

Whither Creative Cluster in 2017?

Delivered to

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Last year's forecasts - trends are accelerating

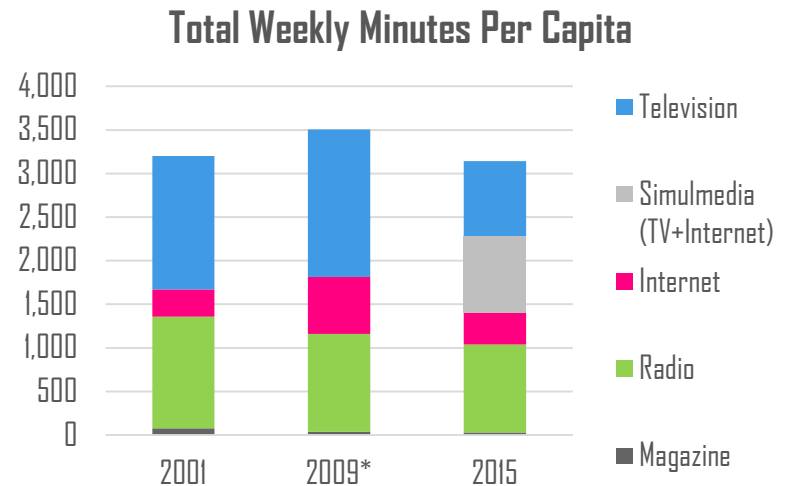
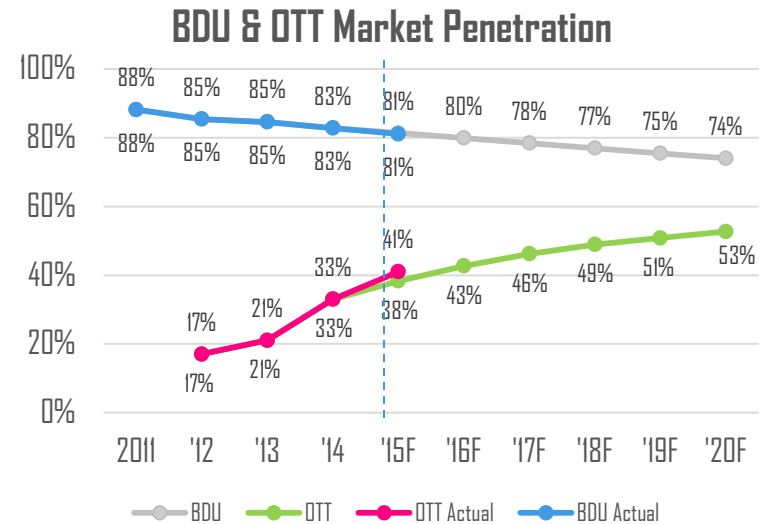
OTT Market Share Increase

- Explosive growth of OTT
 - Video: Netflix, Amazon
 - Music: Pandora, Spotify
- Amazon Prime 62M subscribers (est.)¹

+ Steady Consumption

- BDUs in competition for finite viewership hours
 - Growth in "simulmedia" offsets overall growth

= Increased Competition for Advertising Audiences



* Simulmedia was not measured in 2009

1. <http://fortune.com/2016/07/11/amazon-prime-customers/>

Key observations one year on

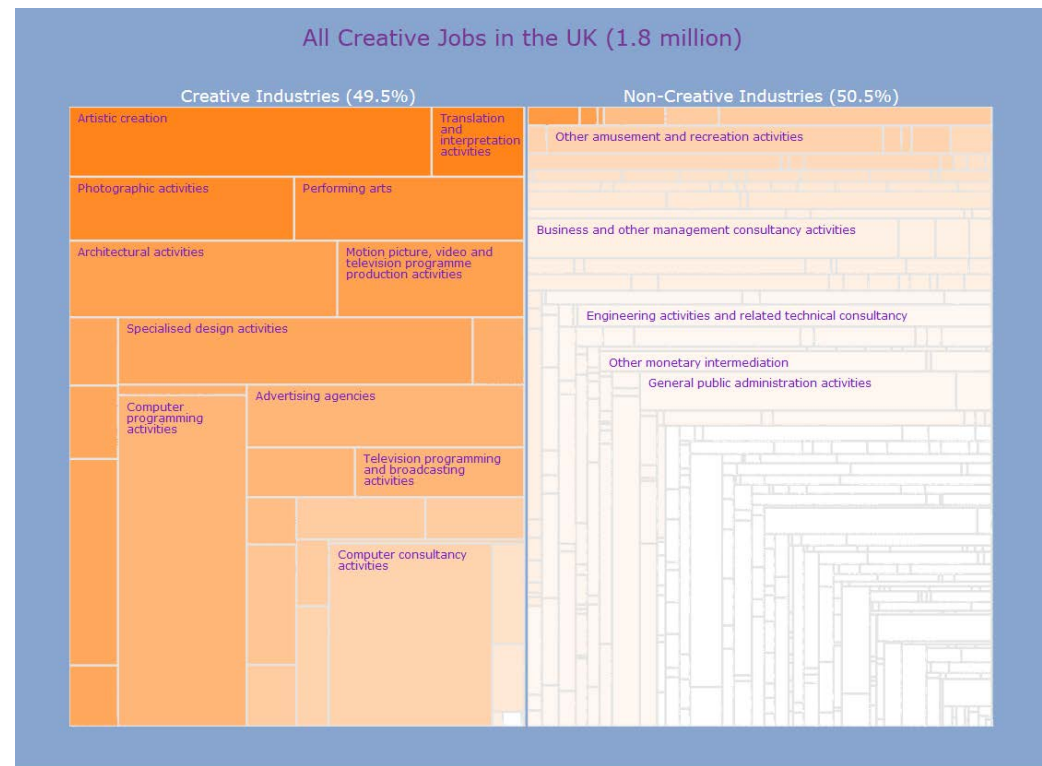
- Yes, there is greater industry and policy attention to the importance of
 - Discoverability – how to foster it
 - Content with global appeal – how to encourage exports
 - Convergent/cross-sector content creation – how to monetize
- More tools are available, but adoption mainly left up to content firms and artists themselves – are we ahead?
- Lots of policy discussions, submissions, reports – but only limited action so far
- Still face structural barriers – gaps in capital pools, few anchor companies, domestic market limited

High level actions to strengthen creative cluster

- **Create a more coherent message** – to coalesce around broad strategic, political, and policy levels.
 - The federal consultation process did not insist on integrated voice
 - A Canadian equivalent to the UK's Creative Industries Federation?
- **Build a bigger tent**
 - Expand into other creative sectors, e.g. design and fashion
 - Ally with tech, e.g. Tech North, the super tech cluster
- **Make a more compelling case** - Need to express more meaningful narrative of:
 - Canadian society, culture and diversity
 - The new creative entrepreneurship
 - Creators reach into all parts of the economy

Beefing up the CI impact

- Creative workforce in Ontario/Canada, not just in the Creative Industries
- Nesta's Creative Intensity shows its wider impact
- Useful in Ontario/Canada?



Source: Data are for 2013 from the Department for Culture, Media and Sport.