

Screen Industries Workforce Study: Project overview and methodology

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Digital Media Board

Prepared by
Nordicity

About this Presentation

Nordicity has been asked to present the scope of research and analysis proposed to be undertaken for the *Screen Industries Workforce Study* commissioned by the City of Toronto.

Specifically, this presentation covers:

1. Project Scope and Mandate
2. Inputs and Data Sources
3. Nordicity's Soundstage Database
4. Detailed Methodology and Outputs

1. Project Scope and Mandate

- Study objective: *Benchmark growth requirements and opportunities for the screen industry workforce in order to respond to the jurisdiction's growing market demand.*
- To satisfy this objective, Nordicity will:
 - **Forecast production demand** and **assess soundstage capacity** over the next five years;
 - **Forecast workforce requirements** based on the amount of production that can be serviced;



- **Assess future occupational shortages** and **skill gaps** based on (a) current shortages, (b) forecasted demand, and (c) anticipated future skills requirements; and
- **Develop an equation to estimate incremental workforce needs** based on the amount of soundstage space available.

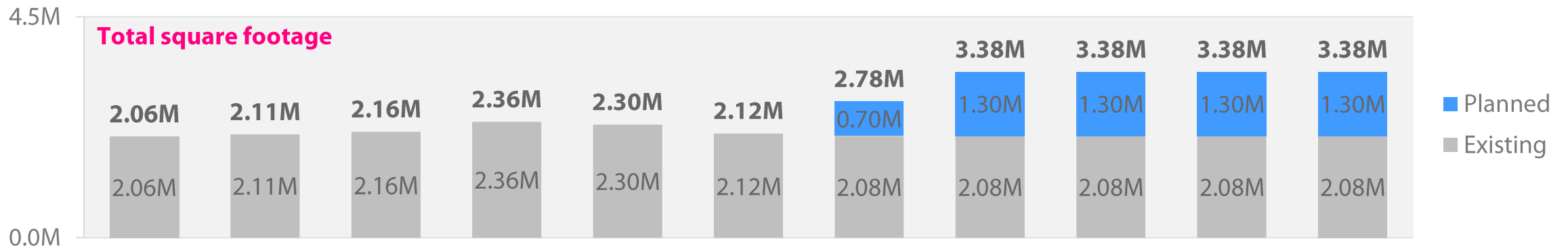
2. Inputs and Data Sources

- **Soundstage space:** Nordicity's proprietary Soundstage Database tracks soundstage availability over time. This data will be used to understand the production capacity of infrastructure in the GTHA.
- **Production volume:** Recent trends observed in GTHA and global production statistics and stakeholder feedback will inform a forecast of production demand in the GTHA.
- **Current workforce:** Nordicity will solicit administrative data from unions and refer to provincial employment data to develop a baseline estimate of the size and composition of the GTHA screen industry workforce.
- **Skill gaps:** Nordicity will consider present-day “pain points” in forward-looking analysis based on information obtained through stakeholder interviews.
- **Future skill needs:** Nordicity will assess skills that are anticipated to be in increasing demand due to the introduction of new technologies in production.

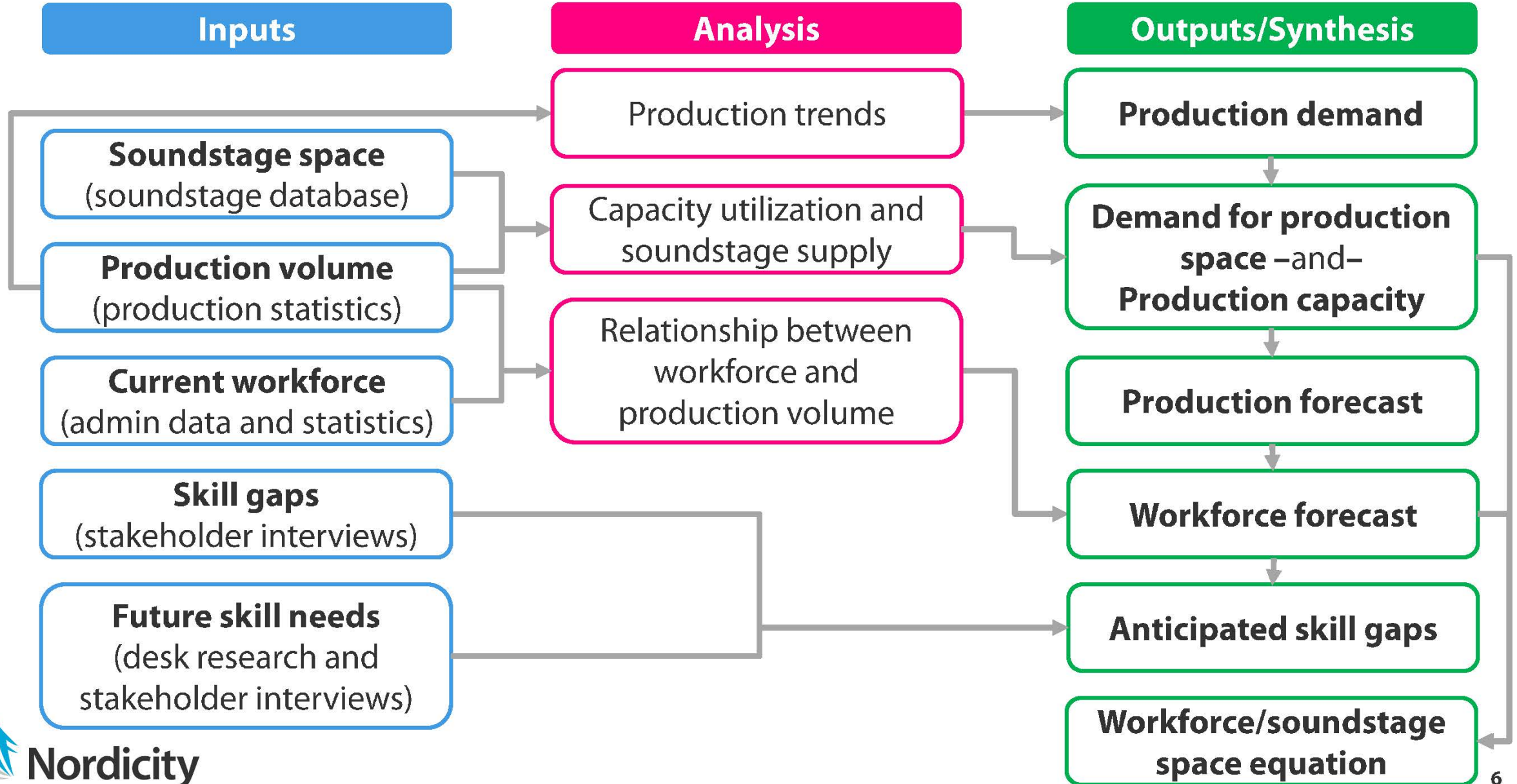
3. Nordicity's Soundstage Database

- **Nordicity's proprietary Soundstage Database** tracks the specifications of soundstages over time. This data source was most recently used to perform analysis for CreateTO's *Soundstage Market Sounding Assessment* (2019).
- Specifically, the database includes historical data and publicly announced plans:
 - **For each studio location:** the address, number of soundstages, largest stage specifications, and auxiliary facilities (workshops, office space, digital facilities, storage space, etc.); and,
 - **For each soundstage:** square footage, height to lowest beam (if available), opening date, and closing date (if applicable).

Soundstages in the GTHA (circa mid-2019)



4. Detailed Methodology and Outputs



Questions?

