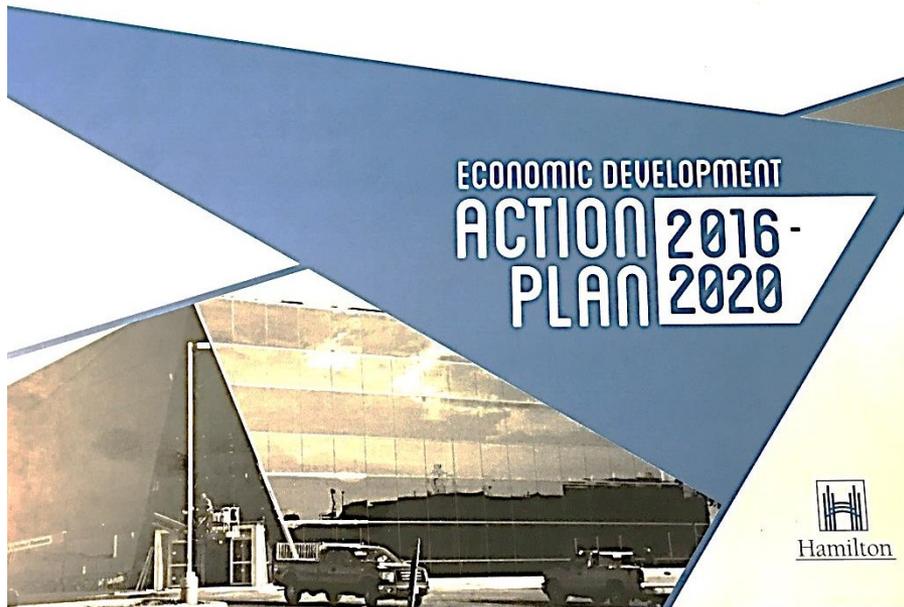


CREATIVE INDUSTRIES SECTOR PROFILE REPORT

March 20, 2019

Key Sector in Economic Development Action Plan



CREATIVE CULTURAL INDUSTRIES

Creative Cultural Industries includes a wide variety of businesses in areas such as music, film, fashion, writing and publishing, visual and applied arts and graphic design, and live performance and festivals. This sector fosters high-profile creativity and innovation; attracts and supports other key sectors through its impact on quality of life; requires a large number and wide variety of knowledge sets and skills; and enhances Hamilton's image as a vibrant city. Currently, the City supports the Arts through various granting programs, and these programs will continue.

Over the last five years, the City has focused its efforts in this sector on music and film. In 2013, the City approved a Music Strategy and engaged 12 music industry volunteers to champion and implement the 30 actions within the strategy. Over the last three years, Hamilton has seen a significant increase in filming and in 2015, filming generated \$8,449,440 in direct spending within the City. In 2017 a sector profile for the Creative Cultural Industries will be developed to determine the current number of jobs and businesses, opportunities and potential growth areas and trends for this sector.

Currently, Hamilton is well-positioned to attract a large film studio, which would include pre and post-production facilities, as well as greatly support the expansion, retention and attraction of the larger sector and complementary businesses and jobs in areas such as fashion, writing, visual arts, graphic design, etc.

AREAS OF FOCUS

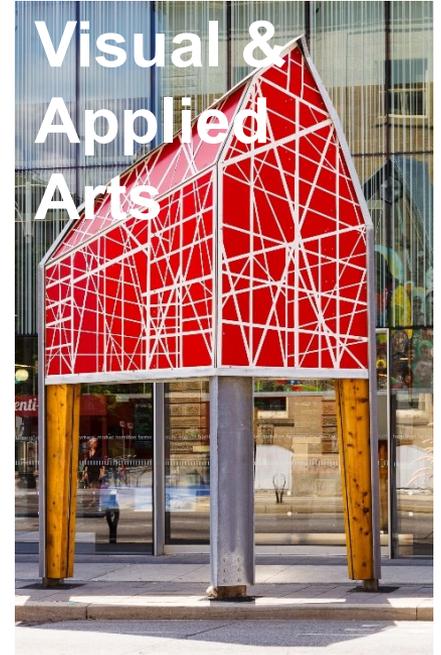
40

MAJOR ACTIONS

TIMELINE

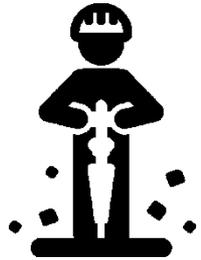
Implement the Music Strategy and launch the City of Music marketing efforts	ongoing
Implement the Cultural Plan	ongoing
Create and implement a Creative Cultural Industries sector strategy	short term
Review zoning and other barriers to the establishment of Creative Cultural Industries	short term
Create a City of Hamilton Animation Strategy targeting the improvement of public space animation	long term
Establish incubative makers' spaces for specialty manufacturing in the creative/cultural industries	long term

Defining Creative Industries



Images (clockwise from left): Blackbird Studios at Darkness Fashion Show, Mother Tareka at Music Mondays, Hamilton Aerial Group at Canada Day, Raising the Barn public art by Dave Hind, Concrete Poetry public art by Simon Frank, Cable 14 at Hamilton Arts Awards.

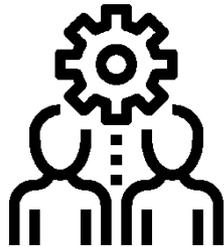
Hamilton's Creative Industries Snap Shot



11%
Hamilton's Total
Labour Force
2016 Statistics

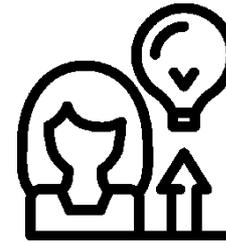


A+ Highly Educated, Younger & Self-Employed 2016 Statistics

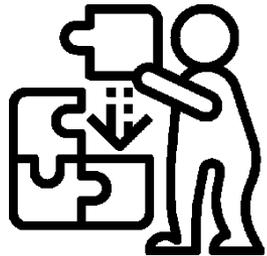


Shortage of
Skilled Labour

Median Income of \$36K
compared to national \$34K
2016 Statistics



64%
Sole proprietorship, 1-4 employees
2017 Statistics



Cross-Sector
Collaboration



6%
Of Hamilton Businesses
2017 Statistics

16 % employment growth from
2011 to '16, compared to provincial
and national rates of 12% and 10%
2011-2016 Statistics

Top Three Areas for Growth & Why

FILM

MUSIC

FASHION



The Butcher Shop

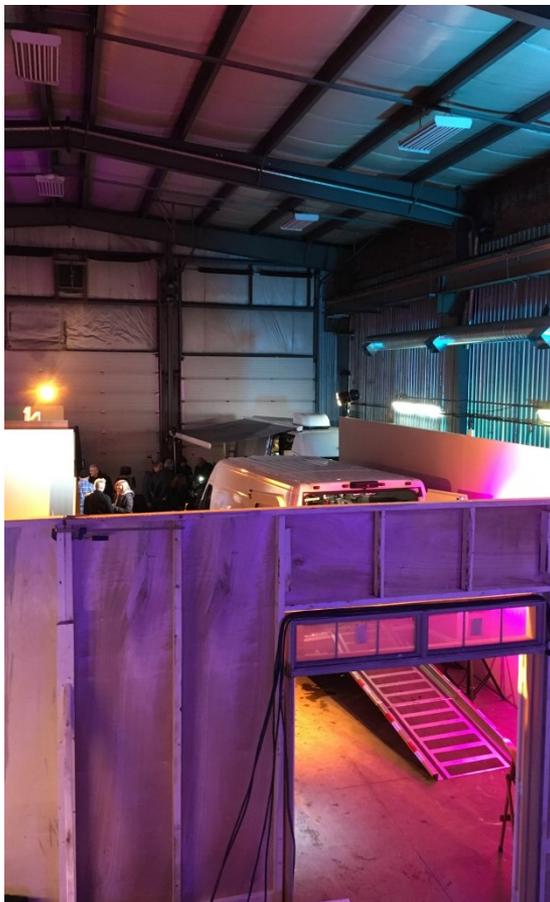


Absinthe



Bra-Makers Supply

FILM



Images (clockwise from left): Hamilton Film Studios, Westdale Theatre, Filming on King William St, Lighting Crane – Shaftesbury, and Base Camp - Shaftesbury

MUSIC



Images (from top left): Stardust Records, Catherine North Recording Studio, Musician Loading Zone at This Ain't Hollywood, and Birchway Sound

FASHION



Images (clockwise from left): Model wearing Angela DeMontigny, Bra-Makers Supply's owner Beverly Johnson creating patterns, Model wearing Designs by Mallory, fabric available at Bra-Markers Supply on Ottawa St N

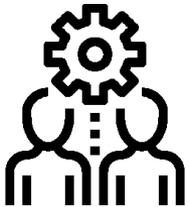
Next Steps & Implementation



- Business Retention and Investment Attraction



- Talent and Skills Development



- Local Industry Engagement



- Marketing and Branding
- Research

Examples of New Actions for 2019 (no budget impacts)

- ❖ Host a creative industries forum event in 2020
- ❖ Undertake economic impact research for Hamilton's music industry
- ❖ Assist in addressing labour and skills gaps for film and fashion
- ❖ Complete Digital Media Strategy



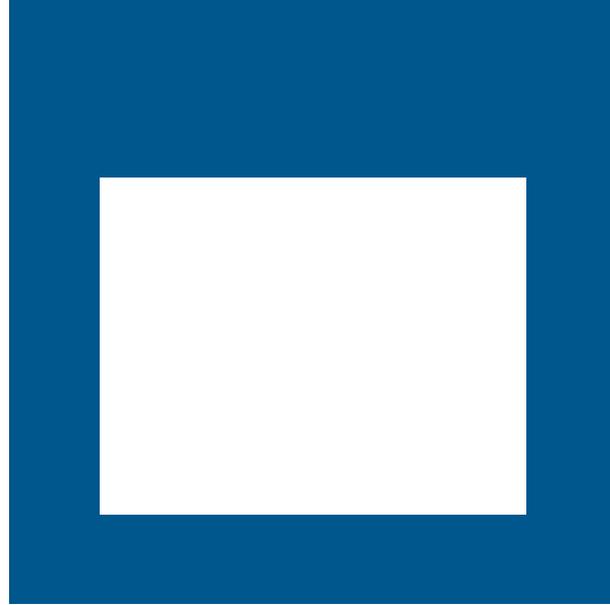
This Ain't Hollywood



Threshold Studio



Art Aggregate



QUESTIONS

Thank you.