



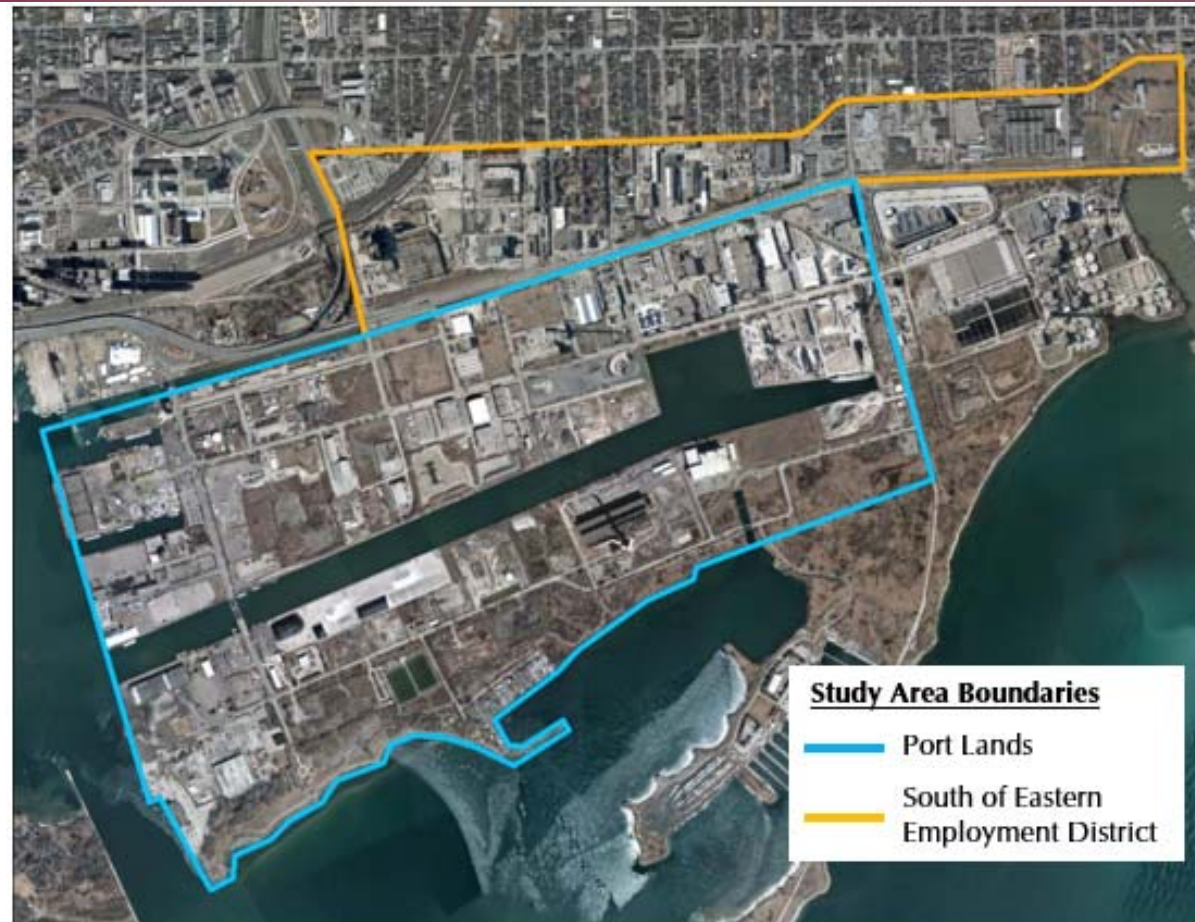
STUDY OF FILM AND SCREEN INDUSTRY STUDIOS IN THE PORT LANDS AND SOUTH OF EASTERN EMPLOYMENT DISTRICT

Summary of Findings and Recommendations

August 25th, 2017

HEMSON Consulting Ltd.

THE STUDY AREAS ARE HOME TO MANY OF TORONTO'S STUDIOS



Source: Hemson Consulting Ltd. with data from ESRI

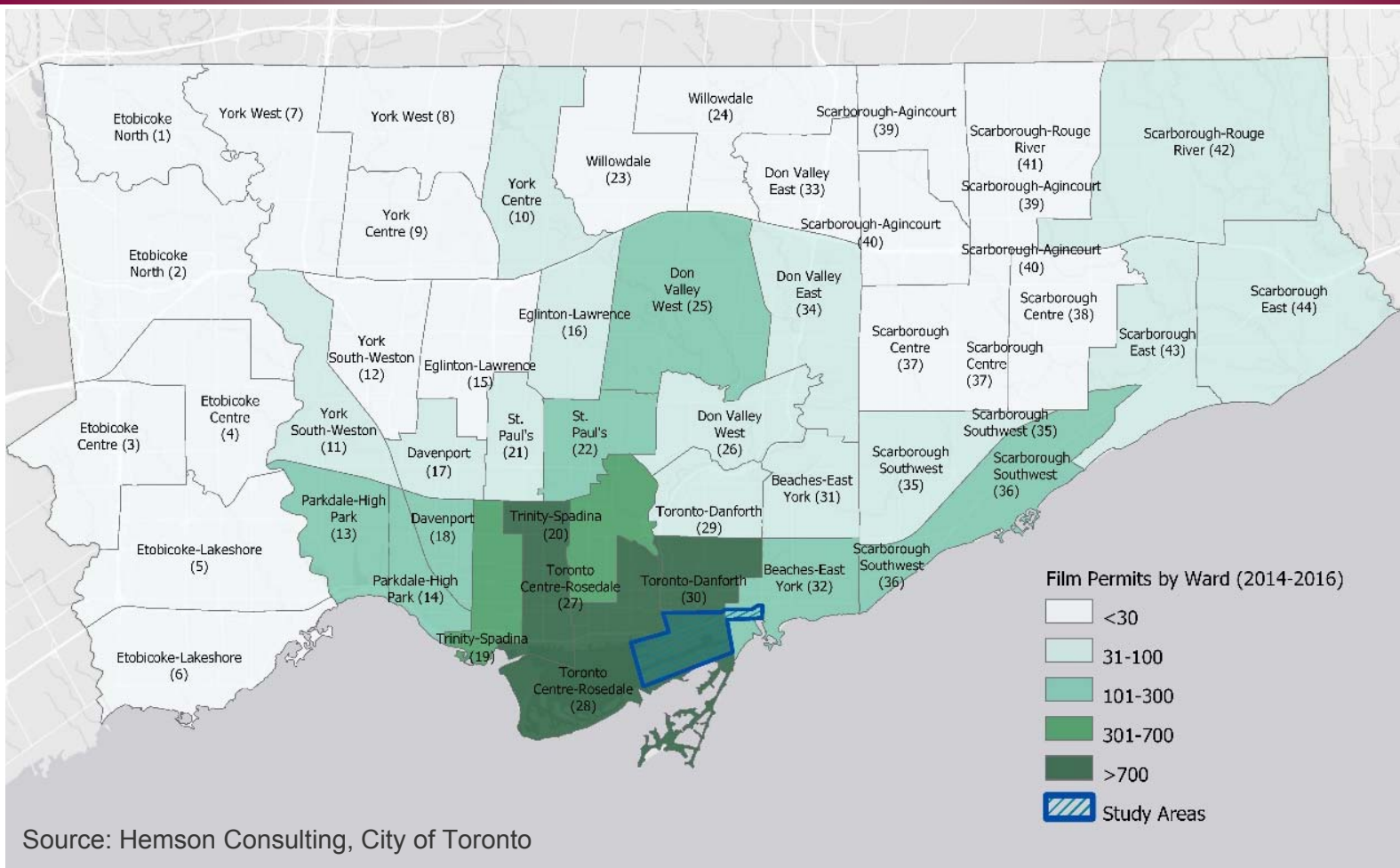
STUDY OBJECTIVES

- Assess the state of existing film and screen studios and related infrastructure
- Examine the potential impacts of development plans on industry activity
- Identify opportunities and concerns and provide recommendations as to how the City can encourage industry growth

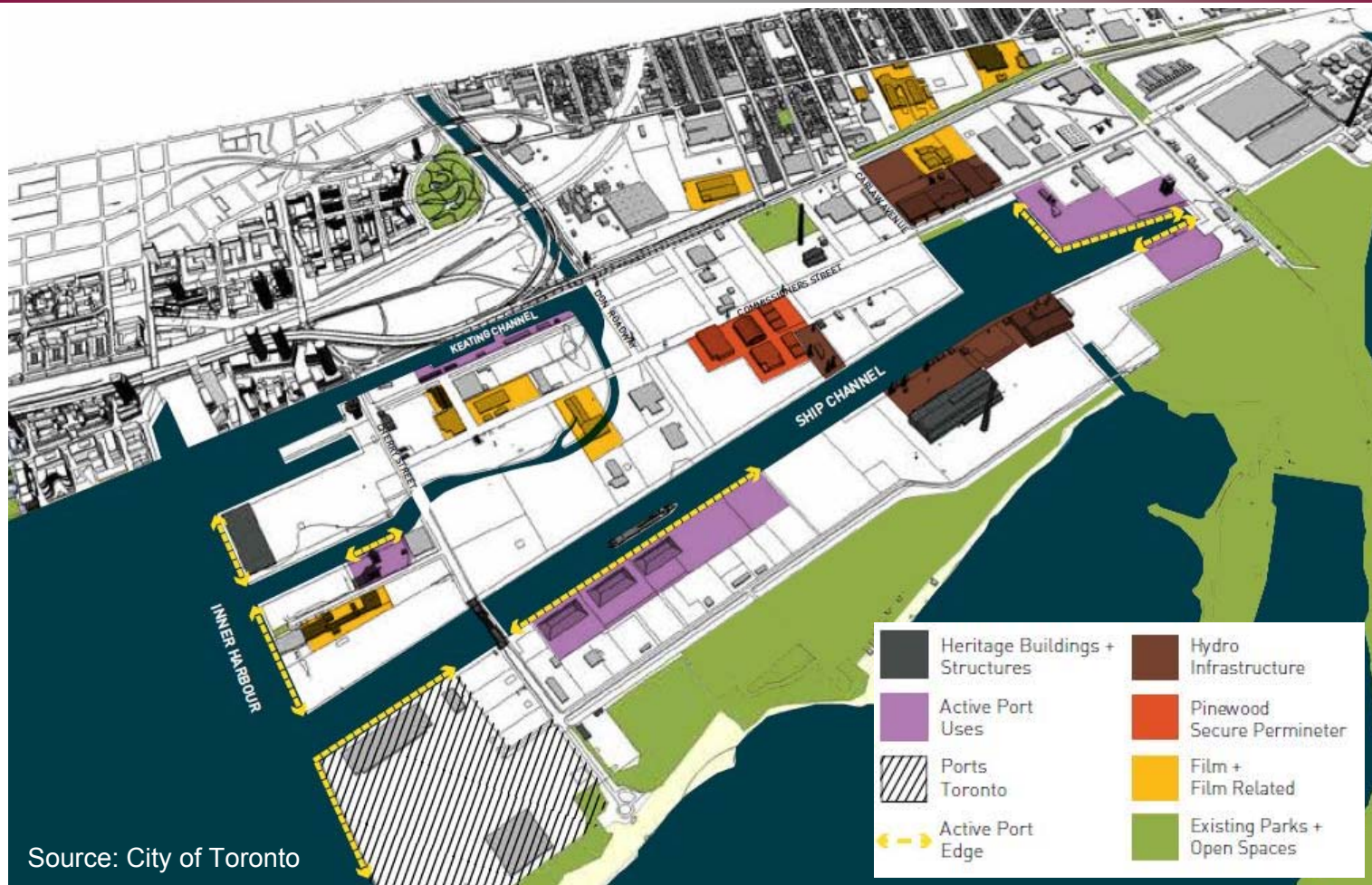
KEY FINDINGS

- Study areas are industry's preferred location for growth
- However, changes could constrain opportunity, but are surmountable
- Flexibility and innovation will be key to future success

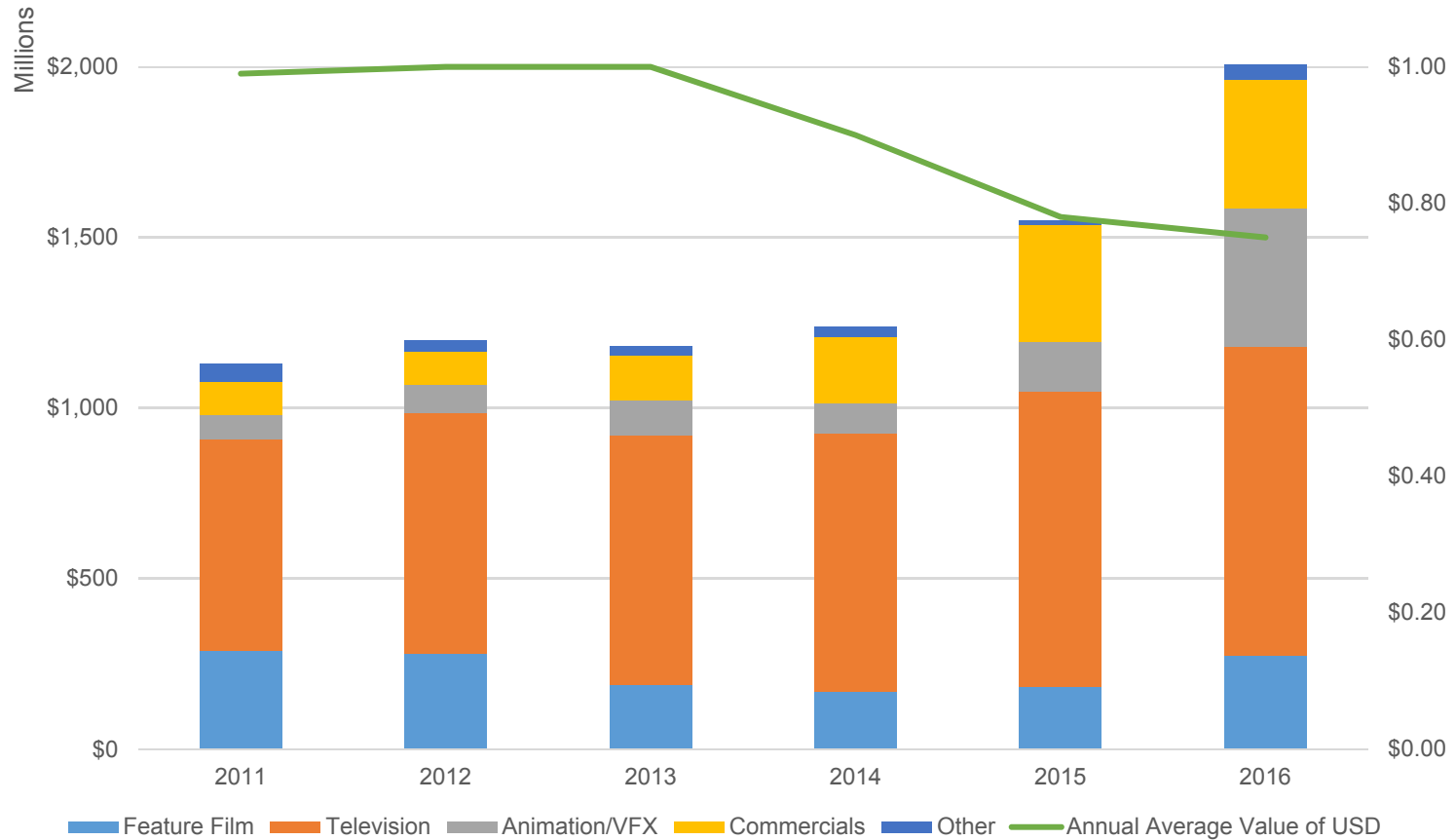
LOCATION BASED SHOOTING IS CONCENTRATED IN THE DOWNTOWN



STUDIO INFRASTRUCTURE ALREADY ESTABLISHED IN THE STUDY AREAS



NEED FOR SPACE IS GROWING, BUT EXISTING SUPPLY UNDER PRESSURE



Source: City of Toronto Economic Development & Culture Division

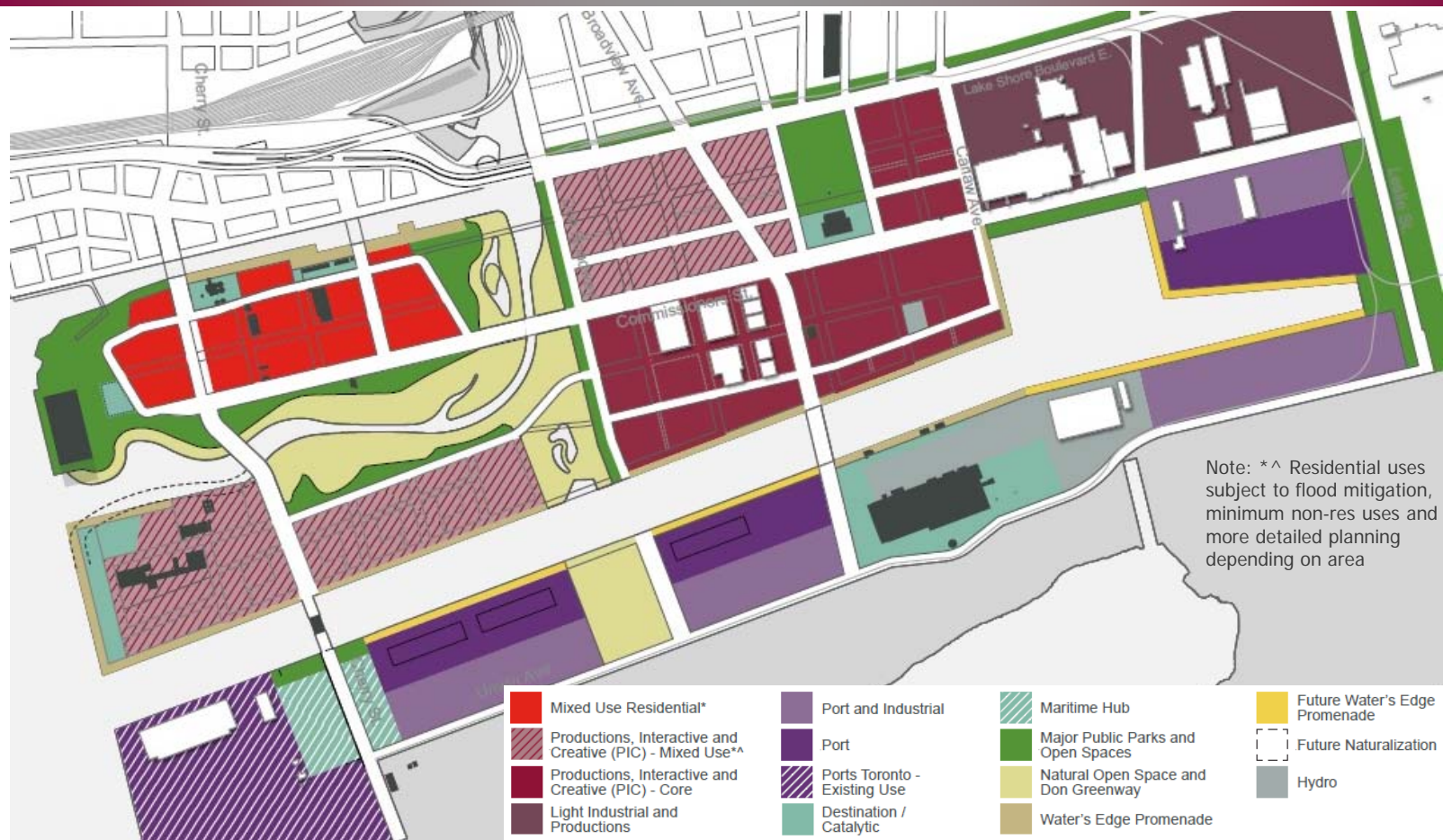
STUDY AREAS ARE PREFERRED LOCATION FOR GROWTH

- Location is ideal for a cluster of industry uses
- Industry benefits from diverse mix of type and quality of space
- Greatest need is for more purpose built studio space (larger complexes favored)

CHANGES ARE COMING TO SOUTH OF EASTERN



PROPOSED PLANS ARE RESHAPING THE PORT LANDS



Source: City of Toronto.

CITY'S OWNERSHIP OF LAND PRESENTS OPPORTUNITY

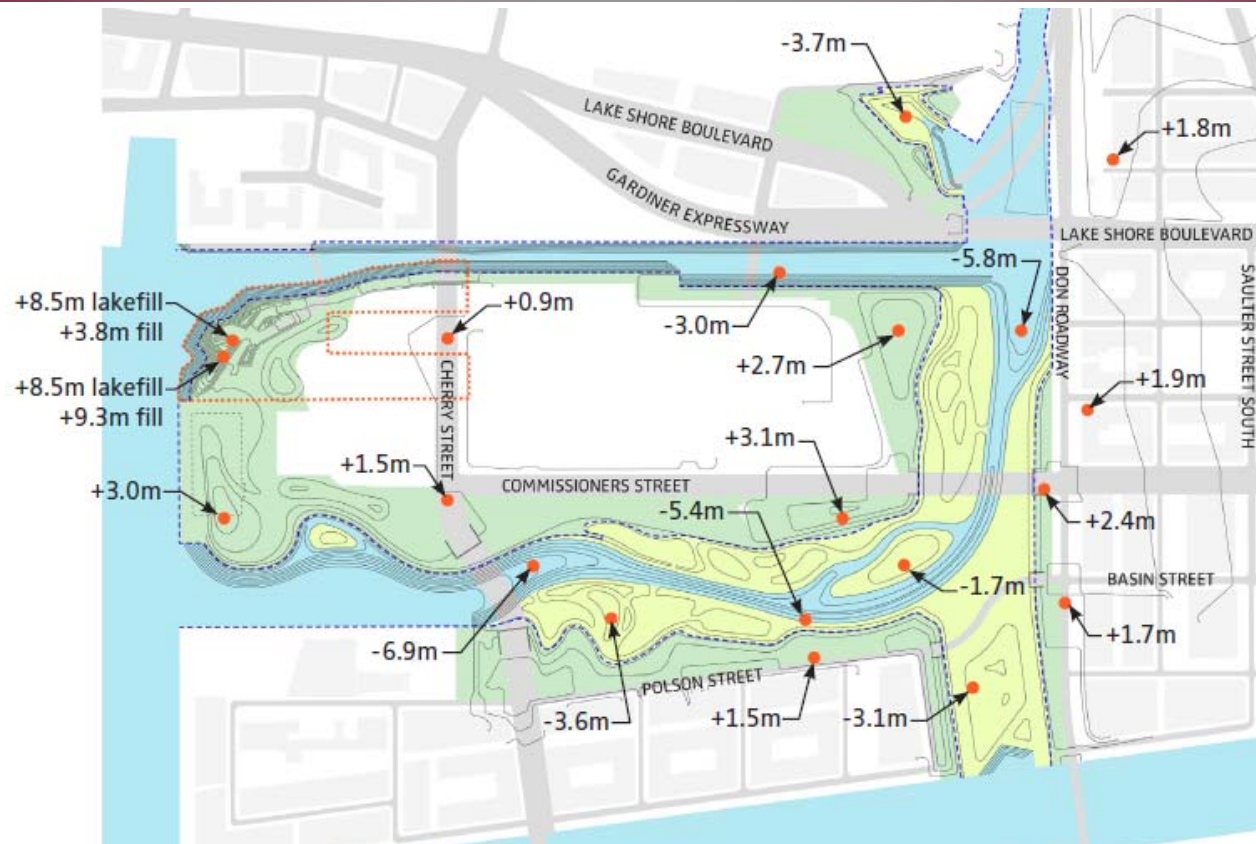


Source: City of Toronto.

KEY CONSTRAINTS MUST BE RECOGNIZED

- Most large, securable sites would require consolidation (10+ acres preferred)
- Land tenure – short term leases
- New uses will bring more competition
- Both areas will be affected by ongoing construction

FLOOD PROTECTION WILL RESHAPE AREA



Legend

● Spot Elevation

±m Grade Difference

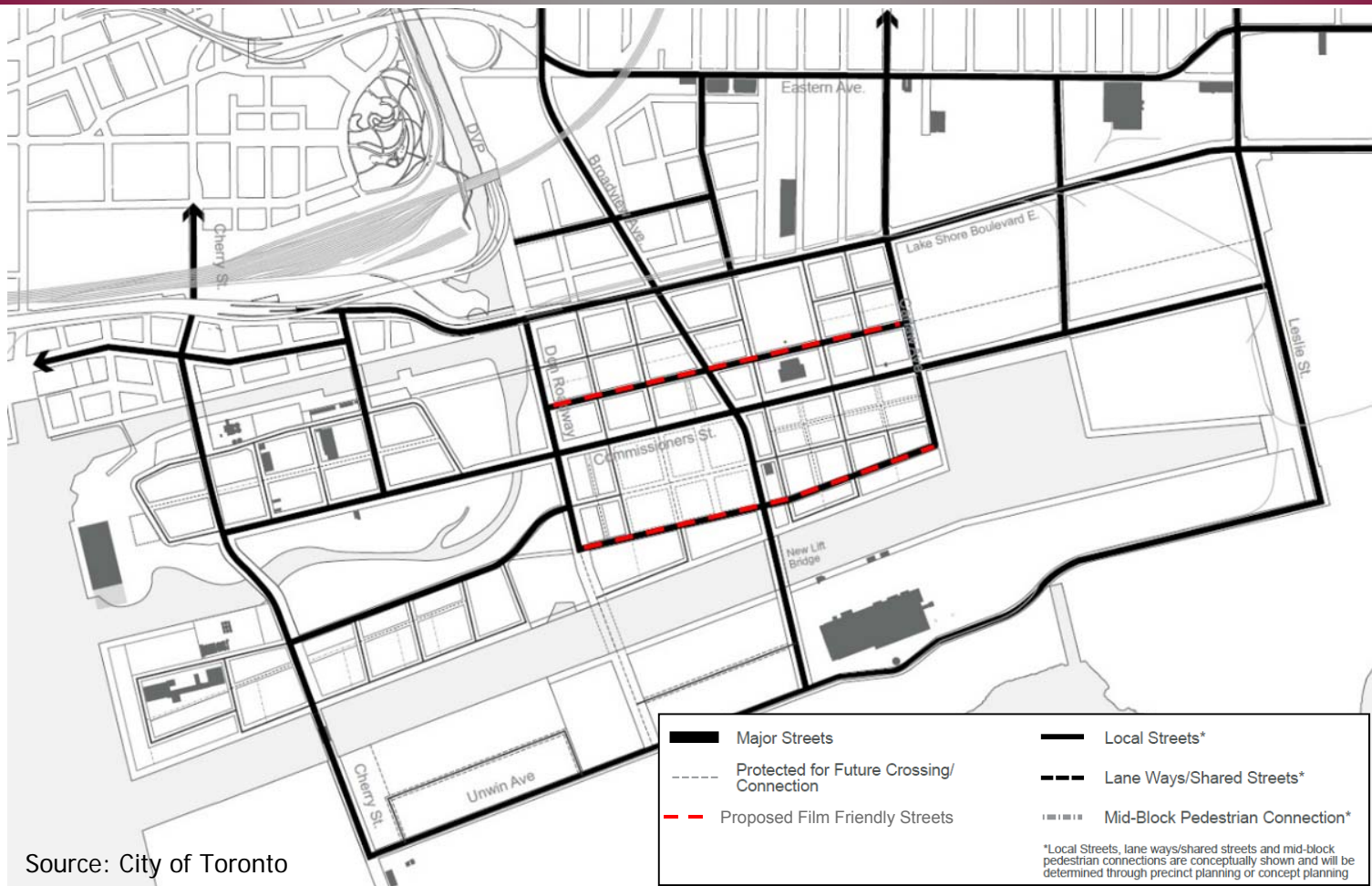
— Proposed 1m Contour Line

- - - Regulatory Flood Line

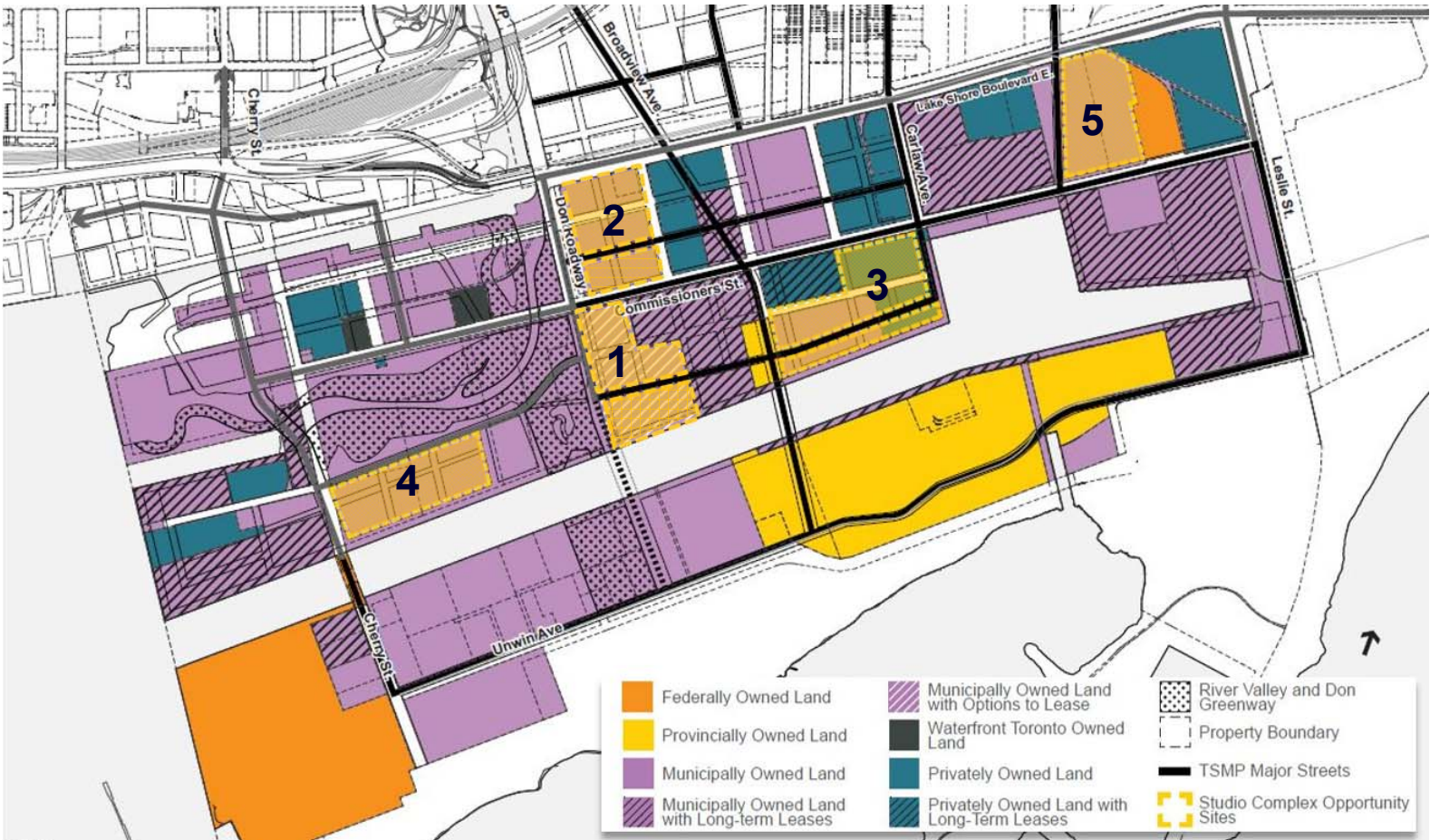
⋯ Zone of Lakefill

Source: City of Toronto.

CHANGES TO TRANSPORTATION NETWORK WILL ALTER BLOCK PATTERN

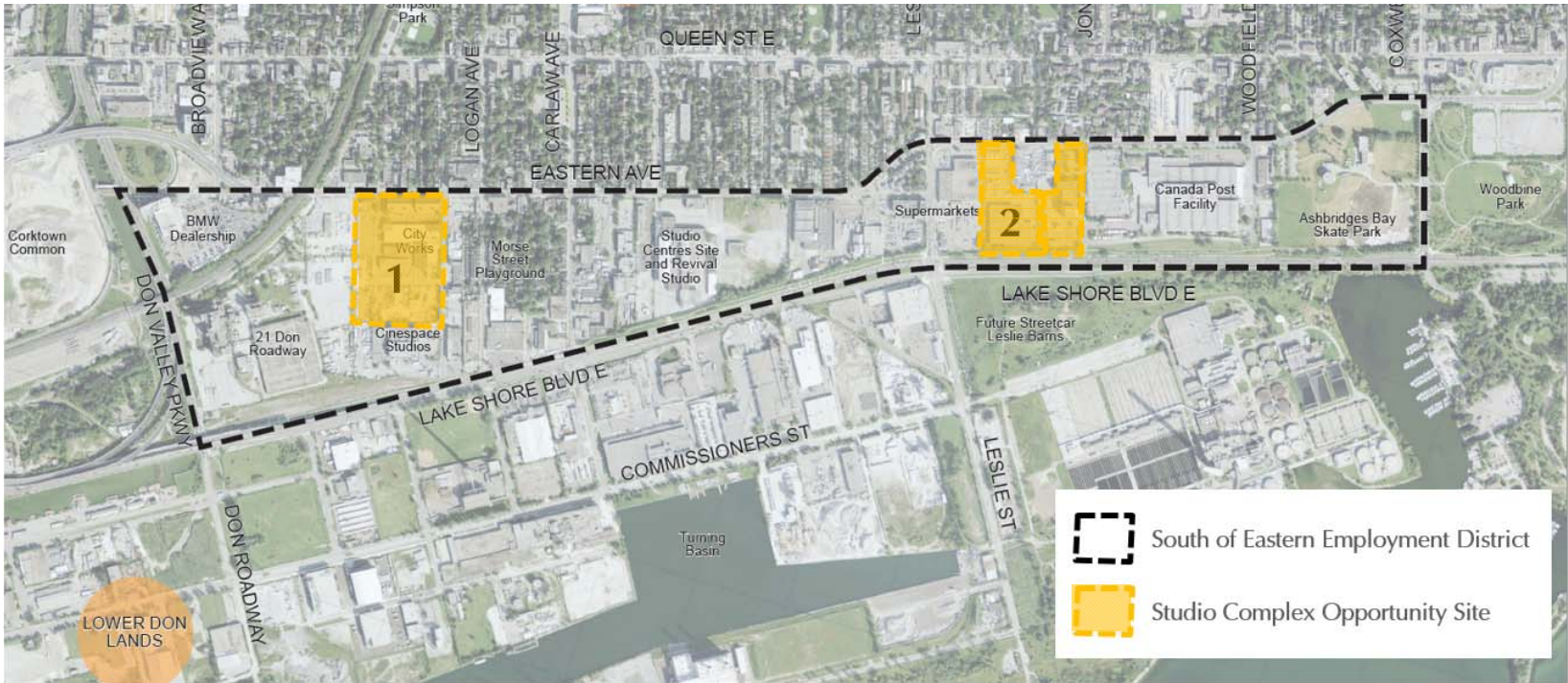


POTENTIAL STUDIO COMPLEX DEVELOPMENT SITES – PORT LANDS



Source: Hemson Consulting, adapted from City of Toronto

POTENTIAL STUDIO COMPLEX DEVELOPMENT SITES - SoE



Source: Hemson Consulting, adapted from City of Toronto and planningAlliance

KEY CONCLUSIONS

- Both areas will be in transition for many years to come
- Success of cluster hinges on adding more core studios
- Acting early will avoid need to compete with other uses
- Stakeholders will need to be flexible

RECOMMENDATIONS TO FURTHER DEVELOPMENT OF STUDIO CLUSTER

1. Seek to maintain existing studio uses as a condition of development where possible
2. Encourage TPLC to consider longer land leases for studio developments
3. Encourage consolidation of developable parcels

RECOMMENDATIONS TO FURTHER DEVELOPMENT OF STUDIO CLUSTER

4. Encourage and incent flexibility and innovation in site design
5. Limit the speculative potential of sites best suited for studio complex development
6. Explore possibility for studio development on the federally owned Ports Toronto site