

The background of the cover features a grayscale wireframe landscape of a valley with a road leading into the distance. This is overlaid with large, bright blue geometric shapes: a triangle in the top left and a larger, more complex polygonal shape in the bottom right. The text is centered in the upper half of the page.

From the Margins to the Mainstream

MOVING BC'S CREATIVE INDUSTRIES FORWARD

APRIL 2012

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Acknowledgements

This discussion paper focuses on the creative industries in BC. In particular it examines the content creators within book and magazine publishing; music and sound recording; and film, television and interactive digital media production. These sectors are a subset of the creative industries. As such, they provide the content for both traditional and digital platforms. They also face similar challenges and have many industry features in common. This discussion paper is commissioned by, and prepared in consultation with, the provincial associations representing these creative industries in British Columbia.



The BC Producers' Branch of the CMPA represents the interests of screen-based media companies engaged in the development, production and distribution of English-language television programs, feature films and digital media content in British Columbia. Our over 75 member companies are significant employers of Canadian creative talent and assume the financial and creative risk of developing original content for Canadian and international audiences. Independent producers create content for distribution on traditional film and television, internet and mobile wireless platforms.



Music BC is a non-profit society dedicated to providing information, education, funding, advocacy, awareness and networking opportunities to nurture, develop and promote the spirit, growth and sustainability of the BC Music community. Music BC is the only provincial music association that serves all genres, all territories and all participants in the industry from artists to managers, agents, broadcasters, recording studios, producers and all other industry professionals.



The Magazine Association of BC (MABC) represents, connects and promotes the BC magazine industry by uniting the talent, knowledge and skills of its publishers, editors, writers, graphic artists, salespeople and others in the industry. BC magazines foster award-winning talent and represent some of the best periodicals published in Canada. MABC membership is made up of a wide variety of magazines, from small to large, literary to lifestyle and leisure, arts and culture, news, business and special interest magazines.



The Association of Book Publishers of BC (ABPBC) is a provincial association of BC-owned and -controlled book publishing companies working to support the long-term health and success of the Canadian-owned book industry in British Columbia. The ABPBC believes a healthy BC book industry is essential to the educational, social, cultural and economic life of the province. British Columbia's publishers produce books in all genres that engage and inform Canadian and international readers, young and old, scholars and those who read for pleasure.

A Turning Point for BC's Creative Sector

The creative industries are a cornerstone for the economy, providing local stories and developing British Columbia's own brand of content that both resonates with British Columbians and is exportable to the rest of Canada and the world.

The province is home to a vibrant book publishing industry, a fast-growing digital media sector, a successful film and television industry, a diverse magazine industry comprised of small literary and large consumer magazines, and a flourishing music industry of artists and entrepreneurs producing original Canadian material.

Furthermore, the province has a strong base for developing creative talent through well-established post-secondary institutions including Simon Fraser University, the University of British Columbia, BC Institute of Technology, Capilano University, Emily Carr University of Art + Design and their innovative cooperative venture, the Centre for Digital Media.

The creative sectors are both challenged and energized by the new business models being explored to address current digital delivery mechanisms. Development of new creative products is at the core of the creative industries. We are currently witnessing the growing application of innovation to content development.

Innovation requires technological developments and creative ingenuity, both of which exist in BC's creative and technology sectors. At the same time, the creation of written text and audio-visual content begins with the creative concept, often designed for multiple delivery formats.

BC's creative industries are at a turning point. Businesses in the creative industries need healthy financial structures in order to continue to develop intellectual properties and retain the rights to their exploitation. In a period of rapid technological change, creative content producers must keep current or risk falling behind other jurisdictions.



A Cross-Sectoral Framework for the Creative Cluster in BC

The creative cluster is an important driver in BC's economy. Creative industries represent one of the fastest growing segments of the provincial economy, developing highly skilled jobs and employing more workers than agriculture, forestry, fishing and hunting combined. As other jurisdictions have recognized, where governments play a role in ensuring such clusters have the means necessary to support creativity and innovation, a thriving creative sector is built.ⁱ

The multi-dimensional nature of the creative industries often results in fragmented policy strategies. An integrated approach is needed, requiring effective institutional mechanisms to coordinate policies across the various departments and agencies responsible for these areas.ⁱⁱ

Building on existing government and industry partnerships, enhanced policies will encourage the growth of the creative cluster by creating a climate for business development and sustainability in the creative industries.

But policy approaches need to move from the margins to the mainstream. The current ad hoc nature of programs and funding in BC for the creative industries limits the sector in achieving its full potential. A more holistic approach, using the synergies of the creative cluster working in partnership and under the leadership of the provincial government, will result in a successful strategy for the sector and the province.

The province is well-positioned to take advantage of the growing creative economy. We have the talent and we have the opportunity. But without a well-conceived and funded cross-sectoral framework to expand on these opportunities, the drain of talent and industry to other more supportive jurisdictions will continue.

The province's creative industries are looking for ways to work together with all levels of government to maximize the potential of BC's creative cluster during this dynamic time.

BC is unique. Our assets are different. Our future requires a made-in-BC solution.



Creative Economy & Creative Clusters

Domestic and international research demonstrates a growing understanding of the relationship between creativity, culture and economics. This understanding forms the basis for the concept of the “creative economy”.ⁱⁱⁱ

At the heart of the creative economy are the creative industries, which incorporate a large and diverse field of activities. A broadly accepted definition coined by the UK government refers to the creative industries as “*those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property*”.^{iv}

The concept of “creative clusters” describes the composition of the creative industries and reflects the involvement of industries that support the creation, production and monetization of creative products.^v

This discussion paper focuses on film, TV and digital media production; book and magazine publishing; and music as a subset of the creative industries. These sectors face similar challenges and have many industry features in common. Creative clusters involve these content producers along with their business, education and government partners.



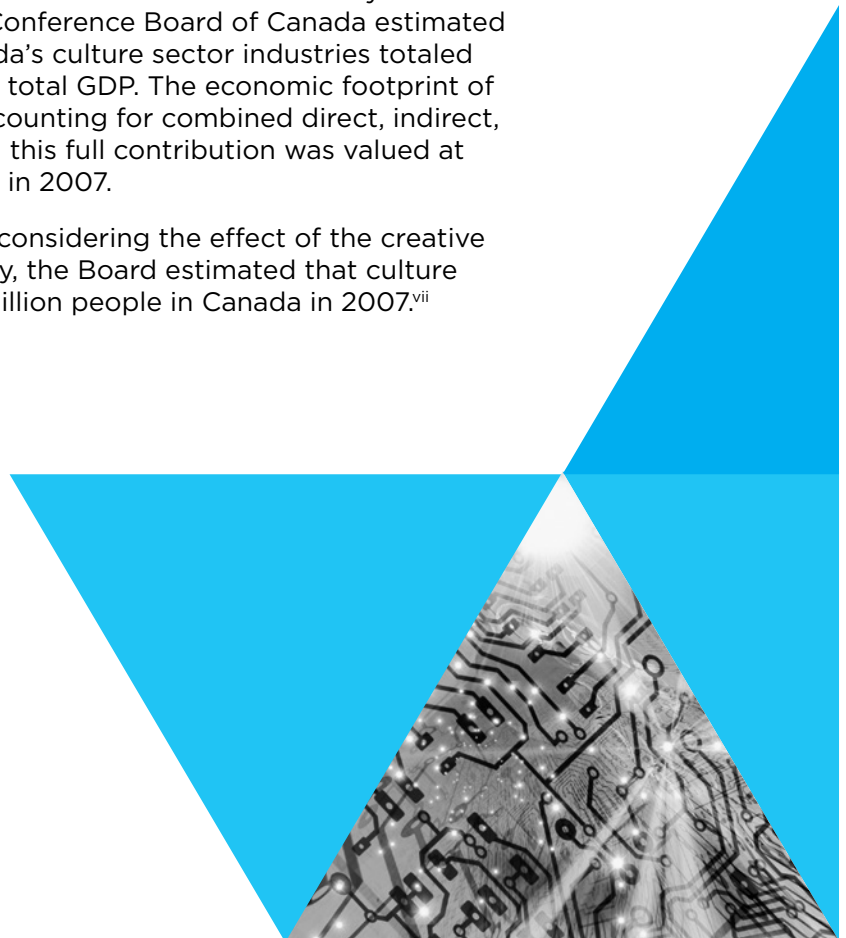
Economic Contribution of the Creative Industries

The creative economy cuts across a number of different sectors in the overall economy including economic development, urban planning, trade, labour, domestic and foreign investment, technology, tourism and education. It is this very cross-sectoral nature that makes it difficult for policy makers to quantify the contribution of the creative industries and target support. Numerous studies have attempted to document the impact of creative industries and their significant economic contributions to Gross Domestic Product (GDP), employment, and exports.

PricewaterhouseCoopers (PwC) determined that creative industries comprise some of the most dynamic sectors of world markets. According to its *Global Outlook 2011-15*, PwC found that 2010 saw the global economy begin to recover from its steep decline in 2009 and these improved economic conditions played a major role in the recovery of overall entertainment and media (E&M) markets, which rose by 4.6%. Over the next five years PwC forecasts that aggregate E&M global spending will rise to \$1.9 trillion in 2015, a 5.7% compound annual advance driven by economic growth. Canada's creative industries are forecast to grow at a similar rate to the global market.^{vi}

Statistics Canada does not track the creative industries but has developed a framework for culture statistics covering most of the economic activity in the culture sector. Using these statistics, the Conference Board of Canada estimated that the real value-added output by Canada's culture sector industries totaled \$46 billion in 2007, approximately 3.8% of total GDP. The economic footprint of the culture sector is much larger when accounting for combined direct, indirect, and induced effects. The Board calculated this full contribution was valued at \$84.6 billion, about 7.4% of total real GDP, in 2007.

In terms of contributions to employment, considering the effect of the creative industries on other sectors of the economy, the Board estimated that culture and related industries employed over 1.1 million people in Canada in 2007.^{vii}



Demand for Creative Products

Growth in demand for creative products has been a significant driver of the creative economy. Use of the internet, digital technologies and mobile devices has grown exponentially over the past decade, driving content producers to develop new business models and find new ways to monetize their creative products.

Canadians are and always have been extensive media users. We are the biggest internet users in the world, spending on average more than 43 hours per month online. In addition, we are some of the biggest users of Google, Facebook, and YouTube and we are generous contributors to Wikipedia. At the same time, we continue to be mass consumers of traditional media including music, books, magazines, films, and television.^{viii} While these products continue to be delivered to consumers via traditional media in hard copies (books, magazines, CDs, DVDs), the shift to digital distribution channels is rapidly increasing.

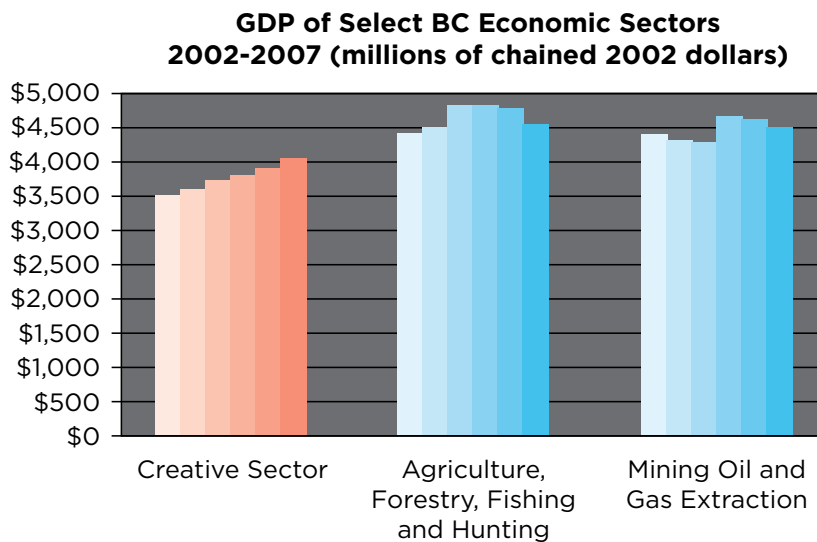
Trends in digital delivery include the growth of digital aggregators such as iTunes, where a consumer is able to go online to purchase digital versions of songs, podcasts, books, and videos. Amazon offers an open platform for book writers. YouTube is becoming an aggregator by launching 100 new channels of video content. And all these entities are operating in the cloud, where content can be accessed anytime on any device, including mobile phones, tablets and laptops.

However, underlying this massive movement towards digital delivery and consumption, one fact remains clear. Written text, audio and video productions and interactive digital media are the products that online and wireless digital platforms deliver to users/audiences. Each requires creative acts to initiate the production value chain. Without creative producers there will be no content.



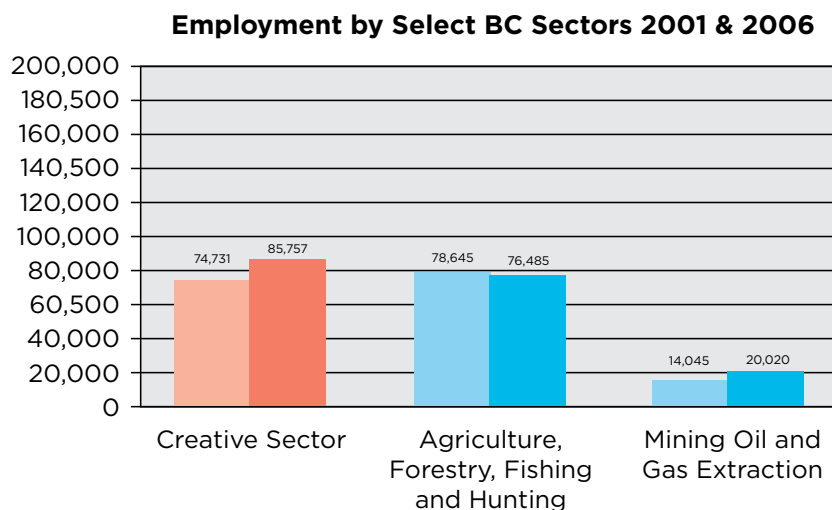
BC's Creative Cluster

According to PwC, BC's creative sector experienced a steady 3% annual real GDP growth from 2002 to 2007, outpacing many of BC's other major sectors including agriculture, forestry, fishing, and hunting combined. By 2007, the creative sector GDP was \$4 billion, contributing a share of provincial GDP comparable to other major sectors.



Source: PricewaterhouseCoopers - "Opportunity BC 2020"

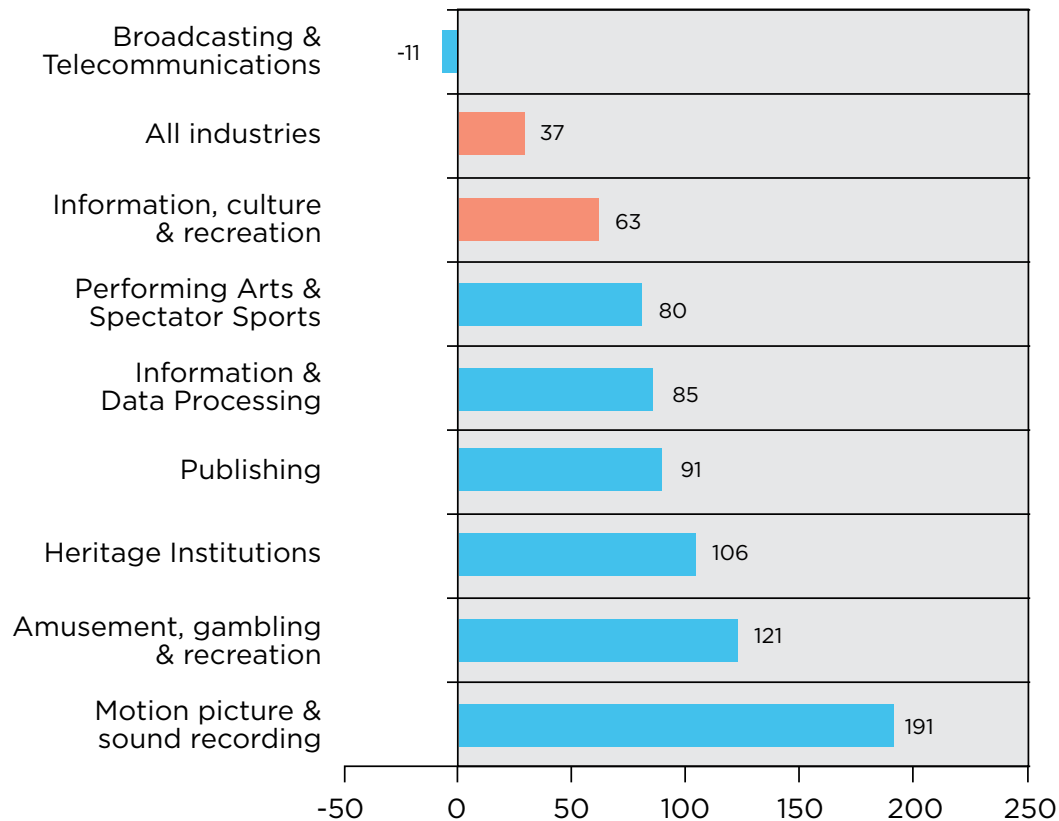
Additionally, employment in the creative sector grew to represent almost 4% of the provincial workforce.^{ix}



Source: PricewaterhouseCoopers - "Opportunity BC 2020"



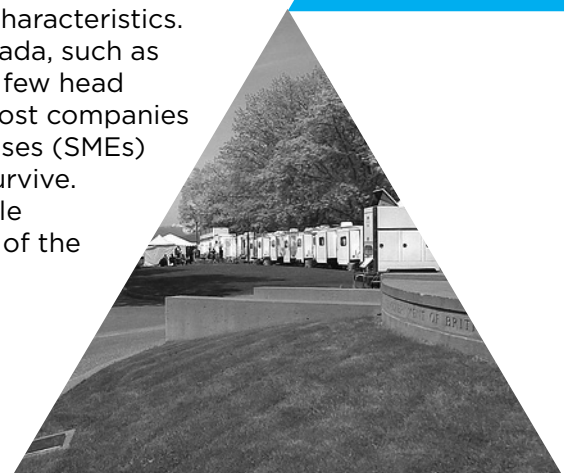
Change in Employment 1990-2005 (%)



Source: BC Government Statistics

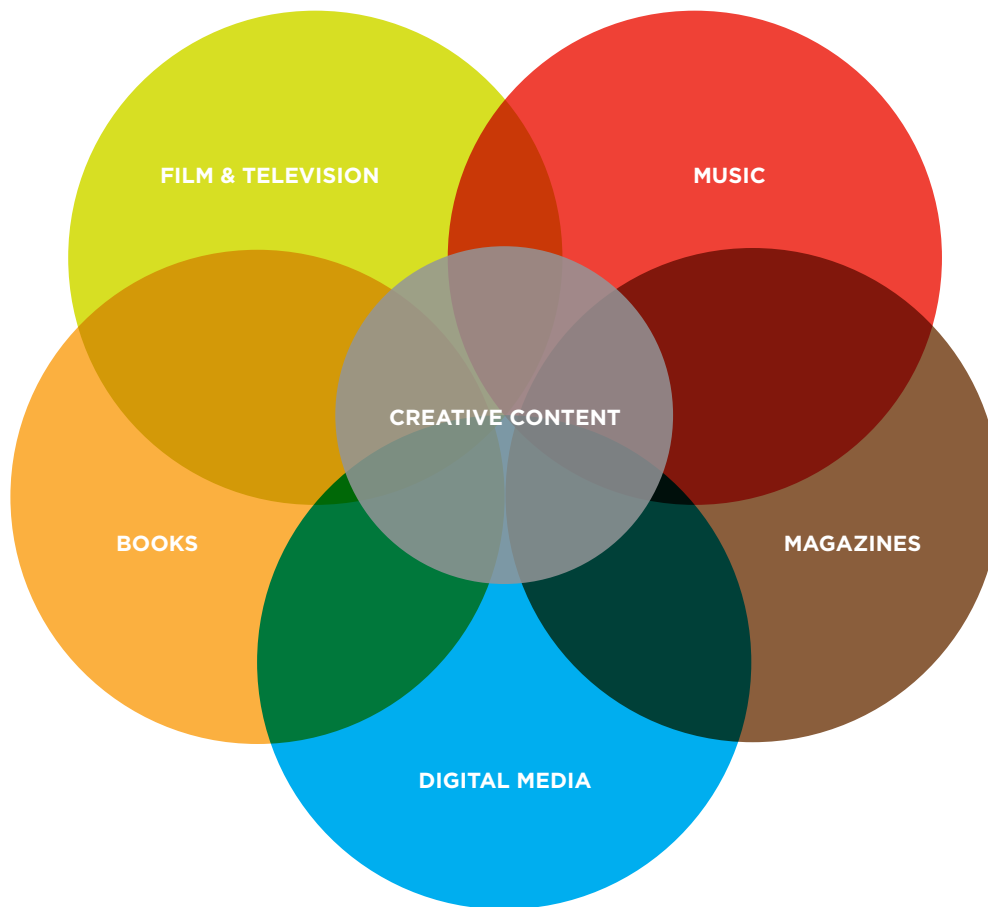
Government policies supporting the development of the creative industries, the entrepreneurial spirit and business talents of individuals and companies in these sectors, and the appeal of BC as a location for major international companies have contributed to the development of BC's creative industries over time. There has been huge private sector investment in infrastructure, most notably in the film and television production sector. It is estimated that capital investment made by the film and television industry in BC, including studio infrastructure, production services equipment, and post-production facilities, exceeds \$1 billion.

The creative industries in BC have a number of distinguishing characteristics. The sectors are younger than in other established areas of Canada, such as Ontario, and with the exception of the book industry, there are few head offices of major companies, Canadian or foreign. As a result, most companies operating in the creative sector are small-and-medium enterprises (SMEs) that have had to develop cross-sectoral expertise in order to survive. Being outside the centre has promoted more nimble and flexible creative producers that embody the entrepreneurial spirit, one of the cornerstones of innovation.



Cross-Sectoral Examples in BC

In addition to the innovative nature of the creative industries in the province, the sector also makes use of a common talent pool. BC's creative industries do not operate in separate silos but find common ground as well as business opportunities across sectors, as the following diagram and examples demonstrate.



EXAMPLE 1 - ZEROS TO HEROES MEDIA LTD. (Z2H)

- **Digital Media**
- **Magazines**
- **Film & Television**
- **Music**
- **Books**



Zeros to Heroes Media Ltd. (Z2H) is a technology-based media company in Vancouver that believes in making 'awesome' entertainment properties. Founded in 2006 by an old-school Los Angeles showrunner and a New York new media start-up veteran, their studio develops its own unique new entertainment properties. Z2H's strategy is to take advantage of best-of-breed digital solutions ranging from smart phone applications to sprawling alternate reality games to unique mixed media experiences. Their motto is to make the next generation of digital content for the next generation of digital audiences. One of Z2H's current projects, *Animism*, utilizes the medium of motion comics and artistic talent from around the world. The producers sought to

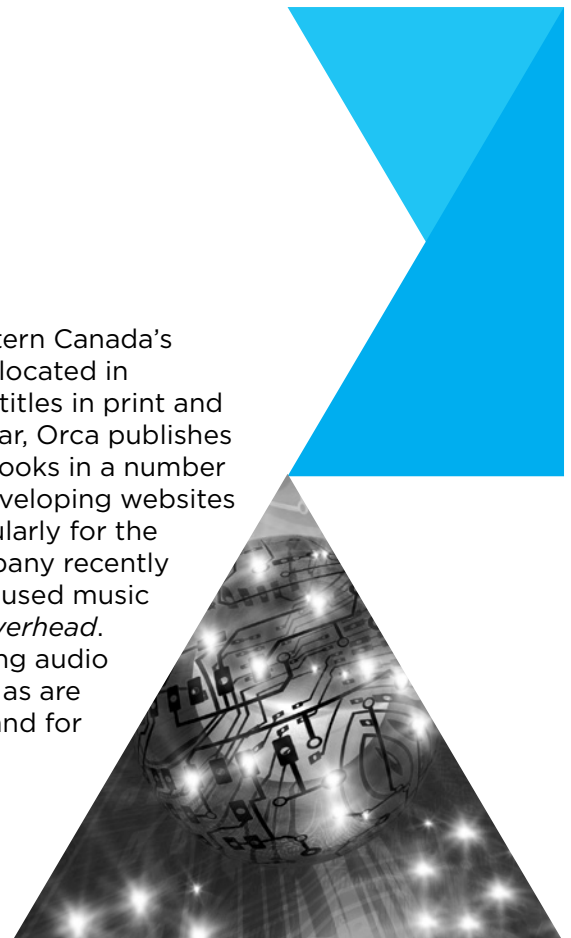
capture the myth, mystery and magic inherent in the script of *Animism* to create this acclaimed series. The overall project combines many platforms including television, mobile, comics and e-books, an alternate reality game and wide-spread use of social networks. (www.z2hmedia.com)

EXAMPLE 2 - ORCA BOOK PUBLISHERS

- **Books**
- **Digital Media**
- **Music**

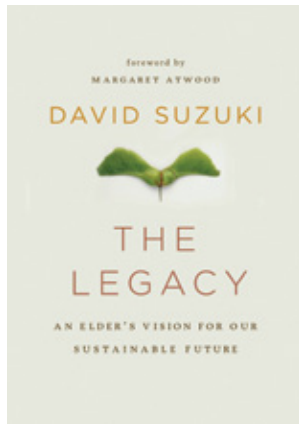


Orca Book Publishers is western Canada's premier children's publisher, located in Victoria, BC. With over 500 titles in print and more than 60 new titles a year, Orca publishes award-winning, bestselling books in a number of genres. Orca has been developing websites to accompany books, particularly for the education market. The company recently produced a book trailer that used music from a local BC band *Jets Overhead*. Orca is also actively producing audio books for a number of titles, as are many BC publishers as demand for audio books grows. (www.orcabook.com)



EXAMPLE 3 - DAVID SUZUKI

- Film & Television
- Books
- Digital Media



David Suzuki is an award-winning scientist, environmentalist, and broadcaster, well known for his television series *The Nature of Things*. His book *The Legacy* and the film *Force of Nature* were both based on the Suzuki legacy lecture. The film was nominated for the Directors Guild best documentary in 2011. Suzuki's *The Legacy* enhanced e-book app includes the full book, audio from the lectures, and footage from *Force of Nature*. It is co-published by BC's Greystone Books and the David Suzuki Foundation. (www.davidsuzuki.org)

EXAMPLE 4 - JEREMY FISHER

- Music
- Film & Television
- Digital Media



Jeremy Fisher, a Canadian folk-pop troubadour, self-released his third album *Goodbye Blue Monday* while he was living in Vancouver in 2007. It featured the hit "Cigarette". The accompanying music video, produced on Fisher's Mac for \$50, has been viewed more than two million times on YouTube. The songwriter made his US network television debut that same year appearing two nights in a row on *The Late Late Show* with Craig Ferguson. Fisher has started his own animated web series, "*For Real with Jeremy Fisher*," and has created music videos for artists such as Xavier Rudd, Hannah Georgas and Hawksley Workman. He also founded *The Malahat Revue* (a play on the name of the literary magazine published since 1967), an ensemble

that includes fellow Canadian pop masters *Said the Whale*, Hannah Georgas, and Aidan Knight. (www.jeremyfishermusic.com)



EXAMPLE 5 - DOUGLAS COUPLAND

- Books
- Magazines
- Film & Television



Douglas Coupland's fiction is complemented by recognized works in design and visual art arising from his early formal training. His first novel, the 1991 international bestseller *Generation X: Tales for an Accelerated Culture*, popularized terms such as McJob and Generation X. He has published 13 novels, a collection of short stories, seven non-fiction books, and a number of dramatic works and screenplays for film and television including *JPod*, a CBC TV series based on the book of the same name and the film *Everything's Gone Green*. Coupland has been described as "...possibly the most gifted exegete of North American mass culture writing today." He was the presenter of the 2010 Massey Lectures, was long-listed for the Giller Prize in 2006 and 2010, was

a finalist for the Rogers Writers' Trust Fiction Prize in 2009, and was nominated for the BC Book/Hubert Evans Non-Fiction Prize in 2011 for *Extraordinary Canadians: Marshall McLuhan*. (www.douglascoupland.com)

EXAMPLE 6 - PAPERNY ENTERTAINMENT

- Film & Television
- Digital Media



Paperny Entertainment has been producing compelling non-fiction television for almost 20 years, and continues to fiercely push the envelope with groundbreaking ideas and approaches. Many programs now include new media components to enhance viewership and audience participation. *Eat St.* is one of their lifestyle series that offers a curbside view of North America's tastiest, messiest and most irresistible street food. Hosted by Canadian comedian James Cunningham, *Eat St.* tours the continent in search of the most inventive meals served from food truck windows – from sirloin burgers slathered in bacon jam to Tijuana-style tacos served out of an Airstream trailer. To accompany the

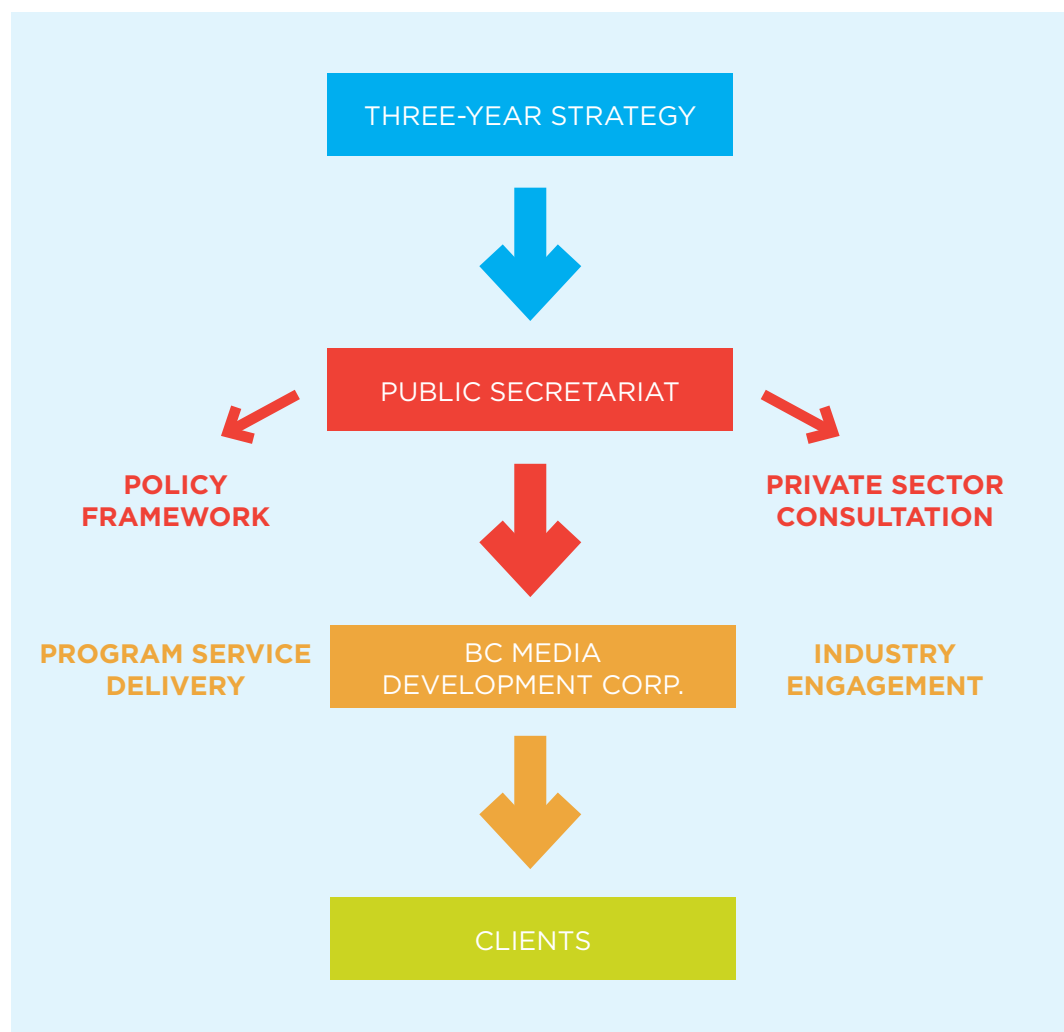
series, the *Eat St. App* is a downloadable GPS tool for street food lovers - over 300,000 downloads of the app to date. (www.papernyentertainment.com)

A Blueprint for Success

Government has a vital role to play in the development of BC's creative cluster. Building on past successes, it is time for the government to re-imagine its commitment to the creative industries. The changes that are rippling through the creative industries are creating opportunities to develop a dynamic sector that will contribute to BC's economic growth and sustainability.

When government works in partnership with the creative sector to create a business environment favourable to research and development (R&D) and the expansion of entrepreneurial skills and local talent, the opportunities for innovation and the development of commercially viable creative products and services are greatly enhanced.^x

For BC, developing a blueprint for success starts with a high-level, cross-sectoral strategy for the creative industries in BC undertaken as a public-private partnership. Its goal should include the development of a **three-year strategy** for the creative industries, informed by the following steps:



CREATE A PROVINCIAL SECRETARIAT

To maximize opportunities it is critical to look through a common lens rather than looking at each component of the creative cluster as a stand-alone silo. The establishment of a governmental secretariat will facilitate this approach as well as aid in policy development. The ministries responsible for economic development, advanced education, finance, culture, trade, labour, tourism and technology and innovation should be represented and included in the secretariat.

REVIEW EXISTING PROGRAMS & EXPLORE OTHER MODELS

Development of an overall strategy should include an assessment of existing tools and potential enhancements, such as a competitive tax policy and tax credit incentives for private investment. Reviewing the service delivery of programs should be undertaken together with a consideration of models currently in place in other jurisdictions.

For example, the multi-dimensional nature of creative industries suggests that an umbrella organization similar to the Ontario Media Development Corporation makes sense as BC moves into this converged world. An umbrella organization will contain the necessary expertise to develop a cross-sectoral plan and will work with the creative industries individually and as a group to foster growth and strengthen the creative cluster. Such an organization may be charged with developing a strategic approach for the cluster in consultation with the secretariat, focusing resources and implementing policies individually to each sector while also enhancing R&D innovations across the sectors.

COMMON TARGET AREAS

A blueprint should include programs targeting key cross-sectoral areas:

- Research and Development
- Project Development Funding
- Marketing and Export Development
- Venture Capital
- Skills Retention/Talent Development

Seed capital for BC companies to develop new creative projects and support for marketing and distribution domestically and internationally are the very minimum of required elements necessary for any continued success in the creative industries.



As importantly, cross-sectoral funding for the research and development of new content for the digital marketplace is critical for BC to remain an innovative and creative content supplier. Support for the on-going training of the next generation of creative producers and employment opportunities for them when they graduate will ensure the continued success of the creative cluster in BC.

Examples of the ability of relatively small initiatives to support and develop a creative sector in BC are illustrated in Appendix 2. Further, Appendix 3 outlines small and large approaches from around the world to support the creative industries, most recently a massive billion dollar commitment in the European Union with the goal to stimulate the economy through creative enterprise.

ESTABLISH INDICATORS OF SUCCESS

The goal of building and strengthening BC's creative industries can be measured against a future return on investment^{xi}, by:

- Increasing the creative cluster's contribution to BC's GDP
- Accelerating the rate of job creation within the creative industries
- Enhancing market share in domestic and global markets, especially via digital media
- Fostering innovation
- Improving aggregate company and tax revenues and wages
- Incubating new company creation



Conclusion

We are experiencing a global economic shift towards knowledge-based creative economies. Governments large and small are exploring ways to encourage such growth within their countries and regions. Given the public and private investment in our many assets, our vibrant traditional creative industries, and the existence of innovative and thriving digital media companies, we have the strengths to capitalize on this shift. The opportunity is now but it requires a timely, strategic, and multi-faceted approach or we risk losing ground to other regions and countries.

A three-year cross-sectoral strategy to support and nurture the creative industries in BC is good public policy. The provincial government has a leadership role to play, in partnership with the creative industries, to maximize the opportunities presented by these dynamic, challenging and extraordinary times.



Appendix 1: Snapshot of Creative Industries in BC

While the creative sector makes use of creative talent that crosses between the various industries, it is nonetheless useful to provide a snapshot of the industries themselves and some of the similar challenges they face.^{xii}

The key industries include:

- Book Publishing
- Digital Media
- Film and Television Production
- Magazine Publishing
- Music and Sound Recording



BOOK PUBLISHING

British Columbia is home to the second largest English-language book publishing sector in Canada with annual sales in excess of \$150 million. Despite the proliferation of digital formats, the publishing sector has retained its market share, with e-readers and virtual bookstores playing an increasing role. Indeed, publishing now incorporates both print and digital formats and increasingly considers written and visual content (full-length text, chunks, excerpts, visuals) as its business. Published books are a key source of creative content for other creative industries including film, television and digital media. BC companies such as Douglas & McIntyre and Harbour Publishing are established leaders and recognized supporters of BC's creative talent.

D&M PUBLISHERS is English Canada's largest independent, Canadian-owned publishing company with offices in Vancouver, Toronto and Gabriola Island. Founded in 1971, D&M has since published over 2,000 quality books. In 2007, the company was sold to a private, BC-based investment group and is now composed of three distinct imprints: Douglas & McIntyre, Greystone Books and New Society Publishers. Today D&M's sales are around \$10 million, approximately 30% of which are export sales. Today their books are sold all over the world and in numerous languages.

Issues and Opportunities

- Electronic publishing is expected to be a considerable growth area: the emerging e-book market rose by more than 50% in 2009. However, Canadian-owned publishers have limited access to capital and often have difficulty retaining and exploiting ownership and control of digital rights. In addition, producing and distributing both print and electronic titles has put enormous pressure, both financial and in human resources, on the industry.
- Consolidation in book retailing over the past decade has radically decreased accessible shelf space for domestic product. Publishers must find alternative sales opportunities for print books and engage in expanding e-book markets.
- Canadian-owned publishers must compete at price points set by large US competitors who have reduced costs due to economies of scale. As a result, Canadian publishers have smaller profit margins and lower retained earnings. A by-product of this situation is the difficulty BC publishers have in keeping authors. Many BC authors are lost to foreign-owned or Ontario publishing houses.



DIGITAL MEDIA

BC is an internationally recognized centre for digital media, particularly in the video game industry. Industry leaders Electronic Arts and Vivendi have a long and established presence in Vancouver, spawning the creation of a significant number of smaller BC-owned companies working in the sector.

According to DigiBC, there are over 1,300 companies in BC's digital media sector, creating innovative products in wireless and mobile, video gaming, animation and VFX, web 2.0 and social media, interactive marketing and e-learning. Collectively, this sector employs 22,000 people and generates revenues of \$3 billion a year, making it one of the most significant contributors to BC's creative economy. (www.digibc.org)

BC faces strong competition from Toronto and Montreal where tax incentives and funding programs have attracted investment and talent, a situation that is not dissimilar to the competition BC's film and television industry faces from these jurisdictions.

BC has one of the top video game clusters in the world, with the presence of major publishers, including EA, NINTENDO, THQ, VIVENDI/ACTIVISION, and MICROSOFT. The EA studio is the largest of its kind in the world. Digital media has a strong symbiotic relationship with the North American film and TV sector.

BC's roots in mobile communications run deep beginning with satellite data technologies developed by MACDONALD DETTWILER and continuing with the GIS systems developed by MDI. Vancouver is also home to major companies in wireless telecom and technology, including such companies as TELUS MOBILITY, SIERRA WIRELESS and NOKIA. (Vancouver Economic Development Commission)

Issues and Opportunities

- Recognition of digital media as a sector has lagged behind other cultural industries despite its growing importance. The sector is not routinely measured by Statscan.
- Similar to the other creative industry sectors, BC's interactive digital media companies cannot rely on the small Canadian market for sustainability. Digital content creators must by necessity look to foreign markets for revenue opportunities.
- Funding and access to capital are also significant issues in this sector. Interactive digital media companies often live from project to project and are therefore unable to make significant capital re-investments in their companies. These companies have very little negotiating power, particularly with international players, when selling their products. In many cases they must give up ownership of their intellectual property – and potential future revenue streams – to ensure that their projects are completed.

FILM & TELEVISION PRODUCTION

Film and television production in BC boasts a world-class infrastructure, a large and skilled workforce, and a geographic proximity to Los Angeles. The industry in BC accounts for more than \$1 billion in direct production spending for both foreign-service production and domestic Canadian production. The sector employs approximately 20,000 people directly with an additional 15,000 indirect jobs. BC is home to North America's third-largest film and television sector, behind Los Angeles and New York.

The foreign production services and BC-owned sectors of the province's production industry have become increasingly interdependent. The sustainability of the industry depends on a strong BC-owned domestic production sector. However, production spending in BC's film- and TV-production industry was down to \$1 billion in 2010 from \$1.3 billion in 2009. According to British Columbia Film + Media, foreign (or service) productions shot in BC totaled 94 and shrank from approximately \$1.1 billion to less than \$800 million in 2010.

Domestic production is the key to maintaining a sustainable industry given fluctuating foreign production levels. In 2010, 152 domestic productions were shot in BC, growing from \$218 million in 2009 to \$244 million in 2010. However, this modest increase is still lower than the \$408 million in 2007 and the \$366 million of 2008. Competition from other Canadian jurisdictions with more advantageous tax credit systems, as well as a lack of provincial seed capital and production funding has greatly impacted the sector. This in turn impacts on the retention of talented writers, actors and creative producers in BC.^{xiii}

Sanctuary: Recently completing its 4th season, this popular sci-fi series started off as a web series and is now broadcast in the US and Canada.

Daydream Nation: This feature film opened the Toronto International Film Festival's Canada First! Program and was theatrically released in the USA. The film has sold to numerous countries internationally including ZDF Germany and was also nominated for numerous Genie Awards (Canada's Academy Awards).

Cupcake Girls: A lifestyle series about two Vancouver women entrepreneurs - the show has to date been sold in over 60 countries around the world.

- Developing and financing domestic production is more difficult in BC due to the lack of provincial equity funding, more competitive production tax incentives available in other provinces, and the fact that the Canadian broadcasters who commission content are based in Toronto and increasingly relying on Ontario product.
- However, BC has witnessed the growth in service animation projects, which shot up over 100% in 2010. BC Film+ Media also joined forces with the BC Arts Council to implement two digital content creation programs.
- Similar to the other creative industries, BC independent producers consistently struggle to raise sufficient capital to develop and create productions. They are forced to sell most if not all of the potentially lucrative intellectual property rights, simply to finance production budgets. Producers find it difficult to leverage loans and attract private investors.
- Without access to provincial funding, it becomes more difficult to trigger federal production funding, through the Canada Media Fund and Telefilm Canada.



MAGAZINE PUBLISHING

BC's periodical publishing sector reported revenues of almost \$300 million in 2008. However 2009 and 2010 are projected to show net declines due to the economic downturn and reduced advertising dollars. Most BC magazine publishers produce only a handful of titles each, with only one or two larger magazine publishers based in BC. The BC magazine publishing sector has a higher ratio of literary magazines than in other provinces, reflecting the creative value of magazine contributors to the growth of the literary field and the creative industries in BC and Canada. Prize-winning authors such as Annabel Lyon, Timothy Taylor, Douglas Coupland and Madeleine Thien all got their start writing for magazines.

Magazines in BC are known and respected for their content and longevity, and often their innovation:

BC BUSINESS *is the authoritative voice on the province's business scene.*

DANCE INTERNATIONAL *has focused on classical and contemporary dance worldwide for 34 years.*

EVENT *has supported new and established talent in both word and image for 40 years.*

Published for more than 30 years, volunteer-run Room (formerly Room of One's Own) is Canada's oldest literary journal by and about women.

THE TYEE *is a leading independent online news magazine with in-depth coverage of local and international politics, social and environmental issues, and arts and culture.*

YOUTHINK *is written by teens for teens and distributed to over 430 high schools in BC and Alberta.*

Issues and Opportunities

- Reduced advertising spending has significantly impacted the magazine sector in Canada, shrinking operating revenues and reducing profit margins. The ability of these publishers to capitalize their companies and develop new talent is limited.
- Magazine publishers are witnessing the migration of their audience to online content and are attempting to engage them there. Many publishers integrate their magazines with online activities including web versions of their magazines and additional content, social media networking, and downloadable mobile applications. While exploring the opportunities for this new medium can be exciting and challenging, managing both a print and online version of a magazine puts increased pressure on the bottom line.

- Canada Post is the primary distribution outlet for Canadian magazines. Postage accounts for a significant portion of operating costs. Postage rate increases and postal strikes impact on magazine publishers as well.
- The Canadian magazine industry has also had to compete with government publications that often have lower or no distribution costs and other special relationships with the advertising community.



MUSIC & SOUND RECORDING

BC has world-class production capabilities and is home to a large number of successful and internationally renowned musicians, producers, engineers, songwriters, composers and managers. **Bryan Adams, Nelly Furtado, Nickelback, Diana Krall, Michael Bublé** and **Sarah McLachlan** all call BC home. On the industry side, Nettwerk Records, SL Feldman & Associates and Bruce Allen Talent are located in BC, as well as rising independent labels such as 604 Records, Mint Records and Cordova Bay Records.

The industry is divided into three main areas: sound recording, music publishing and live performance. Sound recording is an important economic generator in BC. Of 331 sound recording companies in Canada, 41 of those have head offices in BC. The BC companies generate over \$31 million annually and receive about 9% of the music publishing royalties paid in Canada, representing \$15 million to \$20 million annually. British Columbians spend approximately \$90 million annually for concerts and revenues from these various sources create an economic impact over \$500 million annually.

Traditional sales (CDs) have steadily dropped over the past ten years. In January 2012, it was announced by CNN.com that digital music sales surpassed traditional music sales in 2011 for the first time. The paradigm has indeed shifted. Building a business model that incorporates many diverse streams of revenue is essential to building a healthy music company. Given that the consumption of music in all its forms is increasing, there is a significant opportunity to further expand the economic potential of the industry in BC.

TEGAN AND SARA, signed to Neil Young's Vapor Records label, boast six full-length releases and have worked with producers such as Hawksley Workman and Chris Walla (Death Cab for Cutie).

In their lengthy career (they started in 1998) they have toured with the likes of Weezer, Neil Young, The Killers, City and Color and Ben Folds. They have won numerous music awards including WESTERN CANADIAN MUSIC AWARDS for International Achievement and Outstanding Pop Recording, as well as multiple JUNO NOMINATIONS and a shortlist for the POLARIS MUSIC PRIZE.

Based in Vancouver, BC, they embody the hard-working independent ethos of successful musicians today and are among the most in-demand Canadian musicians in the industry.

Issues and Opportunities

- Online retailers such as iTunes and Spotify are replacing the traditional bricks and mortar music retailers. This has led to a decentralization of the music industry and the rise of the independent sector, allowing BC-based companies to thrive in the new market. As well, digital advances are providing new and creative opportunities for advertising and promoting artists and acts. Social media (YouTube, Facebook, Twitter and others) are increasingly being used as music marketing vehicles.

- Without major label support, artists are financing their own recordings, booking their own tours and carrying out manager duties. BC artists now own their own copyrights, keeping the intellectual property rights at home and building infrastructure.
- Music publishing revenues are received from live performance, radio and television play. With the explosion of digital cable stations, the demand for licensed music for use in shows has expanded dramatically. Opportunities exist to capitalize on the use of music in films, TV and video games.
- Live performance is critical for artistic development in today's market. Many Canadian centres support live music and an increase in live performance revenues is projected. Artists, managers and agents all benefit from the development of strong live performance followings.



Appendix 2: Examples of Creative Industries' Initiatives in BC

A. PEAK PERFORMANCE PROJECT 2011

Background

As a proposed new Vancouver radio station in 2007, 100.5 The PEAK reached out to the BC music industry and asked the question: what does the industry need in order to develop new and emerging artists?

The answer: Free digital downloads of music had led to a crisis in the music industry. Artists were finding themselves in the unenviable position of having to develop themselves with little or no help from the traditional players. On the flip side, with the explosion of online social media and digital download retailers, artists were able to take control of their own destiny. Artists need not only talent but a keen business sense.

It is this artist empowerment that is truly the essence of the Peak Performance Project. 100.5 The PEAK and Music BC Industry Association created The Peak Performance Project ("PPP"). PPP is a \$5.2 Million seven-year artist development program from the station's promised CRTC Canadian Content Development Funding that integrates education, marketing, promotion and significant funding for BC artists.

Each year more than 500 applicants vie for the Top 20 spots in the six month program which includes an intense seven-day boot camp where the artists are immersed in the development of the business and artistic skills needed to compete in today's music business environment. Each of the Top 20 is initially awarded \$5,000 for artist development initiatives and they also participate in various marketing challenges. At a series of showcases, each of the artists is judged on their performance. Finally, they are asked to prepare a report which, amongst other things, shows their demonstrated ability to market themselves successfully.

Five artists are selected by the PPP committee for further funding, where 4th place receives \$10,000 and 5th place receives \$5,000. The Top 3 artists play at a grand finale concert where the order of the Top 3 is announced. The Top 3 artists receive significant funds to enhance their careers. The winner receives \$100,500, second \$75,000 and third \$50,000. In Year 1, the winners were: We Are the City (1), The Left (2) and Bend Sinister (3). In Year 2: Kyprios (1), Said the Whale (2) and Vince Vaccaro (3). In Year 3, the winners were Current Swell (1), The Boom Booms (2) and The Matinee (3).

The Peak funding is also leveraged by sponsors such as Apple computers (Simply.ca), music equipment (Roland and Long & McQuade), merchandise (Band Merch) and in year 3 Vancouver 125 (City of Vancouver) funded the recording of 20 songs at the Bootcamp "inspired by Vancouver" for Vancouver's 125 birthday.



Success of Program

The PPP is presently in the fourth year of a seven year commitment and already has had **two JUNO Award winners (Said the Whale and Greg Sczebel)**. While long-term results will take some time to appreciate, the following represents some real tangible accomplishments from the Top 3 artists:

2010

KYPRIOS

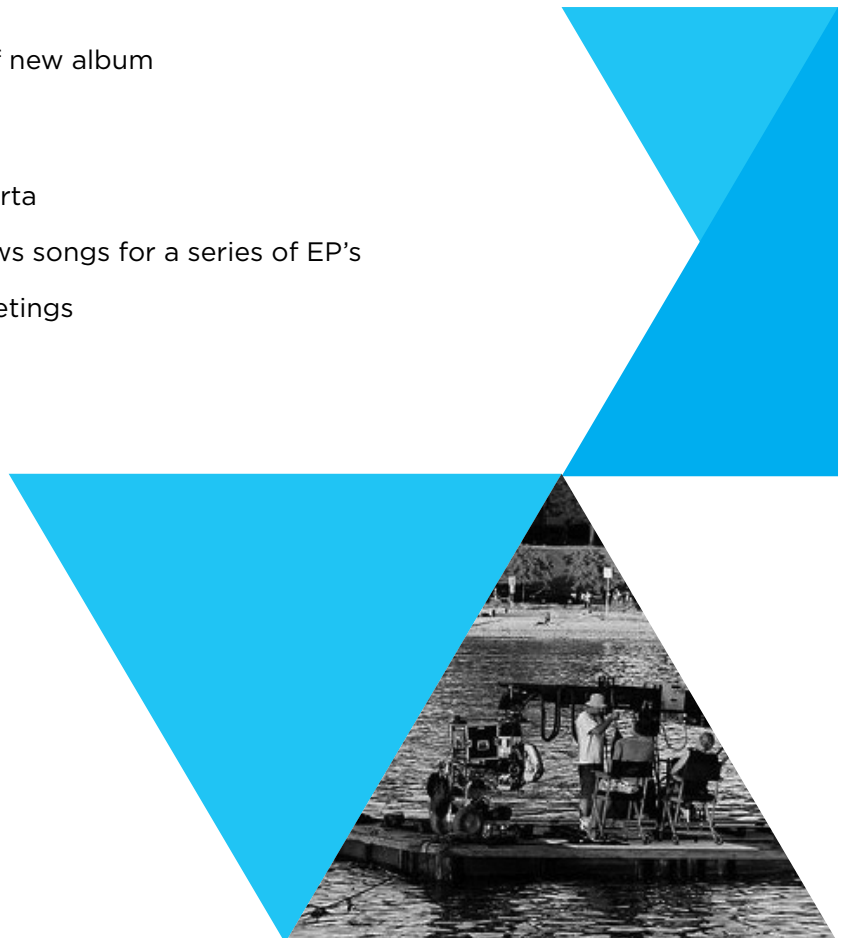
- Musician fees to move from a DJ to full band performances for key festivals such as Canada Day, Vancouver 125, Live at Squamish
- EPK filming and photo shoots, website redesign
- Mixing and mastering of single “How the West was Won” released during NHL playoffs

SAID THE WHALE

- Rehearsal space rental for pre-production of new album
- US tour including SXSW showcase
- UK tour and promotions
- Merchandise expenses
- Studio time, mixing, production of new album

VINCE VACCARO

- Heart/Mountain tour of BC & Alberta
- Studio time and production of news songs for a series of EP's
- Australia tour and networking meetings



Testimonials of the Bootcamp and Peak Performance Project Overall

With over 40 past and present faculty and hundreds of artists having participated in the PPP, the project has received a huge amount of feedback about the program. Below is a selection of these testimonials.

Grant Lawrence (CBC Radio 3): “There’s so much education going on and it’s so positive, to essentially empower musicians to go out and do it for themselves.”

Brendon Foreman (World Vision): “The music industry not only needs more of this, but needs to understand that what the PEAK Performance Project is doing here is beyond what they could get in any education process anywhere else.”

Scott Johnson (Warner Music Canada): “I’ve seen some magical moments and connections being made here that I’ll never forget.”

Warne Livesey (Producer The The, Midnight Oil): “It’s far exceeded what I ever expected, the level of talent is just stunning. It’s building artists, not only from a creative point of view, but from a business point of view.”

Greg Szebel (Year 2 Top 5): “Bootcamp changed my life. I’ve done this for eight years, right out of highschool. I’ve gone to panels and conferences, I’ve driven across Canada for it. I learned more in that 7 days at bootcamp than I did in those 8 years.”

Conclusion

As can be seen, the Peak Performance Project is proving itself to be one of the most effective artist development programs in Canada. In fact, in 2010 the program won the Canadian outstanding program award at Canadian Music Week.



B. HOW R & D FUNDS LEVERAGE PRIVATE & PUBLIC INVESTMENT AND CREATE JOBS

Omni Film Productions was founded in the late 1970s and has produced hundreds of hours of award-winning content ranging from high-budget dramatic series to blue chip documentaries to top-rated factual series and lifestyle shows.

Omni programs are broadcast in more than 70 countries around the world and are entirely export oriented, meaning that none of the customers are based in BC. All the income Omni generates (\$27 million this year) is brought into BC from other provinces and countries.

In 2008, Omni accessed \$25,000 in R & D funding from BC Film to explore a story about a unique airline operating in Yellowknife, NWT.

This concept was pitched and sold to a broadcaster and resulted in a 13-episode documentary series called “*Ice Pilots*”. That series premiered to record numbers, and since then Omni has produced a second and third season, and are well into the planning for season four. Based on that success, Omni has spun off extensive online, digital and mobile content including an iPhone/iPad app.

Perhaps most significantly, Omni is now producing a new dramatic series, “*Arctic Air*”, a high budget spin-off TV series creating new jobs in BC. “*Arctic Air*” premiered in January 2012 on CBC Television.

The total economic activity generated to date from this property alone is in excess of \$30 million. Currently Omni employs more than 200 people on both the documentary and dramatic series and that number is expected to grow. More than 95% of Omni employees are BC residents and taxpayers. The revenues Omni generates from international sales of these properties, for which they retain intellectual property rights, will be reinvested in the company and its employees.



Appendix 3: Approaches to Creative Industries Around the World

Cities, regions and countries around the world have recognized the important role that the creative industries play in the overall economy. Creative industries generate employment, attract people and spur creativity and innovation across all sectors of the economy. Research supports the concept of cities as important hubs of creative activity and notes that the creative industries in Canada are predominantly located in Toronto, Montreal and Vancouver.^{xiv}

The following examples illustrate activities undertaken to encourage the development and maintenance of creative clusters in various jurisdictions in Canada and around the world.

1. CANADA

a. Ontario's Approach

"Culture is our business"

The Ontario Media Development Corporation (OMDC) is an agency of the provincial Ministry of Tourism and Culture dedicated to supporting Ontario's creative industries in the production of film, television, music, books, magazines and interactive digital media. (www.omdc.on.ca).

As stated, OMDC's overriding mandate is to help Ontario be recognized as a leading global jurisdiction to invest in, create, produce and enjoy original cultural media product.

The organization provides:

- Content and Marketing Funds, Industry Development Programs, and Export Development Programs for these sectors;
- Tax credits for Book Publishing, Computer Animation and Special Effects, Film & Television, Interactive Digital Media, Production Services, Sound Recording programs;

According to OMDC, these industries contribute 300,000 jobs and \$12.2 billion a year to the Ontario economy.

The Ontario government stood by its commitment to the OMDC during its most recent "austerity budget" of 2012. Continuing the approach outlined in its 2010 report, the Ministry of Tourism and Culture in Ontario identified a coordinated framework to support the growth of the creative industries as a cluster in order to 'seize' the opportunities - in digital media, traditional cultural industries and across all creative industries. As the report states, OMDC provides a comprehensive approach and long-term strategy to allow and enable companies to compete domestically and globally in the production, sale and export of creative products.^{xv}



The Ontario Ministry identified six pillars as the basis for underpinning the creative industries framework in Ontario:

- Develop private investment and financing;
- Develop a global presence and market expansion
- Foster innovation and digital transition
- Develop a strong ecosystem
- Develop skills and leadership infrastructure
- Foster industry-government collaboration

As outlined on the OMDC website, this framework is designed to promote economic growth and innovation:

OMDC promotes, enhances and leverages investment, jobs, and original content creation by:

- a. contributing to the continued expansion of a business environment in Ontario that is advantageous to the growth of the cultural media industry and to the growth of new employment, investment and production opportunities in Ontario;*
- b. facilitating and supporting innovation, invention and excellence in Ontario's cultural media industry by stimulating creative production, format innovation and new models of collaboration among sectors of the cultural media industry;*
- c. fostering and facilitating co-operation among entities within the cultural media industry and between the public and private sectors to stimulate synergies in product development and the creation of products with original Canadian content;*
- d. assisting in the promotion and marketing of Ontario's cultural media industry as a world-class leader;*
- e. administering provincial tax credit programs and such other programs and initiatives as may be required by legislation or a Minister of the Government of Ontario; and*
- f. acting as a catalyst for information, research and technological development in the cultural media industry provincially, nationally and internationally.*



b. Quebec's Approach

La Société de développement des entreprises culturelles (SODEC) is a Québec government agency that supports the production and distribution of Québec culture through the creative industries. It operates under the auspices of the Ministère de la Culture, des Communications et de la Condition féminine. (www.sodec.gouv.qc.ca - English translations may vary)

As stated on the website, since 1995 SODEC has been *resolutely* fulfilling its mandate: to promote and support the establishment and development of cultural enterprises, including the media, in all regions of Québec and abroad. To fulfill its mandate, SODEC takes up the challenge of addressing both artistic creation and business development, by focusing on culture as a key economic development sector.

SODEC believes it is important to develop a deep understanding of the cultural industries and their unique business conditions. It designs its approach to be flexible and responsive to the real needs of each sector's different environments. The assistance programs and financial services are regularly reviewed. SODEC undertakes to make decisions quickly, based largely on the business plans of companies.

SODEC's directive is to provide comprehensive public financial support to companies working in the following areas:

- Books
- Music and variety
- Film and television production
- Arts training and visual arts

EXPORT ASSISTANCE

Through the Export Assistance Program, SODEC supports the international distribution of works and the development of foreign markets for cultural enterprises. Funding is provided as a grant or refundable aid.

FUNDING

SODEC administers government support for cultural enterprises to support the production and distribution of works in Quebec. As part of the various programs of film and television production, this assistance is in the form of investment in the project, grant or refundable aid.

- screenwriting
- domestic film and television production
- support for the new generation of emerging talent and integration into the regular channels of film and television production
- support for promotion and distribution of cultural works, encouraging the holding of festivals, events and promotional activities that enhance film and television production, and support for businesses that operate movie theaters



FINANCING

SODEC offers Quebec cultural enterprises the services of an investment bank. These services include term loans, revolving credit, loan guarantees and interim financing of the tax credit and, exceptionally, it invests in the project and share capital.

TAX CREDITS

The tax credits are jointly managed by Revenu Québec and SODEC. Tax credits are provided for:

- Film and television production
- Foreign production services
- Also, eligible expenditures that relate to computer-aided animation and special effects for use in an eligible production give rise to an increase in the rate of the tax credit.

2. THE EUROPEAN UNION

In November of 2011, the European Commission proposed the world's largest-ever cultural funding program under the title Creative Europe^{xv}. The initiative, which will disperse approximately \$2.4 billion between 2014 and 2020, represents a whopping 35% increase in European Union (EU) expenditures on culture, and is part of a larger pan-European goal to stimulate the economy through cultural enterprise.

Representing an average 4.5% of the region's GDP, culture and media have drawn attention in Europe as a robust sector in which they can prosper. This is in stark contrast to North American policymakers who are looking to reduce federal funding for the creative sector to balance their budgets and improve the economy.

It is estimated that half of Creative Europe funds will be allocated to the film and video industry, while \$670 million will be targeted directly toward promoting the visual and performing arts, with an estimated 300,000 artists to receive funding of some kind for cultural projects across the continent. The remainder of funding would be provided as collateral against loans up to an additional \$1.4 million for "small operators" across the various mediums.

Androulla Vassiliou, the EU Commissioner for Education, Culture, Multilingualism, and Youth, said in a statement: "This investment will help tens of thousands... to reach new audiences in Europe and beyond; without this support, it would be difficult or impossible for them to break into new markets." She emphasized the program's focus on diversity and expanding Europe's cultural horizons beyond its cosmopolitan hubs.^{xvi}



3. THE UNITED KINGDOM

The report *Creative Britain: New Talents for the New Economy* (2009) documents the United Kingdom government's approach to stimulating Britain's creative industries. The report acknowledges that global competition is growing as other countries recognize the economic value of creativity. It states that the UK's creative industries need the best possible business support structures to be in place and an abundant pool of talented people with the right skills to meet the needs of an expanding creative sector.

Underpinning the UK strategy is the belief that the creative industries must move to the mainstream of economic and policy thinking, as the government looks to create the jobs of the future. The report notes that the strategy is built upon the Government's fundamental belief in the role of public funding to stimulate creativity and sharpen Britain's creative edge.

The following are three examples of the multi-faceted and cross-sectoral approach outlined in *Creative Britain: New Talents for the New Economy*.^{xvii}

a. mediacity:UK

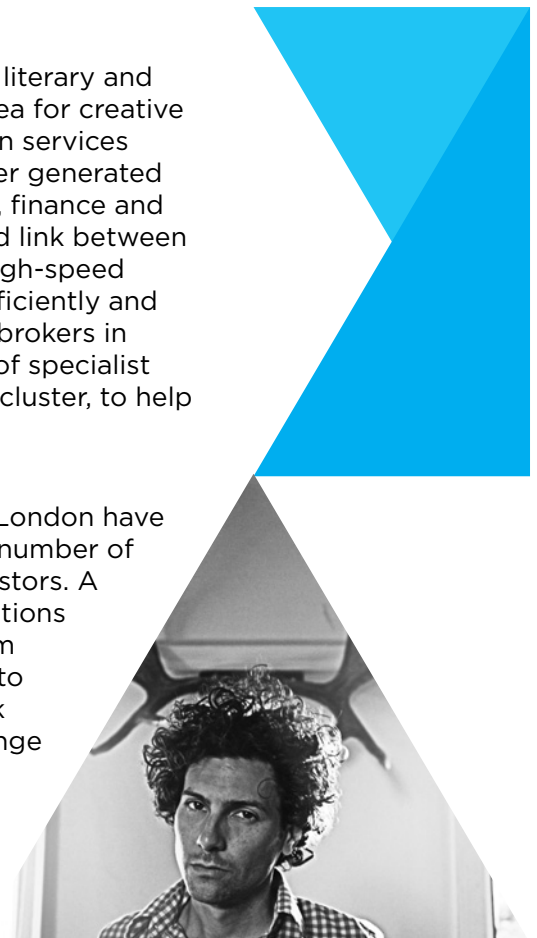
mediacity:UK is being built on 200-acres of waterfront property in the North West near Manchester. It is envisioned to be an innovative, creative hub for the UK's media industry. It will host large and small enterprises, both established and start-up firms, that create, produce and distribute content. The area is slated to be home to eight BBC departments and will include space for a 1000 media, creative and related businesses, as well as housing the UK's largest TV production studio block.

b. Film in Soho

Historically, Soho has been an entertainment area in London with literary and artistic connections and thriving music clubs. It is an attractive area for creative individuals to live and work. Over time, a cluster of film production services has developed in Soho specialising in special effects and computer generated content. The presence of the cluster has led to better networking, finance and marketing. Sohonet, a pioneering and privately funded broadband link between studios and post-production houses, started in 1995. It enabled high-speed transfer of digital content allowing the cluster to operate more efficiently and enhancing its networking capability. Several specialist banks and brokers in the area provide film finance. The cluster also includes a number of specialist marketing firms, linking the film cluster with the local advertising cluster, to help promote new films.

c. Investor-ready project for the London film industries

The London Development Agency, the UK Film Council and Film London have formed a partnership to pilot a project designed to make a small number of London-based film production companies more attractive to investors. A business opportunity was identified in the area of unfulfilled ambitions of private equity funds to invest in UK film production. The UK film production sector clearly required further business development to secure that type of investment. The new partnership aims to work with film companies who are willing and able to rise to the challenge to overcome current structural and financial obstacles that are deterring investors.



4. AUSTRALIA

In its recent research paper *Arts and Creative Industries* (February 2011), the Australia Council for the Arts grappled with the issues of funding for artists (or content creators) and supporting the broader creative industries. Undertaken by leading academics, the report suggests looking at the creative “ecosystem” as a whole. They define this as “the spatial infrastructures, the educational structures, the legal and technical services, the ‘soft’ infrastructure of identity, networking and inspiration.”^{xviii}

The authors find that a combination of cultural, social, economic and urban expertise has been growing in cities and regions in Australia and across the globe, and has been under-utilized by their national policy makers. The report concludes there could be a greater collaboration between the agencies involved with art, media and design and other social and economic agendas.

Following this report, in May of 2011 the Australian government announced its first creative industries initiative - \$10 million in new funding for artists. “The initiative is to support artists across all art forms to deliver new artistic works, undertake fellowships and create additional presentations to Australian audiences over the next five years, as part of the Government’s commitment to invest in a creative Australia.”^{xix}

5. SINGAPORE

Singapore developed a strategy aimed at establishing its reputation as a new Asian cross-sectoral creative hub. Among the list of international creative industries it has succeeded in attracting are international film financing company RGM Holdings, electronic games developer Koei Company, Ltd. from Japan, and automotive and product design studio BMW Designworks USA. In addition, 53 foreign media companies have set up regional headquarters or hubs there in the last four years.^{xx}



- i See reports from the United Nations (UNCTAD) “Creative Economy Report” 2008 and 2010; The Conference Board of Canada, “Valuing Culture: Measuring and Understanding Canada’s Creative Economy”, August 2008; and Martin Prosperity Institute’s report “Ontario in the Creative Age”, February, 2009.
- ii United Nations (UNCTAD), “Creative Economy Report 2008”, p. 28.
- iii See the reports noted in i above.
- iv PricewaterhouseCoopers, “Opportunity BC 2020: Creative Sector”, 2009, p. 2.
- v See Ontario Ministry of Tourism and Culture’s report “Ontario’s Entertainment and Creative Cluster: A Framework for Growth”, 2010.
- vi PricewaterhouseCoopers, “Global Entertainment and Media Outlook: 2011-2015”.
- vii The Conference Board of Canada, pp. 4-5.
- viii Dwayne Winseck, “Are Google, Facebook and Apple the saviors of old media?”, Globe and Mail Tuesday, May 31, 2011. (www.globeandmail.com)
- ix PricewaterhouseCoopers, “Opportunity BC 2020: Creative Sector”, pp. 5-6.
- x The Conference Board of Canada, p. 37.
- xi Based on the section *Future Returns on Investment* in Ontario Ministry of Tourism and Culture, “Ontario’s Entertainment and Creative Cluster: A Framework for Growth”, 2010, p. 28.
- xii Sources for these snapshots: Ministry of Tourism, Sport and the Arts, “British Columbia’s Creative Industries: Convergence is Our Future”, Draft Discussion Paper, November 2007; and Ontario Media Development Corporation’s Industry Profiles, www.omdc.on.ca.
- xiii British Columbia Film + Media, Annual Activity Report, 2010-2011.
- xiv Conference Board of Canada, pp. 2 and 8.
- xv Ministry of Tourism and Culture, “Ontario’s Entertainment and Creative Cluster: A Framework for Growth”, 2010, pp. 14-15.
- xvi Art Info, “EU Plans Largest-Ever Arts Funding Program, Pinning Economic Hopes on Culture Industry”, November 23, 2011, <http://artinfo.com/news/story/751658/eu-plans-largest-ever-arts-funding-program-pinning-economic-hopes-on-culture-industry>.
- xvii Department of Culture Media and Sport (UK), “Creative Britain – New Talents for the New Economy”, 2009, pp. 47, 57 and 60.
- xviii Australia Council for the Arts, “Arts and Creative Industries”, February, 2011, p. 6.
- xix Australia Council for the Arts, Media Release: “The Australia Council for the Arts welcomes the budget announcement of \$10 million in new funding for artists”, May 11, 2011. (<http://www.australiacouncil.gov.au/news>)
- xx United Nations (UNCTAD), “Creative Economy Report 2008”, pp. 179-180.



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