

Spotlight on Toronto: A Strategic Action Plan for the Film, Television and Digital Media Industry

**Toronto Film, Television and Digital Media Board
May 2017**

TORONTO FILM, TELEVISION AND DIGITAL MEDIA BOARD

The Toronto Film, Television and Digital Media Board is an advisory body to City Council. The Board's mandate is to:

- Provide recommendations and advice to enhance the attractiveness and competitiveness of Toronto for the film, television and digital media industry;
- Seek input from the broader industry to provide coherent advice to City Council on issues and opportunities for the sector; and
- Monitor and track marketing strategies that could be used to attract new or returning film, television, and commercial production business to Toronto.

Members of the Toronto Film, Television and Digital Media Board include:

Councillor Paula Fletcher, Chair

Jonathan Ahee, Co-Chair, President, NABET 700-M UNIFOR

Neishaw Ali, President and Executive Producer, SPINVFX, and Co-Chair, Computer Animation Studios of Ontario

maxine bailey, Vice President, Advancement, Toronto International Film Festival, Inc.

Douglas Barrett, Professor, Schulich School of Business

David Carter, President, Canada Film Capital, and Executive Vice President, Entertainment Partners (EP) Canada

Ken Dhaliwal, Partner, Dentons Canada LLP

Shelley Eriksen, Writer and Executive Producer

Victoria Harding, Associate Executive Director, Directors Guild of Canada - Ontario

David Hardy, Vice President, Industry / Government Relations & Sustainability, William F. White International, Inc.

Alistair Hepburn, Director, Film, Television, and Digital Media, ACTRA Toronto

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Cynthia Lynch, Managing Director and Counsel, FilmOntario

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Peter Miller, Past Chair, Interactive Ontario

Jim Mirkopoulos, Vice President, Cinespace Film Studios

Monty Montgomerie, Business Agent, I.A.T.S.E. Local 873

Roger Nair, CEO, Roger Nair Productions

Wendy Noss, President, Motion Picture Association - Canada

Councillor Jaye Robinson

Warren Ross, Vice-President, National Industrial Relations & Senior Counsel, Canadian Media Producers Association

Jennifer Stewart, Director, Marketing & Development, The Academy of Canadian Cinema and Television

Message from the Chair and Co-Chair of the Toronto Film, Television and Digital Media Board

On behalf of the Toronto Film, Television and Digital Media Board, we are pleased to present *Spotlight on Toronto: A Strategic Action Plan for Toronto's Film, Television and Digital Media Industry*.

The film, television and digital media industry is a major economic driver for Toronto and contributes to the vitality, prosperity and creativity of our city. In 2016, the industry continued its rapid growth, achieving a record-breaking production investment of over \$2 billion. The remarkable success of this growing sector shows that Toronto has what it takes to be one of the leading global centres for film, television and digital media production.

We are committed to working with our industry partners to ensure that they have the tools needed to create jobs, attract talent, and continue to tell their stories on screen. The Board's recommendations and strategic action plan will help to strengthen this important industry and enhance our competitive position on the world stage.

Councillor Paula Fletcher
Ward 30, Toronto-Danforth
Chair, Toronto Film, Television and
Digital Media Board

Jonathan Ahee
President, NABET 700-M UNIFOR
Co-Chair, Toronto Film, Television and
Digital Media Board

EXECUTIVE SUMMARY

Toronto's film, television and digital media industry is recognized globally for its innovation and creativity. The sector is a key economic driver for Toronto and continues to experience significant year-over-year growth, achieving a record-breaking production investment of over \$2 billion in 2016. Home to a diverse array of filming locations and a widely respected pool of on- and off-screen talent, Toronto has many of the key market fundamentals needed to thrive as one of the leading global centres for film, television, and digital media.

Yet, while Toronto's screen sector is growing, competing jurisdictions are doubling their efforts to attract new business. Amid heightened competition and burgeoning growth in cities such as Chicago, Vancouver and Atlanta, the City and industry partners must do everything they can to build and maintain Toronto's market share, and sustain the city's long-held position as one of the premiere production centres in North America.

The time is right to adopt a new strategic action plan that empowers sector stakeholders to compete in an increasingly global market. The Toronto Film, Television and Digital Media Board's strategic action plan, based on consultation with industry and government partners, identifies goals and recommended actions to enhance the partnership between the City and the film, television and digital media industry and seize opportunities within this rapidly evolving sector.

Spotlight on Toronto charts a path for growth across five pillars of strategic focus:

1. Active Advocacy

The City must assume the role of a leading advocate and champion for the screen industry and encourage all orders of government to adopt policies and programs that support the continued growth of the sector. Recommendations call on the City and sector partners to encourage competitive, stable creative industry tax credits and develop policies that respond to new and emerging issues impacting the industry.

2. Strong Fundamentals in Physical Infrastructure and Workforce Development

Expanded physical and human infrastructure is essential to the continued growth of the screen industry. Recognizing that Toronto's studios are operating at capacity, *Spotlight on Toronto* recommends immediate action to create opportunities for studio development and investment, and address demand for location filming. The Board also calls on the City, sector and education partners to create a new workforce development strategy for the screen industry, supporting the development of top-tier talent both on and off camera.

3. Exceptional Customer Service Enhancements

As the industry grows, Toronto has an opportunity to build its competitive advantage through exceptional customer service. Recommendations are designed to enhance Toronto's image as a film-friendly city, and include actions to support production clients and improve community outreach and engagement efforts in neighbourhoods across Toronto.

4. Globally-Recognized, Innovative Digital Media Sector

Digital technology continues to transform the way that screen-based media is made, consumed and imagined. *Spotlight on Toronto's* recommendations leverage the potential of new digital technologies and identify actions that will position Toronto as a leading jurisdiction for digital media innovation and partnerships.

5. Dynamic Branding and Strong International and Business Partnerships

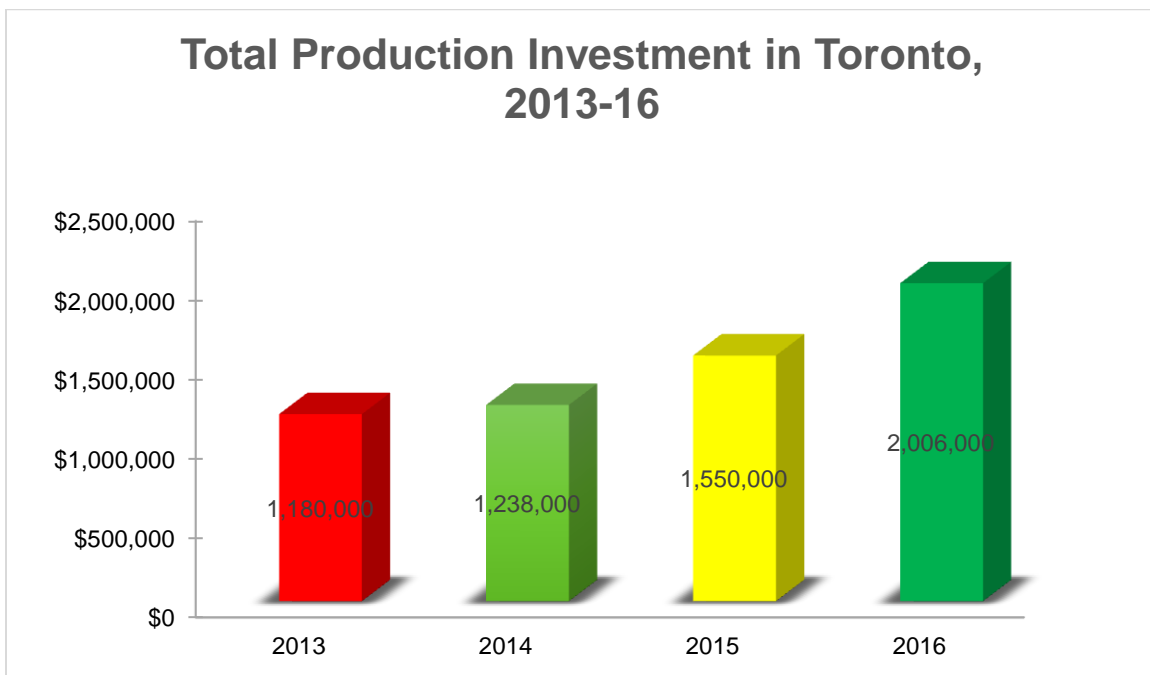
Toronto's vibrant film scene leads the city's global media profile, contributing to our reputation as one of the best places to live, visit and do business. The Board's recommendations seize opportunities to enhance the city's brand as a leading screen-based production centre and promote the high-quality domestic and international film, television and digital media products made in Toronto.

BACKGROUND

[Bounce Back to Fast Forward](#), the City of Toronto's previous strategic plan for the screen industry, was completed in 2007 at a time of turmoil and uncertainty for the sector. Investment in production had hit a record low of \$680 million, and the industry was struggling with major challenges including the continued impact of the SARS crisis, the high value of the Canadian dollar and a lack of purpose-built studio infrastructure. Following its adoption by City Council, the previous strategic plan played a key role in the recovery of the screen-based industries in Toronto, with key accomplishments including investment in new studio spaces and supporting the development of an experienced, skilled crew base.

Today, the screen-based industries have grown to become one of Toronto's key economic drivers, contributing a record-breaking investment of over \$2 billion to the city's economy in 2016 and supporting an estimated 30,000 jobs. The economic impact of Toronto's film, television and digital media industry continues to reach new heights:

- Foreign major production investment in film and television grew to \$794 million in 2016, a 49% increase from 2015 – and an astonishing 129% since 2014.
- Investment in commercials production continued to rise to record levels, growing to \$380 million, a 10% increase from the \$345 million reported in 2015. Since 2014, investment in this area has increased by 95% from \$195 million.
- The number of location filming shoot days has seen three record breaking years, with an increase to 7,280 shoot days in 2016 from 6,680 in 2015.



Source: City of Toronto, Economic Development and Culture Division, 2017.

Building Toronto's Competitive Advantage

Among industry professionals, Toronto stands out as a top choice for film, television and digital media production. Toronto's diverse urban and natural landscape has made the city an attractive, flexible location for filming, standing in for locations ranging from 16th century France, to 1920s Chicago, and modern-day Manhattan. Critically-acclaimed Canadian and international independent films, television series, and box office blockbusters have been produced in Toronto, including "Orphan Black", "Murdoch Mysteries", "Room", "Spotlight" and "Suicide Squad", building confidence in the city's crews and talent.

The city's screen industry is highly regarded for its expertise and experience across the broad spectrum of the production pipeline, from location shooting, to visual effects, and beyond. The City has also increased its own capacity to service the industry, hiring additional Film Permit Coordinators to meet growing demand from production clients, and a dedicated Film Sector Development Officer to lead business development initiatives, and build stronger relationships with industry partners locally, nationally, and internationally.

Yet, while Toronto's screen sector is growing, competing jurisdictions are doubling their efforts to attract new business. Competitor markets are investing in new studio spaces and maintaining effective, reliable tax credit systems for the industry. A comparison of the growth in television pilot projects over the last five years highlights this trend. Data from Film LA Inc. shows that the number of television pilot projects filmed in Toronto doubled from 2011-2016 – however, at the same time, the number of pilots increased by 150% and 200% respectively in Vancouver and Atlanta. The City and industry partners must do everything they can to ensure that Toronto remains a competitive jurisdiction for screen-based content.

A changing industry is creating new opportunities for Toronto. The proliferation of subscription cable and streaming platforms such as Netflix and Amazon creating their own high quality content has shifted the traditional broadcast model, creating an opportunity for long-term, multiple-season projects. Support for Canadian content creation remains a priority for industry and government partners and is the focus of a wide-ranging policy review currently underway by the federal government.

The time is right to adopt a new strategic action plan that empowers sector stakeholders to compete in this increasingly global market and encourages the continued success of Toronto's homegrown talent. The Board's updated strategic action plan, based on consultation with industry and government partners, identifies key goals and recommended actions to enhance the partnership between the City and the film, television and digital media industry, and seize opportunities within this rapidly evolving sector.

Strategic Focus

The Toronto Film, Television and Digital Media Board held stakeholder consultations in the fall of 2016 to identify priorities for the sector over the next three years. The Board heard from colleagues representing a wide cross-section of the industry, including directors, producers, writers, actors, studio operators, film festival organizers, distributors, animators, unions, guilds, educational institutions and other creative entrepreneurs. Participants were asked about trends, opportunities and challenges for the sector, and collectively brainstormed potential actions to enhance Toronto's competitive position. In addition to these consultation meetings, sector partners were invited to complete an online survey to share their thoughts on potential directions to inform the development of the strategic action plan.

Building on the results of the consultations, as well as the actions undertaken as part of the [Mayor's Five-Point Plan](#), adopted by City Council in June 2016, the Board is recommending a path for growth across five pillars of strategic focus for 2017-2020. Each strategic focus includes strategic goals, and recommended actions to achieve them over the next three years:

1. Active Advocacy
2. Strong Fundamentals in Physical Infrastructure and Workforce Development
3. Exceptional Customer Service Enhancements
4. Globally-Recognized, Innovative Digital Media Sector
5. Dynamic Branding and Strong International and Business Partnerships

FOCUS 1: ACTIVE ADVOCACY

Tax credit stability was consistently ranked by many consultation participants as being the most critical factor for the continued success and growth of the industry. This issue was also cited by industry leaders in Los Angeles during trade missions led by Mayor Tory in 2016 and 2017. Instability in creative industry tax credits could prompt industry decision makers to look to other locations for their next investment, and weaken Toronto's competitive position in the global film market - particularly as other leading North American centres such as New York, Atlanta and Los Angeles continue to implement aggressive incentive programs to attract and retain new business.

Yet, with the exception of one City incentive to support studio construction, decisions related to creative industry tax credits - along with many other government programs and policies that impact Toronto’s film, television and digital media industry - are made by the provincial and federal governments, falling outside of the City of Toronto’s jurisdiction. Accordingly, the City must assume the role of advocate and champion for the industry, raising awareness among other orders of government of the economic impact of the screen sector, and encouraging the development of policies and programs for its ongoing success.

Strategic Goal
Government programs and policies support the continued growth of the film, television and digital media industry and are responsive to the sector's changing needs

Recommended Actions:

- 1. The City advocate on behalf of the sector to other orders of government, emphasizing the need for competitive, stable tax credits, and responsive policies and programs that encourage the development of the industry*

The City must take a continuing leadership role as an advocate for the sector, and maintain consistent communication and collaboration with all orders of government. Along with calling for continued tax credit stability, the City must also advocate for responsive policy-making that evolves alongside a changing and unique sector and champions new modes of content creation. Consideration must be given to new and emerging issues, such as opportunities to develop dedicated sector housing and accommodation for the film, television and digital media workforce. Wherever possible, the City and industry partners must also advocate for a diverse, inclusive sector, both in front of the camera and behind the scenes. The Toronto Film, Television and Digital Media Board can support the City in its advocacy efforts by identifying additional emerging issues, sector priorities and consultation opportunities on an ongoing basis.

- 2. Staff advocate on behalf of the sector within City Hall to raise awareness among staff and Councillors of the positive impact of the industry and of best practices for working with and supporting productions in Toronto*

Advocacy is not limited to other orders of government. Members of the Toronto Film, Television and Digital Media Board, along with staff of the Economic Development and Culture Division, must continue to champion the sector at City Hall. Many City divisions play an important role in supporting film, television and digital media production in Toronto, and the Board and staff should continue to encourage cross-divisional collaboration and dialogue to identify best practices for working with the industry. The Board can also continue to encourage Councillors to act as ambassadors for the industry, and advocate for the sector to other orders of governments and within the community.

- 3. The City and sector partners continue to advocate for good-faith industry consideration as part of major City planning, policy and budget initiatives*

It is vital that the City consider the impact and implications of any programs, policies and budget decisions on the film, television and digital media industry in recognition of its significant economic and cultural impact for Toronto. The Board and City staff both have a role to play in ensuring that government partners apply a "screen lens" to policy development, and actively consult with industry stakeholders to assess benefits, risks and any mitigating measures where applicable.

FOCUS 2: STRONG FUNDAMENTALS IN PHYSICAL INFRASTRUCTURE AND WORKFORCE DEVELOPMENT

The rapid growth of the film, television and digital media industry in recent years has led to a sharp increase in demand for infrastructure to support the sector. However, the supply of studios in Toronto has not kept pace with industry growth, leading to increased competition and a shortage of available and appropriate space for productions. This shortage of studio availability is now one of the top constraints on the sector's continued development.

Consideration must also be given to the workforce infrastructure that supports the industry. The continued growth of the industry is contingent on fostering top-tier homegrown talent to attract and support major productions. Taken together, expanded physical and workforce infrastructure will provide the fundamentals for Toronto to affirm its position as a leading jurisdiction for the screen industry.

Strategic Goal

Toronto's physical infrastructure has expanded to meet growing demand from the screen industry and service a wide range of project needs

Recommended Actions:

- 1. The City actively create and support opportunities for private investment in studio infrastructure, including both purpose-built and converted studios capable of serving a broad range of projects, while also removing impediments to studio development*

Consultation participants consistently cited a shortage of studio space as a barrier to industry growth in Toronto. Toronto's studios are operating at capacity, with limited space available to accommodate new large-scale feature film and television productions, while competing jurisdictions are investing heavily in new studio space. Action is required immediately to address the shortage of studio space in Toronto, and achieve progress in the next three years.

New purpose-built and converted studio spaces with the capacity to service a wide array of film, television and digital media projects - from "tentpole" features and over-the-top, premium series through to commercials and animation - are essential to the continued growth of production investment in Toronto. Consultation participants highlighted the Port Lands and surrounding areas as a priority for future development, based on its employment land zoning, proximity to downtown and existing cluster of creative businesses.

The City can facilitate the development of new and repurposed studio spaces by identifying available and appropriate sites, leveraging existing incentives, such as tax increment equivalent grants where appropriate, and identifying and addressing any barriers to development. Industry partners are encouraged to identify opportunities for studio development and expansion, and work in close collaboration with the City to implement plans.

2. *The City ensure that policies related to transportation and mobility encourage location film production in the public-right-of-way*

Filming in the public right of way, including city streets, sidewalks and other public spaces, is fundamental to the success of Toronto's screen industry. Toronto is recognized by producers for its diverse urban fabric that can stand in for locations around the world. The downtown core is particularly popular for location filming, with 80% of all on-site production work in the city taking place within a tight grid between Queen Street, the Don Valley Parkway, Front Street and Bathurst Street. There is no substitute for location filming, which can be further enhanced by digital technology.

Film productions require access to parking in the public right-of-way for vehicles and trailers holding equipment, cast dressing rooms, hair and makeup, mobile generators and more. However, as Toronto continues to grow – particularly in the downtown core – the industry is at risk of losing access to parking for location productions. As the City develops policies and plans related to transportation and mobility, it will be essential to consider the ongoing need for the film industry to maintain access to parking in the public-right-of-way in order to continue supporting economic growth and job creation in Toronto. The screen industry is committed to working with partners in the public realm to find win-win solutions for all.

3. *The Toronto Film, Television and Digital Media Board provide industry expertise to facilitate the development of film-friendly policies for Toronto's downtown as part of the TOCore project*

TOCore: Planning Downtown is a three-year interdivisional project led by City Planning to develop a new Secondary Plan for the downtown core. In November 2016, City Council adopted policy directions as part of Phase 2 of TOCore, including a direction to recognize and accommodate the film sector's creative needs in the downtown. The Toronto Film, Television and Digital Media Board, working in partnership with sector stakeholders, can provide industry expertise to implement and activate this policy direction. Such expertise would inform curbside management strategies, as well as other special initiatives to develop the downtown core as a film-friendly district and attract additional investment to the city.

4. *The City support the development of and access to the best high-speed and high-capacity communication and digital tools for the industry*

Toronto can improve its competitive position in the global market by ensuring that creative businesses have access to world class communications technologies, allowing for collaboration with production partners around the world, and high-speed, dedicated and secure transfer and storage of digital content. The City should identify any gaps in access to broadband for creative businesses and encourage service providers to expand digital infrastructure where needed to make Toronto a leading jurisdiction for content creation from first frame to final finish.

Strategic Goal

Toronto is recognized for its top-tier talent both on and off camera, and for creating training and career opportunities that are responsive to the changing needs of the sector

Recommended Actions:

- 1. The City create a workforce development strategy to develop, attract and retain top-tier talent for the screen industry through partnerships with educational institutions, creation of training opportunities, and collaboration with incubators, industry associations, unions, guilds, the non-profit sector and others*

In consultation with industry and education partners, the City can support job creation and retention by creating a new workforce development strategy specific to in-demand roles for the screen sector, including top-tier creative talent, production crews, and functions such as production accountants and AZ- or DZ-licensed drivers. This new strategy should be based on principles of diversity and inclusion, and identify specific gaps, actions and opportunities to increase job-specific training, and improve career education. The City can also build on the results of initial pilot projects to inform the strategy, including co-op programs, and the Economic Development and Culture and Toronto Employment and Social Services Divisions' efforts to match Ontario Works recipients to industry roles.

- 2. The City advocate for financial incentives for internship and apprenticeship programs for the film, television and digital media industry*

To support talent development, the City can play a leadership role by encouraging other orders of government to create dedicated financial incentives for job training specific to the screen sector, and ensure that industry roles are eligible for support through existing programs. Consultation participants also emphasized the need to develop training programs to engage underrepresented and equity-seeking groups in the industry.

FOCUS 3: EXCEPTIONAL CUSTOMER SERVICE ENHANCEMENTS

The Film and Entertainment Industries section of the City's Economic Development and Culture Division is responsible for issuing film location permits and providing front-line service to the screen industry. The Board heard from consultation participants who spoke to the interests and concerns of two key client groups – first, production companies working in Toronto, and secondly, residents and community members who live and work around production locations. Recommendations have been developed to strengthen relationships with both of these key stakeholder groups, and achieve a vision of Toronto as a film-friendly city for industry and residents alike. As well, industry-leading customer service enhancements will position Toronto to attract and retain new business, and serve as a model for best practices for film centres around the world.

Strategic Goal

The City provides timely, professional, responsive service to clients and the community, and resolves issues promptly and efficiently

Recommended Actions:

- 1. In addition to its one-stop permitting process, the City provide a new concierge service for clients, positioning it to serve as a central point of contact for production planning in Toronto*

The City is recognized by industry clients for its "one-stop shop" approach to location film permits. With assistance from a dedicated Film Permit Coordinator, a production client can secure all of the permits and approvals required to film in Toronto through one single point of contact. To enhance the existing one-stop model, the Board recommends that the City introduce a new "concierge service" for clients, which will extend beyond the permitting process to include other important aspects of planning a production in Toronto.

Under a concierge service model, the City's Film and Entertainment Industries staff would assist clients through each stage of production planning, offering professional, helpful advice that simplifies the process of working in Toronto. Staff would assist clients with location inquiries and production logistics, and connect them with third-party service providers who can offer specialized assistance and advice related to filming and working in Toronto. The concierge service would also support temporary relocation to the city by working with partners to provide assistance with accommodation, information on schools and childcare and access to City services. This is particularly important for large-scale feature productions, which can see talent relocate to Toronto with their families from periods ranging from three months to as many as seven years.

The concept of a concierge service model was raised not only during industry consultations, but also during recent trade missions to Los Angeles. The success of this initiative will also require close collaboration and communication with partners at the Ontario Media Development Corporation, who act as a primary contact for production clients looking to film in Ontario.

2. The City confirm its commitment to issuing permits and resolving customer issues in a timely manner

Currently, the City's Film and Entertainment Industries team commits to service standards that include a 24-hour response time for e-mail inquiries and a 48-hour turnaround to issue location filming permits. These industry-leading standards have set a new benchmark for municipalities in North America and must be maintained, even as Toronto's production levels continue to increase year over year. Similarly, Film and Entertainment Industries staff must continue to act promptly to address any customer issues or community concerns related to location filming, and serve as an advocate for both clients and residents.

3. The City maintain a client-focused, distinctive web presence to serve the film, television and digital media industry

For a majority of clients and community members, the City's website will be the first stop for information about filming in Toronto. As a primary marketing tool, it is essential that the Film and Entertainment Industries section of the City's website be regularly maintained and updated to include current information, and that its content be clear, concise and engaging for its target audience.

4. The City allocate the required human resources to the Economic Development and Culture Division's Film and Entertainment Industries section to respond to growing demand from production clients

In 2016, the Economic Development and Culture Division received approval to expand the staff complement of Permit Coordinators in the Film and Entertainment Industries section to meet an increase in demand for client service. An increase in the staff complement allows for a marked improvement in customer service and satisfaction by creating more opportunities for one-on-one interaction with clients, and to address and monitor production footprint and community concerns on location. Maintaining an appropriate staff complement will be essential to implementing an enhanced concierge service for the industry in the coming years.

Strategic Goal

Toronto is widely seen by the screen industry as a film-friendly city, and the industry is recognized by Torontonians to be a major economic driver and a partner in community-building

Recommended Actions:

- 1. The City maintain a no-fee policy for location filming permits and provide other services to the industry on a revenue-neutral basis*

In recognition of the significant economic impact of the production industry, the City issues location permits at no charge and provides other City services such as parking and policing on a revenue-neutral basis. This is also in keeping with operating practices in most other leading North American jurisdictions and should be maintained going forward to remain competitive and project stability to production clients considering Toronto as a filming location.

- 2. The City support the industry's social responsibility and outreach efforts such as community give-back programs, green initiatives and waste reduction*

Industry leaders have expressed an interest in strengthening local relationships through enhanced outreach and social responsibility programs. It is particularly important for the industry to address and minimize any perceived disruption for residents, and to be recognized by Torontonians as a good neighbour and city-builder – which several consultation participants referred to as "city-friendly filming". Potential outreach initiatives for the industry could include community "give-back" programs to engage residents in film, green initiatives to lead the sector in the reduction and reuse of resources, and other targeted outreach to improve community relations. Programs such as these can be tested and evaluated in neighbourhoods with active location productions across Toronto.

- 3. Staff work with City Agencies, Boards, Commissions, Divisions and other City partners to accommodate location filming requests on City properties where appropriate*

To improve access to City-owned properties, Film and Entertainment Industries staff can work internally with other municipal partners to facilitate requests for productions, including location filming and parking where feasible. Consultation participants cited strong interest in exploring opportunities to film in local schools. The Board and City staff will continue to collaborate with the Toronto District School Board to address this demand.

FOCUS 4: GLOBALLY-RECOGNIZED, INNOVATIVE DIGITAL MEDIA SECTOR

Over the last ten years, new digital technologies have transformed the way that film and television products are made, consumed and imagined. The rate of change continues to be rapid and unpredictable, making it difficult to forecast what will come next. Looking forward, it will be important to remain flexible and responsive to changes in the digital media landscape.

The City must become a leader in technology development and deployment, and adopt strategies that allow it to leverage the economic potential of digital media for the screen industries. Toronto is already recognized as a leader in information and communication technologies, and is home to many research institutions and advanced technology companies, providing a strong foundation for growth in digital media for the screen sector.

"Digital media" can be defined in many different ways and encompasses a range of products and functions. The Board's Strategic Action Plan focuses specifically on actions to support the development of screen-based digital media entertainment content, visual effects technologies and animation, and the supply chains that support their production.

Strategic Goal
<i>The digital media sector is recognized as a key economic driver by government</i>

Recommended Action:

- 1. *The City conduct and support sector research to better define the scale, impact and potential of digital media for the screen industry*

While the transformative nature of digital technologies is widely recognized, less is known about the specific economic impact of Toronto's digital media sector. In order to effectively champion this emerging industry, and also encourage government partners to leverage its potential, it is important that the City support ongoing research to identify economic trends, employment patterns, and additional detail on the economic and cultural contributions of digital media. This research should build on recent work by industry partners including Interactive Ontario and the Computer Animation Studios of Ontario.

Consideration should also be given to the infrastructure that supports the digital media industry. As part of its sector research, the City is encouraged to examine the industry's short- and long-term digital media infrastructure requirements. This research can identify locations for digital media productions, employment clusters and the types of spaces used by the industry for content creation. A proactive approach to infrastructure planning for the digital media industry will be essential to building Toronto's competitive advantage in the coming years.

Strategic Goal

Toronto will be a leading international jurisdiction for digital media innovation and for supporting the development of top-of-class digital talent

Recommended Action:

- 1. The City develop strategies to build capacity in the digital media industry through support for content creation, access to digital infrastructure for business, and the growth of employment clusters*

Given the rapid rate of change in the sector, and the lack of economic and employment research and data, it is difficult to recommend specific actions at this time to build capacity within the digital media industry. Using the results of the industry research noted above to inform its direction, the City should work with the Toronto Film, Television and Digital Media Board to develop strategic actions that will position Toronto as a global hub for digital media.

Consideration should be given to how the City can support content creation, promote research and development, facilitate access to broadband and other high-speed technologies for businesses, and support training and development for digital media employment. It will be important for the City to remain flexible and proactive in developing actions to build capacity in the digital media industry, and pay close attention to new trends, platforms and research.

Strategic Goal

Industry and government partners create opportunities to make connections and foster collaboration for the digital media industry

Recommended Action:

- 1. The City support and host events that promote collaboration and capacity-building for the digital media industry*

Consultation participants felt that the City can support the digital media industry by acting as a convener, bringing key industry players together to promote partnerships and opportunities, and to share best practices. The City, in consultation with the Toronto Film, Television and Digital Media Board, can work with industry and government partners to host events that foster partnerships and opportunities, and the sharing of best practices. The City can also identify opportunities to engage the digital media industry in trade missions and related events to encourage collaboration on an international scale.

FOCUS 5: DYNAMIC BRANDING AND STRONG INTERNATIONAL AND BUSINESS PARTNERSHIPS

Toronto's vibrant film scene leads the city's global media profile, contributing to our reputation as one of the best places to live, visit and do business. The city is home to one of the biggest newsmakers in the industry - the Toronto International Film Festival, the world's largest public film festival, and a leading economic driver for both the City and the screen sector.

At the same time, consultation participants cited a need to better promote and share Toronto's on-screen successes, and brand the city as a leading production centre. Continued action and innovation is required to improve Toronto's standing in the global market and enhance the city's brand as a premiere destination for film, television and digital media.

Strategic Goal
<i>Toronto is consistently ranked as a leading screen-based production centre in North America</i>

Recommended Actions:

- 1. *The City and industry partners maintain, expand and leverage relationships with existing and potential treaty, co-production and co-venture partners to promote Toronto as a global film capital, attract new investment, and increase market share*

There is considerable potential for further growth in foreign production investment in Toronto. In 2016, foreign major production investment increased by almost 50% to a new record high of \$794 million, following an increase of 80% from the year prior. To capture even more of the global market, and expand audiences for Canadian content, Toronto-based companies can leverage relationships with partners from existing co-production and co-venture countries, and explore new potential relationships with other jurisdictions that do not currently have a formal partnership with the City. Consultation participants cited opportunities to further expand partnerships and relationships with major markets such as India, China, the United Kingdom and Ireland. The City and industry can also extend its global reach by working in partnership with the Ontario Media Development Corporation and Telefilm Canada on international promotion and business development for Toronto-based creators.

- 2. *In light of the importance of Los Angeles based clients, the City promote Toronto's brand and build relationships among key Los Angeles decision makers*

Continued outreach is essential to making the case for Toronto as a top investment choice for Los Angeles-based studios and creative producers. Competing jurisdictions, including Vancouver and Montreal, regularly promote their cities' brands in Los Angeles, making it all the more important for Toronto to continue its efforts to seek and attract new Hollywood clients and maintain existing relationships. Part of this outreach should include continuing the successful partnership with the Ontario Media Development Corporation and FilmOntario to operate the Toronto-Ontario Film Office in Los Angeles and host events to market and promote Toronto in Los Angeles.

- 3. The City and industry partners actively seek out opportunities for the film, television and digital media industry to participate in trade missions and export development initiatives*

To further encourage foreign production investment in Toronto, and to empower Toronto-based film, television and digital media companies to promote their products and services internationally, the City and sector partners should consider options to integrate a strong industry presence as part of inbound and outbound trade missions, as well as export development programs. This three-pronged approach will enable Toronto companies to participate in the global production market both as service providers and as content creators. Industry partners, as well as the Toronto Film, Television and Digital Media Board, can advise the City on potential international opportunities to inform future mission planning.

Strategic Goal
<i>Toronto has an internationally-recognized brand that promotes the high-quality domestic and international film, television and digital media products made in Toronto, and conveys the City's promise to provide world-class services and infrastructure for the screen industry</i>

Recommended Actions:

- 1. The City develop a marketing strategy for "xoTO" as a brand for film, television and digital media products, including a commitment to feature xoTO as an official credit for Toronto, to make brand collateral widely available to local stakeholders for use in projects and productions, and to collaborate with industry on promotion of xoTO wherever possible*

Consultation participants highlighted the need to better promote Toronto's film, television and digital media talent at home, nationally, and on the global stage. There was a strong interest among stakeholders to better develop the xoTO brand, which was launched to industry acclaim during the 2016 Toronto International Film Festival.

xoTO has the potential to become an internationally-recognized brand for Toronto's film, television and digital media products,. The brand can serve two purposes - first, on a global scale, xoTO can be developed to signify the quality of Toronto-based content. As a new official screen credit for Toronto, and through placement in other industry projects, the brand will become synonymous with the city's creative and innovative screen-based industries. Secondly, for industry stakeholders, the brand can come to symbolize Toronto as a great place to invest and do business. It is the Board's hope that the xoTO brand can be developed to convey Toronto's stature as a global film capital through a multi-platform marketing strategy that will increase recognition over the next three years.

CONCLUSION

This Strategic Action Plan presents a path for the continued growth of the film, television and digital media sector in Toronto. Working together, the Toronto Film, Television and Digital Media Board, all three orders of government and industry partners can build on successes to leverage the economic potential of the screen sector to create jobs, share the stories of Toronto-based creators and promote the city's brand on the world stage. The City and the Board are committed to working in close partnership to champion the industry, and develop innovative approaches to address new and emerging issues and trends across the sector, affirming the city's position as a competitive and premiere global hub for content creation across all platforms.