance to arts not for profit, a public arts and urban design service.

- Initiated in the 1990s, HAA’s Management Assistance and Organisational Development Enterprise (MODE) program targeted technical assistance to small and mid-size arts organizations. The Arts Incubator program emerged from this program in 1995 seeking to support the emergence of the next generation of arts organizations in Houston and offers:
  - Incubator program - offers 3 year programs to participants selected through a competitive peer review panel process and accepts up to 6 companies to the program tri-annually. Successful companies selected to become residents of the Arts Incubator benefit from:
    - Private offices at the incubator housed within the Houston Centre for the Arts
    - Access to business equipment and services
    - Access to conference room facilities
  - Receive grant assistance from Cultural Arts Council for staffing or technical assistance costs – approximately $15,000
  - A customized plan for technical assistance based on a self-assessment undertaken with the assistance of a consultant
  - [www.cachh.org](http://www.cachh.org)

**Arts Incubator of Kansas City**

AIKC is an artist-founded and managed not-for-profit established in 2001 to support emerging artists in the development of their careers. The project is modeled on business incubators but tailored to the needs of creative entrepreneurs and provides affordable studio space, business workshops and consulting, public events and classes.

Located in the Bauer Machine Works building in the city’s Crossroads Arts District, the AIKC houses 32 resident members with space for:

- 55 artists studios
- Shared shop spaces for woodworking, metalworking, fibre arts, ceramics, printmaking and computer studio
- Two galleries
- Conference room and offices
- Library and resource centre

Arts Incubator resident members receive:

- Studio space
- Access to common workspaces
• Access to technical shops and equipment
• Professional development workshops
• One-to-one business consulting
• Conference room
• Administrative facilities and business library
• Showcases
• Access to exhibition space
• Participation in regular open studio event
• Networking opportunities
The AIKC also partners with the Kauffman Foundation in the fast track New Venture Program providing a 10 session training program for arts and creative entrepreneurs.

www.artsincubatorkc.org.

Arlington Arts Incubator Program
• The AAIP has been managed and funded by the Arlington County Cultural Affairs Division since 1991. AAIP takes existing underutilized facilities (school classrooms, auditoriums, retail and office spaces); renovates them with costume, set, lighting, exhibition and other administrative/technical services; and packages them as incentives for artists to invest in Arlington. Individuals interested in starting both non-profit organizations, as well as professional artists, are supported through a competitive grants process and access to facilities, while outside organizations are courted to re-locate to Arlington. The Arlington Arts Incubator program is also a platform through which the County provides technical and financial support to qualified arts groups:
• Organizational/Entrepreneurial Development - Services geared towards assisting individuals and groups who wish to launch new arts ventures in the area and expanding the scope of those organizations already in place. Workshop topics include fundraising assistance, marketing, audience and board development and developing community arts outreach programs to participants of the program.
• Development Agreements – County officials negotiate with developers and realtors to include the arts in their projects, particularly those in hard-to-rent areas with mostly commercial facilities (e.g. zoning variances for the provision of gallery space)
• Gunston Arts Centre – A renovated, 50s-era school that accommodates two theatres, two dance studios, scenery/costume shops, multiple rehearsal rooms and administrative offices. Underused meeting rooms are provided to non-profit organizations (e.g. a satellite campus for literary workshops sponsored by The Writer’s Center)
• Ellipse Arts Center – A County-run art gallery located in an office building’s
commercial concourse (provided in exchange for a zoning variance)
• Lee Arts Center – A County-run open studio for pottery, tile and printmaking housed in a former 1920s school.
• Technical Resources – Theatrical design and construction (collaborative scene shop), a 5000 piece costume collection, master classes and arts management consultants. An interested group can split box office revenue (25%) with the County in exchange for use of its performance facilities, scene shop and costume collection

The Armory Arts Village
The Armoury Arts Village in Jackson, Michigan is a major regeneration project focused on the redevelopment of a blighted 19 acre site, including the historic 19th century Jackson State Prison, into a centre for arts, culture and creative industries. The major focus is on attracting creative entrepreneurs, business start-ups, job creation and inward investment as a catalyst for community revitalization and economic growth. Phase one of the project offers:
• 62 permanently affordable live/work units
• Shared workspaces and equipment for resident artists including a 2 story large scale industrial art production space, ceramics / sculpture studio
• Three class/work rooms
• Gallery areas
• Multi-use performance / special event spaces

The project also offers an Artists entrepreneurship program providing:
• Professional development programs
• Showcasing
• Marketing opportunities

The development of a 28,000 sq. ft. ‘creative industries innovation centre’ is also planned.

www.enterprisegroup.org/armory-arts-project
www.coolcities.com

ENGLAND

Spike Island Centre of Contemporary Art and Design
Situated on the southern end of Bristol’s historic docks, the former 1960s Brook Bond tea packing factory has become, over the last ten years, a leading venue for the production and display of contemporary visual arts. The facility is located in close proximity to both the Bristol Watershed (England’s first dedicated Media Centre), the internationally renowned Arnolfini contemporary arts and cultural centre and Academy Award winning Aardman Animations. Spike Island’s 80,000 sq ft. offers:
• Affordable artists studio space
• Regular exhibition program in its gallery spaces
• Commissioning program
- Residency programs
In addition, the recently established Spike Design is the largest design incubator in the South West of England, offering a highly creative business environment in an open-plan studio/office space with reception and meeting rooms. In addition to a fully-serviced space, Spike Design also provides independent one-to-one business advice, access to high-profile industry mentors, signposting to training events and networking opportunities.

Spike Island’s Associate Program supports Bristol-based artists, writers and curators. Membership offers a shared base in the building, access to opportunities and a network of peers. The program has to date funded visits to international arts festivals such as DOCUMENTA and Venice Bienniale 2007, invited international artists and curators for studio visits and conversations and supported Associate-led exhibitions, screenings and events. The culture of the program is centred around practice, production, dissemination and collaboration.

www.spikeisland.org.uk

**Huddersfield Town and University Creative Business Incubation System**

With a focus on new media, support for the creative industries has evolved in Huddersfield in a relatively brief timeframe from a single “media centre” operation (housing a small business incubator – HBG) to a comprehensive “system” developed in partnership with higher education institutions and economic development agencies aiming to secure the area as a significant cluster of new business activity and innovation. The four components are:

- The Business Mine at Huddersfield University is an on campus state-of-the-art business development facility that provides a professional environment for students to research and ‘try out’ their business ideas. The free facilities include:
  - Use of computers and broadband internet
  - UK telephone and fax facilities
  - Hot-desk use
  - Swipe card access
  - A personal mentor to provide business advice and a wide variety of issues to help nurture ideas into a commercially viable opportunity
  - Help to find money to start-up the business
  - Use of the boardroom and conference facilities
  - Help to incorporate a limited company
  - Access to research sources and business library
- The Huddersfield Business Generator (HBG) - provides subsidised office work spaces, mentorship, an on site manager, and a range of business
support to start-up businesses in the creative sector. Since its launch in 2000, the team has helped create over 200 new businesses in Kirklees, with over half set up by Huddersfield University graduates. The project also boasts an impressive business survival rate exceeding 75%. HBG began with two rooms in the Media Centre but has expanded and now occupies seven rooms in the Centre, with 200 square metres of space, enough for between 15 and 17 businesses. In addition to workspace, shared facilities, a library / resource centre and business advice and support including accessing to mentoring HBG encourages networking and skills development. HBG has extended its services to provide virtual support to non-resident companies.

- The Media Centre is located in the heart of Huddersfield’s creative hub, 25 minutes from Leeds and Manchester, and is one of the most innovative clusters of creative, digital and media businesses in the UK, with a proven track record of tenant success. The Media Centre provides a home to a thriving community of digital, media and creative enterprises. The centre provides business support, IT support, shared meeting and conference spaces, a café, and an increasingly notable creative program. The Centre has 121 office spaces, 21 live-work studios and Virtual Offices for over 120 companies and 300 people.

- Creative Industries Development Agency – the Agency (also based at the Media Centre) provides a full online and live Creative Industries Development Agency service including creative business development support; professional development and skills training; Leadership Training; networking; Information and online tools.

www.the-media-centre.co.uk
www.hud.ac.uk/hubs/enterprise/mine.htm
www.cida.org

**SCOTLAND**

**The Lighthouse**

The Lighthouse is Scotland’s centre for architecture, design and the city - it nurtures, champions and promotes Scotland’s architecture and design nationally and internationally while profiling best practice from across the country and the world. The Lighthouse brings world-class thinking and projects to the UK through a diverse range of projects, exhibitions, events, networks, festivals, awards and publications. It also runs a program of curriculum based education activity and provides professional development support for architecture and design educators. Spanning six floors, The Lighthouse also contains the Mackintosh Centre and Mackintosh Tower, Vitra Conference
Suite, The Lighthouse Shop and The
docot café/bar.

The Lighthouse's membership scheme is
run through its Creative Entrepreneurs
Club (CEC) and has become Scotland's
largest network for the creative industries
with over 2600 members. The Club hosts
a variety of networking events, show and
tell presentations, inspirational speakers
and professional development workshops
and has its own website and online
members directory.
www.thelighthouse.co.uk/

CANADA

Toronto Fashion Incubator
TFI is a not-for-profit small business
incubator dedicated to nurturing and
supporting new fashion entrepreneurs
founded over 20 years ago to support
what was then the City of Toronto’s
second largest industrial employer. It is
regarded as the world’s first “official”
fashion incubator. TFI can support up to
10 residents providing workspace and
shared work areas, reception, meeting
rooms and technical equipment. TFI
provides substantial professional and
business development and mentoring to
its residents many of whom have gone on
to become major players in Canadian
fashion design. TFI also provides a range
of services to its outreach members
including:

• One-to-one business consultation
• Access to online business resources
• An online Mentors Forum enables
anyone to email a question about the
fashion design business or about
fashion design to a list of Canadian
Fashion business experts
www.fashionincubator.com

HIGHER EDUCATION INSTITUTIONS (HEI)

ENGLAND 63

Design London
Design London combines the world class
creativity and design expertise of the
Royal College of Art, engineering from
Imperial College London and business
innovation expertise from Imperial
College’s Tanaka Business School in a
new international centre for design led
innovation. The project has been
developed as part of the core strategic
response to the highly influential Cox
Review of Creativity in Business (2005)
commissioned by the then Chancellor of
the Exchequer which recommended that
Higher Education should play a distinctive
role in improving the performance of
British business innovation through
“centres of excellence” offering “multi-
disciplinary programs for research and
post graduate teaching” combining
design, business, engineering and
technology.

63 See also the role of Huddersfield University in the wider Huddersfield
creative economy and incubation model, above
Design London has four key pillars:
- Creating new teaching programs
- Top-level research
- Incubating new business ideas
- Pioneering innovations in technology.

Design London at RCA and Imperial is based upon an 'innovation triangle' which blends design (represented by the Royal College of Art), engineering and technology (represented by Imperial College Faculty of Engineering) and the business of innovation (represented by Imperial's Tanaka Business School):
- Education - Within this 'innovation triangle', Design London's teaching will promote knowledge interchange between MA, MEng and MBA students from the RCA and Imperial. It will also be open to industry and institutional partners, seeking to transform the skills of the professionals, managers and senior executives.
- Research - Design London explores how design can be more effectively integrated with business and technology to create world-beating products and services.
- Innovation Technology Centre - students and business partners of RCA and Imperial will be able to exploit the Innovation Technology Centre which is home to world leading design, visualisation, and modeling and rapid prototyping technology. This can help Design London's students and partners to develop their innovation capacity via simulation exercises, digital tools and facilitation.
- The Design London Business Incubator brings together individuals from design and technology backgrounds to:
  - Provide tailored teaching and training to a new community of design entrepreneurs
  - To pioneer new models for interdisciplinary incubation of design-led ventures
  - To demonstrate the value of this approach through a flow of commercial successful project

**www.designlondon.net**

The Enterprise Centre for the Creative Arts
ECAA offers free creative business services and facilities to Londoners and to current and recent graduates of the UoA including:
- Seminars, workshops, training and events
- One-to-one business advice from specialist creative business advisors (1st three sessions free then $25 per session)
- Free advice from accountants and tax specialists
- Resource library for the small creative business
- Website with extensive links to relevant agencies and services
• Up-to-date diary of creative industry events
• Online fact sheets and podcasts
• Access to a creative business support network

ECCA is based at the London College of Communication, which is part of the University of the Arts London. The other colleges in the university are: Chelsea College of Art & Design, Camberwell College of Arts, Central St. Martins College of Art & Design and London College of Fashion - collectively the colleges of the University of the Arts represent one of the most influential and respected global clusters of fine arts and design education. A wide range of courses address enterprise and business issues at different levels and provide the opportunity to train in the skills and knowledge necessary to develop an effective business in the creative arts, the include:

• Cultural Industries & the Law: A practical guide to music, film, television, and publishing
• Business for the Creative Arts (Business Start-Up Skills)
• New Business Start-Up Course
• The Business Plan: developing a proposal for a product, service or contract in the cultural industries
• Technical Support Surgery @ Space Media Arts
• Fundraising for the Creative and Cultural Industries
• Developing Professional Practice for Small Businesses
• Medialex Legal & Business Seminars
• Music Industry Business Support Workshops
• Cultural Enterprise Course

www.ecca-london.org

DEDICATED BUSINESS DEVELOPMENT TOOLS

USA

City of Austin Creative Industries Loan Guarantee Program

The CIL program is designed to encourage private lenders to provide financing for creative industries in Austin, not for profits related to those creative industries and individuals involved in those creative industries. The CIL program focuses on support for profit and not for profit businesses and organisations that will create or retain employment in the city.

Eligible costs include:

• Real estate improvements and related professional fees
• Business personal property
• Working capital

Job creation or retention requirements:

• A minimum of 1 ft (or contract equivalent) created or an equivalent
of 2 ft jobs retained for every $15,000 of CIL guarantee.
• Program recognises the particular nature of creative industries employment
• Jobs created / retained within 6 months
• Encouragement to seek to employ from disadvantaged communities/unemployed – but not required

City of Denver Creative Enterprises Revolving Loan Fund
The Revolving Loan Fund offers for profit and not for profit creative enterprises access to affordable and flexible business capital to increase their income and build their assets.
• Loans up to $40,000 (from 2008) are available for:
  ▪ Business personal property
  ▪ Income generating opportunities
  ▪ Limited space refurbishment
• Loan evaluation criteria are based on the amount requested:
  ▪ Under $1,000 - character based
  ▪ $1k-$5K - character and credit considered
  ▪ $5K - $40,000 - character, credit, business and personal collateral considered
Applicants are required to complete the Misco Business Development’s Creative Business Assessment (Creative MBA) program which gives them a review of their business and provides the tolls and advice necessary to achieve their goals drawing on a range of specialist advisors.

In the 2007 pilot year, the fund supported 44 creative businesses, approved 9 loans totalling $97,500, sustained or created 22 jobs, and achieved 100% repayment. The fund is jointly delivered by Denver’s Economic Development Department, its Office of Cultural Affairs and the Mico Business development Corporation – a Colorado based not for profit dedicated to eliminating barriers to economic independence for disadvantaged entrepreneurs of all ages.

United Kingdom
The Creative Business Accelerator
The Creative Business Accelerator aims to support creative and innovative early stage businesses that are looking to raise finance and achieve substantial growth. The program is funded by the London Development Agency and City of London, and is supported by the Institute of Chartered Accountants in England and Wales. It also has the support of UK Trade and Investment, Royal Bank of Scotland, the Design Council, Harbottle & Lewis, and Kingston Smith. Thanks to these organisations, the CBA is free of charge to all participating companies. Since its inception, the CBA program has
supported 180 entrepreneurs in the main workshop programs and over 40 selected companies in the ongoing intensive support program involving mini workshops and personal mentoring. The program is designed for early stage businesses with a strong business idea and evidence of growth potential, who are seeking relevant finance with a focus on equity. As a result of the CBA, many participating companies have altered their business plan and strategy in order to improve their competitive positioning, and a number have achieved, or are in negotiations for, both equity and debt financing.

www.cbaccelerator.co.uk

Own It
Own It, the free intellectual property Advice service for Creative Businesses in London, UK, was established to provide creative people and businesses with the relevant knowledge, advice and support to protect, exploit and value their intellectual property and take full advantage of the capital contained within it and the resulting business developments and growth. Own It was devised by the London Development Agency, as a result of research undertaken by the Mayor’s Creative Industries Commission who selected London College of Communication, The University of the Arts London (UAL) to develop, deliver and manage the initiative.

www.own-it.org

The Creative Capital Fund
The Creative Capital Fund is a £5m equity fund that helps talented entrepreneurs and businesses in London’s creative industries achieve their potential by providing seed capital investment and business support. It was established in March 2005 as part of the Creative London program. The CCF makes equity investments of up to £500,000 in promising early stage companies. The CCF operates as a matching fund and so every £1 invested by the CCF must be matched by at least £1 in equity from private investors on the same terms.

Typically, the CCF will invest up to £75,000 in its first tranche of investment. As each investee company grows and hits commercial milestones the CCF may invest further funds up to a possible total CCF investment of £500,000 (£1,000,000 including matching funding). In addition, the CCF works closely with seasoned entrepreneurs and professionals
throughout London to offer these nascent businesses not just investment but also the mentoring and support critical for success. The CCF is independently managed by AXM Venture Capital Limited and the capital has been contributed by the London Development Agency and the European Regional Development Fund.

www.ccfund.co.uk

**Advantage Creative Fund**

Advantage Creative Fund is a £5 million venture capital fund set up specifically to assist the growth of the creative industries in the West Midlands by investing in creative businesses. It is the largest creative industries development programme in Europe. It invests sums up to 250,000 sterling (c$5000,000 Canadian) and can invest less than 25,000 sterling the critical small scale investments often needed by creative start-ups. Advantage Creative Fund shares in the risks and profits that the company incurs and expects a commensurate return for the risk taken through a profitable exit from every investment. This is achieved by selling its shares for a capital gain. It has a policy of selling back our shareholding to the owner managers. The Fund is non-profit-distributing, with all the profits being retained within the fund to make further investments in creative businesses. As a Community Development Venture Capital Fund it has the objective both of making commercial returns on its investments and of assisting disadvantaged sectors – in this case creative industry businesses.

www.advantagecreativefund.co.uk

**EDUCATION, TRAINING AND PROFESSIONAL DEVELOPMENT TOOLS**

**USA**

**ArtsLab, Minesota, USA**

ArtsLab, is a collaborative of 5 Minnesota foundations which seeks to build the capacity of distinctive arts organizations through a new $1.85 million three-year training and development program.

A venture of the Bush, F.R. Bigelow, Mardag, McKnight, and Saint Paul foundations, ArtsLab will go beyond traditional capacity-building approaches and work to improve individual leadership capacity within the state’s arts sector working to increase the leadership pool for the arts sector in Minnesota, strengthen the presence of visionary small arts organizations in both urban and rural communities, and use the power of the arts to enhance community vitality and engagement.

In addition to providing modest grants for operations, ArtsLab’s professional staff team will provide technical assistance and peer learning opportunities designed to strengthen leadership skills, strategic thinking, and the impact of its grantees. The initiative also will provide traditional
management tools and systems in areas such as board development and governance, executive assessment and coaching, staff and volunteer skills building, conflict management, organizational effectiveness, fundraising, evaluation and strategic planning, and financial management.

The 17 selected arts organizations were chosen because of their demonstrated ability to creatively explore their own artistic path, while also probing a deeper understanding of engagement with audiences and their civic community. The project started in July 2008.

United Kingdom

The Clore Leadership Program

The program is an initiative of the Clore Duffield Foundation, and its aim is to help to train and develop a new generation of leaders for the cultural sector in the UK. Each year the program supports a 20 to 30 Clore Fellows recruited from the cultural sector to undertake an individual program of learning, work, research, training, and secondment, designed to develop their leadership skills and experience. A bespoke program is designed specifically to meet their own needs including: a period of research on a specific project of practical value to their area of work; tuition, including in business, management, personnel, presentation, marketing, and professional skills; a period of secondment to a cultural organization; and two intensive two-week leadership courses, which will bring all the Fellows together. Each Fellow has an individual mentor (a senior figure from their chosen field), and access to coaching where appropriate.

The Fellow has the option of either taking a full year out on a scholarship whilst doing their program or of continuing to be attached to their place of work - with their employing institution being compensated for their sustained periods of absence during the year. The basic administrative costs of the program are met by the Clore Duffield Foundation, who also provides funds for a number of individual Fellowships. A range of other organizations, from the public, voluntary and private sectors, fund further Fellowships specially related to their areas of interest.

www.cloreleadership.org

Cultural Leadership Programme

The Cultural Leadership Programme is a Government funded investment in excellence in leadership across the creative and cultural industries. By supporting an ambitious range of activities and opportunities, the program aims to nurture and develop world class, dynamic and diverse cultural sector
leaders. The Cultural Leadership Program has two overarching aims: creating a culture of strong leadership and diversity in leadership. Three areas of leadership are targeted:

- Current leaders: supports the needs of senior leaders and provides opportunities for mid-career leaders, supporting them in gaining the skills and aptitudes to progress in their careers and in widening their range of options to contribute as leaders in the cultural sector.
- Future and emerging leaders: promotes the development of future leaders so that they can augment existing creative ability with business and entrepreneurial skills.
- Boards and trustees as cultural leaders: aims to improve the development and training of board members and trustees of cultural and creative organizations enabling them to provide the governance, leadership and advice necessary to meet the challenges that organizations will face.

The program is delivered through a cross sector partnership – the Cultural Leadership Delivery Partnership – comprised of Arts Council England, Creative and Cultural Skills – the sector skills council – and the Museums, Libraries and Archives Council.

www.culturalleadership.org.uk
The project consortium, with the assistance of the Cultural Economy Lab at the University of Toronto, used a GIS database of enterprises, organizations and individuals that represent a current snapshot of sector establishments and employment in the City of Toronto and across the broader Toronto CMA.

Recognizing the limited availability of sub-CMA industry data, a robust database has been generated from consolidating the following sources:

- Dunn & Bradstreet (D&B) 2007 data for selected Statistics Canada Industry codes
- Toronto Arts Council data derived from independent artist grant applications for 2005, 2006, and 2007\(^64\)
- City of Toronto 2003 Cultural Facilities database

Approximately 9,500 CCS establishments have been identified in the CMA Included in this figure are 2,791 Creative Core establishments that consist of approximately 2,000 individual artists identified by the Toronto Arts Council (TAC). A further 1,862 Cultural Industries and over 4,800 Creative Service establishments have been identified.

Data from D&B was obtained from a “Selectory Online” database that was created August 15, 2007. The database is updated on a monthly basis according to D&B data collection processes that use yellow page directories and other detailed businesses listings. Building on the definition of “Creative Industries” as used in the *Imagine a Toronto...Strategies for a Creative City* report, Selected 6-digit North American Industry Classification (NAIC) codes, combined with 4-digit Standard Industry Classification (SIC) codes were requested to generate a refined definition of creative sector establishments and employment to be represented by the D&B database.

\(^{64}\) Includes independent visual and media artists, writers, playwrights, composers and choreographers
Location Quotients (LQ) for creative occupations by 2001 Statscan Census Place of Residence were also mapped at the census tract level. LQs provide an indexed measurement of creative occupations as a percentage of the total labour force in each census tract vs the CMA. In other words, those census tracts with an LQ value that is higher than 1 have a higher concentration of individuals with creative occupations living in the area, in comparison to the CMA average. Mapping LQs by Place of Residence at the census tract level provides an additional dimension of spatial analysis that identifies where concentrations of Toronto’s creative workforce choose to live.

Given the limitations of conventional industry data classification and collection methods, any analysis of the sector should be recognized as a sample of what constitutes the broader reality of the sector. For example, a considerable portion of independent artists fall under the radar of data collection services that rely on formal business directories, such as Dunn & Bradstreet. The D&B database identified only 360 independent artists across the CMA. While this figure was further supplemented with TAC data that revealed a further 2,000 artists in the City of Toronto, it continues to represents only a fraction of the 2001 Census count of approximately 10,475 independent artists in the CMA, and just over 8,000 for the City of Toronto.

Other industries, such as fashion design, are not well represented as they are often subsumed by other industrial categories related to general retail and manufacturing. By contrast, some categories may include a slightly broader array of establishments than intended, particularly related to craft artisans such as potters, glass blowers and wood workers that are grouped with other light manufacturing. New Media is a further ill-defined industry that is not always discretely represented by available data sources, but rather incorporated into broader software and media categories.

Nevertheless, the Cultural Industries establishments mapped for this project provide a comparable sample size (approximately 80%) to 2004 Canadian Business Patterns data that identified just over 2,300 establishments in the CMA. The Creative Services establishments mapped using D&B data also provide a 90% sample of the 5,400 creative service establishments identified by 2004 Canadian Business Patterns data for the CMA.

65 The Business Register Division (BRD) maintains the Business Register (BR) which is the central repository of information on businesses in Canada. The Canadian Business Patterns database uses the Business Register, which is largely based on the Business Number (BN) collected and assigned by Canada Customs and Revenue Agency (CCRA). Therefore, the quality of the data is dependent upon the quality of the information submitted by Canadian businesses when applying for their Business Number (the database includes all businesses that have an income tax (T2) account, are an employer or have a GST account with an annual gross business income of over $30,000).
While somewhat outdated now, the 2003 cultural facilities database provided by the City of Toronto compliments the D&B data on galleries and museums, theatres, arts centres and media studios to provide a relatively comprehensive picture of where these facilities are located in the City of Toronto.

It should be noted, that employment figures for establishments captured in the Dunn & Bradstreet data are subject to limitations. Employment numbers for branch subsidiaries of larger parent companies are not always captured. This was most evident in the Motion Picture, TV, Media, and Software industries, and represents approximately 9% of missing employment data from the overall database. Furthermore, the 133,000 employment figure for the Toronto CMA’s total Creative Sector, as identified in the Imagine a Toronto report, used a definition of 2001 Census data based on 4-digit NAIC codes. This is larger than the approximate employment CMA figure of 70,000 captured by the D&B data mapped in this project, as a more refined definition of the industry was employed using 6-digit level NAICs codes.

### Cultural and Creative Sector by 2001 NOCS Occupations

<table>
<thead>
<tr>
<th>Occupation Codes</th>
<th>Creative Core</th>
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<tbody>
<tr>
<td>F021 Authors and writers</td>
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<tr>
<td>F032 Conductors, composers and arrangers</td>
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<tr>
<td>F033 Musicians and singers</td>
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<tr>
<td>F034 Dancers</td>
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<td>F035 Actors and comedians</td>
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<tr>
<td>F036 Painters, sculptors and other visual artists</td>
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<tr>
<td>F132 Other performers</td>
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<tr>
<td>F144 Artisans and craftspersons</td>
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<tr>
<td>F145 Patternmakers, textile, leather and fur products</td>
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<tr>
<td>A341 Library, archive, museum and art gallery managers</td>
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</tr>
<tr>
<td>F012 Conservators and curators</td>
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<td>F013 Archivists</td>
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<thead>
<tr>
<th>Occupation Codes</th>
<th>Cultural Industries</th>
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<tbody>
<tr>
<td>F022 Editors</td>
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<td>F023 Journalists</td>
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<tr>
<td>F031 Producers, directors, choreographers and related occupations</td>
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</tr>
<tr>
<td>A342 Managers, publishing, motion pictures, broadcasting and performing arts</td>
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</tr>
<tr>
<td>F131 Announcers and other broadcasters</td>
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<tr>
<td>C073 Software engineers</td>
<td></td>
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<tr>
<td>C074 Computer programmers and interactive media developers</td>
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<tr>
<td>C075 Web designers and developers</td>
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<table>
<thead>
<tr>
<th>Occupation Codes</th>
<th>Creative Services</th>
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</thead>
<tbody>
<tr>
<td>C051 Architects</td>
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<tr>
<td>C052 Landscape architects</td>
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<tr>
<td>C152 Industrial designers</td>
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<tr>
<td>F142 Interior designers</td>
<td></td>
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<tr>
<td>F143 Theatre, fashion, exhibit and other creative designers</td>
<td></td>
</tr>
<tr>
<td>F141 Graphic designers and illustrators</td>
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<tr>
<td>F121 Photographers</td>
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As part of the study’s broader engagement process, World Café style events were held in four distinct neighbourhood zones that are characterized by a high concentration of the Cultural and Creative Sector. Each neighbourhood exhibits an emerging, established, or transitional/threatened stage of creative district evolution. The four zones include: Liberty Village, King/Spadina, Queen West/Parkdale and Queen East/Leslieville. The World Café events had a dual purpose:

1. To have participants discuss three specific research questions about the role of place and how it relates to their creative practice:
   - How does their neighbourhood help them do what they do?
   - How does it fail to help them do what they do?
   - Ideas for change and future improvements

2. To provide an experimental testing ground and starting point from which new neighbourhood conversations, connections, and collaborations could emerge

The following notes are taken directly from notepads and comments sheets completed by event participants and compiled by the study’s research team.
LIBERTY VILLAGE
Monday, November 5, 2007
No Regrets Lounge, 6:00 - 9:00pm

<table>
<thead>
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<th>FIRST NAME</th>
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<tr>
<td>Libin</td>
<td>Pan</td>
<td>Extend media</td>
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<tr>
<td>Ryan</td>
<td>S.</td>
<td>Clear Sky Media</td>
</tr>
<tr>
<td>Christine</td>
<td>Samuel</td>
<td>Digital Cement</td>
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<tr>
<td>Lee</td>
<td>Dale</td>
<td>Smack Inc</td>
</tr>
<tr>
<td>Robert</td>
<td>Boyle</td>
<td>Freelance</td>
</tr>
<tr>
<td>Carrie</td>
<td>Hayes</td>
<td>CARRIE</td>
</tr>
<tr>
<td>Kathy</td>
<td>Traill</td>
<td>Freelance</td>
</tr>
<tr>
<td>Mir</td>
<td>Lada</td>
<td>BOA Solutions</td>
</tr>
<tr>
<td>Bruce</td>
<td>Gaxin Ward</td>
<td>OZ Design</td>
</tr>
<tr>
<td>Monica</td>
<td>Mckenna</td>
<td>McKenna Photography</td>
</tr>
<tr>
<td>Taffi</td>
<td>Rosen</td>
<td>Redhead Entertainment</td>
</tr>
<tr>
<td>Karen</td>
<td>Satok</td>
<td>Sputnik Design Partners</td>
</tr>
<tr>
<td>Michael</td>
<td>Nobel</td>
<td>University of Toronto</td>
</tr>
<tr>
<td>David</td>
<td>Sagha</td>
<td>Sputnik Design</td>
</tr>
<tr>
<td>Lee</td>
<td>Bouchard</td>
<td>Architecture for Humanity Toron</td>
</tr>
</tbody>
</table>

How the neighborhood supports people in doing what they do
- New buzz about the neighbourhood
- Good energy due to lots of likeminded people in the same place
- Good start up environment - lots of young firms here
- Relatively cheap space that is close enough to downtown
- Smaller firms attracted to the campus feel and density of other businesses
- Currently redevelopments adding good amenities that actually make it easier to work here, but the district needs to remain affordable
- Neighbourhood is very walkable
- Centrally, accessible location
- Sense of community, but difficult to meet a lot of people

How it fails to support people in doing what they do
- No real social networking infrastructure or knowledge exchange infrastructure
- Not a lot of firms working together or collaborating because they have no easy, effective way to know who is here
- Broader socio-economic issues in the larger area can be a turn off for business contacts
- No real business support for individuals (e.g. no professional development workshops)
- Not a lot of green space - stadium is wasted space during the work day (corral artists in the neighbourhood to help animate the space)
- The neighbourhood is at a tipping point - risk of losing its authentic vibe
- No one is currently taking leadership to start a “spark” in the neighborhood around which people can begin to gather (it was suggested that Artscape and the BIA could partner to start that spark both online and in person)
- Businesses themselves don’t have the time to create the infrastructure to bring people together (“they need to punch the clock”)

Ideas for the future
- Community “hot spot” of shared amenity spaces
- Provide shared, flexible workspace for freelancers - the lack of such space is part of the reason that many are not in the neighbourhood - that kind of space does not exist here
- Provide outlets for selling artistic products such as a retail store for local craftspeople
- Develop a liberty village talent bank
- Develop a business community newspaper
- Create a physical and/or online community bulletin board to promote weekly events, promote buying local services, developing local partnerships
- Develop a Community Board that can administer neighbourhood programs
- Mandate that developers engage local artists for providing their public art
- Host a series of “open houses” in each building - to understand who’s here/what they do
- Create an event where you have mini presentations from specialists on interesting topics - look at the speak-easy event model that the design industry uses
- Devise a small business owner “meet-up” event
- Provide online tools that allow people to connect easily, but also build a stronger desire to meet face-to-face at events
- LVBA website could be a starting point, but needs to be more interactive - they should partner with other organizations in the neighbourhood to do so and partner with a local web designer to create it
- Workshops and facebook groups in the neighbourhood would help
- Become the centre for the “Creative Technology” community in Toronto
- Larger spaces, less high rises, artist representation on the BIA board

What people learned from the event
- The nature of the transition of the neighbourhood makes the current healthy mix seem ephemeral
- The neighbourhood has changed to more of a commercial milieu than an artistic one
- Gentrification of small businesses is now talking place in the same manner as what happened to the artists in Liberty Village and in QW
- People here want to be connected
- There is a common interest in and concern about the neighbourhood in managing the growth pressures
- This is a passionate, friendly, open minded group of people (representative of the broader community?) discussing great ideas
- Many people are unaware of the vibrant community that exists here

Other specific issues or opportunities for the district
- Open the social network
- Facilitate co-op business opportunities
- We need to do a better job of connecting businesses, particularly in person
- These types of events can be a kernel of positive movement amongst the creative community
- Any additional housing needs to be “multi-demographic”
- More nurturing and celebration of the artistic community that still exists here
- Keep rents affordable
- Encourage safer driving - streets are too busy now
- Concern about the condo-boom in the East half of the district
How the neighborhood supports people in doing what they do

- Easy access to the downtown core
- Excellent vibe – strong sense of shared experience & priorities
- Strong indie-business vibe – easy to find like minded people
- Opportunities for social/spontaneous/casual events because of cheaper space & supportive businesses
- Affordable space still here
- A lot of new collisions between new people
- Plurality is inspiring – easy to meet the critical mass to inspire change
- Inclusive
- Excellent meeting/gathering spaces – Gladstone in particular
- Density local suppliers - easy access to creative resources
- People are the best resource
- Creative nature of neighbourhood creates opportunities
- Neighbourhood represents a model of a dynamic, diverse district – enable those interested to practice what they preach regarding “living locally”
- A lot of community functions
- People going freelance
- Easy to identify “clusters” of similar businesses

How it fails to support people in doing what they do

- Caters more to visitors than residents
- Not bike-friendly
- Not a well-defined neighbourhood – difficult for networks outside your own to take hold
- Doing business with other creative providers very expensive
- Space getting too expensive
- No quick, healthy food option
- No parking
- Sidewalks now wide enough
- Easy to meet your “own” kind – but not others
- Inconsistent transit
- Not a lot of incentive to stay local
- Not enough “nice” places to take clients
- Difficult to access wi-fi
- High turnover of businesses – makes it difficult to build connections
- Less populated
- Marginalization of low income takes away from the neighbourhood
- GO rail (lack of?)
- Perception in other neighbourhoods that it’s not safe
- No forums/networking platforms to discuss local issues, share and develop new ideas (BIAS focused on infrastructure)
- Gentrification
- No central meeting place/square – geographically, it’s a long strip with no centre
- Not enough public space (courtyards/patios)
- Lack of markets
- Very competitive environment – hard to stand out
- The district doesn’t really have a real identity – no real here, here

Ideas for the future
- Animate, green spaces (film screenings, pot lucks, outdoor music + art events)
- Create a mechanism for idea exchange
- Local grocery
- Better public transit
- Central teaching/training space that’s affordable
- Create more space for collaborative projects – flexible, mixed-used/multi-disciplinary, shared, incubators, gathering spaces, services, work exchanges – as well as multi-use large event space – spaces to hold meetings
- Multidimensional space to support theatre and visual arts
- Online community forum
- Networking events
- Lecture series – ideas of interesting people – “top 20”
- Create better way-finding signage for what’s going on in Parkdale (west of the rail overpass)
- Affordable housing – green development, local green growers
- Design Competitions & youth opportunities to learn/work in design industry
- Artist co-ops
- More balanced development - not so many bars and condos
- Preserve the architectural heritage
- Funds for entrepreneurs and designers, studio tours

What people learned from the event
- A lot of interesting, creative people with a strong passion for the neighbourhood
- Most people wear multiple hats
- Many people here who want the same types of shared amenities and a way to connect

Other specific issues or opportunities for the district
- Captured in above points
How the neighborhood supports people in doing what they do

- Diversity of businesses and people
- Fine grain of spaces result in a lot of small orgs doing interesting work
- Strong sense of a local supply chain for freelancers - services, clients, printers, other businesses - a good location where freelancers can easily find work
- Provides for both personal and professional growth
- Critical mass of people, places to interact, amenities - close to good food - a lot of options for both social and business meetings
- Easy for shopping, food, supplies, clothing
- New Tech Corridor of Toronto is Spadina - not an accident - “Spadina corridor has incubated my business at every stage”
- A lot of resources in the area - provide immediate responses
- High-level of networking opportunities
- Organic meeting of people because of density - serendipitous meetings and relationships (and accessibility)
- Sense of community - Close to People in the area want to help each other out
- Many Art/tech entrepreneurs - A lot people with great ideas - inspires us all to think bigger
- Appreciate the number of risk-takers in the area (specific to 401 R or 215 Sp)
- Businesses owners - both commercial and retail have a shared sense of values
- Walking the ‘hood inspires people for ideas for work
- Atmosphere, people and energy make it attractive - helps people to work
- Very accessible - a quick commute, walk, cycle or public transit
- TTC makes it work for businesses (to get to and from other places)
- Compared to Q/W and Junction - it is closer to clients
- Clients here/ home is here
- Big, bright cheap spaces in the beginning - good for design and advertising firms
- Still affordable for the kind of space aesthetic people look for
- Awesome public networking spaces (401 R and 215 Spadina) - spaces like Le Gourmand and places in Kensington market
How it fails to support people in doing what they do
- Lack of “community centres” for business - lack of small coffee spots, informal spaces for interaction and relaxation, commercial/public interface lacking
- Aggressive panhandling
- Street crime, recent stabings - makes it unattractive to new employees of larger firms
- Lack of space for small businesses to expand (5 - 15ish)
- Lack of parking for clients
- Social crisis/social policy - drug problems in the area, homelessness
- Lack of bike lanes - dangerous for cyclists - need more bike lock posts
- Not a lot of appropriate, affordable space so that freelancers can live here too
- Suffering from gentrification - too hip now
- Loss of public spaces, or spaces are not well used
- Suburban like condo development is not well liked

Ideas for the future
- Need to create places for possibilities - both creative and civic - more spaces to hold events like this - for people to share and work on ideas
- More hubs with shared, collaborative, supportive, flexible workspace for freelancers
- Create a gathering space that provides for diverse, dense interactions - include outdoor space - locate it in Lower Spadina to help activate that part of the neighbourhood
- Dedicated streetcar and bike lanes for Queen and Dundas
- Space that offers lower commercial rents
- Accessibility - traffic, transit, pedestrian and bike lane improvements (on King, Queen, Spadina and Dundas) - create a bikeshare network
- Open access WI-FI
- Green buildings
- More public art - also interactive public art that changes all the time
- Mechanisms to resist gentrification - new people are coming in with an open eye - wanting change and taking a vested interest in the area
- Area caters to a narrow stage of life - more opportunities for youth and families (e.g. skate parks, music venues, community centres, libraries)
- Night markets - make the area 24/7 so that it’s safer at night

What people learned from the event
- How many very young, newly started or incubated businesses have moved here
- Idea of growing the neighbourhood in the lower Spadina area
- So many likeminded people who care about the community and its environment + it’s sustainability
- Passionate, committed, visionary thinkers w great individual ideas that need structure and a way to get ideas into action
- A vibrant consensus among people even though they seemed to have very different opinions first

Specific issues or opportunities for the district
- Better Public Transit
- Better Street design
- More activity on lower spadina
- More mixed income housing
- Create a gathering space/community centre where people can meet up for ideas - self organizing communities of artist and individuals with similar world views
- Provide social spaces around art spaces to create destination visits
- Needs more thoughtful sustainable architecture - monoculture must not happen - keep the diversity
- More spaces like 215 and art spaces - more convergence between artists, businesses and NGO
- Public art space - indoor and outdoor

**DOWNTOWN EAST**
Wednesday, November 14, 2007
OverJoy Bistro - 6:00 - 9:00pm

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<th>FIRST NAME</th>
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<tr>
<td>Barbara</td>
<td>Hopkinson</td>
<td>International Book Publishing</td>
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<tr>
<td>Chris</td>
<td>Warrilow</td>
<td>Fantastic Creations</td>
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<td>Linda</td>
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<td>Steve</td>
<td>Paul Sims</td>
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<td>Toni</td>
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<td>Eve</td>
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<td>Wendy</td>
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<td>Steve</td>
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<td>Joanna</td>
<td>Strong</td>
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**How the neighborhood supports people in doing what they do**
- Open-minded community - anything seems possible here
- Front porch culture here – people know their neighbours
- Established but quirky neighbourhood (blend of sketchy and creative) - inspiring for work – a bit off the main stream
- People and business (shop) owners share the same values
- Hangman gallery is an asset - need more like it
- Density of interesting curious people (interested about our work as well)
- A lot of youth – emerging energy
- Storefronts and architecture attract specific crowd
- Somewhat easy for new artists to settle here – emerging district
- Services close by like UPS, Loomis, other arts supplies, framers, printers , daycare (also a place to meet other creative people and artists)
- A lot of local customers for art/workshops
- Great green spaces like Monarch Park – filled with other artists walking dogs, taking children out to play – good spot for networking
- Close to other natural spaces like the Leslie Street Spit and the waterfront area has tremendous potential
- Access to TTC, GO Train and Gardiner – accessible to downtown core
- Riverdale BIA and Riverdale artist network are two organizational assets

**How it fails to support people in doing what they do**
- No opportunities for exchange
- Lack of galleries – not a lot of space for exhibition - its difficult for artists to get into the local galleries that are here
- Needs more cultural infrastructure – galleries, supply stores, events
- No comprehensive/cohesive arts network – Artist network of Riverdale is great for visual artists, but not all artists and creative workers
- Not enough studio space for rent
- Gentrification taking root – workspaces converting to condos – difficult for established firms to find space to expand
- Fear of “Downtown Toronto” condos and “WalMart” infiltrating
- Missing welcoming indoor gathering spaces
- Rising cost of housing is not accessible for freelancers and new developments are inappropriate for creative work
- Lack of live performance venues that could draw people together
- Corktown not developing in the same way as Leslieville – needs help – not enough galleries there either
- Pollution issues – sewage treatment factories
- Loss of heritage buildings
- Lack of parking
- Huge concentration of artists, but no real cultural centre
- Lack of affordable shared space
- Crime issues in the neighbourhood – Logan and Queen – a lot of drug dealing still goes on
- Amazing waterfront possibilities that are at a stalemate

**Ideas for the future**

- Work with the city to keep the district affordable
- Have a more active BIA or a more comprehensive neighbourhood association
- Create a central meeting point, a cultural community space, community hub that has a place to hangout, food and beverages, exhibit art on the wall and have facilities for live performance (music, stand up comedy, etc)
- Create an interactive, online, collaboration site for the community and artists
- Bring in more commercial galleries
- Make park permits more easy to obtain so that events can happen in greenspaces – also shows the value of the greenspaces so that they aren’t lost to development
- More green elements like composts in parks
- Turn the Music Hall into a cross-disciplinary hub for the Artscape
- General space and place for artists to connect, collaborate, show, perform, educate
- Work studios to purchase – not live work, just work
- An Artscape development in Queen East

**What people learned from the event**

- No one seems to see that the artists are being economically pushed out
- We are powerful people, but feel alone and fragmented
- Everyone really craves a common place to meet – common need for connection

**Specific issues or opportunities for the district**

- How to sustain funky stores
- Demand more green space from new developments
- Integrate families and youth into arts events
- Dealing with broader socio-economic issues, crime, addiction, homelessness
- Impending gentrification vs affordability
## APPENDIX V – POLICY FORUM PARTICIPANTS

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<tr>
<th>FIRST NAME</th>
<th>LAST NAME</th>
<th>TITLE</th>
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<tbody>
<tr>
<td>Judy</td>
<td>Allan</td>
<td>Revitalization Coordinator</td>
<td>The City of Edmonton</td>
</tr>
<tr>
<td>Allan</td>
<td>Anderson</td>
<td>Project Manager Community Events Coordinator</td>
<td>CONCERT Report, York University</td>
</tr>
<tr>
<td>Fred</td>
<td>Andrews</td>
<td></td>
<td>City of Barrie</td>
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<tr>
<td>Allison</td>
<td>Bain</td>
<td>VP Finance</td>
<td>Toronto International Film Festival Group</td>
</tr>
<tr>
<td>Ric</td>
<td>Barr</td>
<td>Owner</td>
<td>NGB Studios</td>
</tr>
<tr>
<td>Ruth</td>
<td>Baumann</td>
<td>Chair Supervisor, Cultural Services</td>
<td>Green Arts Barns Community Association (GABCA)</td>
</tr>
<tr>
<td>Leah</td>
<td>Bayly</td>
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<td>City of Thunder Bay</td>
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<tr>
<td>Josh</td>
<td>Bean</td>
<td>Executive Director</td>
<td>Brantford Arts Block</td>
</tr>
<tr>
<td>Rose</td>
<td>Bellosillo</td>
<td>Director, Development Officen Sector Development Officer</td>
<td>Hot Docs</td>
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<tr>
<td>Laurie</td>
<td>Belzak</td>
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<td>Toronto Economic Development</td>
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<td>Anne-Marie</td>
<td>Beneteau</td>
<td>Program Manager</td>
<td>The Ontario Trillium Foundation</td>
</tr>
<tr>
<td>Phyllis</td>
<td>Berck</td>
<td>Mgr, Sector Partnerships, EDCT</td>
<td>Toronto Office of Partnerships</td>
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<td>Tonya Surman</td>
<td>Executive Director</td>
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<td>Adrienne Swanson</td>
<td>Economic Development Planner</td>
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<td>Nadine Taft</td>
<td>Services Branch Manager, CITY Leaders Policy Advisor, Culture</td>
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<tr>
<td>Randah Taher</td>
<td>Program Development Manager</td>
<td>Ontario Ministry of Culture</td>
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<td>Lori Tesolin</td>
<td>Policy Unit</td>
<td>Rarebloom</td>
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<td>Michelle Tilley</td>
<td>Producer/ Curator</td>
<td>Project Lead, Creative Trust</td>
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<td>Patrick Tobin</td>
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<td>Alice Toyonaga</td>
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<td>President</td>
<td>ArtsBuild Ontario</td>
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<td>Meg Van Rosendaal</td>
<td>General Manager</td>
<td>Olympic Plaza Cultural District</td>
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<td>Bonnie Ward</td>
<td>Director, Parks &amp; Recreation Culture Services Coordinator</td>
<td>Town of Ingersoll</td>
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<tr>
<td>Rebecca Weinfeld</td>
<td>Manager, Research and Strategic Planning Manager, Industry Initiatives</td>
<td>Ontario Ministry of Culture</td>
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<td>Raina Wells</td>
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<td>James Weyman</td>
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<td>Ministry of Ec Dev, Regional Ec Dev Programming</td>
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<td>Kim Wimgrove</td>
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<td>Susan Wright</td>
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<td>Eddy Yanofsky</td>
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<td>Women In Film and Television</td>
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<td>Sadia Zaman</td>
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