



**City of Kingston
Report to Council
Report Number 21-114**

To: Mayor and Members of Council
From: Peter Huigenbos, Commissioner, Business, Environment & Projects
Resource Staff: Colin Wiginton, Cultural Director, Cultural Services
Date of Meeting: April 6, 2021
Subject: Creative Industries Profile Sector Report and Strategy

Council Strategic Plan Alignment:

Theme: 4. Strengthen economic development opportunities

Goal: 4.2 Foster Innovative arts, culture and social enterprises

Executive Summary:

The purpose of this report is to share with Council an inventory of the creative industries in Kingston and a strategy that outline recommendations on how they can be better supported and expanded to develop the sector and enhance economic development opportunities. This is an initiative identified in Council's Strategic Priorities (2019-2022) and the recommendations as outlined in the Creative Industries Strategy are included in the Integrated Economic Development Strategy previously reviewed and approved by Council through [Report Number 21-012](#) on December 15, 2020. An earlier staff report providing an update on the draft Creative Industries Profile Sector Report was provided to the Arts Advisory Committee on November 5, 2020.

The Creative Industries Strategy is a supplementary document to the Integrated Economic Development Strategy that lays the foundation for strategies, tactics and targeted activities that will create a sustainable and thriving ecosystem to support business growth, start-ups, investment attraction and opportunities in the community. Extensive community consultation was completed to develop and validate the recommendations identified as part of the Creative Industries Strategy that outlines the vision and opportunities to grow the sector in Kingston. The Strategy identifies three key subsectors for investment and growth, including film, music and

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theatre, and recognizes the strength of Kingston's heritage sector that provides a competitive advantage as well as a unique foundation upon which creative industries can grow.

Implementation of the Creative Industry Strategy and recommendations it identifies will be led by the City of Kingston, through the Cultural Services Department, working in partnership with the Kingston Economic Development Corporation and Tourism Kingston and the Kingston Film Office, in particular. Other key community partners will include Queen's University and St. Lawrence College along with sector-specific businesses, organizations and creatives. Work is also currently underway to establish an implementation plan and prioritize immediate, short and long-term actions.

Recommendation:

That Council endorse the Creative Industries Profile Sector Report and Strategy attached as Exhibit A to Report Number 21-114; and

That Council direct staff to work with key partners to establish an implementation plan and prioritize immediate, short and long-term actions specific to the Creative Industries Strategy included as part of the Kingston Integrated Economic Development Strategy.

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Authorizing Signatures:

ORIGINAL SIGNED BY COMMISSIONER

**Peter Huigenbos, Commissioner,
Business, Environment &
Projects**

ORIGINAL SIGNED BY CHIEF
ADMINISTRATIVE OFFICER

**Lanie Hurdle, Chief
Administrative Officer**

Consultation with the following Members of the Corporate Management Team:

Paige Agnew, Commissioner, Community Services	Not required
Brad Joyce, Commissioner, Corporate Services	Not required
Jim Keech, President & CEO, Utilities Kingston	Not required
Desirée Kennedy, Chief Financial Officer & City Treasurer	Not required
Sheila Kidd, Commissioner, Transportation & Public Works	Not required

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Options/Discussion:

Among Council's current Strategic Priorities (2019-2022) is the priority to "strengthen economic development opportunities" and to "foster innovative arts, culture and social enterprises". In support of these Strategic Priorities, staff identified the need to inventory the existing creative industries in Kingston and to determine how they can be best supported and expanded to develop the sector and enhance economic development outcomes. This work has begun with the development of a Creative Industries Profile Sector Report and Strategy (Exhibit A).

In April 2020, staff within the Cultural Services Department began work to develop this document in alignment with the creation of a joint Integrated Economic Development Strategy between the City of Kingston and Kingston Economic Development Corporation. Stiletto Consulting, which was already working to develop the Integrated Economic Development Strategy, was contracted to develop a creative industries strategy to ensure alignment and integration.

Creative industries are recognized globally as key economic drivers. The United Nations Educational, Scientific and Cultural Organization (UNESCO) defines creative industries as those sectors of organized activity that have as their main objective the production or reproduction, the promotion, distribution or commercialization of goods, services and activities of content derived from cultural, artistic or heritage origins. This includes publishing, performing arts, music, film and video, museums and cultural heritage, crafts and visual arts, architecture, audiovisual and interactive media, advertising, fashion, television and radio and design. As of 2017, it is estimated creative industries in Ontario generate \$12.2 billion in gross domestic product (GDP) annually, which is larger than Ontario's energy industry and approaching 70% of the auto manufacturing sector, and surpasses the GDP of the agriculture, forestry and mining sectors combined.

The Creative Industries Strategy also recognizes the impact of COVID-19 on the sector which has been especially hard hit and will be among the slowest to recover. It also recognizes the reality of new economic conditions and factors impacting the Kingston community, region and country and provides direction regarding how to plan accordingly. To support recovery, as well as long-term sustainability, it is imperative that all levels of government work in collaboration with the not-for-profit sector and industry partners to locate and produce necessary supplies, keep industry and businesses afloat and safeguard the health of the population.

Kingston's Creative Industries Profile Sector Report and Strategy was completed in October 2020 and recommendations were subsequently embedded within the Integrated Economic Development Strategy that Council reviewed and approved through [Report Number 21-012](#) on December 15, 2020. This Council Report provides background information specific to the development of the Creative Industries Profile Sector Report and Strategy itself, including the recommendations identified and the next steps required.

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Purpose and Goals

The purpose of the Creative Industries Profile Sector Report and Strategy is to provide a clear and accurate description of the City's creative sector. It offers a framework and strategy to assist the City of Kingston, its partners, and creative industries businesses, entrepreneurs and creatives to work together to grow and support the sector.

The goal of the Strategy is to outline the areas of strength and opportunity in the Creative Industries that can act as catalysts for development, encouraging short and long-term GDP growth through focused investment in three emerging creative subsectors, including film, music and theatre.

Critical to the success of the Integrated Economic Development Strategy as well as this strategy is the ability to leverage Kingston's value propositions that include:

- 1) access to more than 14.5 million people in the Toronto-Ottawa-Montreal corridor;
- 2) the existence of a large domestic tourist market;
- 3) the ability to attract international post-secondary students in high volumes; and
- 4) the existence of one of the highest concentrations of PhDs in Canada.

Methodology and Public Consultation

For the purposes of this Strategy, a creative industries classification system was utilized as shown in Table 1 that includes four main "sectors" (heritage, arts, media and functional creations) along with key sub-sectors and further defined categories.

Figure: Table 1

Sector	Sub-sector	Categories
Heritage	Traditional Cultural Expression	Festivals, exhibitions
	Cultural Sites	Libraries, archeological sites, historical sites and buildings, artist hubs
Arts	Visual Arts	Paintings, sculptures, photography, antiques
	Performing Arts	Live music, theatre, dance, opera, circus, music
Media	Publishing and Printing	Books, newspapers, other publications
	Multimedia	Film, television, radio, other broadcasting
Functional Creations	Design	Interior, graphic, fashion, jewelry
	Creative Services	Architectural, advertising, creative R&D
	New Media	Software development, video gaming, digitized creative content

More than 380 data points were collected by Stiletto Consulting as part of the secondary data aggregation and analysis. That process included the following assessments:

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- Asset mapping;
- 20 one-on-one consultations with key stakeholders;
- A quantitative survey with locals that generated 62 responses;
- A global trend review; and
- An exemplary jurisdiction review.

Additionally, as part of developing the Integrated Economic Development Strategy, a public survey was facilitated online through the City of Kingston's [Get Involved public engagement platform](#). The survey sought input on potential sector clusters, tactics to advance growth as well as ways to measure success. The online survey also included one targeted question specific to creative industries in Kingston. The survey was open for three weeks and a total of 375 surveys were completed.

Key takeaways that emerged from the process of data gathering included the following points that build on the fact positive momentum already exists in relation to creative industry business counts in Kingston:

- **Community Assets**
 - Kingston boasts a total of 236 assets in the creative industries, including infrastructure, programs, services, amenities, community meeting places, historical sites, libraries, museums and art galleries.
 - Kingston has a relatively balanced, wide variety of assets in all four main sectors as defined.
 - Heritage was slightly larger in terms of representation, reflective of Kingston being Canada's museum capital with 24 museums and historic sites and three art galleries, along with numerous designated historical buildings.
 - Among the sectors, live music had a good portion of the overall inventory.
- **Business Counts**
 - The City's creative industries included a total of 340 businesses in 2019, increasing 58% over five years, creating positive momentum and growing at an exponential rate in the City.
 - The 61% growth rate in the creative industries over five years exceeds growth in other 2-Digit North American Industry Classification System (NAICS) level sectors, including agriculture (57.1%) and information (45.5%).
 - The sector represented 2.6% of total Kingston businesses, including those with and without formal employment and unclassified businesses. This percentage was low compared to provincial (6.5%) and national (6%) rates.
- **Workforce**
 - The City's creative industries had a total workforce of 1,417 in 2019, increasing 4% since 2014.
 - Motion picture and video production saw the largest workforce growth through 2014-2019.

The Strategy identifies three emerging creative industries subsectors for investment and growth in Kingston that include film, music and theatre. The intent is to focus on these three subsectors

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over the next five to ten years with other subsectors to be interwoven and integrated where appropriate and as opportunities arise, including visual arts, heritage and Indigenous heritage and culture.

Strategy Framework

The vision as set out in the Strategy intends to establish Kingston as a City that fully supports the emerging creative industries ecosystem and where creative businesses and entrepreneurs can live, work and thrive. By acting collaboratively, Kingston is a destination of choice for a wide range of creative industry producers and consumers. Also, the intent is that the implementation of the Strategy and the recommendations identified will be led by the City of Kingston, through the Cultural Services Department, working in partnership with the Kingston Economic Development Corporation.

Key partnerships with Tourism Kingston and the Kingston Film Office, along with Queen's University and St. Lawrence College, are also essential to deliver on the metrics as intended that include the following:

- Contributes to GDP growth;
- Supports increased number of business start-ups and growth;
- Drives tourism related to key creative industry categories;
- Builds and leverages creative assets;
- Increases collaborative ventures among cultural producers; and
- Increases intellectual property creative levels for commercialization within Creative Industries.

Results derived from the industry and workforce analysis, stakeholder feedback and comparable jurisdictions have been analyzed and condensed into a total of 15 recommendations grouped within six themes as outlined below.

Theme: Build a Creative Industries Narrative - to elevate Kingston's Creative Industries narrative, both locally and beyond, promotion and storytelling is key.

1. Promote Kingston's Creative Industries sector and reputation through existing and new promotion and marketing campaigns and platforms that align with the Kingston Integrated Economic Development Strategy.
2. Create a local creative industries campaign that highlights the creative industries ecosystem in Kingston and celebrates and showcases the local creatives who live and work here.
3. Engage in collaborative and participatory future creative industries storytelling campaigns and programs that align with City strategies that support the promotion of diverse cultures and histories.

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Theme: Support Emerging Creative Industries - film, music and theatre have the potential to create sustainable growth within the creative industries in Kingston.

4. Target sector-specific measures and develop strategies for emerging subsectors including film, music and theatre, to enable economic development, support economic recovery due to the impact of the pandemic, maintain activity and enhance growth in high profile and high potential creative industry sectors.
5. Establish greater alignment between the municipality, economic development and business agencies, community partners and organizations to reduce barriers across creative industries sector.

Theme: Offer Business Skills and Training - offer tactical business skills and education to sustain and strengthen Kingston creative businesses and ventures.

6. Work in partnership with Kingston innovation ecosystem partners to leverage existing programming to support the growth and development of creative industry businesses and entrepreneurs. Add a creative industries “track” to the existing programming such as accelerator programs, incubators, workshops and educational programming to provide entrepreneurship programming and services to creatives and artists to transform ideas into cultural business, products and services.
7. Explore existing business support funding programs available at the municipal, provincial and federal levels and through the economic development agencies. Identify programs that may assist businesses with seed funding.
8. Examine best practices for digital platforms to sustain communication and the flow of knowledge within the creative industries sector itself and between the City, business and tourism partners, and community.

Theme: Facilitate Partnerships and Collaboration - leverage partnerships and neighbouring jurisdictions to expand bandwidth to provide Kingston creatives with greater support, funding and visibility.

9. Establish a Creative Industries Working Group that will include representatives from the creative and cultural sector, and representatives from business, tourism, post-secondary institutions and the municipality. This group will inform and advise on strategic direction to develop the Creative Industries sector in Kingston, while championing Kingston as a choice location for creative industries to locate.
10. In partnership with Queen’s University and St. Lawrence College, identify new pure and applied research and development funding programs that may be available.
11. Build collaborative partnerships with communities outside of Kingston to share best practices, cross-promote activities, and provide programs and support to Kingston creatives. Continue to nurture relationships with other municipalities through the Canadian Creative cities Network.

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Theme: Identify, Develop and Make Available Sustainable Spaces and Places - creatives benefit from affordable and accessible working and collaboration space and help build their networks and resources.

12. Leverage and create greater awareness for existing venues such as libraries, public parks and other public spaces available throughout the City for creative industries, with a particular focus on the performing arts.
13. Identify existing spaces that can be re-thought and re-animated through the creative industries, to help create greater accessibility for the sectors to interact and collaborate.

Theme: Support Diversity and Inclusion - this will bring new voices to Kingston's creative sector, diversify leadership and present new opportunities to a broader range of creatives.

14. Undertake research to better understand issues of diversity in the sector and emerging subsectors.
15. Establish diversity and inclusion commitments for the creative industries and develop measurements for reporting to help support continuous improvement.

Next Steps

The recommendations as identified are intended to ignite the imagination and explore the possibilities that exist in relation to the creative industries in Kingston. Additional work is still needed to establish an implementation plan that includes prioritizing the recommendations and identifying and allocating the resources necessary to drive results and to foster economic growth.

Staff have consulted with key partners to develop this report, including representatives from the Kingston Economic Development Corporation, Tourism Kingston and the Kingston Film Office. Over the next few months, staff will continue to meet with these, and other key partners including Queen's University and St. Lawrence College, to establish and execute the implementation plan for creative industries. At the same time, focused work will begin to implement a series of recommendations in the short-term that include the following:

- 1) Establishing a creative industries working group that aligns with the other identified priority clusters.
- 2) Define and promote a long-term film strategy that builds on the success of the Kingston Film Office to date.
- 3) Develop strategies and action plans for priority focus areas including music through the development of a 'Music City' strategy for Kingston and including theatre that includes strengthening community partnerships to enhance sector development opportunities.

The key partners have also identified a desire to focus on the following recommendations:

- 4) Telling the story and promoting the creative industries through marketing campaigns.
- 5) Leveraging existing programming to create Creative Industries "tracks" in accelerator programs, incubators and workshops.

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6) Supporting diversity and inclusion as part of all immediate recommendations.

Staff will report back to Council through the Arts, Recreation & Community Policies Committee in either late 2021 or early 2022 with a progress update regarding the status of the implementation plan and the work completed to date. In the meantime, staff within the Cultural Services Department will also be pursuing work to support the music and theatre subsectors as identified. That includes beginning work on a 'Music City' strategy for Kingston as well as the renewal of a Service Level Agreement with the Kingston Theatre Alliance. The latter will include providing Council with a separate report for consideration later this spring that will enable the Cultural Services Department to continue to partner with the Kingston Theatre Alliance to professionalize and promote the sector and to support the presentation of the annual Kick & Push Festival in 2021.

Existing Policy/By-Law:

None

Notice Provisions:

None

Accessibility Considerations:

None

Financial Considerations:

The development of the Creative Industries Profile Sector Report and Strategy cost \$45,000 and involved the use of a single source contract to ensure alignment with the higher-level Integrated Economic Development Strategy being developed by Stiletto Consulting on behalf of the Kingston Economic Development Corporation. This contract was reported through [Report Number 20-226](#). Staff later expanded the work and engagement, which cost an additional \$7,500.

Budget to support immediate actions to be led by the City of Kingston in support of creative industries, including the development of a music strategy, has been approved as part of the Cultural Services' Departments existing capital budgets. It is anticipated that additional budget will need to be allocated to support this work in the mid and long-term as part of the 2022 City budget process and beyond.

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Other City of Kingston Staff Consulted:

Danika Lochhead, Manager, Arts and Sector Development, Cultural Services

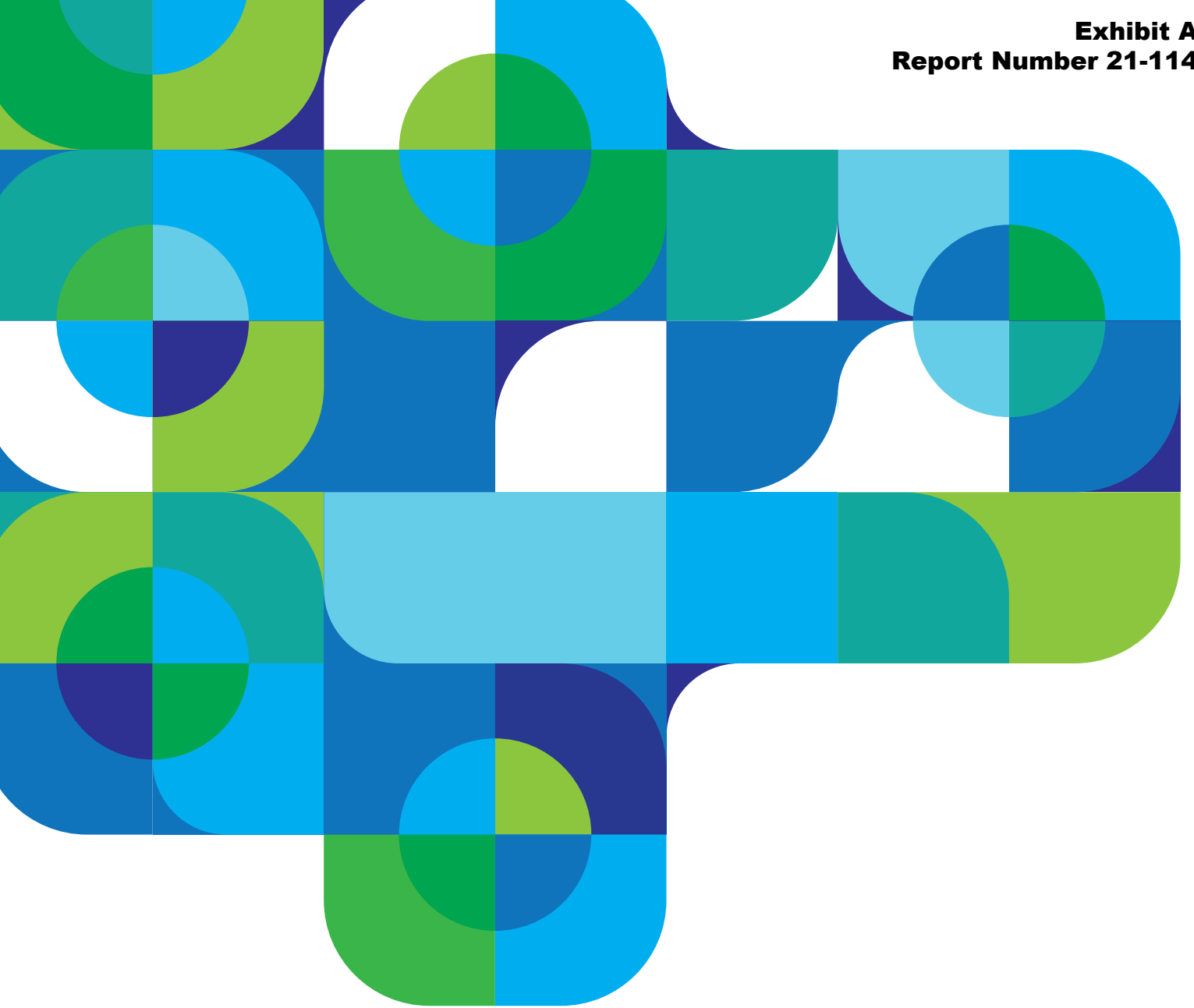
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Craig Desjardins, Director, Office of Strategy, Innovation and Partnerships

Exhibits Attached:

Exhibit A Creative Industries Profile Sector Report and Strategy, City of Kingston



CREATIVE INDUSTRIES

City of Kingston

October 2020



STILETTO

Foreword

REPORT SCOPE

The Creative Industries Profile Sector Report has been developed by the City of Kingston to provide additional information regarding the potential that exists in Kingston specific to the creative industries. It provides an inventory of the existing creative industries in Kingston along with recommendations on how they can be better supported and expanded to develop the sector and enhance economic development opportunities. Recommendations included in this report are also embedded in the Integrated Economic Development Strategy (IEDS). Implementation of the recommendations will take place in partnership with Kingston Economic Development, the City of Kingston Cultural Services Department and other key stakeholders within the community.

REPORT METHODOLOGY

More than 380 data points were collected as part of the secondary data aggregation and analysis. The process has included the following assessments:

- Asset Mapping;
- One-on-one Consultations with Key Stakeholders;
- A Quantitative Survey with Locals;
- A Global Trend Review; and,
- An Exemplary Jurisdiction Review.

Details on market trends, impacted sectors, strategy reports, and other substantive information have been considered in the formulation of the report's recommendations.

Conclusions are based on analysis of information at the time of report preparation and are subject to change with market conditions. *The evolving nature of the COVID-19 pandemic has made mid- to long-term forecasting a special challenge. To that end, baseline data (2019) and other available data (January 2020 to current) have been included and sourced to clearly date pre- and post-COVID information.*

STAKEHOLDER CONSULTATIONS

A total of 20 one-on-one meetings took place during the development of this report. An online survey was developed and distributed to members in the community and the Creative Industries. A total of 62 individuals participated in the survey.

Discussions were had with industry representation from the film, music, performing arts, visuals arts, books / published materials, and creative services industries, as well as from heritage and cultural sites.

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Executive Summary

There is a significant opportunity for Creative Industries in Kingston.

With access to 14.5 million people (40 percent of the total Canadian population), Kingston is uniquely positioned to leverage its market access and excellence in tourism performance to drive new growth potential for creative industry product development and delivery.

Creative Industries in Kingston includes Heritage, Arts, Media, and Functional Creations. The industry is supported by more than 236 Creative Industries assets including infrastructure, programs, services, amenities, community meeting places, historical sites, libraries, museums, and art galleries. Heritage was slightly larger, reflective of Kingston being Canada's museum capital with 24 museums and historic sites, three art galleries, and numerous historical buildings.

Two primary sectors of Film and Music and a tertiary sector of Theatre have emerged as the leading areas for economic growth potential in Kingston based on trends in current performance, feedback from stakeholder engagement and market research, total community assets and overall business count and workforce momentum.

Overall the City of Kingston's Creative Industries had a total of 340 businesses in 2019, increasing 58 percent over the last five-year period (2014

to 2019). As a result of this growth, a greater emphasis on supporting the Creative Industries Entrepreneurs has been included as one of the six themes included in the strategy framework.

The strategy framework includes six themes, five enablers and 15 recommendations. Recommendation themes include 1) Build a Creative Industries Narrative, 2) Support Emerging Creative Industries, 3) Offer Business Skills and Training, 4) Facilitate Partnership and Collaboration, 5) Identify, Develop, and Make Available Sustainable Spaces and Places, 6) Reinforce Diversity and Inclusion.

The five enablers to support the execution of the recommendations include areas that can be leveraged to maximize overall outcomes including: 1) Kingston Heritage, 2) Funding Potential, 3) Educational Institutions, 4) Tourism, and 5) Advantageous Location.

This Creative Industries Profile Sector report has been developed to provide an inventory of the existing creative industries in Kingston and recommendations on how they can better be supported and expanded to develop the sector and enhance economic development opportunities. Recommendations contained in this report have been included in the Kingston Integrated Economic Development Strategy (a joint initiative between the City of Kingston and Kingston Economic Development).

About the Creative Industries Report

PURPOSE OF THE SECTOR PROFILE REPORT

The purpose of the Creative Industries Profile Sector Report is to provide a clear and accurate description of the city's creative sector. It offers a framework and strategy to assist the City of Kingston, its partners, and creative industries businesses and entrepreneurs to grow and support the sector.

The goal of the Sector Profile Report is to outline the areas of strength and opportunity in the Creative Industries that can act as catalysts for development, encouraging short- and long-term GDP growth within the city. This report also identifies three emerging sub-sectors for focused investment that are represented in a strategy framework with recommendations.

Recommendations from the Sector Profile Report are embedded in the Kingston Integrated Economic Development Strategy, which is a joint strategy between the City of Kingston and Kingston Economic Development Corporation. The Integrated Economic Development Strategy will identify new economic development opportunities and initiatives that can strengthen the local economy by increasing job opportunities and growing the local gross domestic product (GDP).

A STRATEGIC PRIORITY FOR THE CITY OF KINGSTON

Globally, Creative Industries are recognized as key economic drivers. As of 2017, it was estimated that these combined industries generated \$12.2 billion CAD in GDP for Ontario's economy annually, and was number one in Canada by GDP.¹ The Government of Ontario reported that Creative Industries GDP "is now larger than Ontario's energy industry, is approaching 70 per cent of the auto manufacturing sector, and surpasses those of agriculture, forestry, and mining sectors combined."² The City of Kingston recently recognized the importance of the Creative Industries sector as part of its Strategic Priorities for 2019-22: to strengthen the City's economic development opportunities and foster innovative arts, culture, and social enterprises. To support this Council Priority, the City of Kingston has completed a Creative Industries inventory, investigating how they can be better supported and expanded to develop the sector and enhance economic development opportunities.

THE KINGSTON VALUE PROPOSITION

1. Kingston has access to more than 14.5 million people in the Toronto-Ottawa-Montreal corridor. No other Canadian Census Metropolitan Area (CMA) has such a large population base within a three-hour radius.
2. Kingston has a very large domestic tourist market. No other CMA attracts more Canadian tourists than Kingston, relative to population size.
3. Kingston has an ability to attract international post-secondary students in high volumes. It has the second largest number of international students among CMAs in Ontario.
4. Kingston has one of the highest concentrations of PhDs in Canada.

Creative Industries can leverage value proposition one and two specifically, building new product in the Creative Industries to drive economic development return for the City of Kingston.

DEFINITION AND PROFILE OF CREATIVE INDUSTRIES

DEFINITION

The definition of “Creative Industries” is as varied as the arts themselves. It is necessary to have a strong definition at the research outset to determine which industry areas will be included, and to have consistent and comparable statistics for future analysis.

For the purposes of this report, two of the major frameworks were considered, one Canadian and one international. Statistics Canada’s Canadian Framework for Culture

Statistics (2011) defines culture as “creative, artistic activity and the goods and services produced by it, and the preservation of heritage.”³ There are six possible criteria for inclusion, “the most notable representing the requirement for a product’s potential for copyright protection. Other criteria relate to goods and services that support the creation, production, dissemination, or preservation of culture. In the Canadian context, we exclude explicit measures of the environment, tourism, and information technology from the definition of culture.” The overall domains are Heritage and Libraries, Live Performance, Visual and Applied Arts, Written and Published Works, Audio-visual and Interactive Media; and Sound Recording.⁴

The international classification of Creative Industries was developed by the United Nations Conference on Trade and Development as part of their Creative Economy Report (2008). According to UNESCO, Creative Industries “includes goods and services produced by the cultural industries and those that depend on the innovation, including many types of research and software development.”⁵ The report divides Creative Industries as part of four broad groups: heritage, arts, media, and functional creations.

For the purposes of this research, the UNESCO domains have been incorporated to reflect the unique Kingston cultural environment: Heritage, Arts, Media, and Functional Creations (Figure 1 provides a complete classification and list of sub-sectors). Following the Canadian example, tourism has been considered as out of report scope but is one of the enablers supporting the sector.

PROFILE OF THE CREATIVE INDUSTRIES SECTOR

For Creative Industries in the City of Kingston, there are three components: Primary Sectors, Sub-sectors, and Categories. There are four Sectors: Heritage, Arts, Media, and Functional Creations. Each Sector has multiple Sub-sectors which each have their own list of Categories. For example, the Heritage Sector is made up of Traditional Cultural Expressions and Cultural Sites. Cultural Sites is then further subdivided into the Categories of libraries, archeological sites, historical sites and buildings, and artist hubs.

For the purposes of this report, Sectors, Sub-sectors, and Categories can be defined as follows:

Sectors: The broadest classification of Creative Industries, sectors refer to the four main grouping of all Creative Industry Sub-Sectors and Categories.

Sub-Sector: Classification of Creative Industries sectors into more specific buckets. Sub-Sectors includes broad sectors that fall within Heritage, Arts, Media, and Functional Creations.

Categories: Specific classifications of Creative Industries Sub-sectors. Include specific activities and potential areas of focus within each Sub-sector.

“Creative economy is not a single superhighway, but a multitude of different local trajectories ...”

UNESCO, Creative Economy Report

Figure 1: Profile of the Creative Industries sector in Kingston

Sector	Definition⁶	Sub-sector	Categories
Heritage	Defined as art that includes cultural aspects, whether it be historical, anthropological, or ethnic. It is associated with traditional knowledge and is often expressed through traditional cultural festivities	Traditional Cultural Expression	Festivals, exhibitions
		Cultural Sites	Libraries, archeological sites, historical sites and buildings, artist hubs
Arts	Art is that is inspired by “heritage, identity or symbolic meaning”	Visual Arts	Paintings, sculptures, photography, antiques
		Performing Arts	Live music, theatre, dance, opera, circus, music
Media	Media content that is used to communicate to large groups	Publishing and Printing	Books, newspapers, other publications
		Multimedia	Film, television, radio, other broadcasting
Functional Creations	Creations that are services-oriented and serve a functional purpose	Design	Interior, graphic, fashion, jewelry
		Creative Services	Architectural, advertising, creative R&D
		New Media	Software development, video gaming, digitized creative content

For the purposes of this report, we are assessing which specific Categories will become Sub-sectors of note (Emerging Sub-sectors) within the Kingston context.

Report Vision, Mission, and Target Outcomes

VISION

Kingston is a city that fully supports the emerging Creative Industries ecosystem, where creative businesses and entrepreneurs can live, work, and thrive. By acting collaboratively, Kingston is a destination of choice for a wide range of Creative Industries, producers, and consumers.

MISSION

The City of Kingston Cultural Services Department, in partnership with Kingston Economic Development, will leverage the city's assets to drive investment and business growth in the Creative Industries.

METRICS FOR SUCCESS

1. Contributes to GDP growth.
2. Supports increased numbers of business start-ups and growth.
3. Drives tourism related to key creative industry categories.
4. Builds and leverages creative assets.
5. Increases collaborative ventures among cultural producers.
6. Increases intellectual property creation levels for commercialization within Creative Industries.

TARGET OUTCOMES

The following target outcomes have been identified for the Creative Industries Profile Sector Report and recommendations:

1. Growth in the identified core sectors within the City of Kingston.
2. Cluster development within identified sub-sectors.
3. A cohesive economic development approach for Creative Industries to align with the overall vision(s) for the City of Kingston and Kingston Economic Development.
4. Identification of short-term Creative Industries opportunities that can drive immediate results for overall economic development for the region.
5. Identification of long-term Creative Industries opportunities that can support the long-term economic development plan for the City of Kingston.
6. Identification of short-term and long-term Creative Industries opportunities to support business expansion, and potential investment attraction to the City of Kingston.

Kingston's Baseline Data for Creative Industries

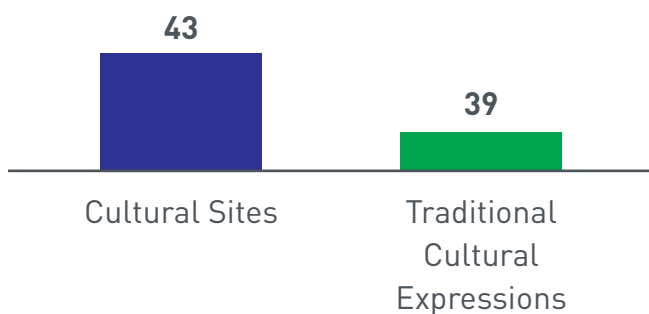
COMMUNITY ASSETS

As a result of the asset inventory (Fall 2020), Kingston boasted a total of 236 assets in the Creative Industries. Creative Industries assets included infrastructure, programs, services, amenities, community meeting places, historical sites, libraries, museums, and art galleries. Individuals artists who contributed to the Creative Industries are classified separately and are not included in this total.

HERITAGE SECTOR

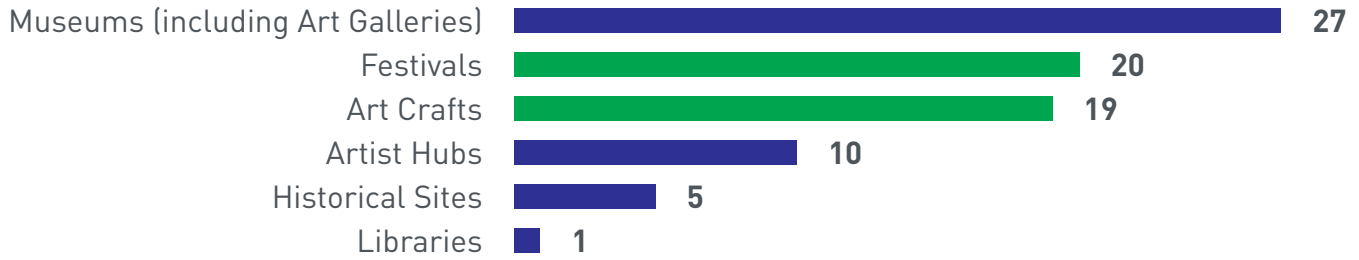
The Heritage Sector had two sub-sectors and six categories within the sub-sectors. The sector consisted of more than 82 assets including 36 companies. Assets included the Tett Centre for Creativity and Learning, the Kingston Association of Museums, Art Galleries and Historic Sites, Fort Henry, the Multicultural Arts Festival, and the Agnes Etherington Art Centre.

Figure 2: Total numbers of Heritage sector assets in Kingston by sub-sector, 2020



- | **249** Creative Industries assets
- | **61% growth** in new business from 2014-2019 (2nd highest growth sector)
- | **2.6%** of total Kingston business
- | Photography, graphic design, and music bands **growing the fastest** by number of businesses
- | Ontario has the **largest cultural industries sector in the country**, accounting for almost half of all cultural industries GDP in Canada and 3.3% of Ontario total GDP
- | **Creative industry exports are a priority** for the federal and provincial governments
- | Creative industries are **4%** of total Kingston workforce
- | Motion picture and video production saw the **largest workforce growth**
- | **More than 2000** local PSE graduates a year

Figure 3: Total numbers of Heritage sector assets in Kingston by category, 2020



ARTS SECTOR

Within the Arts Sector there were two sub-sectors and eight categories within the sub-sectors. The sector boasts more than 58 assets including 23 venues. Assets include The Grand Theatre, The Isabel Bader Centre for Performing Arts, The Leon’s Centre, and The Dan School of Drama and Music at Queen’s University.

Figure 4: Total number of Arts sector assets in Kingston by sub-sector, 2020

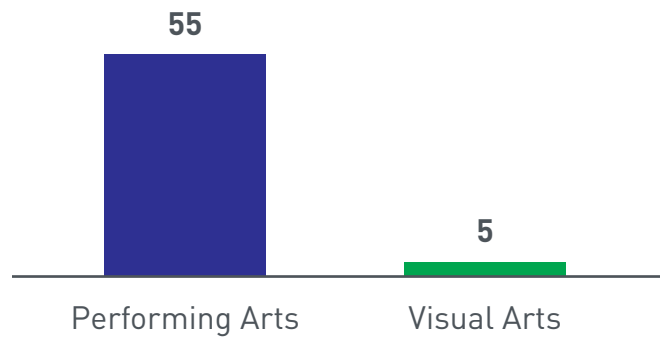
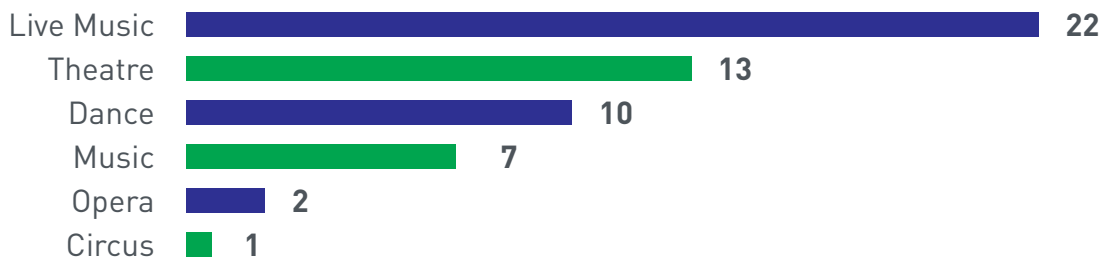


Figure 5: Total number of Arts sector assets in Kingston by category, 2020



MEDIA SECTOR

Within the Media Sector, there were two sub-sectors and seven categories within the sub-sectors. The sector was made up of more than 52 assets, including more than 30 companies. Assets included The Film Office, The Screening Room, The Kingston Whig Standard, and 105.7 K-Rock FM.

Figure 6: Total numbers of Media sector assets in Kingston by sub-sector, 2020

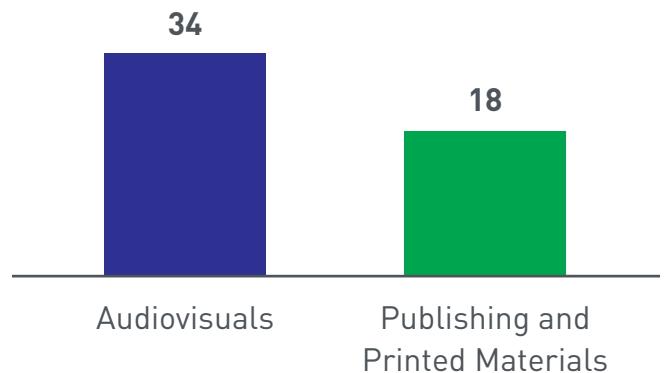
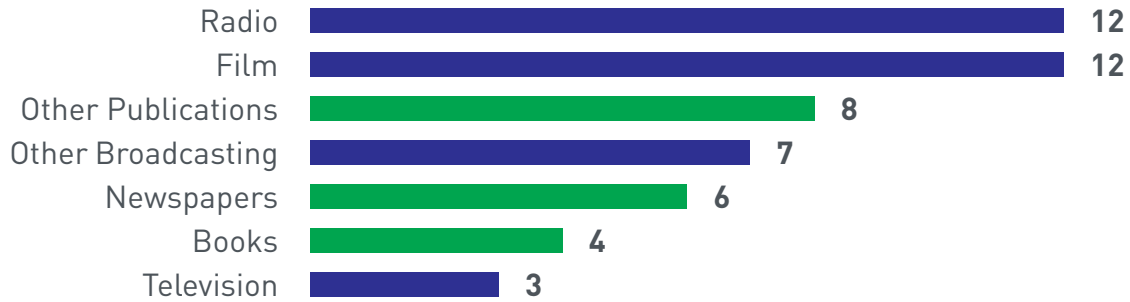


Figure 7: Total numbers of Media sector assets in Kingston by category, 2020



FUNCTIONAL CREATIONS SECTOR

The Functional Creations Sector was comprised of three sub-sectors with 10 categories within the sub-sectors. The sector was made up of more than 42 assets, including three companies. Key assets include St. Lawrence College’s Digital Marketing and Communication program of Applied Arts, HDR Architects, and the Okwaho Equal Source Action Lab.

Figure 8: Total number of Functional Creations sector assets in Kingston by sub-sector, 2020

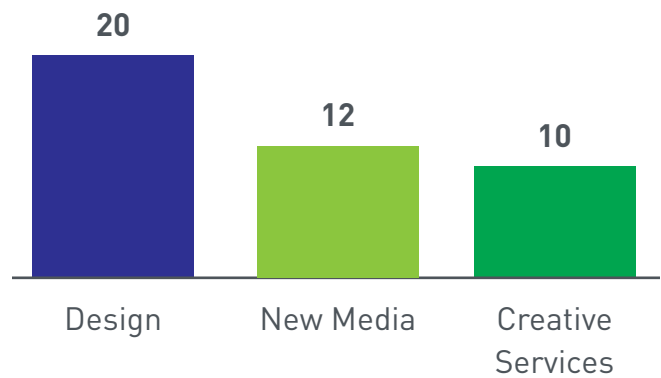
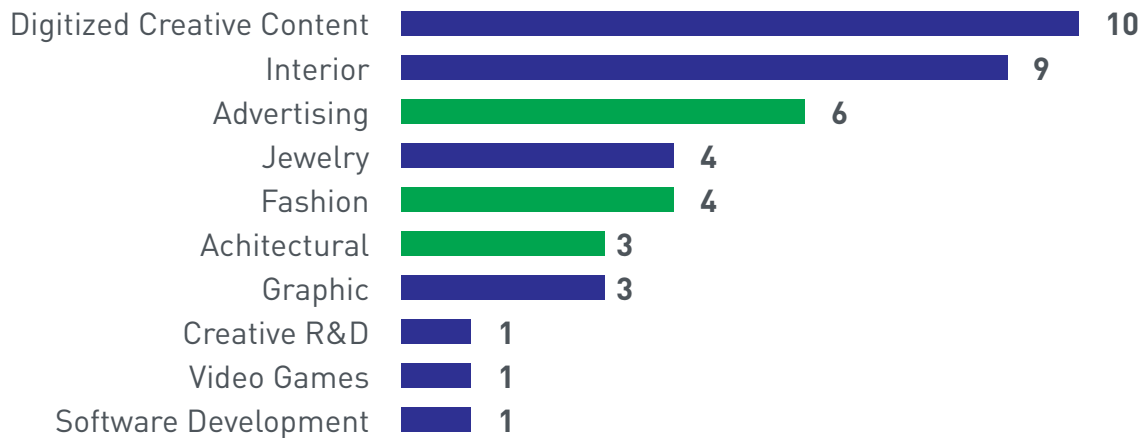


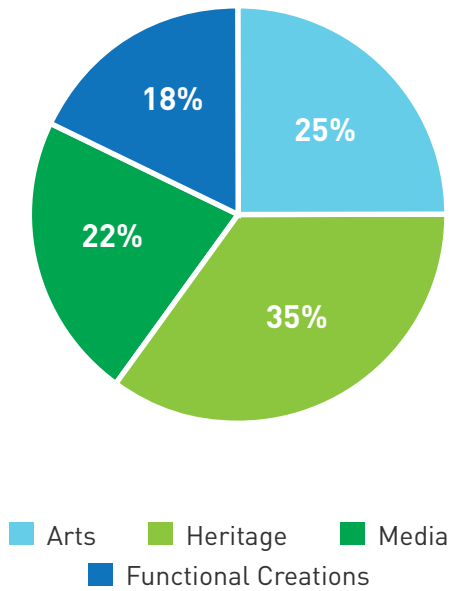
Figure 9: Total numbers of Functional Creations sector assets in Kingston by category, 2020



Key takeaways: This asset inventory demonstrates that **as of Fall 2020, Kingston had a relatively balanced, wide variety of assets in all four main sectors** (Figure 10). Heritage is slightly larger, which is reflective of Kingston being Canada’s museum capital with 24 museums and historic sites and three

art galleries, and the number of historical buildings.⁷ Among the sectors, live music has a good portion of the overall inventory (nine per cent of all category assets), though this result might be higher due to the interplay between categories (e.g., festivals, radio).

Figure 10: Percentage split of Creative Industries assets, Kingston, 2020



TOTAL BUSINESS COUNT

To determine Kingston’s total business count in the Creative Industries, North American Industry Classification System (NAICS) codes were used to assess unit and percentage change for various outputs at a 2-Digit, 4-Digit, and 6-Digit level.

According to Statistics Canada data, the City of Kingston’s Creative Industries had a total of 340 businesses in 2019, increasing 58 per cent during the previous five years. The large increase can be attributed the growth (or increased reporting) of businesses without formal employment, which saw a growth rate of 112 per cent between 2014 and 2019. This category included the self-employed (i.e., those who do not maintain an employee payroll, but may have a workforce of contracted workers, family members, or business owners, and have a

minimum of \$30,000 in annual revenue).⁸ Businesses with formal employment, in contrast, saw a small loss of 0.5 per cent.

Kingston’s creative industries represented 2.6 per cent of total Kingston businesses (or 13,145 businesses). These totals included businesses with and without formal employment, and unclassified businesses. The percentage of Creative Industries sector businesses was low compared to provincial and per national rates at 6.5 per cent and six per cent, respectively. Analysis conducted from the data indicated strong growth in the music, film, and visual arts industries, with photography services, graphic design, and musical groups seeing the largest business count growth from 2014 to 2019. Figure 11 shows a detailed breakdown of the ten 6-Digit NAICS with highest business count growth from 2014 to 2019.

The new media, publishing and printed materials, fashion, and advertising categories saw the lowest growth by Business Count from 2014 to 2019. Figure 12 shows a detailed breakdown of the ten 6-Digit NAICS with lowest business count growth from 2014 to 2019.

In looking at other Kingston sectors, Creative Industries had more businesses as 2-Digit NAICS levels for manufacturing (128), transportation and warehousing (119), real estate (138), finance and insurance (187), or wholesale trade (133).

Figure 11: Highest business count growth, by percentage, by 6-Digit NAICS, Kingston, 2014-19

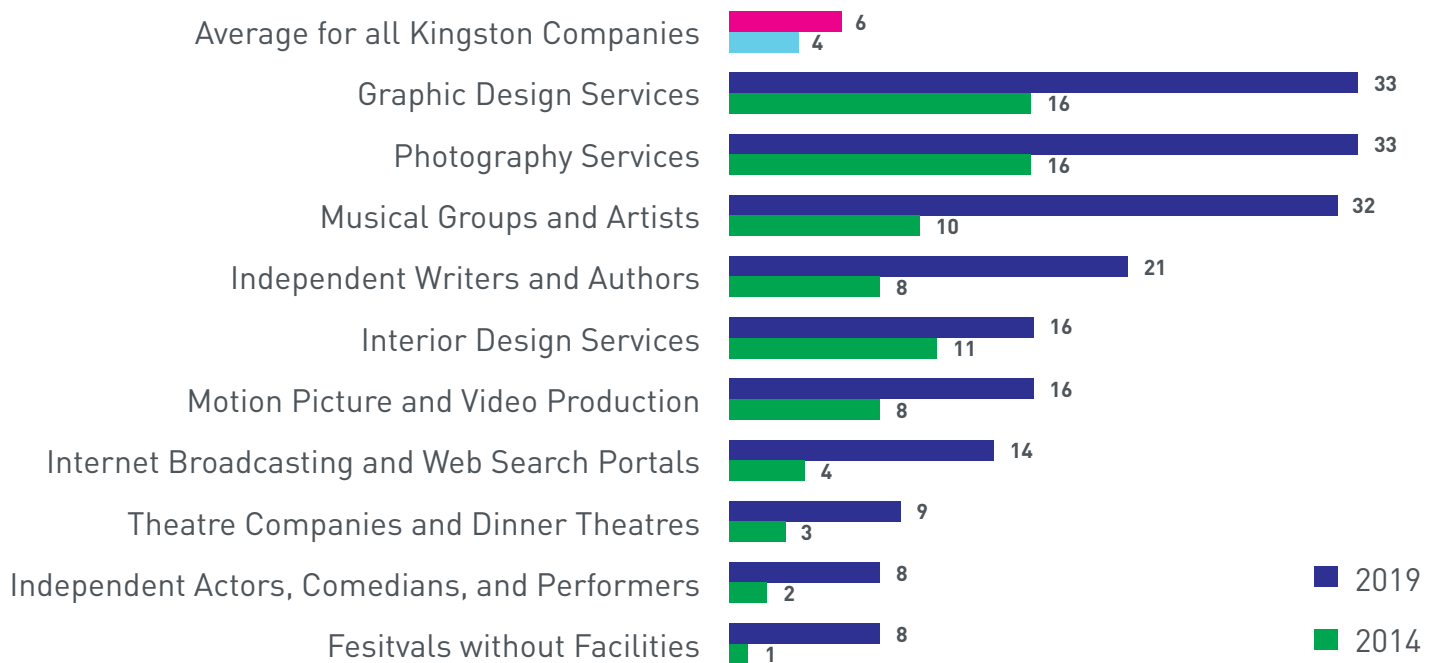
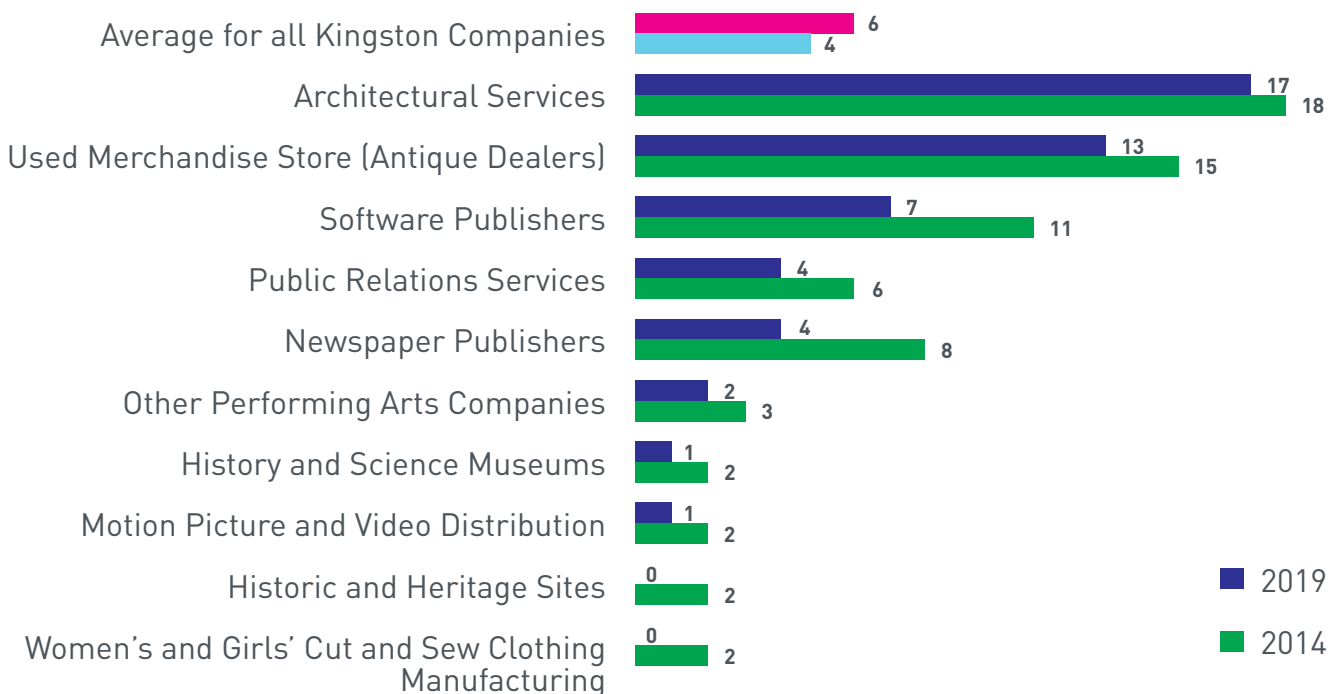


Figure 12: Lowest business count growth, by percentage, by 6-Digit NAICS, Kingston, 2014-19



Key takeaways: There was positive momentum in the Kingston Creative Industry business counts. The entire creative sector was growing at an exponential rate in the city, though size / revenues of organizations require further investigation. The 61 per growth

rate in Creative Industries in five years far exceeds growth in other 2-Digit NAICS level sectors such as agriculture (57.1%), information (45.5%), and mining and quarrying (28.6%), but not as much as utilities (100%).

TOTAL CONTRIBUTION TO GDP

Canada: In 2017, the Creative Industries accounted for more than \$53.1 billion CAD in GDP, 2.7 per cent of Canada's overall GDP, and more than 666,500 direct jobs (or 1.5 %).⁹ The largest contributor to culture GDP and jobs "was audio-visual and interactive media, which includes activities related to video game publishing, film, television and video production, as well as motion picture exhibition."¹⁰ Cultural industries accounted for 3.6 per cent of all Canadian jobs in that year.¹¹

The 2017 economic impact of the culture industries "outpaces that of agriculture, forestry, fishing and hunting (\$39 billion), accommodation and food services (\$46 billion) and utilities (\$46 billion) culture industries also have eight times more economic impact than what is provided by sports."¹²

On a per sector basis, broadcasting, interactive media, multimedia published works, and film and video pulled the highest GDP numbers in 2017. By the next year (2018), growth in the Information and Cultural Industries (NAICS 51) sector in Canada increased by two per cent over the previous year while the Canadian Economy level (NAICS 11-91) increased 2.2 per cent.¹³

Ontario: In 2017, Ontario's cultural GDP was more than \$24.97 billion CAD, with the highest provincial GDP per capita of any province at \$1,765. As a result, Ontario has the largest cultural industries sector in the country, accounting for almost half of all Canadian cultural industries GDP. It also had the highest percent share of all provinces / territories at a 3.3 per cent share of the total economy.¹⁴

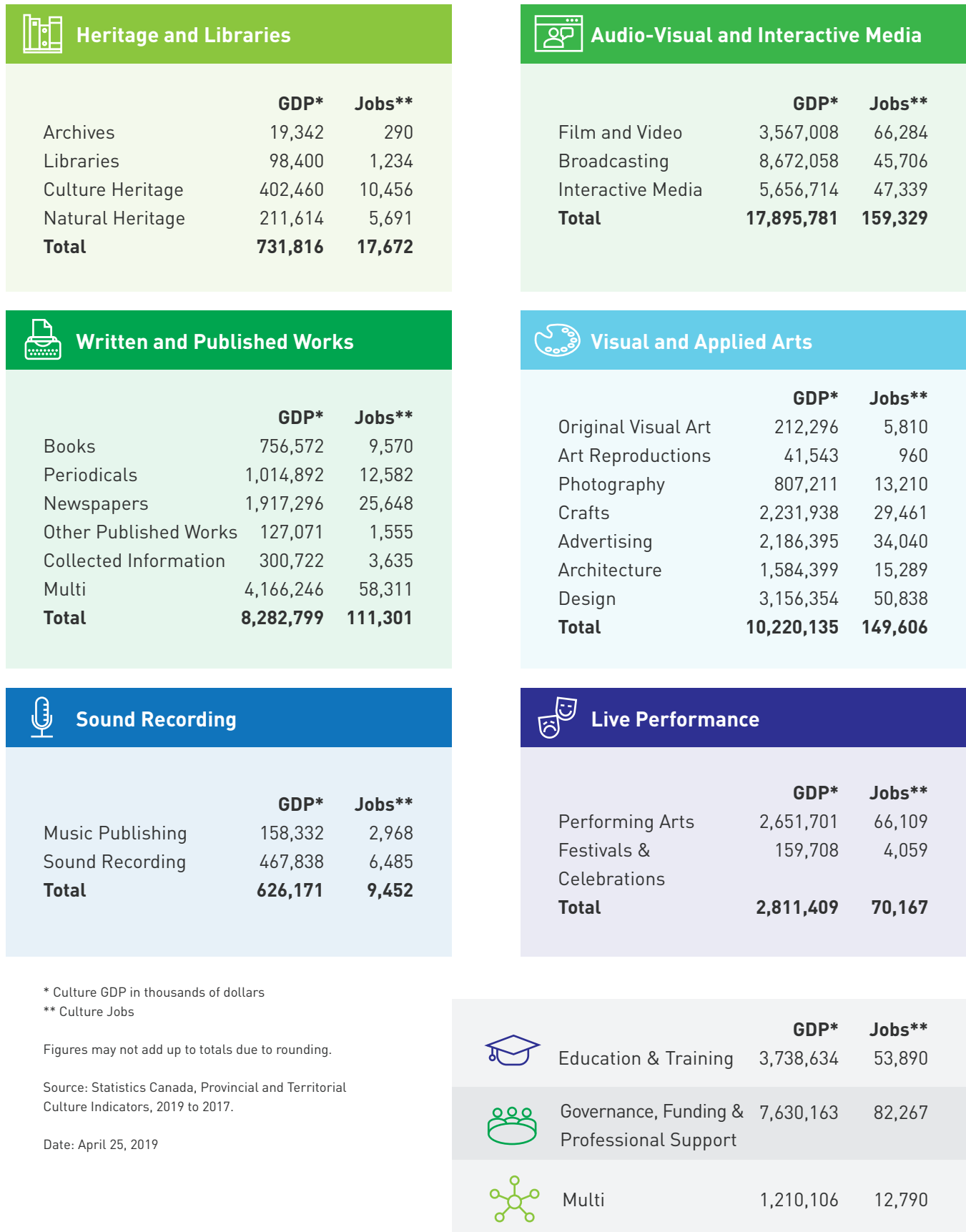
The GDP change from 2017 to 2018 was lower than that of Canada at 1.3 per cent, growing from \$27.54 billion CAD to \$27.88 billion CAD. Ontario ranked about midpoint in GDP growth amongst the provinces and territories, with Nunavut, Quebec, Yukon, Manitoba, PEI, Nova Scotia, and British Columbia with higher creative industry GDPs.¹⁵

Kingston: In 2016, Kingston's GDP was 8.7 billion, growing at a rate of 16 per cent from 2012. Kingston ranks midpoint amongst all Canadian CMAs in terms of GDP, and seventh in terms of GDP growth from 2012 to 2016.¹⁶

The Cultural Industries' contribution to Kingston was unknown for this period. If the Cultural Industries were 2.2 per cent of overall Canadian GDP in 2017, however, then a very broad proxy at the Kingston level would be \$48.4 million CAD.

Ontario has the largest cultural industries sector in the country, accounting for almost half of all Canadian cultural industries GDP. It also had the highest percent share of all provinces / territories at a 3.3 per cent share of the total economy.

Figure 13: Culture industry GDP and jobs, Canada, by sector, 2017¹⁷



* Culture GDP in thousands of dollars
** Culture Jobs

Figures may not add up to totals due to rounding.

Source: Statistics Canada, Provincial and Territorial Culture Indicators, 2019 to 2017.

Date: April 25, 2019

Source: Canadian Heritage, Government of Canada

Figure 14: Status and projected growth of Creative Industry categories, Canada and Ontario

Group	Sub-Sector	NAICS	Category	Ontario Businesses (2019)	Canadian Businesses (2019) ¹⁸	Ontario % of Canadian Businesses	Kingston Businesses (2019)	Kingston % of Ontario Businesses	Global CAGR*
HERITAGE	Traditional Cultural Expression	7113	Promoters (Presenters) of Performing Arts, Sports, and Similar Events	1,330	4,586	29%	8	0.60%	9.0% (2021-23) ¹⁹
	Cultural Sites	7121	Museums, Historical Sites, and Similar Institution	541	2,164	25%	8.5	1.60%	7.0% ²⁰ (2021-23)
		5191	Other Information Services	2,987	6,789	44%	2	0.07%	n/a
ARTS	Visual Arts	5419	Other Professional, Scientific, and Technical Services	21,750	53,049	41%	33	0.15%	n/a
		4533	Used Merchandise Stores	936	2,463	38%	13	1.40%	n/a
	Performing Arts	7111	Performing Arts Companies	4,513	11,572	39%	41	0.90%	8.0% (2021-23) ²¹
		7113	Promoters (Presenters) of Performing Arts, Sports, and Similar Events	1,330	4,586	29%	8	0.60%	9.0% (2021-23) ²²
		5122	Sound Recording Industries	2,308	5,629	41%	3	0.13%	6.0% (2021-25) ²³
MEDIA	Publishing and Printed Materials	5111	Newspaper, Periodical, Book, and Directory Publishers	2,308	10,990	39%	5	0.21%	1.6% (2020-27) ²⁴
	Audiovisuals	5121	Motion Picture and Video Industries	8,785	20,430	43%	26	0.30%	5.0% (2021-23)
		5151	Radio and Television Broadcasting	828	1,971	42%	9	1.09%	3.5% (2017-26) ²⁵
		5191	Other Information Services	2,987	6,788	44%	14	0.47%	n/a

Figure 14: Status and projected growth of Creative Industry categories (con't)

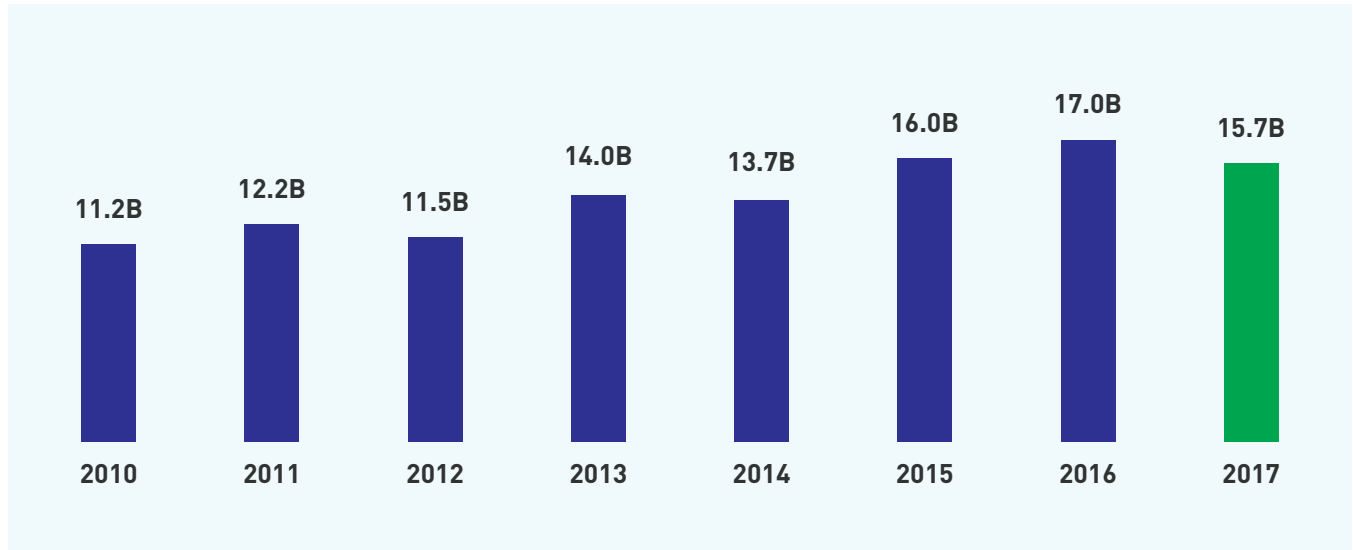
Group	Sub-Sector	NAICS	Category	Ontario Businesses (2019)	Canadian Businesses (2019)	Ontario % of Canadian Businesses	Kingston Businesses (2019)	Kingston % of Ontario Businesses	Global CAGR*
FUNCTIONAL CREATIONS	Design	5414	Specialized Design Services	9,799	21,776	45%	49	0.50%	13% (2019-22) ²⁶
		3152	Cut and Sew Apparel Manufacturing	726	2,342	31%	5	0.69%	n/a
		3399	Other Miscellaneous Manufacturing	413	1,252	33%	3	0.70%	n/a
	Creative Services	5414	Specialized Design Services	9,799	21,776	45%	8	0.08%	13% (2019-22) ²⁷
		5413	Architectural, Engineering, and Related Services	2,773	7,110	39%	17	0.61%	4.8% (2017-25) ²⁸
		5418	Advertising, Public Relations, and Related Services	9,040	20,089	45%	33	0.37%	8.0% (2020-23) ²⁹
	New Media	5112	Software Publishers	1,565	3,068	51%	7	0.45%	10.91% (2018-22) ³⁰

Source: Statistics Canada, 2019

Note: Certain categories are located in more than one sector.

EXPORT OF CULTURAL INDUSTRIES

Figure 15: International export trade of culture products, Canada, \$CAD, 2010-17³¹



Top 5 Countries

-  United States
\$9.5 billion
-  China
\$695.7 million
-  United Kingdom
\$486.8 million
-  Germany
\$442.0 million
-  France
\$384.2 million

Top 5 Subdomains

-  Crafts
\$4.2 billion
-  Film and Video
\$3.0 billion
-  Governance, Funding & Professional Support
\$1.2 billion
-  Design
\$1.1 billion
-  Performing Arts
\$900 million

Source: Canadian Heritage, Canada Council for the Arts

Note: As Creative Industries' export levels are not available for Kingston, Canadian and Ontario GDP are used as proxies.

Canada: The Trade of Culture and Sport Products (TCSP) provides measures of the international and interprovincial trade of goods and services attributed to both culture and sport (inclusive of the arts and heritage). In 2017, Canada exported \$15.7 billion CAD in cultural products, down 7.6 per cent from 2016. The categories with the largest export volumes were crafts (\$4.2 billion CAD) and film and video (\$2.9 billion CAD). The United States, the EU, and China were the three largest export markets.^{32,33}

In addition, in 2019 the federal government released a tri-part Creative Export Strategy supporting Creative Industries in achieving international business objectives. A number of trade missions specific to cultural industries have been recently planned, as well as virtual export seminars. The three pillars of this strategy include:

- “Positioning creative industries for export and sales in foreign markets, and bolster funds available through existing programs: Canada Arts Presentation Fund, Canada Book Fund, Canada Music Fund, Canada Periodical Fund, and Telefilm Canada.
- Increasing capacity at Canada’s embassies and consulates to help Canadian Creative Industries succeed in key export markets, including but not limited to: New York, Paris, London, Los Angeles, Berlin, Shanghai, Mumbai, Mexico City, and Tokyo.

- Growing Canadian Creative Industries by funding export ready projects through the Creative Export Canada program and build the relationships needed to make business deals via trade missions, events and partnerships.”³⁴

Ontario: Export expansion in this sector is a major Ontario government policy initiative, especially in the areas of film, interactive digital media, and music. And Ontario commands a major share of the national cultural industries exports. For example, exports have driven growth in Canada’s music publishing industry “with more than two-thirds of revenues coming from foreign sources in 2017, compared to when it was less than one-third in a 2005 study. This complete reversal of business activity has a bottom-line impact: according to Statistics Canada, total industry revenues increased from \$118.6 million CAD in 2005 to \$329 million CAD in 2017. Music publishing revenues accrue largely in Ontario, with 92 per cent of revenues being associated with Ontario headquarters.”³⁵

Key takeaways: There is a growing international market for Canadian cultural products. Export does not have to be with major industry categories, but can also reside at the cottage industry level, like crafts. Film and music are major focus areas for both the provincial and federal governments, and there is funding to be gained for local creative businesses.

TOTAL WORKFORCE

According to Statistics Canada data, the City of Kingston's Creative Industries had a total workforce of 1,417 in 2019, increasing four per cent since 2014. Workforce growth mirrored business count growth, with some minor differences. Motion picture and video production saw the largest workforce growth through 2014 to 2019, with libraries and theatre companies and dinner theatres also seeing strong workforce growth. Figure 16 presents a detailed breakdown of the ten 6-Digit NAICS with highest workforce growth from 2014 to 2019.

Broadcasting, software publishing, and post-production and other motion picture and video industries saw the lowest workforce growth from 2014 to 2019. Figure 17 presents a detailed breakdown of the ten 6-Digit NAICS with lowest workforce growth from 2014 to 2019.

Figure 16: Highest workforce growth, by percentage, by 6-Digit NAICS, Kingston, 2014-19

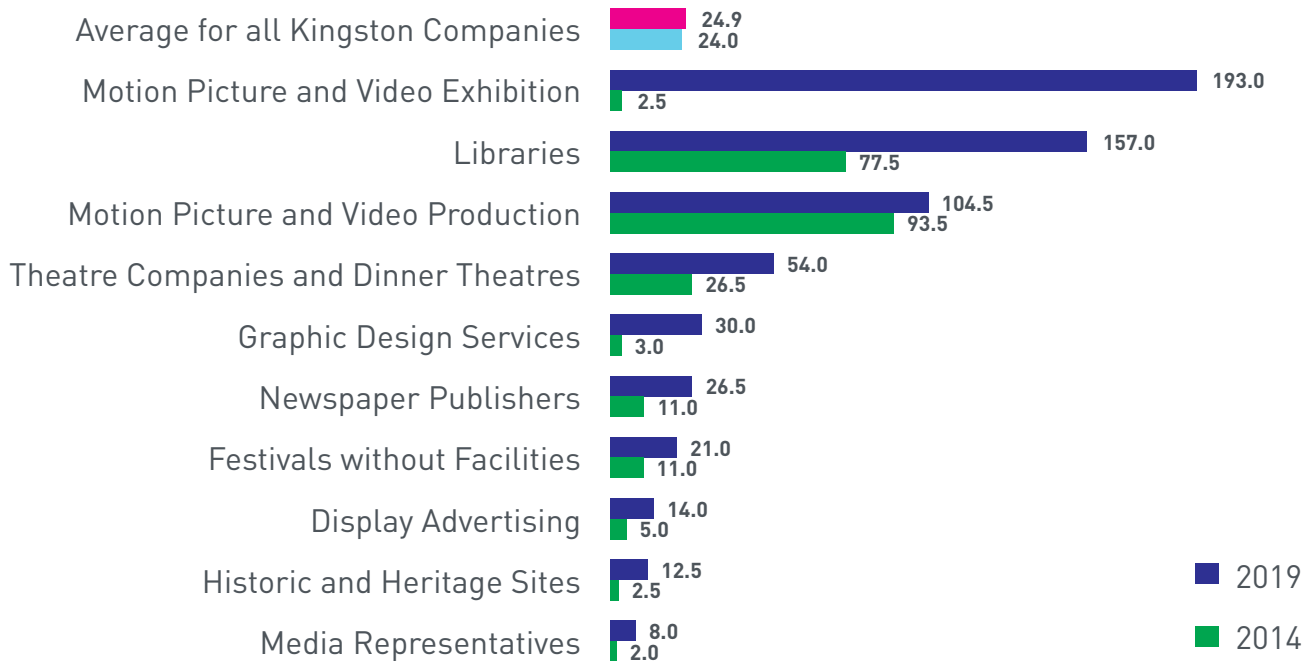
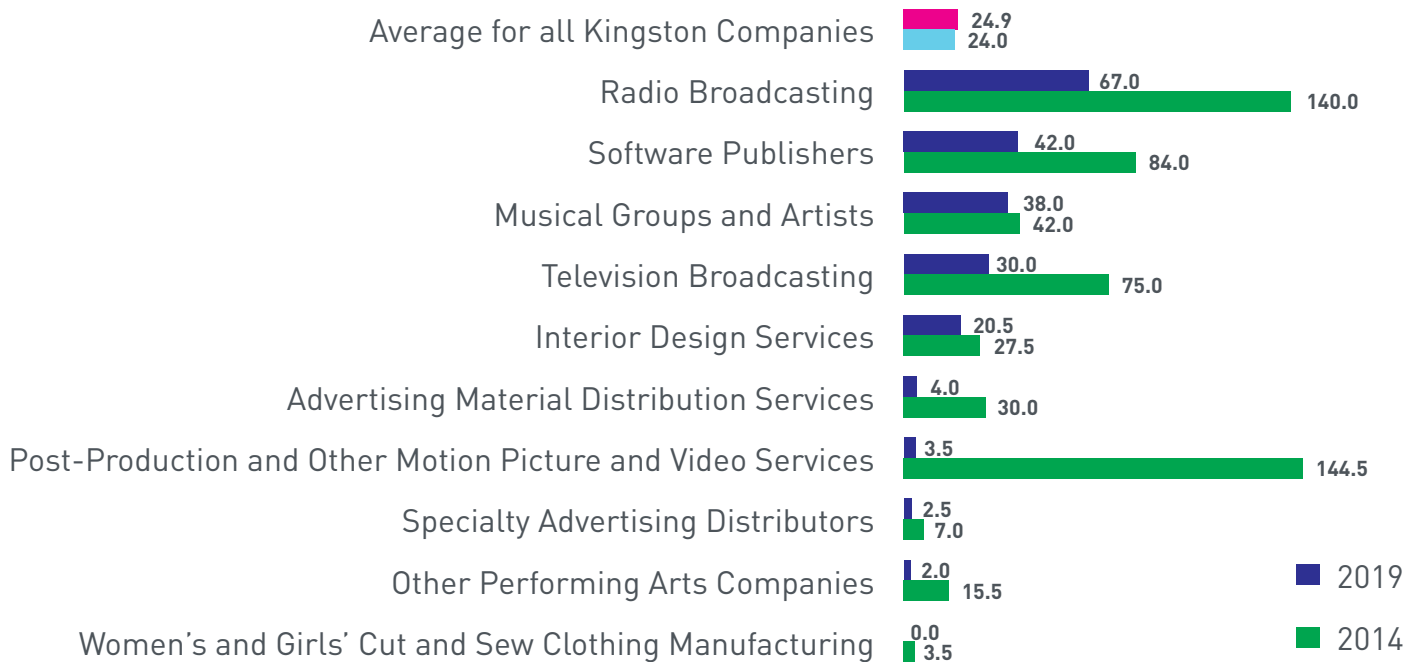


Figure 17: Lowest workforce growth, by percentage, by 6-Digit NAICS, Kingston, 2014-19



As stated previously, employment in the Creative Industries sector saw growth by approximately four per cent (1,417 persons) from 2014 to 2019. The number of Creative Industries employees as a part of the general Kingston workforce was also four per cent, which mirrored that of Canada as a whole (3.96%).³⁶ The following inferences can be made about Creative Industries sector employment (Figure 18):

- The top three sectors account for 0.6 per cent of total Kingston employees.
- There is a huge drop-off between the third and fourth place sectors, making the impact of film (motion picture exhibition and associated products combined) even more profound. Together, they garner a 0.4 per cent of Kingston employment.

- As a significant cultural industries employer, public and post-secondary libraries and library staff need to be leveraged for overall support of other creative sectors, and as creative producers in themselves.
- It is unknown how many of these employees focus on the digital side of their profession (e.g., online journalists and bloggers, digital display advertising, born-digital theatre productions).

Those Industries that came in fourth place and lower, all together, are only half of the substantial amount of people working in film (146 in total vs. 298).

Figure 18: Highest growth creative industry categories, by employees, Kingston, 2019

Creative Industries Sector	Number of Employees	Percentage of total Kingston Employees
All sectors	77,437	100%
All creative sectors	1,427	4.00%
Motion picture and video exhibition	193	0.25%
Libraries	157	0.20%
Motion picture and video production	105	0.13%
Theatre companies and dinner theatres	54	0.07%
Graphic design services	30	0.04%
Newspaper publishers	27	0.03%
Display advertising	14	0.02%
Historic and heritage sites	13	0.02%
Media representatives	8	0.01%

When looking at employment forecasts, a recent study contracted for the City of Kingston (Watson and Associates, 2019) showed an overall moderate employment growth rate: “Under the Base Case Scenario, the City of Kingston’s employment base is forecast to increase from 74,800 jobs in 2016 to 85,700 jobs in 2046. This represents a total employment increase of 10,900, or 0.5 per cent per year (363 jobs / year).”³⁷ In Figure 19, all of the creative industry growth levels in the 2017-2021 period were higher than that estimate, with even the lowest growth rates (e.g., librarians and advertising managers) coming in at double the city’s forecast. Creative Industries will bring up the city’s average regarding employment growth.

Creative Industries will also increase income levels. The most recent Census (2016) estimated per capita income for Kingston residents at \$31,772 (after taxes).³⁸ In Figure 19, the Ontario government has estimated income levels per job type. As the Ontario government figures are pre-tax, unfortunately, a direct comparison was not available. As a proxy, we can estimate a straight 30 per cent tax rate for the figures provided. Once that is done, only two occupations, movie theatre manager and actor / comedian, would fall under the current per capita income. An increase in the number of Creative Industries jobs will bring up average incomes in Kingston.

A point of interest: Watson also had forecasted a rise in the number of NFPOW (no fixed place of work) employees: “Work at home and NFPOW employment represents the remaining 22 per cent of forecast employment growth for the City, with a forecast employment increase of 1,600 between 2016 and 2046.”³⁹ As many in the creative class work at home or will be increasingly working from home because of COVID-19 aftereffects, this forecast also bodes well for the creative Kingston community.

Key takeaways: With four per cent past growth rates, above average past income levels and stable future job outlooks, the **Creative Industries will offer beneficial job choices for individuals, and will support future economic growth for Kingston.** Additional research on age, education, and other demographics of this employee group are recommended for future analysis.

Notable musical alumni, film-focused organizations, and accredited academic institutions gives Kingston multiple avenues of establishing itself as a creative hub within Ontario.

Figure 19: Creative Industries Data by Selected Occupational Categories

According to the Ministry of Labour, Training and Skills Development, Province of Ontario,⁴⁰ projected job growth in selected Ontario Creative Industries occupations will be average. Note figures do not reflect the impact of COVID-19.

Creative Industries Categories by Sample National Occupations Code (NOC)	Ontario Annual Estimated Income (pretax)	Estimated after tax income (30% rate)	Ontario Job Outlook (2017-21)	Total projected number of job openings	% change in employment levels (2017-21)
Motion picture and video exhibition – 0651: Movie theatre manager	\$33,998	\$23,799	Average	1,001-2,000	4.1% - 5.0%
Libraries – 5111: Librarians	\$73,514	\$51,460	Below Average	1,001-2,000	1.1% - 2.0%
Motion picture and video production – 5131: Producers, directors, choreographers, and related occupations	\$60,788	\$42,552	Undetermined	1,001-2,000	2.1% - 3.0%
Theatre companies and dinner theatres – 5135: Actors and comedians	\$17,572	\$12,300	Undetermined	801 - 900	2.1% - 3.0%
Graphic design services – 5241: Graphic designers and illustrators	\$46,661	\$32,663	Average	2,001 - 3,000	4.1% - 5.0%
Newspaper publishers – 5123: Journalists	\$60,789	\$42,552	Average	601 - 700	5.1% - 6.0%
Historic and heritage sites – 0511: Library, archive, museum, and art gallery managers	\$79,253	\$55,477	Undetermined	<=100	3.1% - 4.0%
Display advertising – 0124: Advertising, marketing, and public relations managers	\$82,214	\$57,550	Above average	2,001 - 3,000	1.1% - 2.0%
Media representatives – 1123 Professional occupations in advertising, marketing, and public relations	\$59,663	\$41,764	Above average	9,001 - 10,000	7.1% - 8.0%

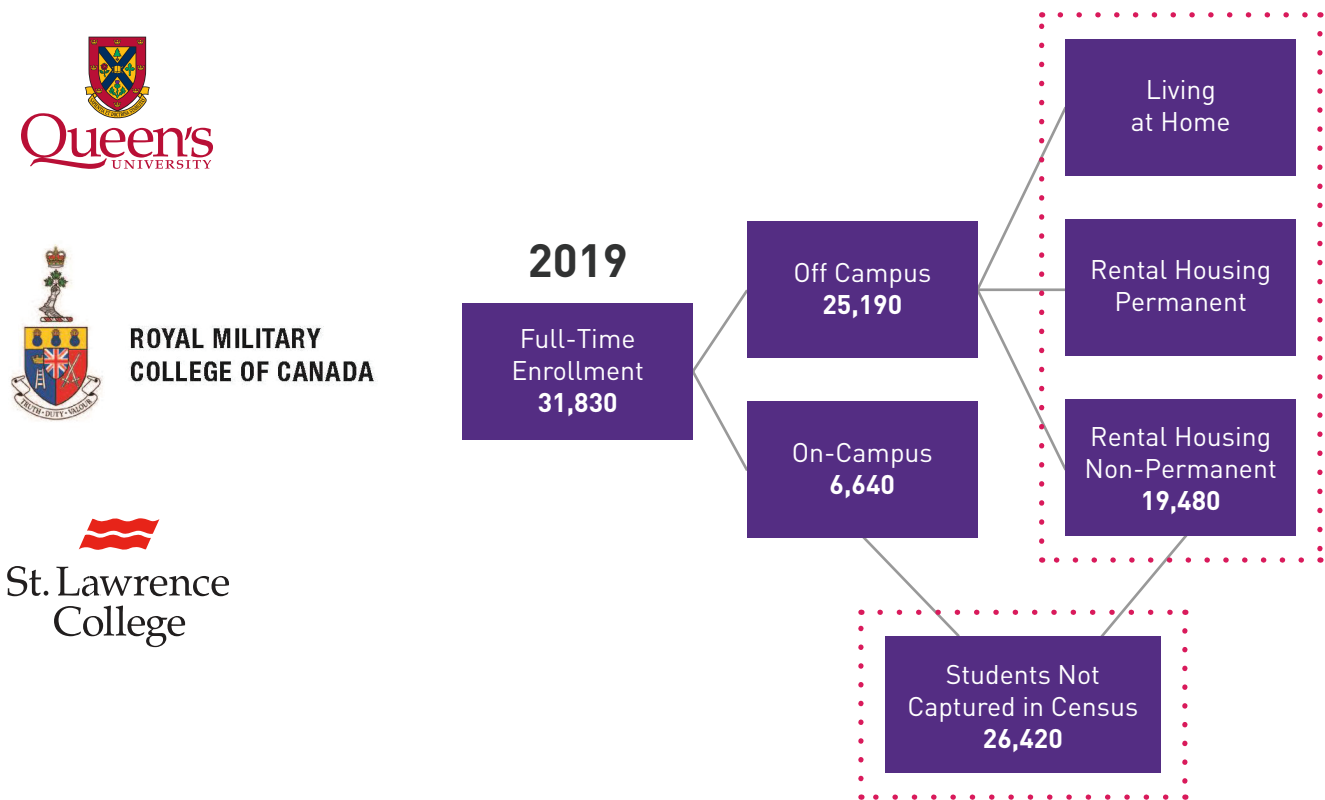
Source: 2019-21 Employment Handbook, Government of Canada.
Not all NOCs are represented, just sample ones per category

EDUCATION AND TRAINING

The City of Kingston enjoys a healthy student population from three post-secondary institutions: Royal Military College, Queen’s University, and St. Lawrence College. Though the vast majority are not enrolled in Creative Industries programs, they will have exposure to them through program minors, course options, and extracurricular activities. Those who not actively participate as a creative producer may be an active consumer; as such, the student market is a significant one to analyze.

Every year, more than 2,000 Creative Industries graduates complete their studies at these three institutions. In 2016, though St. Lawrence overall had lower numbers within each program, the higher number of programs they offered in the Creative Industries generated more than 12 per cent of their graduating class. Queen’s had a much broader subject offering, and even with including all business students, their Creative Industries degree completion numbers were 4.65 per cent (2016).

Figure 20: City of Kingston post-secondary student population, 2019



Source: Updated graphic as presented in the City of Kingston, Population, Housing and Employment Forecast, 2016-2046.

Note: All numbers are rounded to the nearest ten.

Figure 21: Programs by institution and completion numbers^{41,42,43}

Title	PSE	Credential	2016 Completions	% of total graduating class
Arts	RMC	Bachelor's	n/a	n/a
Business	RMC	Bachelor's and Master's	n/a	n/a
Total			n/a	n/a

Title	PSE	Credential	2016 Completions	% of total graduating class
Business and Commerce (all)	Queen's	Bachelor's and Master's	1,292	29.45%
Fine Arts and Applied Arts	Queen's	Bachelor's, Master's, and Doctoral	190	4.33%
Humanities	Queen's	Bachelor's, Master's, and Doctoral	530	12.08%
Creative Industries Total Graduates			2,012	4.64%

Title	PSE	Credential	2016 Completions	% of total graduating class
Advertising	St. Lawrence	Certificate, Diploma, Advanced Diploma or Graduate Certificate	68	2.17%
Business – Marketing only	St. Lawrence	Certificate, Diploma, Advanced Diploma or Graduate Certificate	65	2.07%
Game Development	St. Lawrence	Certificate, Diploma, Advanced Diploma or Graduate Certificate	18	0.57%
General Arts and Science	St. Lawrence	Certificate, Diploma, Advanced Diploma or Graduate Certificate	64	2.04%
Graphic Design	St. Lawrence	Certificate, Diploma, Advanced Diploma or Graduate Certificate	64	2.04%
Journalism	St. Lawrence	Certificate, Diploma, Advanced Diploma or Graduate Certificate	14	0.45%
Music and Digital Media	St. Lawrence	Certificate, Diploma, Advanced Diploma or Graduate Certificate	34	1.08%
Music Theatre	St. Lawrence	Certificate, Diploma, Advanced Diploma or Graduate Certificate	41	1.31%
Visual and Creative Arts	St. Lawrence	Certificate, Diploma, Advanced Diploma or Graduate Certificate	14	0.45%
Creative Industries Total Graduates			382	12.19%

Note:

- Royal Military College: Total completion from all Bachelor's, Master's, and Doctoral degree programs, 2020: more than 300 graduates, including 230 officers. It is assumed that approximately 70 graduates subsequently entered the non-military workforce in 2020
- Queen's University: Total completion from all Bachelor's, Masters, and Doctoral degree programs, 2016: 4,387
- St. Lawrence College: Total completion from all programs, Summer 2016 – Winter 2017: 3,134

PROGRAM LISTS RELEVANT TO THE CREATIVE INDUSTRIES

As of Fall 2020, academic programs were varied and reflected the areas of activity in Kingston. A few subject areas were missing: there was no local education / training for library science or museum studies, two areas which carry considerable employment levels. There was also a gap in design services, with no specific interior / fashion / jewelry design programs. There was no local architecture school, nor photography program (though partially covered through media arts). The journalism program was suspended in 2014 due to lack of interest. There was quite an offering of European languages, with also some Indigenous languages taught. A few programs showed support of art administration and fundraising as well.

Royal Military College

- English Culture and Communications
- French Culture and Communications
- History
- Business Administration
- Public Administration

Queen's

- Art Conservation
- Art History
- Arts Leadership
- Arts Management
- Business / Management
- Business Administration (MBA)
- Computing and the Creative Arts
- Cultural Studies
- Drama
- English Language and Literature
- Executive MBA
- Film and Media
- Fine Art
- French Studies
- German
- German Studies
- Greek

- Hebrew Language and Literature
- Hispanic Studies
- History
- Indigenous Studies
- Inuktitut
- Italian
- Japanese
- Jewish Studies
- Languages, Literatures and Cultures
- Latin
- Linguistics
- Media and Performance Production
- Media Studies
- Mohawk
- Music / Music Theatre
- Portuguese
- Public Administration
- Religious Studies
- Sexual and Gender Diversity
- Spanish and Latin American Studies
- World Language Studies

St. Lawrence

- Advertising and Marketing Communications
- Advertising and Marketing Communications Management
- Business Administration - Marketing
- Fibre Arts - Textile Design
- Fibre Arts - Traditional Rug Hooking
- Fine Arts
- Fine Arts: Visual & Creative Arts
- French Language
- Fundraising Management
- Game - Programming
- General Arts & Science
- Graphic Design
- Literary Writing
- Media Arts
- Music & Digital Media
- Music Theatre - Performance
- Records and Information Management
- User Experience Design
- Visual & Creative Arts
- Website Creation and Design
- Woodworking and Fine Furniture

Some programs of interest:

- St. Lawrence and Queen's are looking at additional collaborative pathways from one institution to the next to provide higher levels of arts mastery. For example, a Queen's pathway agreement with St. Lawrence College facilitates ladder credentials by combining a five-year **Bachelor of Music with a Diploma in Music and Digital Media** which the student completes simultaneously at both institutions.
- The Queen's Faculty of Arts and Science offered an undergraduate minor in Indigenous Studies, an interdisciplinary program designed to bring together courses on Indigenous history, language, and culture.
- The current academic programming priority at St. Lawrence College was health care, "with more than half of student enrolment is in health care-related programs."⁴⁴
- St. Lawrence College offered **SPARK**, a full-service, creative communications agency that allowed an innovative and entrepreneurial opportunity for student experiential learning.

On the flip side, there are many local experts / instructors with which to build collaborations, create innovative curricula and research, and strengthen the skills base of the municipality. For university professors who are tenure track, there are many possibilities here for community involvement and service, which would be beneficial for the city and the instructors themselves.

Key takeaways: All three Kingston post-secondary institutions provide young adults with potential points of entry to the Creative Industries. **With more than 2,000 estimated graduates yearly, building the sector's capacity to retain youth in the city upon graduation must be a priority** to building a strong long-term creative ecosystem.

SKILLS, REQUIREMENTS, AND TRENDS

Besides a high level of artistic and creative aptitude, Creative Industries workers will need to possess a series of core competencies to be successful in today's business world. The global workforce is being transformed into one that adopts automation and digital technologies at various levels, and places an emphasis on entrepreneurship. Even the most traditional of art forms can now incorporate new process and markets for creative innovation.

KEY COMPETENCIES – INNOVATION LITERACY

Too often, Canadian start-ups (whether creative or not) fail to commercialize their ideas into marketable products and services. The ideas are flowing, but there is a knowledge and organizational gap in how to generate revenues. Addressing these issues is the purview of innovation literacy. The Conference Board of Canada defined Innovation Literacy skills in their 2013 report, *Innovation Skills Profile 2.0*.⁴⁵ The four skill sets they used to categorize Innovation Literacy included:

- **“Creativity, Problem-Solving, and Continuous Improvement Skills:** The ability to generate new ideas, rethink how things are traditionally done, and support creativity and inventiveness.

- **Risk Assessment and Risk-Taking Skills:** The ability to take calculated risks and be entrepreneurial, learn from experiences, and support risk through evaluating decisions and actions.
- **Relationship-Building and Communication Skills:** The ability to develop and maintain relationships that support innovation, respect and support new ideas and approaches, and encourage, mentor, and coach others to share ideas.
- **Implementation Skills:** The ability to turn ideas into actionable plans or physical products, accept feedback, and be proactive in leadership and in response to change.”

These soft skills will not only be required of those competing for creative industry corporate jobs, but for independent creatives themselves.

KEY COMPETENCIES – CREATIVE INDUSTRY SPECIFIC

The core competencies needed for various creative industries jobs are varied. Finding a common skills set for **advertising copywriters** as compared to a **sculptors** or **opera company directors** is problematic, as each field draws from different knowledge bases, talents, and personalities.

CREATIVE INDUSTRY SKILLS SHORTAGES

In the UK, a sector-based initiative, ScreenSkills, works to ensure that film, television (including children’s and high-end drama), VFX (visual effects), animation and games have the skills and talent they need. One of their priorities is “identifying skills gaps – current and future – across the screen industries and the whole of the country to provide an evidence base for investment in skills and training.”⁴⁶ Current core competency gaps they have researched

include: multi-skilling, multiplatform skills, and intellectual property monetization (Figure 22). These can be used as a proxy of the number and variety of skills sets required within the Creative Industries community writ large. There is some overlap with the Innovation Skills, but for the most part deal with the unique skills of an international, digital marketplace.

TRENDS

- The **Australian** and **UK** federal governments have been leading global policy research into creative skills for the overall economy.
- Not only do skills need to be developed at the creative specialist level, but at the **creative management level**. This focus creates another series of skill sets, from adaptability and governance to advocacy and data literacy.
- Ever-increasing numbers of volunteers and freelance / contract / gig workers within the cultural sector are changing the nature of skills development needs. More professional development will need to be done at the individual level vs. corporately, shifting the onus for tuition payment. If the individual is paying, the demand for higher instruction quality at a lower cost will be felt.

Creative Industries must also align themselves with the necessary skill sets for “The Future of Work.” As the **World Economic Forum** explains “By 2022 the skills required to perform most jobs will have shifted significantly. Global average “skills stability”— the proportion of core skills required to perform a job that will remain the same — is expected to be about 58%. That means workers will see an average shift of 42% in required workplace skills in the period leading up to 2022. Skills

growing in prominence include analytical thinking and active learning as well as skills such as technology design, highlighting the growing demand for various forms of technology competency. However, proficiency in new technologies is only one part of the 2022 skills equation. “Human” skills such as creativity, originality and initiative, critical thinking, persuasion and negotiation will likewise retain or increase their value, as will attention to detail, resilience, flexibility and complex problem-solving.”

Key findings: Supports are necessary to encourage Creative Industries participants in acquiring key competencies from a professional development perspective. The City of Kingston has a direct role to play in providing access to programming for the Future of Work and innovation literacy. For industry-specific competencies, collaboration between all education and training providers will need to be prioritized for the specific goal of improving local creative skills sets in specific identified fields.

Figure 22: Gaps identified in the screen industries, UK⁴⁷

Skills Set	Skills Requirement
Multi-skilling	“An understanding of different technology platforms and their impact on content development and digital workflow, and new approaches to working in cross-functional creative / technical teams within and across companies”
Multiplatform skills	“The creative and technical skills to produce content for distribution across all potential platforms, and the ability to understand and exploit technological advances. Recent research confirms that creative businesses and having to invest heavily in in-house R&D and new software and hardware, which in turn means that a significant and growing proportion of their staff are focused on activities that require high levels of technology rated skills”
Management, leadership, business, and entrepreneurial skills	“Especially project management for multiplatform development; the hybrid skills combining effective leadership with innovation, creativity and understanding of technology, and the analytical skills to understand audience interests and translate it into business intelligence”
IP and monetization of multiplatform content	“Understanding of intellectual property legislation to protect from piracy, and exploiting intellectual property internationally to take full advantage of emerging markets –with particular focus on the ability to deal with the problem of illegal downloading and copyright infringement”
Broadcast engineering	Industry shortage
Archiving	“Archiving of digital content being an area which is attracting increased attention as a challenging issue for the future”
Sales and marketing	“Being particularly important in Commercial Radio and an emerging need in other sectors”
Diagonal thinking skills	“The ability to tell great stories, then know how to monetize those stories to the best effect utilizing media that cross platforms and territories well”
Supply chain management	“Managing disaggregated production processes across continents”
Foreign language skills	“As part of operating in a global marketplace”
Other business skills	“These include Human Resources competency, Financial management and project management”
Fundraising skills	“These are particularly in demand for Performing Arts, Visual Arts and Cultural Heritage.”
Creative skills	“These include skills such as story-writing, music composition, etc and are often in demand for Film, Literature, Performing Arts, Music and Cultural Heritage sub sectors”
Appropriate “associate professional and technical roles”	“These relate specifically to specialist skills relevant to specific occupations. The sector is highly qualified, but has skills shortages and gaps in specialist roles. Much of the training that occurs, does so to re-skill individuals entering the sector, which is then very ad hoc and informal and resource heavy for small businesses”

Source: SkillSet, UK

Leveraging Kingston's Strengths in Creative Industries

COMMUNITY STRENGTHS IN CREATIVE INDUSTRIES

Kingston's Creative Industries benefit from strong foundational community strengths and assets. Leveraging these assets is imperative to continued growth and prosperity for the sector.

Its small and central location is a key advantage, positioning Kingston as quaint, collaborative, and accessible to nearby city centres such as Toronto, Ottawa, and Montreal. Within the city, community assets provide gathering and creative spaces, a vibrant downtown, and an excellent quality of life. A strong heritage sector gives Kingston a foundation and reputation upon which Creative Industries can grow: existing visual arts programming and cultural attractions tell a story of Kingston's history and heritage that strengthens all other sectors.

Robust grants, funding, and support allows both part-time and full-time artists to thrive, and fosters a lively local festival scene. Notable musical alumni, film-focused organizations, and accredited academic institutions gives Kingston multiple avenues of establishing itself as a creative hub within Ontario.

PRIMARY OPPORTUNITIES IN CREATIVE INDUSTRIES IN KINGSTON

To realize potential growth and leverage community strengths within the sector, Kingston's Creative Industries must address several key opportunities.

Supporting artists is critical to the sector's success. Industry-specific education and programming, paired with accessible and affordable working spaces, can equip artists with the tools needed to succeed independently and strengthen the sector as a whole.

Within Kingston, opportunity lies in administrative and bureaucratic processes. Simplifying grant processes and lessening barriers to funding, especially for diverse and underrepresented groups, will bolster Kingston's creative community. A range of voices within leadership will provide perspective and inspire growth.

Externally, Kingston has the opportunity to promote its musical and art-focused reputation. Leveraging existing heritage assets within the city is critical to success in furthering this narrative. Cooperating with other jurisdictions can serve to further advance it even further, turning potential competition into collaboration.

Strategy Framework

STRATEGY PILLARS

The Strategy Framework for the Creative Industries includes two pillars, six themes, five enablers and 15 recommended initiatives.

The 15 recommended initiatives are included in the six themes. The five enablers have been identified as support requirements to ensure the success of the proposed themes and recommended initiatives.

ENABLERS

Heritage: Kingston's Heritage sector was noted as an important driver for the Creative Industries and has been incorporated as an enabler for the entire Creative Industries sector. Throughout the city, heritage organization and infrastructure (e.g., visual art displays and exhibitions, historical cultural attractions, and storytelling events) strengthen the sector as a whole. Impactful heritage activities are included throughout the recommendations.

Funding: Financial and human resources will drive the breadth and depth of initiatives. Overall, multi-sector, multi-organizational collaboration will lead to better, faster, and more cost-effective programming. Though sometimes challenging to establish, collaborative funding allows for smaller funding investments by multiple parties, and lower risk of failure through the demise of one organization. Collaborations between commercial sponsors, arts partners, academic institutions, and relevant partners from government will result in improved programming, services, products, commercialization, and creative dissemination.

Educational Institutions: Both secondary and post-secondary institutions, as well as private art and music schools, will provide local training and education that goes beyond textbooks and classrooms. Students gain technical and creative skills, real-world experience, and problem-solving abilities that are needed to be innovative in a rapidly changing workforce. Collaborations with these organizations will be central to a successive strategy.

Tourism: Whether by locals or out-of-towners, the bundling and cross-promotion of cultural activities will be done by the City and by various tourism operators. Though artistry can at times be a very individual and solitary exercise among creatives, the very purpose of the Creative Industries strategy is to showcase Kingston assets, to those at home or abroad.

Advantageous Location: Kingston’s natural location and physical assets enable additional creative activity, whether through cross-promotion or as event locales. The proximity of large city and Upstate New York populations further supports potential traffic for future creative endeavours.

Figure 23: Strategy framework, Kingston Creative Industries strategy, 2020



Recommendations

TOP EMERGING AREAS OF FOCUS FOR KINGSTON

The top three emerging areas of focus and potential growth in Kingston for Creative Industries are Film, Music, and Theatre. These will be emerging as key creative industry sub-sectors for Kingston during the next five to ten years.

The top emerging areas of focus and potential growth were selected based on the following criteria:

1

Consistent feedback through stakeholder outreach identifying these categories as strong areas for growth

2

Current level of momentum and local support for the sub-sector

3

Analysis of trends and best practices locally, regionally, and globally

4

Results to date in the region for workforce and business count

5

Total number and quality of community assets in the categories

6

Potential for the sub-sector to contribute to Kingston's economic growth

7

Ability to integrate the sector's local talent with marketing and tourism goals

FILM

Film has emerged as a top priority area for Kingston. Stakeholder interviews with other jurisdictions revealed that Kingston has already developed a reputation as a film-friendly city. It has acted as the backdrop for notable productions such as *Alias Grace*, *Crimson Peak*, and *Murdoch Mysteries*. City Council has already shown its commitment to the sector by developing the Film Office.

The Kingston Film Office has built strong momentum during the past three years, streamlining the process for working in Kingston and helping to grow the city's reputation as a film city. The Film Office's work includes building relationships with production companies / location scouts and working with local schools to fill talent gaps. The film industry is all about location and Kingston offers a range of sought-after assets related to its infrastructure and geography. These assets include the Kingston Penitentiary, Thousand Islands, downtown area, and Market Square. According to the Film Office, 90 per cent of every film dollar goes back into the community.

The film industry can support the city by driving tourism through accommodation bookings during production, film-related tourism post-production, and local jobs directly and indirectly related to productions. Outside of big productions, Kingston also houses a number of local filmmakers and production companies and is supported by The Kingston Canadian Film Festival. It seems that the film industry is just scratching the surface of its potential in Kingston.

A focus on the film sector can also help to highlight and celebrate Kingston's history and heritage. The most attractive sites to

filmmakers are connected to the city's heritage, opening the door to tourism opportunities and awareness of heritage sites.

Business count and workforce data pulled from Statistics Canada support these findings, as do survey results from the general Kingston public. Film associated NAICS, such as motion picture and video distribution, and independent actors, comedians, and performers, are within the top ten industries for both business count and workforce growth from 2014 to 2019. When asked to choose which area they thought has the most potential if supported by the City of Kingston, 178 of 346 (51%) residents of Kingston chose "film and other broadcasting."

MUSIC

Music has also emerged as top priority area for Kingston. The city boasts a strong musical history that the local community recognizes and embraces. Top pop acts such as the Tragically Hip, Moist, The Glorious Sons, and The Arrogant Worms all hail from Kingston. These connections offer the City a strong, experienced, and knowledgeable music network, all of whom have a link to Kingston. Tapping into Kingston's musical past provides opportunities to build music stories are related to history and heritage.

A foundation of music infrastructure also already exists. With more than 20 venues currently in operation, Kingston can house small and large shows. Kingston is attractive to musicians as it has developed a reputation as a city where bar owners pay musicians for their work. Its location close to Toronto, Ottawa, and Montreal makes it an ideal place for bigger acts to stop and host a show and for local musicians to do the same. The Dan School of Drama and Music at Queen's

University has the potential to be a strong asset for the Music sector by providing knowledge, money, or venues. Kingston hosts the Limestone City Blues Festival and other smaller festivals that bring musicians and concert goers to town. And Local 518 of the American Federation of Musicians has been serving Kingston musicians since 1920, acting as advocate for musicians' rights in the workplace (e.g., nightclub, theatre, symphony stage, recording studio).

NAICS codes associated with the emerging Music Industry, such as musical groups and artists and sound recording industries, showed strong and stable business count and workforce growth through 2014 to 2019, respectively. Musical groups and artists added 21 businesses within that time period, although they were primarily independent artists.

Survey findings show that Kingston residents support music as an emerging industry. When asked to choose which area they thought had the most potential if supported by the City of Kingston, 139 of 346 (51%) residents of Kingston chose "Live Music," and 122 (35%) chose "Music Production."

THEATRE

Theatre has a strong foundation with at least 31 assets including The Grand Theatre, The Isabel Bader Centre for Performing Arts, The Leon's Centre, and The Dan School of Drama and Music at Queen's University.

Local stakeholders believe that there is potential to grow the sector, in part by expanding the types of productions that are currently offered. There is potential to drive tourism in this sector through locally written or unique-to-Kingston performances.

Similar to music, Kingston's location close to Toronto, Ottawa, and Montreal puts it in an enviable position of being attractive to travelling performances, talent, and tourists. The sector is supported by the Kingston Theatre Alliance and has many theatre-based organizations, events and festivals including the Storefront Fringe Theatre Festival, Theatre Kingston, Kick & Push Festival, FoldA and the Skeleton Park Arts Festival. It supports business growth and employment in other adjacent sectors including lighting and audio technicians, and musicians.

Changes to insurance requirements and permit applications for participants would make the sector even more accessible. Performing arts can also be a vehicle to drive greater diversity in storytelling across the city. It overlaps with heritage activities such as Indigenous storytelling but could be used to highlight any relevant heritage.

RECOMMENDATIONS

Results from industry / workforce analysis, stakeholder feedback, and comparable jurisdictions have been analyzed and condensed into 15 recommendations, within six themes. These recommendations will position Kingston to strengthen three areas of focus and potential for growth: Film, Music, and Theatre.

1 Build a Creative Industries Narrative

1. Promote the Creative Industries through new and existing marketing campaigns.
2. Create a local campaign that highlights the Creative Industries ecosystem and celebrates artists.
3. Engage in collaborative and participatory storytelling campaigns.

2 Support Emerging Creative Industries

4. Target sector-specific measures and strategies for Film, Music, and Theatre.
5. Establish alignment between stakeholders on Film, Music, and Theatre.

3 Offer Business Skills and Training

6. Leverage existing programming to create Creative Industries “tracks” in existing accelerator programs, incubators, and workshops.
7. Explore and identify programs that may assist Creative Industries with SEED funding, or be available to marginalized or youth artists.
8. Examine best practices for digital platforms for greater communication.

4 Facilitate Partnership and Collaboration

9. Establish a Creative Industries Working Group.
10. Identify pure and applied research and development funding programs.
11. Build collaborative partnerships with communities outside of Kingston.

5 Identify, Develop, and Make Available Sustainable Spaces and Places

12. Leverage and create greater awareness for existing venues.
13. Identify existing spaces that can be re-thought and re-animated to serve the Creative Industries.

6 Reinforce Diversity and Inclusion

14. Undertake research to better understand issues of diversity in the sector.
15. Establish diversity and inclusion commitments for the Creative Industries.

THEME ONE: BUILD A CREATIVE INDUSTRIES NARRATIVE

To elevate Kingston's Creative Industries narrative, both locally and beyond, promotion and storytelling is key. Recommendations that support this initiative are as follows:

1. Promote Kingston's Creative Industries sector and reputation through existing and new promotion and marketing campaigns and platforms that align with the implementation of the Kingston Integrated Economic Development Strategy (i.e., Invest in Kingston).
2. Create a local creative industries campaign that highlights the creative industries ecosystem in Kingston and celebrates and showcases the local creatives who live and work here. This campaign can build on the "Makers of Kingston" campaign and should be targeted to both Kingstonians and tourists.
3. Engage in collaborative and participatory future creative industries storytelling campaigns and programs that align with City strategies that support the promotion of diverse cultures and diverse histories.

Indigenous stories, as an example, should live beyond the campaigns and be integrated into Kingston's everyday culture and as part of its heritage.

THEME TWO: SUPPORT EMERGING CREATIVE INDUSTRIES

With the correct support, emerging Creative Industries in Kingston such as Film, Music, and Theatre have the potential to create sustainable growth within the Creative Industries in Kingston. Recommendations that support this initiative are as follows:

4. Target sector-specific measures and develop strategies for emerging sub-sectors, including Film, Music, and Theatre, to enable economic development, support economic recovery due the impact of the pandemic, maintain activity and enhance growth in high profile, high potential creative industry sectors.
5. Establish greater alignment between the municipality, economic development and business agencies, community partners, and organizations to reduce barriers across creative industries sectors.

THEME THREE: OFFER BUSINESS SKILLS AND TRAINING

Kingston creatives require tactical business skills and education to sustain and strengthen their businesses. Recommendations that support this initiative are as follows:

6. Work in partnership with Kingston Innovation Ecosystem partners (including post-secondary institutions, Kingston Economic Development and Launch Labs) to leverage existing programming to support the growth and development of Creative Industry businesses and entrepreneurs. Work with ecosystem partners to add a Creative Industries “track” to the existing programming such as accelerator programs, incubators, workshops and education programming. The goal is to provide entrepreneurship programming and services to artists and artisans to develop entrepreneurial skills to transform ideas into cultural businesses, products, and services.
7. Explore existing business support funding programs available at the municipal, provincial, and federal levels and through the economic development agencies. Identify programs that may assist Creative Industry businesses with SEED funding to support the growth and development of their Creative Industry businesses. Identify programs that may be available for Indigenous artists, Creative Industry youth entrepreneurs and other marginalized artists.
8. Examine best practices for digital platforms to sustain communication and the flow of knowledge within the Creative Industries sector itself and among the sector, the City, business and tourism partners, and community.

THEME FOUR: FACILITATE PARTNERSHIP AND COLLABORATION

Leveraging partnerships and neighboring jurisdictions will provide the bandwidth to provide Kingston Creatives with greater support, funding, and visibility. Recommendations that support this initiative are as follows:

9. Establish a Creative Industries Working Group that will include representatives from the creative and cultural sector, and representatives from business, tourism, post-secondary institutions, and the municipality. The Working Group would inform and advise on strategic direction to develop the entire Creative Industries sector, while championing Kingston as a ‘choice’ location for Creative Industries to locate. This Working Group will be successful if they are connected to other City Working Groups and strategies.
10. In partnership with Queen’s University and St. Lawrence College, identify new pure and applied research and development funding programs that may be available to support advancements in the arts.
11. Build collaborative partnerships with communities outside of Kingston to share best practices, cross-promote activities, and provide programs and support to Kingston creatives in helping to scale and promote their businesses. The City of Kingston is currently a member of the Canadian Creative Cities Network. Cities within UNESCO’s Creative Cities Network could also offer awareness and networking opportunities.

THEME FIVE: IDENTIFY, DEVELOP, AND MAKE AVAILABLE SUSTAINABLE SPACES AND PLACES

Creatives across Kingston would benefit for affordable and accessible working and collaboration space, building their network and resources. Recommendations that support this initiative are as follows:

12. Leverage and create greater awareness for existing venues such as libraries, public parks, and other public spaces available throughout the city for live and performing arts.
13. Identify existing spaces within the city that can be re-thought and re-animated through the creative industries. The goal is to create greater accessibility for the emerging sub-sectors to interact and collaborate, and to also engage a more diverse audience / customer base (outside of the downtown core and large venues).

THEME SIX: REINFORCE DIVERSITY AND INCLUSION

Greater diversity and inclusion will bring new voices to Kingston's Creative sectors, diversify leadership and present new opportunities to a broader range of creatives in the city. Recommendations that support this initiative are as follows:

14. Undertake research to better understand issues of diversity in the sector. Consider undertaking demographic research on the sector and / or conduct a literature review to identify systemic barriers to participation in the Creative Industries sector from diverse communities.
15. Establish diversity and inclusion commitments for the Creative Industries and develop measurements for reporting to help support continuous improvement.



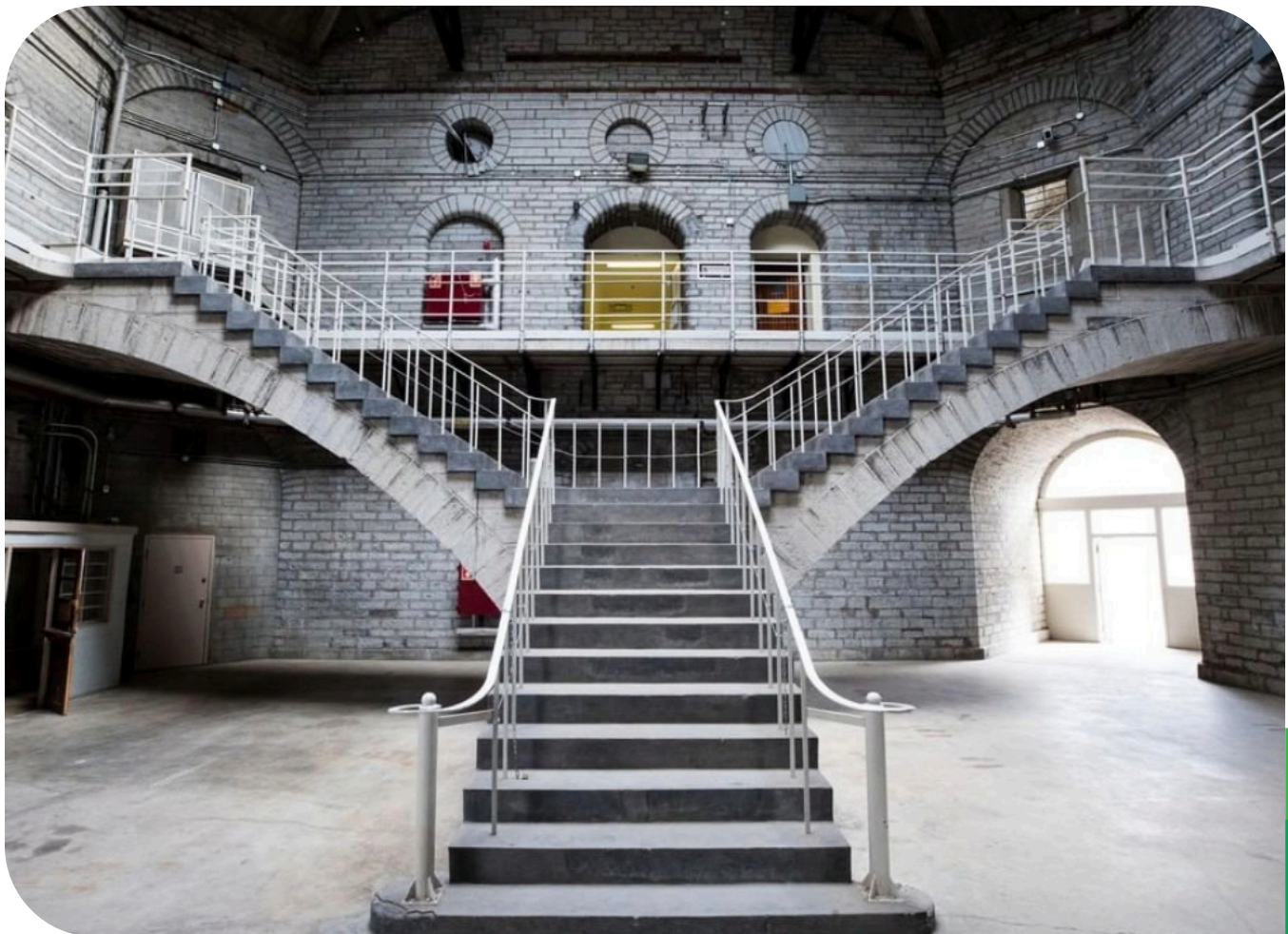
VALIDATION OF RECOMMENDATION DIRECTION

Figure 24: Rationale and validation, by theme

Theme	Rationale / Validation of Direction	Identified as an opportunity	Confirmed in Stakeholder Outreach
Set a Creative Industries Narrative	<ul style="list-style-type: none"> There is a long list of successful musical talent that have roots in Kingston (e.g., the Tragically Hip, Jim Cuddy, The Glorious Sons, Moist and the Arrogant Worms). Locals want Kingston to be proud and advertise this history The “Makers of Kingston” was mentioned by artists and non-artists as a meaningful campaign that helped drive awareness of local success stories Both Indigenous and non-Indigenous stakeholders recognized that “Your Stores, Our Histories” is just the beginning of what can be done to tell Indigenous stories. It was recommended that the stories live beyond tourism Pesaro, Italy embraces its credentials as the birthplace of Gioachino Rossini, a famous Italian composer, through an annual Rossini Opera festival, Hotel Rossini, and Rossini Week, a celebration of his birthday where artists, musicians, and moviemakers come together to celebrate 	✓	✓
Support for Priority Emerging Sectors	<ul style="list-style-type: none"> Kingston has a deep musical history; the industry has already developed a strong foundation of artists, networks, and venues Development of the Kingston Film Office and their continued efforts has led to Kingston gaining a reputation as a film-friendly city, bringing exposure, tourism, and jobs 	✓	✓
Offer Business Skills and Training	<ul style="list-style-type: none"> Current funding structures and requirements in the Creative Industries are geared towards helping organizations and groups. Artists not part of a group also require funding to build their businesses Funding applications are difficult for many people in the Creative Industries to understand and complete due to a lack of knowledge, education, or experience Non-financial support (e.g., assistance with business knowledge, marketing) is welcomed by creatives Queen’s University has been identified as a strong asset to the arts community and is well supported by SSHRC funding Bradford, UK has found success by offering educational opportunities such as co-op programs to high school students Linz, Austria created a business education program specific to creatives. Out of 15 attendees in the first round, three new businesses were started 	✓	✓
Facilitate Partnership and Collaboration	<ul style="list-style-type: none"> The local creative community has asked for the City of Kingston to offer the Creative Industries for more overall support, financial, and otherwise Other jurisdictions within Ontario have signaled that they want to collaborate with Kingston to help build up the Creative Industries Cities (e.g., Victoria, BC; Mississauga, ON) enjoy success as a result of strong city leadership who champion the Creative Industries. All other jurisdictions contacted for qualitative interviews listed having a champion of the Creative Industries as a key factor to their success The presence of post-secondary institution is often seen as an asset to the Creative Industries by the local community The UNSECO Creative City’s network is accepting applications for new cities to join for 2021 	✓	✓

Figure 24: Rationale and validation, by theme (con't)

Theme	Rationale / Validation of Direction	Identified as an opportunity	Confirmed in Stakeholder Outreach
Identify, Develop, and Make Available Sustainable Spaces and Places	<ul style="list-style-type: none"> Artists across the Creative Industries have asked for affordable working spaces within Kingston Residents of Kingston acknowledge and appreciate its abundance of bar venues in the downtown core and the existence of higher-end venues like the Tett Centre. They also recognize, however, that many venues within Kingston have barriers to participation / entrance. For example, shows run out of downtown bar venues may limit those under 18 including youth and families, as well as the disabled community, from attending events 	✓	✓
Reinforce Diversity and Inclusion	<ul style="list-style-type: none"> Within the Creative Industries specifically, artists from diverse cultural backgrounds have reported not feeling welcome or supported by the community Kingston has a tight knit community which often means that the same voices are included at the table 	✓	✓



How Success Will be Measured

In order to monitor and measure the outcomes of the recommended themes and initiatives, the following metrics should be considered as the City of Kingston moves to implementing these initiatives. Return on investment, optimization of resources, and

citizen satisfaction levels will need to regularly and rigorously assessed to comprehensively measure the success of this strategy.

Overall, the main Creative Industries metrics would track how the strategy:

1 Contributes to GDP growth

2 Supports increased numbers of business start-up and growth

3 Drives tourism related to key creative industry categories

4 Builds and leverages creative assets

5 Increases collaborative ventures among cultural producers

6 Increases intellectual property creation levels for commercialization within Creative Industries



Photo provided to City of Kingston
Instagram by user @shotbyeric

Figure 25: Other suggested metrics by theme

Initiative	Metric
Theme One: Set a Creative Industries Narrative	
Marketing Campaigns	<ul style="list-style-type: none"> • % increase in awareness of marketing campaigns • % growth in specific tracking metrics related to the specific campaign message • Various metrics reflective of media (e.g., clickthrough rates, cost per click)
Theme 2: Supporting Emerging Industries	
Strategies	<ul style="list-style-type: none"> • # of category-specific strategies development in 2021 • # of category specific strategies implemented in 2021 • % GDP growth related to priority categories (pre- and post-strategy)
Policies	<ul style="list-style-type: none"> • # of new policies approved and developed • # of new policies communicated to residents and put into use • # of positive / negative feedback received from the community
Funding	<ul style="list-style-type: none"> • % increase in awareness of programs current available to groups and artists • # of local creatives from marginalized groups who apply for funding programs • # of local creatives from marginalized groups who obtain funding
Theme 3: Offer Business Skills and Training	
Creative Industry-Specific Education Programs	<ul style="list-style-type: none"> • # of programs launched • # of attendees • # of businesses started from business education programs specifically targeted to the Creative Industries
Theme Four: Facilitate Partnership and Collaboration	
Working Group	<ul style="list-style-type: none"> • Establishment of a working group • # of strategies and goals for 2021 developed by working group
Collaborating with Other Markets	<ul style="list-style-type: none"> • # of new relationships developed with other creative jurisdictions • # and quality of initiatives developed with other markets • Completion of application to become UNESCO Creative City developed and submitted
Theme Five: Identify, Develop, and Make Available Sustainable Spaces and Places	
Affordable Workspaces for Artists	<ul style="list-style-type: none"> • # of artists who gave gained work or rehearsal space at or below market rent • % increase in affordable square footage offered to artists as work or rehearsal space at or below market rent
Venues	<ul style="list-style-type: none"> • % increase in artist adoption of non-traditional venues for events
Theme Six: Reinforce Diversity and Inclusion	
Research	<ul style="list-style-type: none"> • Development of research plan to understand the crux of the diversity issue • Creation of a diversity and inclusion action plan based on research results
Benchmarks	<ul style="list-style-type: none"> • Development of specific measurements to show continuous improvement in all aspects of diversity

Figure 26: Summary of best practices from exemplary jurisdictions

	What they did	Results
Linz, Austria	<ul style="list-style-type: none"> Became a UNESCO Creative City of Media Arts in 2014 Launched a business education program specifically for creatives to help during COVID-19 	<ul style="list-style-type: none"> Ranked among the top five cultural and creative cities in Europe (2017)⁴⁸ Offered business education; of the first round of 15 participants, three started a new business (2020)⁴⁹
Bradford, UK	<ul style="list-style-type: none"> Became UNESCO Creative City of Film in 2009 Re-instated their Film Office in 2011 Developed a program to work with primary and high-school aged through to PhD students to improve film literacy 	<ul style="list-style-type: none"> Tripled the number of filming days in year to 150 (2017) Launched their education program (34 schools); teachers reporting significant increase in film literacy Five local colleges provided 45 courses, ranging from beginner to postgraduate degrees⁵⁰
Mississauga, ON	<ul style="list-style-type: none"> Focused on sharing Mississauga’s story beyond its borders and create more cultural experiences Created a steering committee made up of city councillors, arts staff and heads of creative organizations and business owners 	<ul style="list-style-type: none"> Increased cultural organization initiatives in the city from 1,602 (2011) to 7,101 (2017) Increased attendance at city events from 868,384 attendees (2011) to 1,768,866 attendees (2017)⁵¹
Barrie, ON	<ul style="list-style-type: none"> Mayor of Barrie acted as the champion for the city to launch its creative plans Developed Creative Barrie to help with branding Developed Emerging Musicians program (2018) to help with training, marketing, and insurance 	<ul style="list-style-type: none"> Development of Culture Days Launched Creative in Barrie campaign to bring awareness to the local creative community Allocated \$308,000 CAD in operating funding and \$26,000 CAD to projects (2019)⁵² Identified 33 emerging musicians (2019)⁵³
Victoria, BC	<ul style="list-style-type: none"> Developed “Create Victoria” branding to shift community cultural thinking Four strategic priorities: <ul style="list-style-type: none"> Connecting people and spaces Building cultural leadership Telling Our Story Being Future-Ready 	<ul style="list-style-type: none"> Assessed total economic contribution of culture to Victoria’s economy: \$382.2 million CAD Won the Cultural Planning Award (2018) from the Creative City Network of Canada, which recognizes a Canadian municipality with a high-quality cultural plan that demonstrates leadership and best practices Distributed \$2.4 million CAN dollars through the city’s funding programs (2018)⁵⁴

Moving to Implementation

Recommendations contained in this report are for consideration by the City of Kingston and have been prepared based on: 1) industry engagement and outreach; 2) findings from the Creative Industries Survey; 3) exemplary jurisdiction review; 4) current performance in the Creative Industries Sector (baseline data); 5) forecasted growth potential; 5) Kingston's unique value proposition; and 6) best practices and trends globally in the Creative Industries.

These recommendations are intended to ignite the imagination and explore the possibilities in the Creative Industries sectors in the City of Kingston. Additional due diligence is required to prioritize recommendations and allocate the necessary resources, ultimately driving results for economic growth in the Creative Industries.

IMMEDIATE (NEXT THREE MONTHS)

1. Conduct a review of the recommendations and themes and prioritize actions and activities that will maximize existing resources and drive results in the short-term.
2. Prepare an execution and implementation plan that details potential initiatives within the recommendations, resource requirements (human resources, financial resources), and timelines (short-, medium-, and long-term).

3. Meet with the lead partners (Figure 26) to confirm direction, potential roles, responsibilities and resources required to deliver on the identified activities and recommendations.

SHORT-TERM (NEXT SIX MONTHS)

Once these three action items are completed, the following are the short-term activities that can be undertaken to mobilize the execution and implementation plan:

1. Establish a Creative Industries Working Group that will include representatives from the creative and cultural sector, business, tourism, post-secondary institutions, and the municipality. The Working Group would inform and advise on strategic direction to develop the entire Creative Industries sector, while championing Kingston as a 'choice' location for Creative Industries to locate. This Working Group will be successful if they are connected to other City Working Groups and strategies.
2. In partnership with Tourism Kingston and the Film Office, develop a long-term Film strategy to augment existing activities and drive economic development in this foundational sector.
3. In partnership with the Creative Industries Working Group, develop individual strategies and action plans for priority focus areas of Music and Theatre.

Summary of Recommendations, Key Partners, and Potential Timelines

Each of the identified themes have associated recommendations, mapped below in Figure 27. Each of the 15 recommendations require varying degrees of resources and funding, which should be accessed and mapped before the implementation period begins. “The City of Kingston will be pursuing this work in tandem with the implementation of the Integrated Economic Development Strategy.

The Cultural Services Department, in its role as a municipal cultural development agency, will help to drive and facilitate the recommendations with the support of key partners as identified.

The top five recommendations for immediate consideration are highlighted in blue; they are the foundational recommendations upon which the rest flow.

Figure 27: Implementation activities

Theme	Recommendation	Key Partners	Short-Term (6 to 12 months)	Medium-Term (12 to 36 months)	Long-Term (3 to 5 years)
Build a Creative Industries Narrative	1. Promote the Creative Industries through new and existing marketing campaigns	City of Kingston Cultural Services Department	✓	✓	✓
	2. Create a local campaign that highlights the Creative Industries ecosystem and celebrates artists	Tourism Kingston Kingston Economic Development	✓	✓	✓
	3. Engage in collaborative and participatory storytelling campaigns.		✓	✓	✓
Support Emerging Creative Industries	4. Target sector-specific measures and strategies for Film, Music, and Theatre	City of Kingston Cultural Services Department Tourism Kingston	✓	✓	✓
	5. Establish alignment between stakeholders on Film, Music, and Theatre.	City of Kingston Planning Department City of Kingston Cultural Services Department		✓	✓

Figure 27: Implementation activities (con't)

Theme	Recommendation	Key Partners	Short-Term (6 to 12 months)	Medium-Term (12 to 36 months)	Long-Term (3 to 5 years)
Offer Business Skills and Training	6. Leverage existing programming to create Creative Industries "tracks" in existing accelerator programs, incubators, and workshops	Launch Labs Kingston Economic Development Queen's University Tourism Kingston	✓	✓	✓
	7. Explore and identify programs that may assist Creative Industries with SEED funding, or be available to marginalized or youth artists	Kingston Economic Development Province of Ontario Government of Canada Kingston Arts Council	✓	✓	
	8. Examine best practices for digital platforms for greater communication	Queen's University Students		✓	✓
Facilitate Partnership and Collaboration	9. Establish a Creative Industries Working Group	Kingston Economic Development Tourism Kingston Queen's University St. Lawrence College	✓		
	10. Identify pure and applied research and development funding programs	Queen's University St. Lawrence College		✓	✓
	11. Build collaborative partnerships with communities outside of Kingston	City of Kingston Cultural Services Department		✓	✓
Identify, Develop, and Make Available Sustainable Spaces and Places	12. Leverage and create greater awareness for existing venues	Kingston Economic Development		✓	✓
	13. Identify existing spaces that can be re-thought and re-animated to serve the Creative Industries	Kingston Economic Development		✓	✓
Reinforce Diversity and Inclusion	14. Undertake research to better understand issues of diversity in the sector	Queen's University St. Lawrence College		✓	✓
	15. Establish diversity and inclusion commitments for the Creative Industries	Creative Industries Working Group City of Kingston Cultural Services		✓	✓

Endnotes

All hyperlinks within have been validated as of the date of this research report.

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