Toronto's Screen Future: A Strategic Framework for Continued Growth 2025-2030

For the Toronto Film, Television, and Digital Media Office by Olsberg•SPI

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Contents

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1. EXECUTIVE SUMMARY

1.1. Introduction

This Executive Summary focuses on the key strategic goals and actions that the Toronto Film, Television, and Digital Media Office ("**Toronto Film Office**," "**Film Office**" or "**TFO**") will consider in its planning for 2025-2030, in its strategic position in the Film and Entertainment Industries section of the Economic Development and Culture Division ("**EDC**") of the City of Toronto.

The full report covers a detailed analysis of the film and television industry ("**screen industry**" or "**screen production industry**") and various areas of focus to inform the TFO's direction. The remaining sections in this report are:

- An industry review of the current state of screen production in Toronto – **Section 2**
- Strategic analyses of key sectors in the Toronto screen industry, including workforce, infrastructure and sustainability – **Section 3**
- An examination of Toronto's competitive positioning through seven city/film office case studies – **Section 4**
- An examination of the operations of the TFO – **Section 5**
- The full list of Strategic Goals, Actions and Recommended Tactics for the industry for 2025-2030 – **Section 6**
- Appendices – **Section 7.**

1.2. Summary – Strategic Goals and Actions for Toronto Screen Industry 2025-2030

Based on the program of research and analysis carried out for this Study, SPI has identified four Strategic Goals for the TFO's leadership role in the industry's continued development over the next five years. Each of these Strategic Goals has specific Actions and Recommended Tactics, and these are described further below.

The four Strategic Goals are:

1. Strategic Goal One – Secure and Maintain Toronto's Position as a Leading Global Production Hub
2. Strategic Goal Two – Expand the TFO's Marketing and Communications Responsibilities and Activities
3. Strategic Goal Three – Refocus and Increase the TFO's Support for the Domestic Production Sector
4. Strategic Goal Four – Create Optimal Operating Conditions for the TFO in its Economic Development and Culture Division Home.

A description of these Strategic Goals and Actions is included below, while details of the various Recommended Tactics are included in **Section 6** of this report.

1.2.1. Strategic Goal One – Secure and Maintain Toronto's Position as a Leading Global Production Hub

Having established its position among the world's leading production hubs as an overall attractive location for valuable portable productions from the US and elsewhere, the focus is on constantly improving the city's offer. It is important to ensure that Toronto maintains and continues to strengthen its position over the next five years, including through attractive incentives and first-class physical infrastructure, and continuously improving its film-friendliness. This is an increasingly challenging task in the face of substantial global competition.

- **Action 1:** Leveraging its convening powers and its deep knowledge of stakeholder needs, **the TFO to strengthen working relationships with key City Divisions to address and resolve highlighted challenges that are within the municipality's control**, using a highly collaborative approach.
- **Action 2: Advocate for the addressing and resolution of key identified issues that are outside of the TFO's control** that have a direct impact on the city's film friendliness.
- **Action 3: Maintain focus on physical infrastructure** by working to ensure Toronto's offer of studio space continues to meet and satisfy demand from international clients.
- **Action 4: Maintain a competitive talent base, as well as a diverse and balanced workforce,** to continue servicing productions filming in Toronto; introduce or expand actions to track and measure the demand for labour in order to inform workforce development initiatives for the next five years.
- **Action 5: Advocate for tax credit stability** by contributing, where and when possible, to ensuring the accessibility and competitiveness of Ontario's tax credit, in line with industry expectations and international best practice.
- **Action 6: Own and lead on expanding Toronto's position on sustainability and green production** by building on existing sustainability initiatives and closing key gaps (e.g., EV infrastructure, renewables), signalling Toronto's aspiration to be a leader in green production.
- **Action 7: Convene industry tables focused on new and advanced production technologies** (AI, virtual production, R&D, etc.) to share knowledge, build fluency, ensure up-to-date awareness and create the conditions for collective progress, acknowledging both the inherent challenges as well as the opportunities.
- **Action 8:** Work with relevant partners to **enact or lobby for the safe and equitable adoption and use of emerging technologies in Toronto**, with strong rights protections for all screen professionals, while ensuring the city remains competitive.

1.2.2. Strategic Goal Two – Expand the TFO's Marketing and Communications Responsibilities and Activities

Build on existing efforts by instituting a more consistent and proactive program of outreach, including communications tools and channels, in-person and virtual events, trade missions, and travelling to participate in international screen festivals and markets, with the express goal of promoting Toronto to new targets and keeping the city and its offer top of mind to existing clients. This is a critical goal to maintain Toronto's competitiveness and is in line with standard operating practice for film commissions and offices all over the world.

- **Action 1: Ramp up marketing and global promotion strategies** by expanding targeted marketing efforts to attract more international productions, diversifying market outreach and educating the public on the sector's value.

- **Action 2: Enhance communication strategies for key stakeholder groups** by improving communication through regular forums, town halls and proactive outreach.
- **Action 3: Continue to drive evidence-based policy and industry monitoring** by implementing robust sector monitoring, regular industry reporting, and coordinated advocacy to ensure policy development is data-driven and responsive to market changes.

1.2.3. Strategic Goal Three – Refocus and Increase the TFO's Support for the Domestic Production Sector

The domestic production sector is facing a range of headwinds from various sources, including broadcaster entrenchment and international competition. The TFO must ideally collaborate with stakeholders to better understand the issues, improve communication and address these factors.

- **Action 1: Work to strengthen the domestic production sector** by collaborating on various efforts and initiatives with key stakeholders.
- **Action 2:** Advocate for the continued support for and investment in **critical provincial and federal funding programs for domestic production.**

1.2.4. Strategic Goal Four – Create Optimal Operating Conditions for the TFO in its Economic Development and Culture Division Home

Build on the unique advantages of being located within the municipal government of one of the world's most innovative, fast-growing and multicultural Western cities, while also addressing operational challenges.

- **Action 1: Expand and deepen communication to leadership throughout the City of Toronto about how the TFO's goals serve larger City strategies** around key areas, including economic growth, workforce development, sustainability and innovation, strengthening alignment in continued service of the screen industry and wider city success.
- **Action 2: Increase the TFO's ability to meet expectations and standards common to competing film commissions** related to its responsibility as the marketing and outreach entity for Toronto's industry in the international marketplace.

2. THE CURRENT STATE OF FILM PRODUCTION IN TORONTO

2.1. Overall Industry Review

The city of Toronto is well-positioned to maintain its prominent global position as a major hub for film and television ("Screen") production, as it is consistently recognized for its capacity to accommodate major international service projects across the production value chain, while also hosting a stable and dynamic domestic production industry. The city's attractiveness for continued investment (subject to market conditions) is underpinned by the strength and reliability of its infrastructure and workforce, its location versatility and film-friendly reputation, as well as the municipal government's consistent public commitment to the industry's success.

The wider Canadian screen industry has faced significant challenges over the past few years. The Canadian Media Producers Association's (CMPA) Profile 2024 report notes an 18.5% decline in overall film and television production volume in 2023, a drop largely attributable to the global impact of the 2023 SAG-AFTRA and WGA labour strikes; similar or more severe disruptions took place in jurisdictions worldwide.

Despite this anomalous downturn, which followed the earlier disruptions caused by the COVID-19 pandemic, **the industry continues to make a substantial contribution to the Canadian economy** and is on a path to recovery following these major crises.[1]

Against this backdrop, Toronto's screen industry has demonstrated resilience: direct production spend reached CA$2.2 billion in 2019, dipped to CA$1.5 billion in 2020 during the pandemic, then rebounded to a record CA$2.5 billion in 2021 (a 13% increase from 2019) and CA$2.6 billion in 2022 (see **Figure 1** below).[2]

Relative to competing production hubs, Toronto's post-pandemic growth exceeded that of Los Angeles, where 2022 on-location shoot days were only 0.7% above 2019,[3] and outpaced British Columbia (BC), whose 2022 production spend of just over CA$3.6 billion remained below its 2019 peak of CA$4.1 billion.[4]

At the same time, **Toronto has not been immune to the recent market uncertainties due to global conditions.** Production spend declined to CA$1.6 billion for 2023,[5] primarily attributed to the 2023 SAG-AFTRA and WGA labour strikes and broader global economic uncertainties, alongside streamer consolidation and shifting priorities towards profitability.[6] For 2024, production expenditure is anticipated to recover to over CA$2.2 billion.[7]

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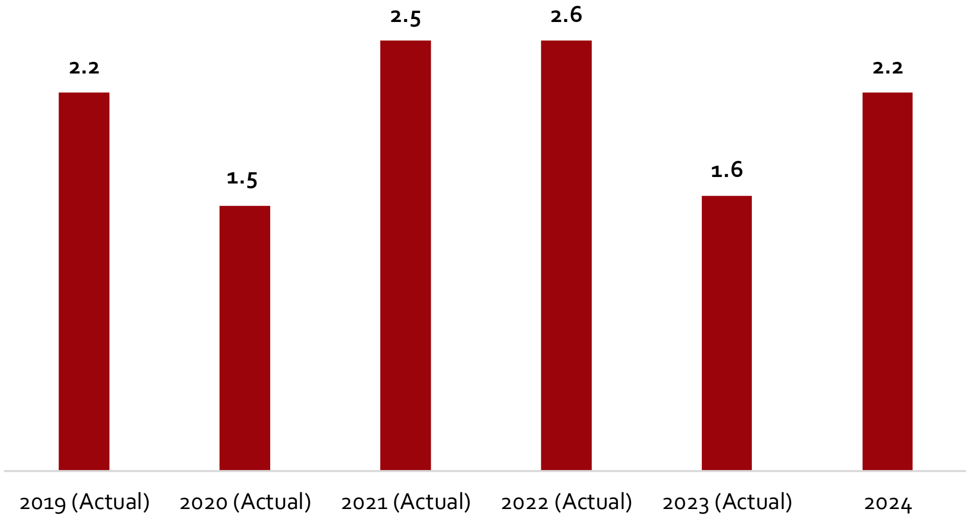
[1] *CMPA Profile 2024*. Canadian Media Producers Association.
[2] *2025 Program Summary Economic Development and Culture.* Economic Development and Culture Division, City of Toronto, 2025.
[3] *Los Angeles area filming maintains pre-pandemic levels through 2022.* FilmLA, 18th January 2023.
[4] *Creative BC insights show that 2022 production spending by film and television projects in BC is over the estimated $3.6b mark in BC.* Creative BC, 27th July 2023.
[5] Ibid
[6] *Content spend in 2024: SVoD services to surpass commercial broadcasters in Europe's major TV markets.* Ampere Analysis, 10th June 2024.
[7] Latest data from the TFO

Figure 1 – Annual Film Production Spend in Toronto (in CA$ billions)



Source: 2024 and 2025 Program Summary, Economic Development and Culture Division

Recent workforce data further underscores Toronto's robust growth. The industry employed over 35,000 highly skilled professionals in 2022,[8] marking a nearly 38% increase from the 25,400 professionals recorded in 2019.[9] According to the TFO, the workforce in 2025 is estimated at 40,000 individuals; for scale, that is comparable to the entire Toronto Public Service (43,729 employees as of June 2025).[10]

This workforce expansion is the result of a combination of factors, including market demand and targeted workforce development initiatives from unions and training institutions. Among these, the City of Toronto's xoTO Pathways program, launched in 2021/2022, has played a key role in strengthening training and advancing efforts to diversify the workforce.[11]

Toronto's screen industry workforce is bolstered by a **robust network of respected educational and training institutions**, such as Sheridan College's Screen Industries Research and Training Centre (SIRT), the Canadian Film Centre and the Toronto Film School.

Furthermore, Toronto's production environment is particularly diverse, with television dramas and streaming series accounting for nearly half of the total production expenditure in 2021, driven significantly by international productions. The ecosystem is further supplemented by feature film productions, an active commercial production sector, and internationally acclaimed post-production, visual effects (VFX), animation and virtual production facilities.

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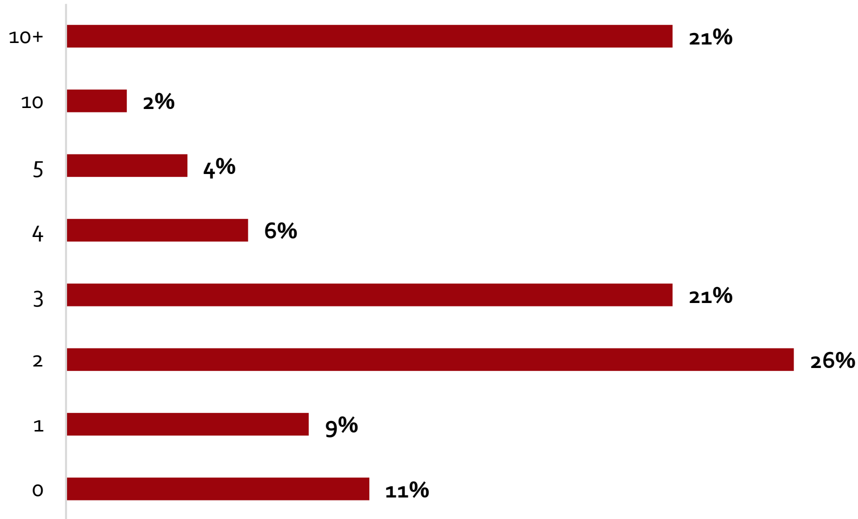
[8] *Film and Television Facts.* ACTRA Toronto.
[9] *Toronto Screen Industry Workforce Study.* Nordicity, 29th March 2021.
[10] *Quarterly Workforce Statistics – June 2025.* City of Toronto, June 2025.
[11] *Toronto Screen Industry 2021: A New Milestone.* Economic Development and Culture Division, City of Toronto, 2021.

To delve deeper into the current operational realities for the workforce in Toronto, a robust program of individual consultations and roundtable discussions was conducted for this Study. In addition, a **sample of domestic industry professionals was surveyed to add some quantitative context to this assessment** (largely producers); approximately 35% of nearly 200 professionals responded.

The survey data reveals a **workforce that is actively engaged across both domestic and international service productions**, highlighting the industry's diversified business model. Most respondents work on international productions, with 89% reporting involvement, and 47% working on two to three international projects annually (**Figure 2**).

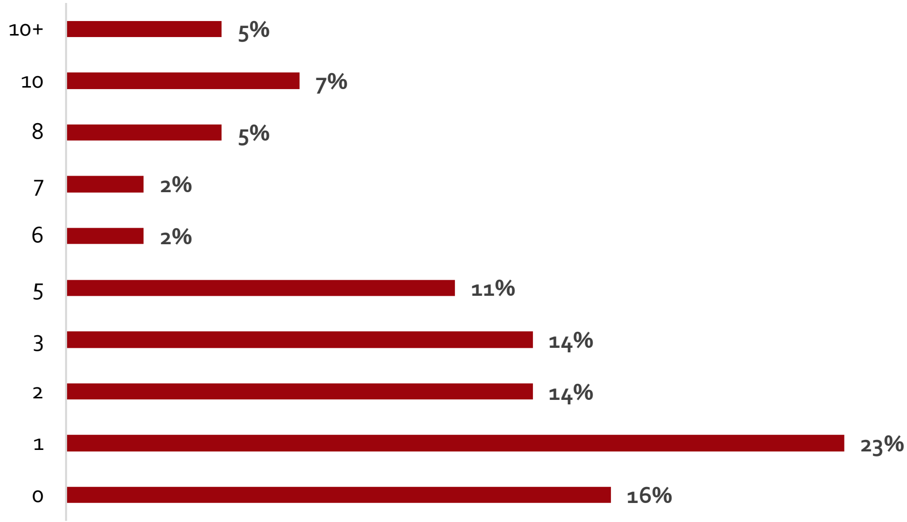
Figure 2 – % of Respondents Who Work on International Service Productions Per Year



Source: Olsberg•SPI (2025), % of respondents (n=54)

Similarly, 84% of respondents work on domestic productions, with 28% involved in two to three projects per year (**Figure 3**).

Figure 3 – % of Respondents Who Work on Domestic Productions Per Year



Source: Olsberg•SPI (2025), % of respondents (n=54)

Only 11% of respondents reported no engagement with service productions, while 16% did not work on any domestic projects. **This distribution indicates a fluid movement of talent across service and domestic work, supporting the case for maintaining robust support for and investment in domestic and international production activity.**

The findings reinforce the strength of Toronto's screen industry as a diverse and adaptable industry, benefiting from a balanced portfolio rather than reliance on a single market.

Physical infrastructure remains a foundational strength, with almost 3 million square feet of studio space, placing Toronto among the largest global studio markets.[12] Prominent facilities include Pinewood Toronto Studios, currently offering 16 sound stages,[13] and Cinespace Film Studios, featuring 29 sound stages.[14] Toronto has also emerged as a global leader in virtual production, particularly in advanced in-camera VFX technologies.

In mid-2025, uncertainty in the US arising from ongoing trade tensions and potential changes to federal screen incentives have posed material risks to Canadian production pipelines. Toronto faces intensifying competition from other jurisdictions and sectors for investment and talent; high real-estate costs are constraining soundstage development; and workforce pressures, including the loss of senior crew and challenges retaining new entrants, are affecting the talent pipeline. These vulnerabilities require proactive monitoring and targeted policy responses. **They also provide a clear rationale for the TFO, together with its stakeholders and partners,**

[12] *Ontario Creates Studio List*, Ontario Creates.
[13] *Pinewood Toronto Studios*, Pinewood Group.
[14] Cinespace Studios.

to seek the authority and resources required to respond to these challenges by pursuing the strategic goals set out in this Study.[15]

Overall, Toronto's screen production industry outlook for 2025-2030 remains strong and positive, supported by a sustained global demand for content and ongoing technological enhancements; the city continues to be a leading global hub for film and television production despite the broader economic uncertainties that have been affecting the screen industry worldwide. It sits within the context of the overall continued success of the global entertainment and media industry, which is projected to reach US$3.5 trillion by 2029, growing at a compound annual growth rate (CAGR) of 3.7%.[16] Toronto's established production infrastructure, skilled workforce and favourable business environment position it well to capitalize on this global growth.

2.1.1. Strengths

- Toronto's talent, both above- and below-the-line, is one of its core competitive advantages, with an **experienced and expanding workforce** estimated at 40,000 professionals, according to the TFO. Programs like xoTO Screen Industry Pathways actively support diversity and professional training, enhancing workforce depth and adaptability as well as the industry's ability to meet ongoing demand from high-profile producer clients.

  For example, Sheridan College's Screen Industries Research and Training Centre (SIRT) have partnered with OYA Media Group's Emerging Filmmakers Program and the xoTO Screen Industry Pathways to offer virtual production training workshops.[17] These workshops provided participants (particularly those from Black, Indigenous and People of Colour (BIPOC) communities) with hands-on experience in cutting-edge technologies such as LED walls and game engines, preparing them for roles in the evolving screen industry.

  Continued investment in talent development supports broader economic benefits, including job creation, opportunities for emerging professionals and spillover effects on adjacent high-growth industries such as gaming, digital health and infrastructure.

- Financially, Toronto benefits from **stable and highly competitive provincial and federal tax incentives**. The provincial incentives are:
    - Ontario Production Services Tax Credit (OPSTC) – 21.5% on all qualifying production expenditures incurred in Ontario
    - Ontario Film and Television Tax Credit (OFTTC) – 35% of the eligible Ontario labour expenditures
    - Ontario Computer Animation and Special Effects Tax Credit (OCASE) – 18% on qualifying labour expenditures.

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[15] *Could a US national production incentive be on the cards with Trump back in charge?* Screen Daily, 15th February 2025.
[16] *Perspectives from the Global Entertainment & Media Outlook 2025–2029.* PwC, 24th July 2024.
[17] *Sheridan Screen Industries and Research Training Centre partners with OYA Media and the City of Toronto to offer virtual production training to under-represented communities.* Sheridan College, 2nd December 2021.

- The federal incentives are:
    - Film or Video Production Services Tax Credit (PSTC) – 16% on qualifying labour expenditures
    - Canadian Film or Video Production Tax Credit (CPTC) – 25% on qualifying labour expenditures.

  The ability to 'stack' or claim both provincial and federal incentives remains a highly attractive selling point, while **favourable currency exchange rates** further bolster Toronto's cost competitiveness.

- Toronto's **infrastructure offer remains globally competitive**, with almost 3 million square feet of studio space able to accommodate concurrent productions over extended periods. Major complexes anchor the city's capacity, while emerging facilities in virtual production – particularly advanced in-camera VFX – add to its strengths.
- The TFO's **proactive approach significantly enhances the city's appeal as a major screen production hub**. In addition to managing an efficient and timely permitting process, the TFO actively supports industry growth through targeted workforce development, addresses real-time labour gaps and inclusion issues, promotes the city's offer internationally, advances film-friendly City policies by facilitating studio construction and leading environmental sustainability initiatives, and advocates for production needs across municipal and government levels.
- Toronto's **diverse urban and suburban locations and its historical buildings** offer creative flexibility and versatility to productions.
- **Toronto's global visibility as a vibrant and active 'film city'** continues to be elevated through the presence of festivals like the **Toronto International Film Festival (TIFF),** now in its 50th year and one of the largest publicly attended film festivals in the world. TIFF attracted more than 480,000 attendees in 2024, and the films included in the programming consistently perform well both in wide release and during the subsequent awards season. Other important festivals that contribute to Toronto's 'film city' brand are the Hot Docs Canadian International Documentary Film Festival, the ImagineNATIVE Film and Media Arts Festival, the Toronto Reel Asian International Film Festival, Inside Out Film and Video Festival and the Toronto Black Film Festival. Highly respected film schools like the Canadian Film Centre also help to underpin Toronto's identity as a 'film city'.
- The **TFO's marketing strategy** contributes to keeping the city top of mind as a major screen production hub for current as well as potential clients, through international trade missions, targeted presentations to studios and large producers, industry networking events, partnering with the Ontario Film Commission and industry on provincial familiarization trips, and more. The recent mission to Ireland and the UK that Mayor Chow led sends a clear signal to international clients about the seriousness of the City's commitment to the industry.[18]

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[18] *Mayor Olivia Chow leading trade mission to the UK and Ireland.* CBC, 6th July 2025.

- The City and the industry's **increasing embrace of sustainability initiatives**, including green production practices and renewable energy investments, positions Toronto as a forward-thinking and responsible location, with the potential to lead on future industry-specific sustainability efforts.
- Toronto's position as **the second-largest and second-fastest-growing tech hub in North America** fosters significant technical innovation and advanced training opportunities, directly benefiting screen production and adjacent creative industries.[19]
- As the **primary hub for creative industries in English-speaking Canada**, Toronto generates most of the revenue in music, book publishing and theatre, underpinning a vibrant cultural ecosystem that supports cross-sector collaboration and talent development.

2.1.2. Weaknesses

- The screen industry in Toronto engages in multiple ways with municipal, provincial and federal governments. While there has been communication and collaboration through regular meetings and joint initiatives to align efforts across the industry, research and feedback indicate that there is an **opportunity for greater alignment to service all stakeholders, particularly between the municipality and the province.**
- **The talent pipeline faces transitional challenges**, particularly with the anticipated retirement of senior crew members, which may create gaps in mid-career skill levels. Additionally, entry-level pathways remain limited in some areas, with the opportunity to improve alignment between training programs and practical on-set experience, as well as to support ongoing talent development.
- **Rising costs, including urban day rates and location fees, and logistical considerations such as traffic congestion and dispersed infrastructure, are key factors that are affecting production budgets**. While international stakeholders widely praised Toronto's fast overall permit turnaround and competitive fees, some consultees flagged targeted areas for improvement to reduce production costs, particularly in securing access to certain City-owned facilities and other municipal sites.

  Examples shared by consultees included longer-than-standard turnaround times for obtaining permits for City parks and Toronto District School Board lots, restrictions or bans in some park locations, and lengthy coordination with property managers for public locations such as malls.
- **Domestic producers are experiencing significant pressures from rising costs across the production value chain, which directly affect project viability.** In parallel, some stakeholders highlighted that commissioning practices, while shaped in part by regulatory frameworks, can also influence the scale and type of domestic production. These issues, though distinct, both point to potential areas

[19] *Why Canada's largest city has become a heavy-hitting global tech hub.* Forbes, 19th February 2020.

where policy adaptation could help strengthen the environment for Toronto producers.

- **The TFO's operational efficiency has been hampered by factors relating to its highly valuable position within the municipal system**, limiting its flexibility in some areas when compared to similar offices in comparable cities. These limitations affect key areas such as the speed of its external communication and the frequency and reach of its marketing and promotional activities, including travel to targeted festivals and markets.
- **Access for the TFO to comprehensive, real-time production data remains limited**, which affects its ability to consistently leverage evidence to quantify the industry's value.
- While the festivals and markets mentioned above (TIFF, Hot Docs Canadian International Documentary Film Festival, the ImagineNATIVE Film and Media Arts Festival, the Toronto Reel Asian International Film Festival, Inside Out Film and Video Festival and the Toronto Black Film Festival), as well as highly respected film schools like the Canadian Film Centre help to underpin Toronto's identity as a 'film city', they can often **face financial precarity year-on-year as wider funding priorities may shift**. This could affect their ability to consistently host programs specific to domestic talent and workforce development.

2.1.3. Opportunities

- **Strengthen communication channels between the TFO and other levels of government for information sharing and strategic collaboration efforts toward industry development**. Working more closely together can lead to more streamlined operations within this industry in Toronto.
- **Continue to strengthen and leverage the TFO's alignment to wider municipal goals** on economic growth, workforce development, sustainability and innovation; this would underpin the necessary collaboration on coordinated service delivery to reinforce Toronto's identity as a film-friendly city. Collaboration to address producers' operational challenges is critical among key Divisions, including Transportation Services, Corporate Real Estate Management and Parks and Recreation.
- **Optimize the TFO's operational effectiveness** within the Economic Development and Culture Division by securing greater decision-making autonomy for marketing and outreach activities, streamlining internal approvals and ensuring annual travel and promotion budgets are aligned with industry opportunities.
- **Expand and diversify global client base** by increasing the TFO's presence at international festivals and markets, adding new target territories each year, and using segmented, audience-specific marketing to promote Toronto's strengths in film, television, post-production, VFX and animation.
- **As and when market demand for studio facilities in the city approaches or exceeds current capacity, increase market share through infrastructure growth** by encouraging foreign direct investment in new and retrofitted studio

facilities, monitoring capacity and occupancy via data collection, and safeguarding employment lands for screen production use.

- **Enhance competitive positioning through workforce development** by addressing current and emerging labour gaps, creating pathways for upskilling and re-skilling, aligning training with evolving technologies, and strengthening Diversity, Equity and Inclusion (DEI) in crew recruitment and retention.
- **Leverage sustainability as a differentiator** by expanding green production initiatives, improving EV charging infrastructure at filming locations and integrating renewable energy solutions; contribute to partner recognition schemes where possible for productions achieving high sustainability standards.
- **Take a multi-pronged approach to strengthening domestic production capacity**: establish dedicated working groups to identify City-specific constraints; facilitate co-production partnerships; expand collaboration with provincial and federal partners (as appropriate) to improve funding and distribution; expand access to studio space; and improve market access for local producers.
- **Position Toronto as a leader in production innovation** by creating industry forums, technology showcases, and advisory groups to share global trends, particularly in AI, virtual production and other advanced production technologies.
- **Increase visibility of Toronto's screen industry** to the wider public through producing targeted communication campaigns; publishing evidence-based snapshots of its cultural and economic impact; and enhancing transparency via public-facing dashboards and annual operational reviews.

2.1.4. Threats

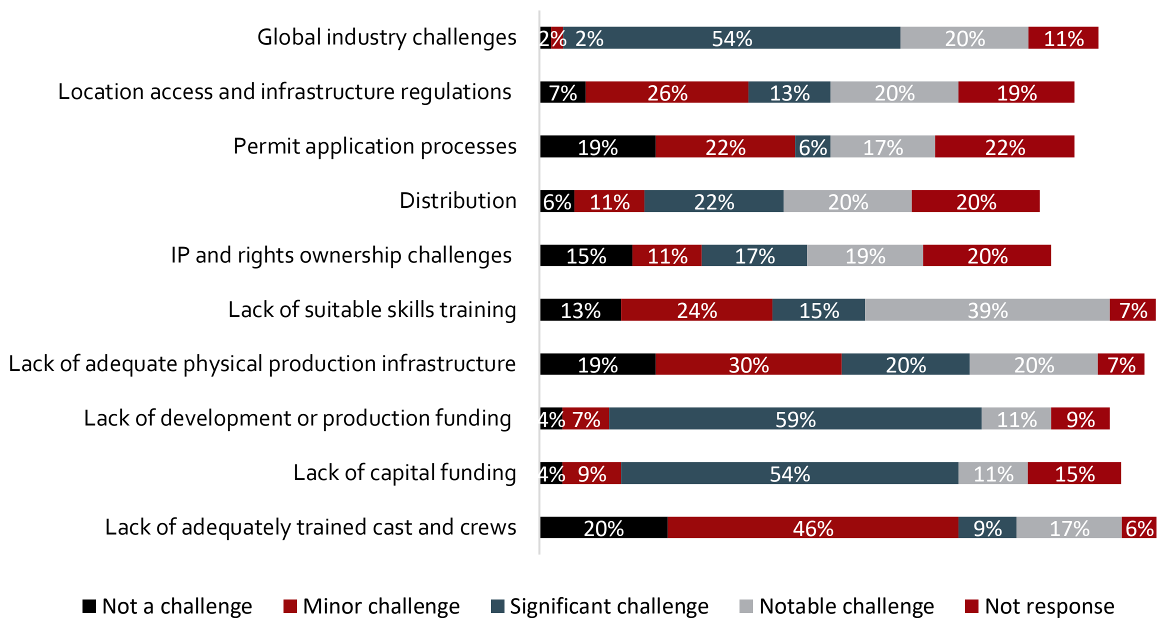
- **Attracting further investment in soundstage development is increasingly challenging.** Developers weighing Toronto against other global jurisdictions, as well as against domestic industries prioritized by government incentives (e.g., electric vehicles and urban mobility), face an uneven playing field. While the City has supported projects through initiatives such as the EDGE program,[20] recent funding reductions underline the importance of renewed and consistent advocacy to provincial and federal partners.
- **Ongoing competition from other jurisdictions** that continue to enhance incentives poses an ongoing risk of production migration if the City eases its consistent annual marketing efforts; competing jurisdictions to Toronto are both in Canada (such as Vancouver in BC and Calgary in Alberta) and in key cities around the world (including London, Melbourne and New York).
- **Toronto's rising living costs, cyclical industry unpredictability and budget constraints are affecting workforce retention**, especially in junior roles. Technological advancements, particularly in AI and virtual production, could impact traditional industry roles, unless proactively addressed through relevant and long-term workforce training and policy.

[20] *Economic Development & Growth in Employment (EDGE) Incentive Program*. City of Toronto.

- **Ongoing market instability creates uncertainty in production planning**, largely driven by consolidation and temporary decreases in commissioning, shifting viewer behaviour, a dynamic trade relationship with the US, and historical shocks such as labour disputes and any lingering pandemic-related effects.
- **The potential reduction of support from other levels of government could exacerbate existing financial pressures in the screen production industry.** Canada's federal budget deficit is projected at CA$43.15 billion for 2024/25, with the government committing to significant expenditure cuts to achieve balance by 2028. [21] As the creative industries have historically been disproportionately affected by broad fiscal consolidation measures, Toronto's screen industry needs to prepare for any potential impacts to its public funding.

The survey revealed several critical challenges impacting professionals in Toronto's screen production industry, as identified by the proportion of participants rating specific issues as notable or significant to their work.

Figure 4 – Key Challenges Involved in Creating Screen Content in Toronto



Source: Olsberg•SPI (2025), % of respondents (n=54)

- **Primary Challenges:**
  - **Limited access to development and production funding** stands out as the most pressing concern, with 70% of respondents identifying it as a notable or significant challenge
  - **Limited access to capital funding** similarly represents a major obstacle, with 65% of participants highlighting it as a significant or notable issue
  - **Global industry challenges** are also highly prominent, with 74% rating these as notable or significant, reflecting broader pressures such as

[21] *Canada's deteriorating federal finances face additional risks.* Fitch Rating, 19th December 2025.

economic uncertainty, rising international competition from emerging markets and supply chain disruptions.

- **Secondary Challenges:**
  - **Lack of suitable skills training** was flagged by 54% of respondents as a notable or significant challenge, signalling possible gaps in workforce development and training accessibility
  - **Operational hurdles**, including distribution difficulties (42%) and location access and infrastructure regulations (33%), are recognized as relevant, though less acute
  - **IP and rights ownership challenges** present moderate concerns, with 36% indicating notable or significant impact.
- **Less Critical Issues:**
  - **Permit application processes** are positively viewed, with only 23% rating these as notable or significant challenges
  - **Lack of adequately trained cast and crews** was identified as a notable or significant challenge by just 26%, suggesting this is a less immediate concern relative to funding and industry-wide pressures.

Table 1 – SWOT Summary

Strengths	**Weaknesses**
1. Large, adaptable workforce with strong diversity and training initiatives 2. Competitive and stackable federal/provincial tax incentives, favorable exchange rate 3. Extensive studio infrastructure and growing virtual production capacity 4. Strong post-production and VFX ecosystem, supported by Toronto's tech sector 5. Proactive TFO providing permitting, workforce, marketing, advocacy and sustainability leadership 6. Wide variety of urban, suburban and historic locations 7. Global visibility as 'film city' through high profile film festivals, markets and film schools 8. Expanding green production practices and renewable energy adoption 9. Vibrant wider creative industries cluster supporting cross-sector collaboration.	1. Fragmented communication channels between regional government agencies 2. Mid-career skills gaps and limited entry-level pathways 3. Rising costs for labour, locations and logistics 4. Cost pressures facing domestic producers 5. Permitting challenges for certain municipal locations 6. Limited operational flexibility for the TFO within the City system 7. Lack of centralized, real-time sector data.

Opportunities	**Threats**
1. Strengthen collaboration with other levels of government and City Divisions 2. Increase the TFO's autonomy and resourcing for marketing and outreach 3. Expand global client base through targeted markets and campaigns 4. Safeguard and grow studio infrastructure (if and when market demand dictates) via new investment and land protection 5. Address labour gaps with upskilling, re-skilling and stronger DEI focus 6. Position sustainability as a competitive differentiator 7. Support domestic production through co-production and funding partnerships 8. Champion AI, virtual production and innovation showcases 9. Enhance public visibility of the sector's cultural and economic value.	1. Intensifying global incentive and infrastructure competition 2. Workforce retention challenges due to rising living costs and industry unpredictability 3. Technological disruption reshaping traditional roles 4. Market instability from streaming consolidation, commissioning reductions and US trade risks 5. Potential funding cuts from federal/provincial governments 6. Challenges attracting new soundstage investment amid competing policy priorities.

3. STRATEGIC SECTOR ANALYSES

3.1. Overview

Toronto's screen production industry is a significant contributor to the city's overall economy, and largely encompasses development, pre-production, principal photography (production), post-production, visual effects, animation and commercial work. As indicated so far in this report, the city benefits from an experienced workforce, established infrastructure and a comprehensive provincial and federal incentive framework that supports both domestic and international service projects.

This section presents a strategic analysis of the key components in Toronto's screen production industry, including workforce training and development, incentive structures and infrastructure capacity, as well as specialized sub-sectors such as VFX, animation, post-production and commercials. It also considers emerging areas such as sustainability and technological developments that are relevant to the industry's ongoing evolution, as well as how it maintains its leading position as a major screen production hub.

The analysis identifies the strengths that support Toronto's competitive position as well as challenges related to labour market shifts, infrastructure limitations and industry-specific considerations. It also draws on direct stakeholder input through a program of confidential consultations and roundtable sessions and sample industry views from the aforementioned industry survey to provide an evidence-based overview, which will inform the TFO's strategic decision-making and wider policy development. **Overall, the findings highlight areas for targeted action to maintain Toronto's position as a competitive and resilient screen production hub in the next five years.**

3.2. Workforce Development and Training in Toronto

Screen production workforce capacity in Toronto is approaching a period of transition, particularly as many experienced heads of department are expected to retire within the next five years. Domestic stakeholders report a high concentration of senior crew in Toronto's estimated 40,000-strong screen workforce. While the survey represents a small sample of the industry workforce's views, it offers valuable insight given that 92% of respondents have more than ten years of experience, aligning with themes raised in stakeholder consultations.

This senior-heavy profile is contributing to emerging skills gaps, as the mid-level talent pipeline is insufficient to replace retiring experts. Addressing this through stronger succession planning will be critical to maintaining the capacity to crew productions effectively at all levels in the years ahead.

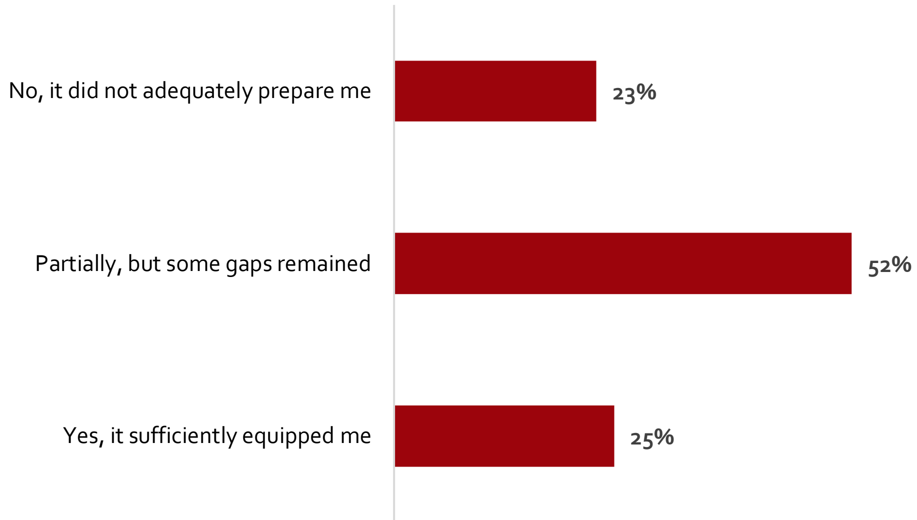
There is an impressive range of **respected universities and specialist film schools in Toronto and the wider region** that are known for their practical programs and industry connections that provide valuable pathways into the industry. They include:

- The **Canadian Film Centre** offers intensive, hands-on programs in film, television, screen acting, music and digital/immersive media
- **Centennial College** provides industry-recognized programs such as digital visual **effects and film and television production**

- **George Brown College** allows students to learn and work alongside industry professionals, focusing on industry-ready training
- **Humber College** offers hands-on experience through Live Labs and ongoing work-integrated learning
- **OCAD University** is Canada's largest and oldest institution for art and design, offering programs in experiential animation and integrated media
- **Seneca College** emphasizes experiential learning and a curriculum that integrates new and traditional media, preparing students for careers in the creative economy
- **Sheridan College** provides programs in animation, game design, and visual effects, with a focus on industry collaboration[22]
- **Toronto Film School** is recognized globally for its industry-focused training; in 2023, it was ranked among the top 15 film schools worldwide by The Hollywood Reporter, due to its distinguished faculty and strong connections with international studios[23]
- **The University of Toronto and York University** offer graduate programs in media production and digital media.[24]

Survey respondents reported that 52% felt their training sufficiently equipped them to work in screen production, although some gaps remained. This is unsurprising, as much of the industry's training is gained through on-set experience. A further 25% indicated that their training was sufficient, reflecting a positive view of Toronto's training provision.

Figure 4 – Did Your Initial Training Sufficiently Equip You to Work in the Toronto Screen Production Sector?



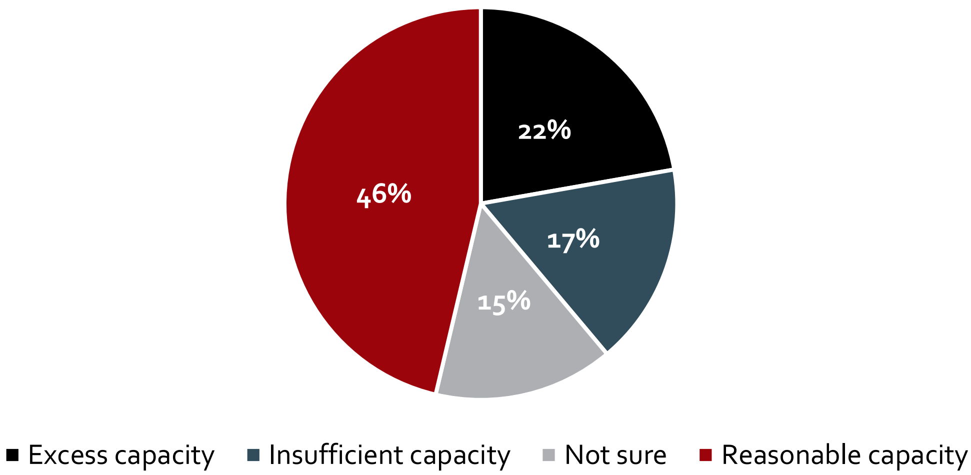
Source: Olsberg•SPI (2025), % of respondents (n=56)

[22] *Sheridan Screen Industries and Research Training Centre Partners with OYA Media and the City of Toronto to offer Virtual Production Training to Under-Represented Communities*. Sheridan College, 2nd December 2021.
[23] *2023 Top 25 American Film Schools, Ranked*. The Hollywood Reporter, 11th August 2023.
[24] *Toronto Career Guide*. City of Toronto.

Recent production slowdowns (mainly due to the 2023 SAG-AFTRA and WGA strikes in the US) have led to some contraction in the labour market, with unions reporting that many freelance crew members are currently inactive, even as high-profile productions continue to film in the city. Feedback from consultees indicates that membership caps as well as reductions in positions for apprentices have added to challenges in maintaining workforce stability. In response, some stakeholders recommend targeted efforts to re-engage lapsed permit holders, especially in areas such as make-up and hair, as there is anticipation of increased activity in the final two quarters of 2025.

Although recent industry disruptions may have led to some contraction in the labour market, survey respondents continue to highly rate the availability and quality of crew (Figure 5). The survey results reflect a positive view of Toronto's capacity to crew productions of scale, where capacity refers to the ability to assemble suitably skilled personnel to meet the demands of productions efficiently and at the required scale. For above-the-line roles, such as producers, directors, and senior creative staff, 46% of respondents rated capacity as reasonable, with 22% indicating excess capacity, demonstrating a solid availability of experienced talent in these key leadership positions.

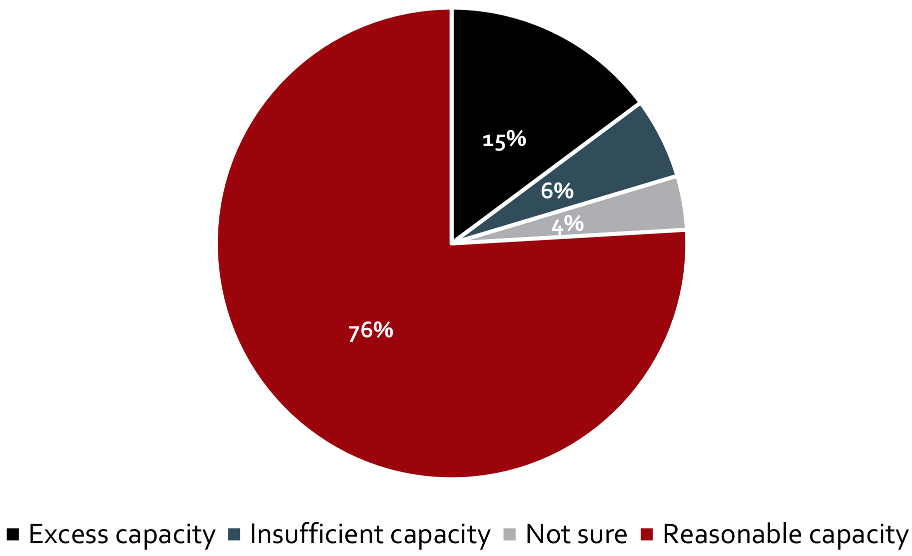
Figure 5 – Capacity in the Toronto Screen Production Sector for Above-the-Line Workforce



Source: Olsberg•SPI (2025), % of respondents (n=54)

Below-the-line roles, which include technical and support crew, received an even more favourable response, with 76% of participants reporting reasonable capacity and 15% noting excess capacity. Only a small minority, 6%, felt there was no capacity in this area. These findings highlight a strong and adaptable below-the-line workforce alongside a healthy above-the-line capacity, reinforcing Toronto's capability to meet the staffing demands of large-scale productions with relative ease.

Figure 6 – Capacity in the Toronto Screen Production Sector for Below-the-Line Workforce



Source: Olsberg•SPI (2025), % of respondents (n=54)

The cost of living in the city of Toronto, particularly high housing costs, continues to influence crew retention and stability. This is especially apparent for mid-career roles in both domestic and foreign service productions. Junior roles are also affected by budget pressures, which may impact opportunities for early career development.

Independent productions remain important for providing training opportunities, although their capacity to do so varies with market conditions; this is a challenge faced across the global production sector, as rising living costs and increased economic uncertainty worldwide are impacting opportunities and career retention for screen production workers.

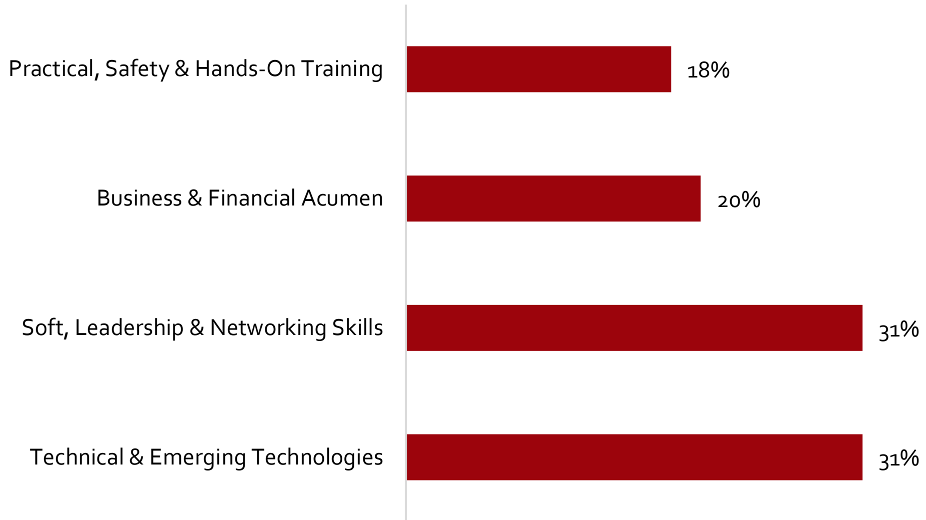
The cyclical nature of the screen production business is another factor affecting the workforce. Some newer entrants, particularly those joining after 2016, may be less familiar with the traditional winter slowdown. Stakeholders have emphasized the value of clearer communication regarding these cyclical trends. One potential solution is the development of a centralized, contract-based job board to support access to transferable roles during off-peak periods, thereby supplementing existing union-managed lists.

Mobility within the industry can be limited by departmental silos and closed hiring practices, which sometimes restrict movement between departments or roles. Some domestic stakeholders suggest that joint partner efforts to create a centralized talent showcase and to more robustly promote Toronto's crew strengths could support broader cross-sector employment.

Some consultees noted uncertainty about how union jurisdictions operate and the training pathways available, suggesting a need for clearer centralized information. They recommended that guidance be made more accessible, such as through consolidated resources on the TFO and Ontario Creates websites.

Further, when asked to identify the essential skills necessary for new entrants, 31% of survey respondents highlighted **technical skills and emerging technologies, as well as soft skills, to be equally as critical** (**Figure 7**). This underscores an evolving industry that will increasingly need to become familiar with innovation, particularly artificial intelligence, while maintaining healthy professional working relationships. Participants also agreed that business acumen (20%) and practical training (18%) are vital to the screen industry's success.

Figure 7 – Considering the Future Needs of the Industry, Identify Three Essential Training Areas/Skills for New Entrants



Source: Olsberg•SPI (2025), % of respondents (n=56)

In the animation and VFX sectors, consultees noted a structural mismatch between graduate numbers and available positions, with Seneca and Sheridan Colleges together producing around 400 graduates annually for an estimated 200 roles. Stakeholders suggested that establishing an Animation Skills Council could help align educational programs with industry demand and manage enrolment levels over the longer term.

Separately, some animation stakeholders reported a recent year-on-year decline of about 30% in applications to animation programs; this is viewed as a short-term concern that could reduce the talent pipeline in future, underscoring the value of renewed high-school outreach and awareness initiatives, such as 'Experience the Screen' days, alongside bursaries and mentorships supported by the TFO, provincial agencies and educational institutions.

Inter-provincial labour mobility is currently constrained by tax credit residency and other requirements. Ontario's tax credit residency requirements are more restrictive than in some global production hubs such as Australia. These rules limit the extent to which workers can be considered eligible labour across provinces, reducing flexibility for productions seeking to engage talent from outside Ontario. Sustainability stakeholders (professionals currently working toward achieving sustainability goals in screen production) also pointed to a **need for more sustainability and technical skills training**, particularly in areas such as energy literacy and clean power solutions for producers, unit managers and technical crew. Targeted programs in these areas could help the sector achieve broader sustainability goals.

Workforce development consultees have proposed a range of responses to industry gaps and training initiatives. These include organizing a Toronto-based screen job fair to highlight transferable skills across film, television, games and events, and the creation of an online career pathways map, similar to the UK's ScreenSkills platform;[25] although the TFO offers a similar resource in the Toronto Career Guide,[26] its visibility and usability could be improved to better support individuals seeking training in screen production and to enhance the availability of information on relevant training opportunities.

There is also support for consolidating and streamlining training programs, with an emphasis on mid-career progression and diversity, equity and inclusion. Initiatives such as recognizing 'Top 5 Rising Talent' annually at major industry events could also raise the profile of emerging professionals.

A key area for improvement in Toronto's workforce strategy is the systematic collection and analysis of reliable data. **At present, no certified or comprehensive source accurately captures the size, composition and characteristics of the city's screen workforce.** Gaps include the absence of breakdowns by sub-sector (e.g., creative, production, post-production, VFX/animation), career stage (entry-level, mid-career, senior), and demographic profile (age, diversity, skills base). This lack of clarity makes it difficult to accurately measure and assess industry capacity, track talent development and identify emerging gaps that could affect competitiveness.

Domestic workforce development stakeholders also urged greater emphasis on equity-seeking creators, noting that current strategies do not go far enough to ensure their inclusion. Targeted measures are needed to expand access to emerging technologies, create city-wide talent showcases and highlight community-based achievements. Without such interventions, there is a risk that underrepresented voices will remain excluded from opportunities.

In addition, participants stressed the **importance of 'wraparound' supports to complement technical training.** While skill development programs remain critical, they must ideally be accompanied by supports such as mentorship, affordable housing, financial literacy and mental health provision, particularly given the precarious, gig-based nature of much screen sector employment. Expanding initiatives like xoTO Screen Industry Pathways and embedding them within a wider network of community partnerships could form the basis of a dedicated workforce hub that provides more holistic and sustainable support for talent.

To address this, the TFO could establish a **clear data strategy setting out what information should be collected, which stakeholders will lead, and how collection and reporting will be coordinated.** A structured approach, developed in collaboration with industry partners, unions, training providers and government, would create a trusted evidence base to inform workforce planning, support advocacy for investment, and align talent development initiatives with the needs of producers and studios.

[25] ScreenSkills.
[26] *Toronto Career Guide*. City of Toronto.

Toronto's workforce training and development landscape demonstrates several strengths, including a highly experienced senior crew base and strong training institutions. At the same time, there are ongoing challenges in mid-level talent development, skills alignment, workforce data collection and adapting to cyclical labour patterns. Continued collaboration across the industry, alongside targeted training and strategic workforce initiatives, will be important for sustaining Toronto's competitive position and resilience in the next five years.

3.3. Ontario's Screen Incentives

Ontario's film and television incentive program is well-established and designed to attract and support inward investment across domestic production, foreign service production and in the post-production, VFX and animation sectors. As the location that attracts the highest proportion of domestic and foreign service production spend in the province, the city of Toronto's offer is strengthened by the reliability and stability of Ontario's incentive program. **The program is administered by Ontario Creates, while responsibility for interpreting, amending, and updating the underlying legislation lies with the Ontario Ministry of Finance.**

Due to where incentive management lies, this section will largely discuss the incentives in relation to Ontario production.

3.3.1. Tax Credits for Foreign Service Productions

The Ontario Production Services Tax Credit (OPSTC) continues to be a key driver in attracting international film and television service productions. Initially introduced in the late 1990s as an 11% labour-based incentive, the OPSTC evolved to a 25% all-spend credit in 2009, before being adjusted to the current 21.5% rate in 2015.

This fully refundable and uncapped tax credit applies broadly to international scripted productions and documentaries. With a minimum global budget threshold of CA$1 million, the program is accessible to virtually all international productions, with some excluded genres. In the 2022 Budget, eligibility for the film and television tax credits was extended to productions released exclusively online.

Between 2013 and 2022, foreign service productions in Ontario increased from 56 to 103 annually, with cumulative production expenditure exceeding CA$10 billion over seven years.[27]

Despite a slight decrease in project volume compared to 2023, post-strike recovery contributed to a significant rebound in spending, particularly among high-budget series.

Complementing the provincial incentive program, the federal Production Services Tax Credit (PSTC) provides an additional 16% refundable credit on qualified Canadian labour, enhancing Ontario's competitiveness in the international market. In 2022-2023, the PSTC supported 705 productions nationally, with foreign spend totalling CA$6.86 billion.[28]

Overall, in Canada, the 2023-2024 period saw a significant contraction in foreign location and service (FLS) production nationally, largely a continued effect of the

[27] *Ontario Film and Television Production 2022-2024 By Format.* Ontario Creates, 2025.
[28] *Profile 2023: An economic report on the screen-based media production industry in Canada*. CMPA, 2024.

2023 SAG-AFTRA and WGA labour strikes. Total FLS spending declined by 26.1% to CA$4.73 billion, with the number of projects falling from 640 to 444.[29] Ontario's FLS spend similarly decreased by 35.2% to CA$1.28 billion, causing the province to slip behind Quebec in volume.[30] Despite the downturn in volume, these figures indicate that larger-scale productions continue to invest in Ontario's screen sector.

Ontario's OPSTC remains a critical element of the province's competitive incentive framework, supported by the federal CPTC to attract international productions. While recent industry-wide labour disruptions have temporarily impacted project volumes and spending, **the recovery in total expenditure and average project size suggests sustained confidence in Ontario as a premier destination for film and television production.**

While the administration of tax credits lies with other levels of government, there is a strategic opportunity for the TFO to support and promote these incentives, given their fundamental importance to the industry's ongoing viability and growth.

3.3.2. Tax Credits for Domestic Productions

The province's domestic production segment benefits from the Ontario Film & Television Tax Credit (OFTTC), which offers a baseline 35% refundable credit on eligible Ontario labour expenditures, increasing to 40% for first-time producers on initial spends up to CA$240,000. Productions can qualify for the additional 10% regional bonus under the OFTTC if they are filmed entirely outside the Greater Toronto Area (GTA), or if they conduct more than five location days with at least 85% of those location days outside Toronto. In practice, this means that productions can undertake all their studio work in Toronto while still receiving the bonus, a mechanism that has become a critical component of financing for many domestic producers. Importantly, the 10% uplift is applied to the entire production budget, not just the regional portion, which has significant implications for the scale of any municipally funded measure intended to offset this incentive.

A minimum expenditure requirement mandates that at least 75% of total project costs be incurred in Ontario, supporting local employment and infrastructure investment. The OFTTC supported 365 certified domestic productions in 2023-2024, with total estimated certified tax credits issued amounting to CA$246.3 million. [31] These productions represented a combined project value of approximately CA$1.37 billion. A total of 424 applications were received, and 377 were reviewed during the fiscal year. As a refundable tax credit aimed at encouraging domestic production, the OFTTC continues to play a pivotal role in sustaining Ontario's local film and television ecosystem.[32]

Further supporting domestic Canadian content, the federal Canadian Film or Video Production Tax Credit (CPTC) offers a 25% refundable credit capped at 60% of labour costs, providing up to 15% overall support for qualifying Canadian film,

[29] *Profile 2024: An economic report on the screen-based media production industry in Canada*. CMPA, 2025.
[30] Ibid
[31] *Tax Credit Statistics 2023-2024*. Ontario Creates.
[32] Ibid

television and digital media productions. This incentive targets Canadian-owned projects, helping enhance their competitiveness both domestically and internationally.

Domestic production remains a vital component of Ontario's screen production industry; in 2024, it generated CA$905.6 million in local expenditure across 284 projects, accounting for 35% of the province's total production spend.[33] This marks a slight decline from 2023's spend of CA$947.7 million and 2022's CA$1.2 billion due to the industry strikes, lower orders from Canadian broadcasters and increased efforts from other provinces to attract domestic productions. These numbers reflect relative resilience during this period of broader market disruption.[34] However, Toronto's production profile differs, with international projects representing 70% of total production value.[35] This reflects the fact that many domestic productions, often working within tighter budgets, choose to film outside Toronto or the wider GTA.

Television series continue to anchor the domestic sector, contributing CA$664 million across 135 series productions in 2024.[36] Feature film production remained steady, with 43 projects generating CA$111.8 million in spending. Animation activity also remained secure, with 15 domestic animation projects contributing CA$46.4 million in 2024.[37]

Toronto-based series such as Murdoch Mysteries (2008-present), Children Ruin Everything (2022-2025) and Law & Order Toronto (2024-present) have international reach, while feature films including Honey Bunch (2025) and Darkest Miriam (2024) premiered at major festivals, reinforcing the city's creative reputation.

Despite the recent downturn, consumer demand for Ontario-made content and ongoing international interest in locally developed IP continue to sustain domestic activity.

Domestic stakeholders expressed concerns that the current regional bonus under the OFTTC creates unintended competitive pressures, with productions incentivized to shift activity outside Toronto.

Domestic producers also identified the opportunity for a dedicated provincial unscripted tax incentive. Unscripted formats represent a sizeable and growing area of global demand, offering year-round production activity, repeatable employment and accessible pathways for entry-level and mid-career workers. Ireland offers a useful reference point; in 2022-2023, the government signalled an intent to design an unscripted tax credit for introduction in 2025, projecting that annual unscripted spend could rise from CA$145 million (€90 million) to CA$484 million (€300 million).[38] That policy direction has already catalyzed market behaviour: FOX Entertainment moved production of Gordon Ramsay's Next Level Chef to Ashford Studios, County Wicklow, along with an estimated CA$48 million (€30 million) of investment and around 300 jobs during production, positioning the site as Ireland's largest unscripted hub.[39]

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[33] *Ontario Film and Television Production 2022-2024 By Format*. Ontario Creates, 2025.
[34] Ibid
[35] *Toronto's Film Industry: Protecting a Valuable Asset*. Toronto Film Office, 2022.
[36] Ibid
[37] Ibid
[38] *Corporation Tax – Tax Strategy Group – 24/03*. Department of Finance, July 2024.
[39] *FOX Entertainment announces significant commitment to TV production in Ireland at official event attended by An Taoiseach Leo Varadkar TD*. Enterprise Ireland, 3rd July 2023.

While this idea requires further study, consideration for a comparable, tightly scoped, pilot unscripted incentive in Ontario, focused on high-value unscripted formats, training commitments and regional activity, could potentially open an area of production currently excluded from incentives, strengthen utilization of existing infrastructure and enhance competitiveness without undermining support for scripted production.

3.3.3. Tax Credits for VFX and Animation

The Ontario Computer Animation and Special Effects Tax Credit (OCASE) continues to be a critical incentive underpinning growth in the VFX and animation sectors. It offers an 18% refundable credit on eligible Ontario labour expenditures related to VFX and animation.

In fiscal year 2023-2024, OCASE received 568 applications, reviewed 314 and certified 289 productions. The certified total tax credits issued amounted to CA$57.15 million, supporting certified project values of CA$715.3 million. Recent regulatory amendments have simplified the credit's eligibility requirements by removing the necessity for certification under related tax credits, improving accessibility and positioning the incentive to attract further VFX and animation investment.

At the same time, stakeholder feedback indicates some challenges affecting competitiveness. Ontario's 'vendor-side' tax credit model presents cash-flow issues for VFX vendors, who must advance rebate amounts to producers and wait extended periods (up to 30 months) for reimbursement. Compared with jurisdictions like Georgia, the UK and Australia, which offer producer-directed or 'buyer-side' incentives, this structure may place additional financial pressure on vendors and could influence project location decisions. Industry participants suggest that transitioning to a multi-tiered, buyer-side tax credit model, which directs credits to producers, could improve cash-flow stability for vendors and strengthen Ontario's appeal for major international productions, especially large-scale features and animation series.

Overall, Ontario's comprehensive and stable incentive program remains a key element of its global competitiveness in film and television production across various segments. Some structural adjustments, particularly in post-production and animation, may support continued growth in market share. International streamers frequently highlight the importance of stable and predictable tax credits in their location decisions, underlining the need to maintain Ontario's incentives as reliable and competitive for the long term.

3.4. Screen Production Infrastructure in Toronto

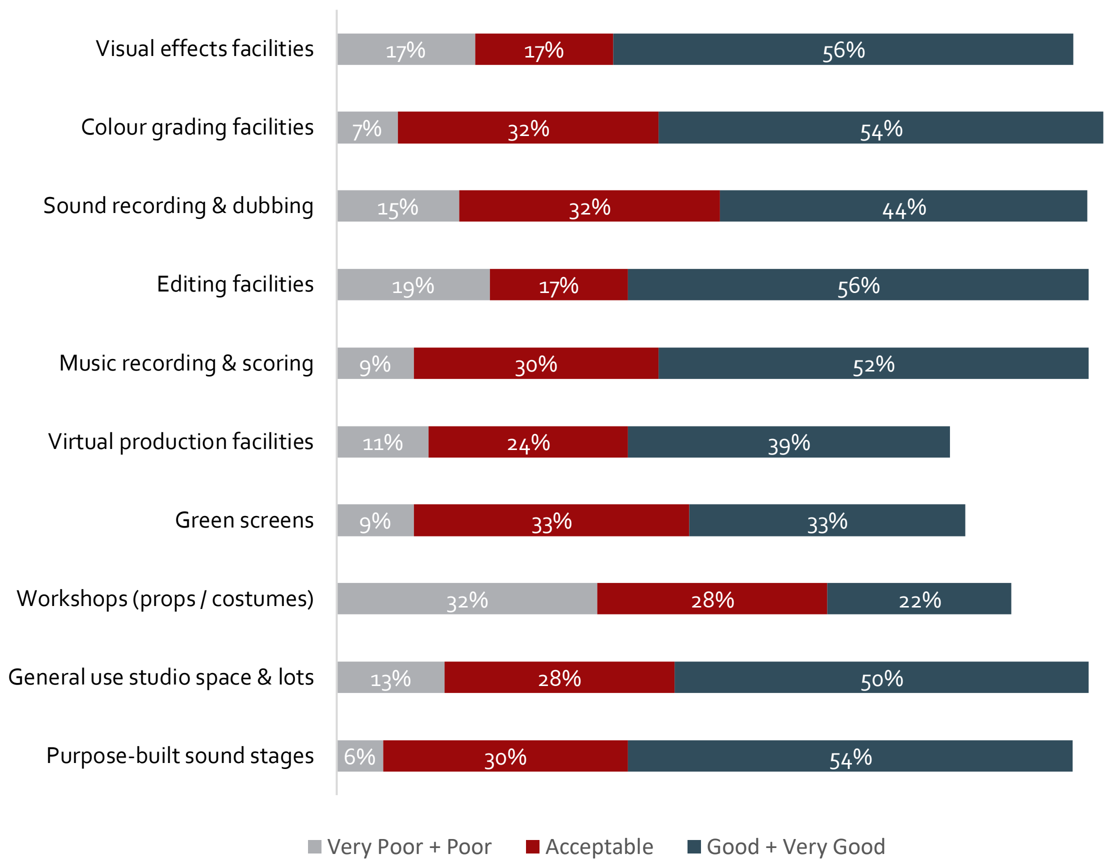
Toronto's screen production infrastructure plays a central role in supporting its film, television, post-production, VFX, animation and commercial sectors. The city offers almost 3 million square feet of stage space across a mix of purpose-built and converted facilities, accommodating a wide range of production types. Planned expansions across multiple sites, alongside confirmed commitments for future projects, reflect ongoing and sustained demand, particularly from international service productions.[40]

[40] *Ontario Creates Studio List*. Ontario Creates.

The survey data suggests that Toronto possesses a robust and well-regarded screen production infrastructure, particularly in post-production services (**Figure 8**). Over half of respondents rate editing facilities (56%), visual effects (56%), colour grading (54%), music recording and scoring (52%) and purpose-built sound stages (54%) as "Good" or "Very Good," reflecting the city's strong reputation for technical excellence and end-to-end workflow capabilities. General-use studio spaces also fare favourably, with 50% positive ratings, underscoring ample capacity for traditional shoots.

At the same time, since the availability of studio space ultimately constrains a jurisdiction's production capacity, **the sustained and consistent demand for facilities in Toronto underscores the need for the Film Office to remain ready to pursue studio growth, as and when market demand dictates.** With demand expected to remain strong, there is a clear rationale for the TFO to support the strategic expansion of studio space over the next five years, aligned with market signals, to ensure infrastructure capacity keeps pace with industry needs.

Figure 8 – Quality of the Toronto Screen Production Sector's Production Infrastructure



Source: Olsberg•SPI (2025), % of respondents (n=56)

By contrast, **workshops for props and costumes (22% positive) present opportunities for further development**, while virtual production facilities, green screens and sound recording/dubbing, each achieving around one-third positive sentiment, indicate emerging strengths that would benefit from additional investment.

Toronto's infrastructure is strong, especially in post-production, and targeted enhancements in specialized physical assets could further elevate its competitiveness.

Post-production and VFX facilities in Toronto are well established, with studios providing key services on internationally recognized projects. The proximity of post-production facilities to production stages enables efficient collaboration and supports both domestic and international service productions. Consultees noted opportunities to develop shared animation facilities by repurposing vacant industrial spaces, which could benefit independent and emerging creators.

Equipment rental houses and technical service providers throughout the city offer a full range of production equipment necessary for all types of projects, from commercials to major productions. These resources enable Toronto to effectively accommodate diverse production needs.

Several operational challenges were identified during consultations, including rising location and infrastructure costs, which cause increased budget pressures. Parking fees often exceed location fees, with productions forced to park at a distance, adding logistical complexity.

Consultees also flagged **challenges related to traffic congestion in the city**, and the impact it can have on delaying or changing production schedules and increasing budgets. While this feedback was balanced against Toronto's overall attractive offer, this ongoing city issue could affect future decisions to film on location, outside of studios in Toronto, as producers may broaden their consideration to less congested areas.

Domestic consultees highlighted several opportunities to maximize Toronto's infrastructure offer through targeted actions within municipal control:

- The City owns vacant properties currently unavailable for production use, which could provide valuable locations if access is negotiated
- A centralized and regularly updated registry of alternative spaces, such as warehouses and parking lots, could improve scouting efficiency and support productions with tighter budgets
- Expanding infrastructure to support sustainability, including electric vehicle charging and renewable fuel access, was also identified as important for the industry's future.

3.5. Post-Production, VFX and Animation Services in Toronto

Toronto's screen production ecosystem benefits from the well-established and interrelated sectors of post-production, VFX and animation, each contributing to the city's strong position in the global market. This key area is complemented by a skilled and experienced total workforce of an estimated 7,000 professionals, significant infrastructure investments and targeted provincial and federal incentives.

The post-production sector in Toronto benefits from a broad network of both international and local firms, offering comprehensive services including colour grading, editing and sound mixing. Supported by a deep pool of skilled professionals, productions increasingly complete their post-production work in Toronto, reducing the need to relocate to other centres and enhancing the city's value proposition as a full-service production hub.

Toronto is home to several leading VFX studios that contribute to major international productions. Recent projects featuring their work include The Boys: Gen V (2025-present), Frankenstein (2025), Ballerina (2024), John Wick: Chapter 4 (2023), Fall of the House of Usher (2023), FUBAR (2023), Yellowstone (2020), 1923 (2023), Reacher Season 2 (2025), Painkiller (2023), Wednesday (2022-present), I Know What You Did Last Summer (2021), Dora and the Search for Sol Dorado (2021) and many more.

The VFX sector is underpinned by approximately 40,700 square feet of existing VR and LED sound stages. Recent investments in virtual production and LED-wall technology enhance local capabilities, enabling productions filmed in Toronto to complete sophisticated in-camera visual effects and post-production locally.

Animation production in Ontario remains a significant contributor to the screen industry, though recent figures show a contraction due to broader industry challenges. In 2024, Ontario recorded 25 animation projects with a combined production expenditure of approximately CA$100.7 million, split among 15 domestic projects (CA$46.4 million) and 10 foreign projects (CA$54.3 million).[41] This compares to 33 projects and CA$170.4 million in 2023, and 28 projects and CA$269.8 million in 2022.[42]

Consultations with industry stakeholders highlighted several challenges. The sector has faced a fluctuating operating environment influenced by the COVID-19 pandemic, labour disruptions and changing investment patterns among streaming platforms. These factors make it difficult for firms to establish consistent baselines for planning capacity. The current vendor-side tax credit model requires VFX companies to advance rebate costs and wait extended periods for reimbursement. This contrasts with other jurisdictions that offer buyer-side incentives paid directly to producers, which helps improve cash flow and pricing transparency. Efforts to reform Ontario's tax credit system have been ongoing but not yet successful, which some stakeholders view as limiting investment opportunities.

Data on post-production and VFX activity in Toronto is limited and dispersed, with no comprehensive public source that captures volumes or financial details. Industry groups and consultants rely on internal data, but the lack of transparent, unified data constrains effective advocacy and sector planning.

Industry participants recommended forming a broad coalition of stakeholders across production services, post-production, VFX and animation to advocate for tax credit reform, including a transition to buyer-side incentives. **Aligning advocacy efforts with provincial ministries and industry organizations could strengthen the case for change.**

There is also a recognized need to **address technology gaps** by encouraging investment in AI compositing, cloud rendering, real-time capture and other emerging tools. The TFO is seen as having a valuable role in convening stakeholders, supporting

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[41] *Ontario Film and Television Production 2022-2024 By Format.* Ontario Creates, 2025.
[42] Ibid

pilot initiatives and assisting in attracting major service providers and specialized talent.

In animation, consultations identified opportunities to enhance training and talent development by consolidating educational programs and improving credential recognition across regions. Calls were made for incentive reforms aligned with international buyer-side models, greater transparency through real-time data dashboards, and support for co-working animation facilities created from repurposed industrial spaces. Addressing cash-flow constraints through rebate-advance funding and rent support was also highlighted.

The VFX sector remains closely tied to physical production schedules, with weather presenting occasional challenges in Toronto. A shortage of on-set VFX supervisors was noted, with industry groups emphasizing the need for targeted training and collaboration among unions and educators.

Stakeholders emphasized the importance of upgrading fibre-optic infrastructure and data capabilities to support cloud rendering and real-time workflows. Embracing AI as a supportive tool in creative processes aligns with Toronto's history as an innovator in this area.

Despite some contraction in animation production and certified projects due to 2023 labour disruptions, **Toronto's post-production, VFX and animation sectors remain robust**. Supported by a skilled workforce, expanding infrastructure, technological innovation and effective tax incentives, they continue to attract major international productions, solidifying Toronto's status as a competitive global screen production hub.

3.6. Commercial Production in Toronto

Toronto maintains a steady level of commercial production, including retail branding commercials, music videos and smaller screen projects. While this format has not expanded at the same rate as feature film and television, there is still a consistent stream of work and a largely dedicated professional workforce.

Following a peak in investment in commercial production in 2019 of CA$454 million, that figure declined to around CA$272 million in 2020 due to contractions in advertising spending and travel restrictions related to the global pandemic. In 2021, the sector showed major signs of recovery by generating approximately CA$568 million in spending.[43] [44]

Consultees emphasized that cost competitiveness remains a significant advantage for producing commercials in Toronto. The city offers the ability to produce high-quality commercial advertising with a North American cultural and linguistic sensibility, making it an attractive alternative to US locations while saving on travel expenses. Typical budgets for commercials range from CA$300,000 to CA$2 million, and they operate in the same broader ecosystem as film and television production.

Toronto's commercial production offer faces competition from international locations such as Slovenia, Bulgaria, South Africa, Mexico City and Spain, as well as

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[43] *Toronto Screen Industry 2021*. City of Toronto, Economic Development and Culture Division.
[44] These are the most recent figures available.

other Canadian centres including Vancouver, Montreal and Calgary. While Toronto remains competitive, some jurisdictions benefit from attractive tax credits specifically designed for commercials, including Atlanta and Chicago.

The commercial production workforce is relatively small and specialized; according to consultees, the workforce is roughly a few thousand crew members working exclusively in this format. There are some challenges regarding crew availability, particularly in the summer months when there can be booking gaps. Feedback also indicates that there is an opportunity to diversify the commercial workforce through targeted outreach and development initiatives.

Consultees also identified infrastructure challenges specifically affecting commercial productions. The steady demand for studio space across the city, driven by foreign service productions and long lease arrangements, can sometimes limit availability for commercials. There is a particular need for additional studio space and backlot facilities to more effectively accommodate commercial shoots, especially given the relatively short lead times and quick turnarounds inherent in the format.

Sustainability is an emerging concern among commercial producers. While many productions aim to adopt recycling and waste disposal practices, the **lack of dedicated municipal facilities and mandates to support these efforts limits progress.** Consultees expressed a desire for more resources and infrastructure to facilitate sustainable production practices.

Permit processing is seen as efficient for standard commercial shoots, **with the TFO performing well in handling permits with planned lead times**. When productions require more rapid turnarounds or when variables change during already-short production schedules, there may be challenges in accessing immediate responses or actions. Coordination challenges also arise when seeking permission from private property managers, such as those overseeing malls or school boards, which can delay access to shooting locations (this is outside the TFO's remit or control).

Improving access to experienced crew and enhancing labour force development were repeatedly noted as critical needs. Commercial productions often operate under tight timelines and require swift location changes, making operational efficiencies and streamlined permitting essential for meeting production schedules.

Domestic commercial stakeholders raised the importance of acknowledging the recent and prolonged labour dispute between ACTRA and the Institute of Canadian Agencies (ICA).[45] The dispute, centred on the National Commercial Agreement (NCA), began in April 2022 and resulted in a de facto lockout of unionized commercial performers across Canada.

The dispute substantially reduces work opportunities for thousands of unionized actors in Toronto, many of whom rely on commercials to supplement their income between film and television projects. Despite mediated negotiations and hearings before the Ontario Labour Relations Board, the parties were unable to resolve, and the sector continues to feel the effects of this disruption.

[45] *Actors are getting organized after being locked out of commercial work in Canada.* Canadian Dimension, 31st January 2024.

Stakeholders emphasized that any strategy concerning commercial production would be incomplete without recognizing this labour dispute and its impact on Toronto's creative workforce.

3.7. Sustainability in Toronto's Screen Production Industry

Toronto's film and television industry has made steady progress in adopting sustainable production practices, supported by a variety of initiatives led by provincial and municipal organizations such as Ontario Creates, Ontario Green Screen (OGS)[46] and the TFO (a founding member of OGS).

The **Ontario Green Screen Strategic Plan 2023-2027** outlines a comprehensive framework to embed sustainability across the sector, focusing on strengthening partnerships, educating stakeholders, supporting the implementation of best practices and measuring sector-wide impact. Building on prior work, the plan sets out clear goals and tactics aimed at reducing greenhouse gas emissions, promoting waste reduction and advancing circular economy principles in film and television production.

Research commissioned by OGS highlights that fossil fuel consumption is responsible for 48%- 56% of carbon emissions from film production in North America, demonstrating the critical need for targeted strategies to reduce energy use.[47] To address this, the plan includes initiatives such as developing accessible training courses, updating educational resources and creating a library of materials to support industry professionals in adopting sustainable practices. It also encourages waste diversion efforts through partnerships with organizations focused on food rescue and material reuse.

The **Toronto Green Standard (TGS)** is the City of Toronto's sustainable design and performance framework for new development. It supports its broader TransformTO Net Zero Strategy, Toronto's climate action plan to achieve net-zero greenhouse gas emissions by 2040.[48] As TGS evolves through its Net Zero Transition Study (NZTS), the TFO has a valuable opportunity to align the City's sustainability goals and initiatives with screen industry activity, especially production infrastructure and on-location filming practices.

Consultations with sustainability leaders in Toronto provide additional context on the city's position relative to other production hubs. While Toronto has seen increased adoption of green practices and benefits from an engaged and enthusiastic group of crew members advocating for sustainability, it continues to lag cities like Vancouver in terms of infrastructure readiness and long-term practical adoption. The sustainability landscape in Toronto is characterized by the involvement of multiple organizations, which has encouraged collaboration but has also led to some duplication in efforts and inefficiencies.

There have been some challenges, including limited coordination between some City departments and some gaps in clear waste and recycling options for productions. Diesel generators also largely remain the norm at some studios. There have also been

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[46] *About Ontario Green Screen* (Ontario Green Screen is a provincial initiative by Ontario Creates that promotes and supports sustainable production practices in Canada's film and television industry.) Ontario Creates.
[47] *Ontario Green Screen Strategic Plan 2023-2027.* Ontario Creates, July 2023.
[48] *TransformTO Net Zero Strategy*. City of Toronto.

some reported challenges with the limited number of connection points ('grid tie-ins') to municipal power systems; to help alleviate this issue, the TFO arranged for the installation of two power drops in areas that experience a high volume of base camp activity, namely Ashbridges Bay and Vladimir Gzowski Park. The TFO periodically reviews the need for more power drops, their location and capacity, to ensure that the environmental infrastructure is right sized for projected use.

Toronto's screen industry does benefit from the ability to leverage some existing initiatives at both municipal and provincial levels, established partnerships with organizations focused on waste reduction and circular economy practices, and a growing base of internal advocates who promote sustainability through peer-to-peer communication (a method identified as particularly effective in building trust and encouraging adoption).

Internationally, the UK offers some instructive examples for Toronto; they have long integrated sustainability requirements into permitting and health and safety standards and developed formal roles with associated training and professional development frameworks. The UK model also features collaborative supplier networks and industry events that facilitate knowledge sharing and innovation, alongside initiatives exploring shared infrastructure for material reuse between screen production and other sectors.

Based on these insights, Toronto is well placed to advance the practical application of sustainability criteria and compliance to screen production. One such example could be to limit the number of production vehicles allowed on location, thereby reducing congestion. The TFO could also embed feedback mechanisms into the permitting process to generate practical data on sustainability.

A coordinated thematic approach addressing energy consumption, waste management, circularity, infrastructure and workforce development is essential.

Sustainability is a pressing priority, and there is a clear need to accelerate efforts across the industry. To maintain and accelerate progress, there is an opportunity for the TFO to coordinate efforts and further align sustainability policies across city departments, and integrate these with broader municipal climate and the City's circularity roadmap, which would minimize fragmented approaches and maximize impact. **By aligning Toronto's screen industry with the City's roadmap, the industry could reduce its environmental footprint, increase resource efficiency and contribute to Toronto's broader sustainability goals.** Enhancing communication about Toronto's sustainability leadership could foster greater buy-in within the industry and strengthen the city's reputation as a destination for environmentally responsible production.

Solutions to advance sustainability in screen production are best managed through inter-agency coordination and private-sector engagement; there are already examples of productive partnerships in place through the TFO's ongoing work with Ontario Green Screen (OGS), of which they are also a founding member. Meaningful progress on resolving practical barriers depends on strong partnerships with municipal services such as solid waste management and facilities providers, as well as private operators. **The TFO's role is not to act as the sole driver of implementation, but as a motivator and convener, bringing partners together, aligning priorities and maintaining momentum.**

Looking forward, a comprehensive and coordinated strategy connecting policy ambition with funding, infrastructure development and workforce capacity will be necessary to embed sustainable production as a core element of Toronto's screen sector identity in the next five years. This will support the city's aspiration to become a global leader in sustainable film and television production, balancing environmental responsibility with ongoing industry growth.

3.8. Emerging Technology in the Toronto Screen Industry

Emerging technologies are becoming increasingly significant within the global screen industry, with immersive storytelling, artificial intelligence (AI), virtual production, transmedia IP adaptation and targeted digital upskilling representing key areas of industry attention and investment.

Immersive technologies, particularly augmented reality (AR) and virtual reality (VR), are beginning to see more deliberate and strategic use in film and television production, as creators and producers experiment with new narrative forms and audience engagement techniques; high-profile film industry events are showcasing these developments. For example, the 2025 Tribeca Festival's recent addition of the immersive exhibition, In Search of Us, reflects a growing industry interest in immersive storytelling's creative potential.[49] Moreover, large-scale immersive experience venues such as Las Vegas' Sphere and Cosm[50] demonstrate the commercial potential of location-based entertainment.

These examples signal opportunities for Toronto to build on existing investments in tech and explore similarly ambitious experiential content strategies to attract both local and international audiences.

Transmedia storytelling, which is the leveraging of existing intellectual property (IP) across multiple platforms, remains commercially attractive for film and television producers globally. Recent prominent examples include A Minecraft Movie (2025), which demonstrates how recognizable IP from video gaming can successfully translate into major cinematic events, driving substantial cross-platform consumer engagement.[51]

Additionally, FromSoftware's collaboration with the renowned and successful film studio A24 to adapt the acclaimed game Elden Ring into a film reflects confidence in the potential of established IP to attract broader audiences.[52] Similarly, Skybound Entertainment's extensive multimedia franchise The Walking Dead has generated substantial revenues exceeding CA$1.4 billion (US$1 billion), validating the effectiveness of integrated, multi-channel IP strategies. Toronto producers could benefit from similar collaborations, using established IP to attract investment, expand markets and increase audience reach.[53]

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[49] *Tribeca Festival launches immersive technology exhibit 'In Search of Us' – Film News in Brief.* Variety, 24th April 2025.
[50] *Immersive tech reshapes music and film landscape with Bono, Metallica and 'Matrix' taking the leap.* The Associated Press, 3rd June 2025.
[51] *How 'A Minecraft Movie' captured the cultural zeitgeist.* Ampere Analysis, 15th April 2025.
[52] *FromSoftware and A24 to produce Elden Ring adaptation.* Games Industry Biz, 23rd May 2025.
[53] *Media Gold Rush: How transmedia companies are redefining entertainment.* Forbes, 28th March 2025.

Transmedia storytelling is an approach with strong potential for Toronto-based companies, as the city is home to over 300 game development companies engaging in a range of technologies and media. The City supports this sector through the Creative Technology Office in Film and Entertainment Industries in the Economic Development and Culture Division, where the TFO is also housed. This deliberate structuring creates a strong working relationship and a valuable springboard for continued development in this area.

AI technologies continue to expand their presence in film and television production workflows globally, with notable industry leaders increasingly embedding AI into their organizational and creative processes. A particularly relevant example includes Mediawan Group's appointment of its first-ever Head of Artificial Intelligence, demonstrating institutional commitment to integrating AI systematically into ongoing production and distribution processes.[54] Likewise, the prominent VFX studio DNEG Group's recent acquisition of AI start-up Metaphysic, and an associated valuation increase of its AI subsidiary Brahma to US$1.43 billion (CA$2 billion), highlight the significant commercial confidence in AI's potential for creative enhancement and production efficiency.[55]

The **industry's cautious yet progressive stance towards AI-assisted content creation** has been underscored by notable developments such as the Academy of Motion Picture Arts and Sciences (AMPAS) confirming the eligibility of AI-assisted films for the Academy Awards, provided there remains clear and significant human creative input.[56] **This reflects a nuanced industry consensus that, although AI presents valuable opportunities for creativity and efficiency, human authorship continues to be considered essential.**

This stance was further reinforced by discussions at FMX 2025 in Stuttgart, where industry leaders debated forming a global trade association to manage AI's workforce implications, underscoring the industry's awareness of AI's broader societal and economic impacts.[57]

Internationally significant milestones, such as the production of the world's first fully AI-generated feature film, Pirate Queen: Zheng Yi Sao (2025), developed collaboratively between teams in Malaysia and Singapore, illustrate the real-world applicability of AI in complex film projects.[58] Such ambitious examples demonstrate tangible pathways Toronto could explore to position itself strategically within global film innovation, leveraging international partnerships to harness AI for novel storytelling and efficient production.

AI technologies have generated considerable international policy discussion, particularly regarding ethical, intellectual property (IP) and regulatory concerns. Leading industry bodies including the European Audiovisual Production Association

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[54] *Mediawan Group makes Max Wiedemann its first head of artificial intelligence.* Screen Daily, 12th February 2025.
[55] *Brahma announces the acquisition of Metaphysic.* DNEG, 18th February 2025.
[56] *Films made with AI can win Oscars, Academy says.* BBC News, 22nd April 2025.
[57] *VFX leaders weigh potential of forming a global trade association and gauge impact of AI on the workforce.* Variety, 12th May 2025.
[58] *World's first fully AI-generated film: Malaysia's Future Studios and Singapore's FizzDragon make history with 'Pirate Queen: Zheng Yi Sao'.* Malay Mail, 25th April 2025.

(CEPI),[59] the Motion Picture Association (MPA)[60] and the World Economic Forum[61] are actively lobbying governments for clear and comprehensive AI regulatory frameworks.

Key areas of concern include the management of sensitive data, addressing misinformation through AI-generated deepfakes, safeguarding jobs from potential AI displacement, and ensuring transparent and fair copyright licensing related to AI-generated content. Recent legislative actions reflect these concerns, such as California's Assembly Bill 2602, which provides specific protections against the unauthorized creation and exploitation of digital replicas,[62] and South Korea's Basic Act on Artificial Intelligence, mandating the clear labelling of AI-generated content.[63]

Moreover, **AI regulatory developments across Europe highlight an international trend toward structured AI governance,** such as Denmark's proposed legislation targeting deepfakes, and Italy's incorporation of AI-specific provisions into audiovisual tax credit programs.[64]

The proactive stance taken by SAG-AFTRA in the US to embed robust AI-related protections into commercial contracts[65] further underscores industry recognition of AI's implications for performer rights and intellectual property.

Equally significant, in Canada, ACTRA has taken substantial steps to codify similarly robust protections for performers.[66] Through its Toronto-based AI Sub-Committee, ACTRA advanced the principles of Consent, Compensation and Control (the Three Cs) into both collective agreement negotiations and federal policy advocacy. The 2025-2027 Independent Production Agreement further institutionalizes these protections, mandating informed consent, transparency of use and fair compensation for AI-generated or replicated performances. **Recognizing ACTRA's leadership ensures that this strategic plan accurately reflects the efforts to safeguard Toronto's performer community.**

Given these developments, Toronto's screen industry should carefully monitor global regulatory trends, actively engage with emerging frameworks, and advocate for policies that support responsible AI adoption. Establishing clear guidelines around ethical AI use, IP protection, and labour considerations will be essential to position Toronto as both a competitive and ethically responsible leader within the global screen production sector.

Canada established the world's first national AI strategy in 2017, but there is still no dedicated federal law governing generative AI in force.[67] The Digital Charter Implementation Act (Bill C-27), which contained the Artificial Intelligence and Data Act (AIDA), was paused repeatedly and then "died on the Order Paper" on 6th January

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[59] *CEPI statement for the fair AI development*. CEPI, 28th January 2025.
[60] *MPA Says copyright law must be defended in AI age*. Deadline, 31st March 2025.
[61] Industries in the Intelligent Age – Media, Entertainment and Sport. World Economic Forum, 21st January 2025.
[62] California Assembly Bill 2602.
[63] *South Korea's new AI law: What it means for organizations and how to prepare.* Onetrust, 27th January 2025.
[64] *Denmark to tackle deepfakes by giving people copyright to their own features.* The Guardian, 27th June 2025.
[65] *Member Message: SAG-AFTRA Members Approve 2025 Commercials Contracts Agreement.* SAG-AFTRA, 21st May 2025.
[66] *Protecting Canadian Performers: Assessing the Impact of Canada's Proposed Bill C-27, Artificial Intelligence and Data Act*. ACTRA, 8th September 2023.
[67] *The Pan-Canadian AI Strategy*. CIFAR.

2025.[68] In practice, the industry will continue to operate under a patchwork of privacy, copyright and contract law for the foreseeable future. In May 2025, Canada appointed its first Minister of Artificial Intelligence and Digital Innovation, The Honourable Evan Solomon. The creation of a stand-alone ministry reflects Canada's intent to accelerate AI adoption across government, industry, and the labour market, with planned investments in data centers, SME tax incentives, and training programs. This development is significant for Toronto's screen sector as it positions Canada to strengthen its global leadership in AI research and commercialization, potentially driving new investment, innovation, and AI-enabled production workflows within the city's screen sector.

For productions and vendors working in Toronto, privacy compliance remains the baseline. The federal Personal Information Protection and Electronic Documents Act (PIPEDA) require consent, transparency and the ability for individuals to challenge organizations' handling of their data.[69] While the producers' associations and the unions are best positioned to provide any guidance on this point, the TFO should participate in any processes or discussions for overall industry perspective.

Copyright and authorship are live and constantly evolving issues in Canada. The February 2025 federal report, Consultation on Copyright in the Age of Generative Artificial Intelligence: What we heard, recorded strong support for consent, credit and compensation when works are used in training or outputs (particularly from creative industries), while others warned about competitiveness risks.[70] Also, a pending Federal Court challenge is seeking to remove a Canadian registration that listed both a human and an AI system as authors; the ruling could set an important precedent for authorship and licensing standards.[71]

Separately, in mid-2024, major Canadian publishers (including Torstar, Postmedia, the Globe and Mail, The Canadian Press and CBC/Radio-Canada) sued OpenAI in Ontario over alleged scraping and use of news content; outcomes could affect dataset licensing practices for screen-sector tools and vendors.[72]

Evolving international frameworks will shape industry standards in Toronto. The EU AI Act applies extra-territorially to providers placing AI systems on the EU market and to EU-based deployers, with obligations phasing in from 2025-2026.[73] Toronto-made content intended for EU distribution may face upstream demands for documentation, risk management and copyright-related transparency under these rules.

Targeted digital upskilling initiatives have become increasingly important as the **global film and television industry seeks to address skill gaps exacerbated by technological developments.** For example, Netflix's strategic partnership with the Institute of Immersive Media exemplifies targeted training efforts in virtual production,

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[68] *Bill C-27: Timeline of developments.* Gowling WLG, 6th January 2025.
[69] *Principles for responsible, trustworthy and privacy-protective generative AI technologies.* Privacy Commissioner of Canada, 7th December 2023.
[70] *Consultation on Copyright in the Age of Generative Artificial Intelligence: What we heard report.* Government of Canada, 11th February 2025.
[71] *Can AI be an author? Federal court asked to decide in new copyright case.* Norton Rose Fulbright, 6th August 2024.
[72] *Major Canadian news outlets sue OpenAI*. BBC, 29th November 2025.
[73] *EU AI Act: first regulation on artificial intelligence.* European Parliament, 8th June 2023.
*Personal data should only be collected and processed for specified, explicit, and legitimate purposes.

aimed at enhancing technical competencies and workforce readiness.[74] Similarly, Australia's on-set workflow services company Toothfish recently introduced specialized workshops to address skill gaps among senior-level creative professionals,[75] offering a clear model that Toronto might replicate to future-proof its own workforce, especially in areas of emerging technical demand.

Virtual production technologies continue to spread across global markets, becoming more accessible to a wider array of producers due to reduced costs and increased flexibility. Recent launches such as Sony's Crystal LED CAPRI system and Dimension's ViV platform exemplify innovations designed explicitly to lower barriers to virtual production adoption, moving beyond high-budget commercial contexts.[76]

Additionally, significant investments such as the University of Southern California's US$25 million (CA$34.3 million) Blavatnik Virtual Production Center reflect strategic recognition of virtual production's growing importance, both as an educational imperative and as critical production infrastructure.[77] Similarly, Japan's Toei Studios, now home to the country's largest integrated virtual production studio, demonstrates Asia's strategic intent to leverage advanced media technology to compete globally, offering Toronto clear international benchmarks for its own sectoral strategy.[78]

Despite these advancements, international developments indicate a degree of uncertainty regarding immediate profitability, particularly within immersive and virtual production contexts. Meta's Reality Labs reported a US$18 billion (CA$24.7 billion) loss in 2024, emphasizing persistent challenges around demonstrating return-on-investment for immersive content.[79] Such cautionary examples underscore the importance for Toronto's producers to carefully assess risk and demonstrate clear value propositions when adopting such technologies.

Overall, while global trends indicate strong investment and adoption of AI, virtual production, immersive storytelling, and transmedia strategies, **Toronto's screen industry should approach these opportunities with strategic caution**, acknowledging potential economic and regulatory uncertainties, carefully selecting proven innovations, and developing targeted training programs to ensure sustainable adoption.

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[74] *Netflix Partners with the Institute of Immersive Media on a virtual production training initiative for women in the European creative industries.* Netflix, 3rd July 2025.
[75] *Toothfish announces on-set workflow upskilling opportunities at Backlot Perth*. IF.com, 16th June 2025.
[76] *Presenting ViV: A world-first robotics solution for virtual production.* Dimension, 14th May 2025.
[77] *The future of filmmaking? USC gets $25 million for virtual production center.* LA Times, 25th June 2025.
[78] *Toei unveils Japan's largest LED virtual production studio, powered by AOTO.* American Cinematographer, 17th June 2025.
[79] *Reality Labs: billion-dollar deficit and still meta-verse optimism? Zuckerberg's strategy on the test bench.* Xpert Digital, 1st February 2025.

4. TORONTO'S COMPETITIVE POSITIONING – CASE STUDIES

4.1. Overview

As has been shared, the city of Toronto has been a leading location for screen production due to its development talent, flexible locations, solid infrastructure offer, experienced and in-demand workforce, supportive and proactive film office and much more. The case studies in this section examine several cities with mature screen industries, their offers and the agencies that preside over them:

- Greater London (**Section 4.2**)
- Los Angeles (**Section 4.3**)
- Melbourne (**Section 4.4**)
- New York (**Section 4.5**)
- Chicago (**Section 4.6**)
- Atlanta (**Section 4.7**)
- Vancouver (**Section 4.8**).

A comparison table is included in **Section 5.4** highlighting some key operational and service areas for Toronto and the cities above.

4.2. Greater London

4.2.1. Overview – Film London

Established in 2003, **Film London**[80] **is the capital's screen agency** and is responsible for promoting, supporting and developing film, television, animation and interactive content production across Greater London.

Film London provides a **coordinated, city-wide approach to attracting productions, nurturing talent and driving innovation in the screen sectors within the city limits**. Its remit spans production facilitation, skills development, location services, inward investment and support for independent cinema and emerging creators (some of Film London's funding programs are mentioned below in **Section 4.2.6**).

Film London is an **independent, not-for-profit company, limited by guarantee**. Its management reports to a Board of Directors comprising leaders from the screen and adjacent sectors. **It is the official screen agency for the Mayor of London** and receives its main funding from the Culture and Creative Industries Unit of the Greater London Authority. It works closely with the Mayor of London and their policy teams to align its activities with the Mayor's priorities in economic growth and promotion of culture.

Film London's other key funder and partner is The British Film Institute (BFI),[81] which is in turn funded by the UK national government through the Department for Culture, Media and Sport (DCMS). The BFI allocates both treasury money and a portion of the proceeds from the National Lottery to Film London alongside other agencies across the UK.

[80] Film London.
[81] British Film Institute.

Film London is also the sister organization of the British Film Commission (BFC)[82] and Games London.[83] While Film London and the BFC have separate operational teams, they share some infrastructure and back-office functions as well as the same CEO, and they collaborate on international marketing and promotion. The BFC's main funding comes from the BFI and DCMS; their mandate differs from Film London in that they are solely focused on attracting feature film and High-End TV (HETV), primarily from the US.

Games London is an initiative of Film London that delivers strategic investment into the games and interactive sector as well as the annual Games London' event, which is a public event alongside B2B sessions and an investment market for the international games industry. Although a separate initiative to Film London, there are shared resources and priorities to deliver to the Mayor's overall creative strategy.

4.2.2. Filming in London

London comprises of 32 individual boroughs across the Greater London area. Each borough is autonomous in both political structure and service delivery to the community. Film London works closely with all the boroughs on policy and cultural development, but it **does not have any oversight of permitting or filming approvals**.

Film London acts as a **first port of call** for an international production considering London as a production base and then works with individual boroughs to help secure that production.

London also benefits from having a **dedicated filming unit in the Metropolitan Police Service**, which covers the whole of Greater London. This unit is a select group of officers who are trained and regularly work with production teams on the streets of London. They also provide an advisory service for the depiction of police characters on screen and consult on scenarios being filmed to ensure accuracy and the safety of the public.

The absence of a common application process for film permitting across the Greater London Area can be challenging for productions filming in multiple boroughs, all requiring different application and processing times.

4.2.3. London Filming Partnership

The London Filming Partnership[84] was formed in 2005 to ensure that Film London could regularly and effectively interact with all the major stakeholders to service screen production across the capital. Now standing at over 650 members, it is a structured hub for discussing policy, operations and business development for the screen-based industries. It also allows all the major public and private organizations and businesses to have an active stake in making London a welcoming place to film.

The London Filming Partnership also has an **Executive Task Force that guides the film office toward ensuring that London remains a 'film friendly' city**. The Task Force is comprised of the CEOs of major corporations based in the city, alongside the Chief of Police, Fire Chief, the Mayor's representative, the CEO of Transport for London, the

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[82] British Film Commission.
[83] Games London.
[84] London Film Partnership.

Ministry of Defence and sector professionals. Its current Chairman is Andy Harries, Producer of The Crown (2016-2023) and CEO of Left Bank Pictures.

The London Filming Partnership also publishes the **Location Filming in London Code of Practice**.[85] This is reviewed and updated regularly by the Executive Task Force and serves to be a reference guide to all productions and businesses planning to film in London. The Code of Practice is a mix of very practical advice for filming, but also includes detailed information for working with firearms, flying drones, the legal obligations for working with child actors and many other aspects linked to filming.

4.2.4. Sustainability

Film London has taken a **leadership role in sustainability practices in the production sector** for more than 10 years. Working closely with European partner organizations, several practical initiatives and policy developments have been published. This position has also led to the publication of **Guidelines for Sustainable Filming in London**,[86] a practical guide to help producers manage shoots in a meaningful way to reduce their impact on the environment.

As part of its efforts, Film London has also introduced Green Screen, billed as "a practical online tool that supports environmentally friendly filming in London.[87]Green Screen enables productions to set environmental targets and provides action plans to achieve them. Since its inception, over 300 productions have achieved certification at the Green Level, with notable titles like The Crown Season 4 (2020) and Everybody's Talking About Jamie (2021), reaching an even higher level at the Silver Level. The initiative has led to a 16.8% reduction in carbon emissions across certified productions. Green Screen is supported by the London Filming Partnership and London's Borough Film Services.

4.2.5. International Marketing

A key focus for Film London is inward investment; it regularly delivers strategic programs and initiatives to attract filming to London and to facilitate businesses looking to relocate to the city. It works closely with the British Film Commission and its team based in Los Angeles to attract and service large-scale Hollywood productions.

Film London also has a very active presence at key international festivals and film markets. This active approach allows regular direct contact with producers and studio executives to deliver on its business development mandates. It also partners with producer organizations in other countries to host a series of **familiarization tours**, hosting producers from select countries in London and in specific activity areas, such as animation, TV drama or post-production and VFX.[88] Film London's senior managers also have **regular business development trips to Los Angeles and New York.**

4.2.6. Talent and Workforce Development

Film London offers a wide range of funding opportunities for people working in or entering the screen sector, [89] including Film London Moving Image Network

[85] *Location Filming in London Code of Practice*. Film London.
[86] *Guidelines for Sustainable Filming*. Film London.
[87] *Green Screen*. Film London.
[88] Familiarisation trips. Film London.
[89] Funding. Film London.

(FLAMIN) [90] and Film London Microwave (micro budget features) [91]. It is also responsible for delivering the Equal Access Network (EAN),[92] which is one of the UK's leading programs delivering **diversity, equity and inclusion initiatives** and practical help to underrepresented communities in the sector; the EAN has had the support of all the major studios and streamers working in London.

4.2.7. Key Takeaways

- Film London has a direct political connection to the Mayor and delivers on their economic and cultural strategies for the screen sector
- Film London's CEO is not a political appointee, ensuring continuity should the elected Mayor change
- The Executive Task Force allows Film London to communicate directly with all the CEOs of London's Public Services and agencies. This direct communication strengthens Film London's effectiveness in negotiating some of the most complex requests for filming in the capital
- The Metropolitan Police Film Unit provides a dedicated team to advise producers and can supply a selection of officers who are trained to work with screen productions
- Film London has established Memoranda of Understanding (MoUs) with other key production centres to collaborate on business development, co-productions and cultural exchanges
- The Filming Code of Practice is a detailed document that provides information and guidance to production teams on how to work efficiently within London rules and regulations
- Film London delivers both inbound and outbound familiarization tours for priority countries, and has individual themes promoting different sectors on different tours, such as physical production, animation and post-production and VFX
- Film London delivers several talent development programs, but the Equal Access Network (EAN) is considered best practice in delivering tangible and successful employment programs in the UK
- Film London collaborates with the British Film Commission and the British Film Institute on international marketing. However, it independently sets its priorities and target markets for promotion and business development
- Film London is a major partner in the UK's sustainability agenda. It was a leader in installing power drops across London to service locations that have a high volume of filming and base camp locations. The initiative started with three identified sites in London and received funding from an EU program and infrastructure funds from the Mayor's office to cover the capital expenditure. There is a plan to extend the network
- Film London was the founding partner of Euroscreen, a screen tourism initiative that was rolled out across Europe in 1992. Screen Tourism is currently under-utilized in Canada. The TFO has an opportunity to take leadership and benefit

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[90] *The Film London Artists' Moving Image Network*. Film London.
[91] *Microwave*. Film London.
[92] *Equal Access Network*. Film London.

from well-tested techniques and campaigns, partnering with Destination Toronto, Destination Canada and Destination Ontario.

4.3. Los Angeles

4.3.1. Overview – FilmLA

FilmLA[93] is the official film office for the city and county of Los Angeles and was created when these two entities combined their support services for the film industry. It serves as the central coordinating body for on-location film, television and commercial production throughout LA County.

It is a **private nonprofit organization** that operates under contracts with multiple jurisdictions, including the city of Los Angeles, Los Angeles County and more than 20 other municipalities and public agencies and School Boards; it is awarded a five-year contract by the participating cities and regions of LA County to provide strategic support and liaison between government departments and the industry.

Its primary function is to manage the complex permitting process for filming on public property, ensuring that productions comply with local regulations and minimize disruption to neighbourhoods and businesses. **It does not have autonomous powers to issue film permits**; the individual cities and municipalities retain that function.

FilmLA is **governed by a 27-member board of directors** comprising funding partners and key industry representatives; they meet regularly to monitor its operations, finances and community engagement and to make strategic recommendations.

Certain cities in LA County are not under the jurisdiction of FilmLA, including Beverly Hills, Santa Monica, Pasadena, Culver City, Long Beach, Malibu and the state parks and beaches in LA County; instead, they are represented by independent departments within those municipalities, with different permitting processes. These cities all have significant levels of production activity.

As part of the data collection and analysis of business trends in Los Angeles, **FilmLA conducts regular research** into the benefits that local filming brings to the Los Angeles region. FilmLA also releases regular reports and industry insights regarding the US film production economy and global production trends. Their reports are used by many other film commissions around the world as reference data to compare the success of their jurisdictions. **FilmLA makes the published data freely available to other entities to be used**.

4.3.2. Filming in Los Angeles County

Los Angeles has had several challenges in recent years, including rebounding from the pandemic, only to see the whole industry affected by and shut down due to the 2023 labour strikes. With the overall reduction in the commissioning of new projects with original IP, the workforce has had a major contraction with widespread unemployment.

In 2024, just as the production levels were predicted to return, large areas of LA County were devasted by wildfires, hugely impacting the number of planned location shooting

[93] FilmLA.

days. With communities devasted and many industry workers losing their homes, production has been decreased even further.[94]

Even with the devastating circumstances that have seen production levels fall in Los Angeles, there are still **13 new studio developments in various stages of construction**, adding to the existing 8 million square feet currently available in Greater Los Angeles County.[95]

4.3.3. Keeping Los Angeles Competitive

The city of Los Angeles is one of FilmLA's key partners, and it works closely with the Mayor's Office of Film and Television, with a dedicated Manager who administers the contract with FilmLA. As a strong supporter of the sector, the Mayor has introduced some **city-specific incentives to attract more business:**

- The Los Angeles City Council and Mayor approved a **reduction in the business tax rates charged for commercial, television and film productions**, creating a significant reduction in business taxes paid by all productions based in the city[96]
- Most **city properties** are available for commercial, television and film productions **without a location fee**; only a cost recovery charge is levied to productions for staff costs or ancillary charges
- The city has installed **power drops at key filming locations** and base camps across the city as part of an initiative to reduce the use of diesel generators in general
- In response to the wider effort in California to support the film and TV industry and to maintain Los Angeles' status and competitiveness for the wider film business, in May 2025, the Mayor issued an **Executive Directive to city departments and agencies** with a set of instructions to review and assess how the city works with and services film production requests.[97] **The directive challenged those departments to investigate efficiencies they can introduce**, from reducing fees to film productions, to speeding up the processing time of responding to requests and issuing permits.

4.3.4. Talent and Workforce Development

As Los Angeles is known as the home of the film industry, workforce development initiatives, including training opportunities for underrepresented communities, are delivered by many of the resident studios through their CSR and DE&I programs. Several non-profits receive funding from various public programs to deliver entry-level training to local communities. FilmLA does not offer programs directly.

4.3.5. Key Takeaways

- FilmLA is an independent organization, operating under a five-year contract between the city and county of Los Angeles and other partner cities, municipalities and school boards

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[94] *Fires, strikes and the pandemic hurt Hollywood production, now, industry workers are asking for help.* NBC News, 7th April 2025.
[95] *L.A. Soundstage Occupancy Declines to New Low of 63% in 2024 With No Signs of Improvement.* Variety, 3rd April 2025.
[96] *Mayor Bass issues Executive Directive to support local film and TV industry.* Mayor Karen Bass, 20th May 2025.
[97] Ibid

- Overseen by an independent board of directors, it is responsive to industry needs as well as community partners' challenges with regards to location filming
- FilmLA's central permitting application for the city and county of Los Angeles is viewed as an asset, although some processes need reviewing.
- Following the renewal of its contract in 2025, FilmLA has been mandated to review the current permitting application process along with the requirements, costs and the need for the deployment of Film Monitors (liaison officers) on location filming
- FilmLA's research department data and analysis reports are referenced and used by many other film commissions around the world as benchmarking for comparing the success of their local industry.
- The Mayor of Los Angeles introduced some fiscal incentives to production companies by reducing business taxes, reducing or eliminating location fees for city-owned properties to special tax breaks for creative talent
- In 2024, the Mayor of Los Angeles convened an Entertainment Industry Council comprised of senior leaders from city departments and industry leaders to periodically review the city of Los Angeles' support of the film and TV industry.

4.4. Melbourne

4.4.1. Overview – Melbourne Film Office

The Melbourne Film Office (MFO)[98] is a department in the city of Melbourne's Creative Strategy and Events Directorate, which is a unit in the City Activation Division. This division reports to the City Economy, Activation and Experience Group, which in turn is overseen by the CEO of the municipality. **Effectively, there are three layers of city management over the MFO.**

The City Economy, Activation and Experience Group is responsible for major strategic policies in events, public spaces, the night-time economy, the visitor economy and overall economic development.

The MFO mainly provides administrative services, hosting a dedicated portal and acting as a liaison point for all of Melbourne's public services and departments to facilitate the permitting of film productions. **Like the TFO, the MFO does not have a distinct marketing brand presence as a film office**; all information related to filming in the city is shared via a page on the city's website. There is a comprehensive Melbourne Filming Guide on the city's website that provides key practical information to producers.[99]

Melbourne's metropolitan area is made up of 31 municipalities, with the MFO responsible for the city of Melbourne. For productions looking to shoot outside of the city, the MFO liaises with VicScreen,[100] the state government film commission.

4.4.2. Filming in Melbourne and VicScreen's Role

The city of Melbourne manages filming permits through the Event Operations team within the Events Melbourne Branch, with its dedicated film officer. This involves

[98] *Filming Permits.* The Melbourne Film Office.
[99] *City of Melbourne Filming Guide*. City of Melbourne.
[100] VicScreen.

managing the relationships among the MFO, the filming applicant, stakeholders, public authorities, including VicScreen and any third parties.

As the state-funded screen agency, VicScreen delivers wider industry support and development programs, such as:

- Manage automatic incentives
- Provide funding for production and other screen culture activities
- Manage international promotion strategies
- Manage Play Now – Melbourne's games festival and market
- Manage talent development and DEI in the state.

In accordance with the Filming Approval Act 2014 enacted by the state government, the city of Melbourne aims to be welcoming and responsive to film crews, providing them with ideal shooting locations and relevant services while ensuring that crews minimize impacts on residents and stakeholders. VicScreen has also published the Victorian Film Friendly Guidelines as a guidance document for all the municipalities in the state to comply with the Filming Approval Act.[101]

The MFO is the permitting agency for the city and assists filmmakers wishing to film on any of the city-owned land and property. VicScreen holds the locations library for Melbourne, along with the wider locations database for the state.

4.4.3. Economic Development

The MFO collects data on production impact and contribution to the city of Melbourne's economy and leads stakeholder consultations regarding the facilitation of filming. This work feeds into the Economic Development and Cultural Policy planning for the city.

4.4.4. International Marketing

International promotion for Melbourne is mainly delegated to VicScreen. **Melbourne is the central focus for the state agency in its international marketing efforts** and has specific information and resources on its outward promotion of filming in the Greater Melbourne area.

4.4.5. Sustainability

There is currently **no bespoke sustainability initiative for filming in the city of Melbourne**. However, VicScreen is a funder and supporter of the national scheme, Sustainable Screens Australia (SSA).[102] This enables and encourages the Australian film and television industry to embed sustainability into daily operations, both at the studios and on location.

4.4.6. Key Takeaways

- The MFO is focused on delivering an administrative function of permitting filming and direct liaison between all the key city departments and agencies
- The MFO collaborates closely with VicScreen, which leads on the wider sector and talent development initiatives to strengthen and grow the screen industries funded by the state

[101] *Victorian Film Friendly Guidelines*. VicScreen, October 2014.
[102] Sustainable Screens Australia.

- While VicScreen has a mandate to represent and promote all of Victoria, it has a clear priority to promote Melbourne and highlight its production infrastructure, which directly benefits MFO.

4.5. New York

4.5.1. Overview – New York City Mayor's Office of Media and Entertainment

The New York City Mayor's Office of Media and Entertainment (MOME) is a municipal agency responsible for supporting, regulating and developing the city's media and entertainment sectors.[103] Encompassing film, television, theatre, music, advertising, digital media, games, publishing and recently, the nighttime economy, MOME is responsible for sustaining New York City's global reputation as a creative and cultural capital.

MOME operates under the direct authority of the Office of the Mayor of New York City, and its Commissioner is a political appointee who reports directly to the Mayor. Its structure reflects its **hybrid role as both a regulatory and promotional body within the broader municipal framework** and its core contribution to the Mayor's priorities for economic equity, workforce development and cultural initiatives. The Commissioner of MOME represents the city of New York's wider creative industries at the local, national and international levels.

4.5.2. Filming in New York City

MOME provides a one-stop shop for all location filming enquiries across New York City's five boroughs by managing the city's permitting process and providing logistical coordination. It works alongside and coordinates with agencies like the NYPD, Department of Transportation and Parks Department to ensure screen production causes minimal disruption.

The single point of permitting for the five boroughs is a benefit to productions. Also, the assignment of a single Liaison Officer to handle all the coordination across the boroughs and agencies like the police and highways departments is beneficial in a complex city like NYC.

4.5.3. MOME Programs

MOME has several ongoing programs that demonstrate its expanded remit beyond a standard film office. Their programs address sustainability, animation, game design and digital media and ongoing communication to wider citizen stakeholders:

- **NYC Film Green** was the first sustainability program for the film and television industry in the US, administered by a government agency. It is a voluntary program that enables productions engaging in environmentally conscious practices to apply for and receive recognition for their efforts
- The **NYC Women's Fund for Media, Music and Theatre** is an initiative by MOME to address the underrepresentation of women and women-identifying artists in film, television, theatre and music. This annual funding program is part of MOME's commitment to DEI for the city's communities

[103] The New York City Mayor's Office of Media and Entertainment (MOME).

- The **NYC Public School Film Festival** is a partnership between MOME and the School Board. It was created to provide students with an opportunity to have their work recognized and to encourage careers in filmmaking. There is also a Career Expo to provide a snapshot of opportunities in NYC's screen industry
- The **Made in NY Animation Training Program** has trained over 10,000 young people from across the city since its inception in 2017
- **NYC Media** is part of MOME and is the official broadcast network and media production group of the New York City. It aims to inform, educate and entertain New Yorkers about the city's diverse people, neighbourhoods, government, services, attractions and activities.

4.5.4. Economic Development

Studio development in the TriState area is growing exponentially, potentially fuelling growth in production activity in New York City and its competing neighbours in New Jersey. This will also place additional demand on the crew and service providers in the TriState area.

New York State recently made improvements to its tax credit program, making it more attractive to productions and targeting independent producers, and increasing the credit available for production companies shooting multiple projects in the state through its Production Plus bonus.[104]

4.5.5. Talent and Workforce Development

MOME delivers a series of **talent and workforce development programs under the Made in NY** brand:

- The **Made in NY Production Assistant program** provides individuals from diverse communities with industry-recognized training for entry level positions in film production. On completing the training, the program assists with access to employers in New York City's production industry. An important component of the training is teaching PA's how to be an effective community liaison representative for the production. Working with local communities to ensure minimal disruption from the filming activities.
- **Made in NY Post-Production Training** is a free, five-week training program for participants to gain experience with industry standard software and preparing them for job opportunities in New York's post facilities with job placement assistance and two years of career guidance and support.
- The **Made in NY Writers Room** provides emerging television writers, from diverse backgrounds, with six months of intensive early career training. The selected participants will receive a paid fellowship that includes monthly one-on-one mentorship sessions with television showrunners, ongoing roundtables with other writers and industry executives, ongoing career development resources and training with the opportunity to build a refined portfolio of at least two sample scripts.
- MOME presents several year-round **Made in NY Talks** which are special events and opportunities for New Yorkers interested in breaking into the creative and

[104] *New York increases film and TV tax credits to $800 million to compete for Hollywood projects.* The Hollywood Reporter, 9th May 2025.

entertainment industries. The programs and events are designed to give people an opportunity to learn from industry experts, gain access to professionals and experience innovation the creative arts.

4.5.6. Key Takeaways

- MOME is the central point of contact for permitting and assistance for the whole of New York City, providing a simple and efficient permit application process for the five boroughs
- MOME is responsible for NYC Media, the city's flagship broadcast network, producing educational and information programming for the communities in wider New York
- The Made in New York marketing credit offers qualified film and television productions with free co-branded advertising opportunities in public advertising spaces across the city, subsidized by NOME. 'Made in NY' productions are projects where at least 75% of the film was produced in New York City
- NYC Film Green is one of the first and longest-running sustainability programs for film and TV production in the US. It is voluntary and not linked to any specific conditions or incentives for filming in the city
- The NYC Public School Film Festival is a program to encourage young people to showcase their talents and explore career opportunities in the film and TV industry in NYC
- The Made in NY training and development programs offer different routes to employment for people looking to enter the workforce in different capacities.
- MOME offers direct programs and investments into all the major screen-based sectors in the creative economy across the city
- The Empire State Development Corporation administers the state tax incentive, which includes commercials
- The Corporation has also launched its Production Plus scheme, a 10% bonus to its base tax credit. This program is specifically targeting production companies to encourage them to base multiple shows in the State, which would clearly benefit New York City.

4.6. Chicago

4.6.1. Overview – Chicago Film Office

The Chicago Film Office (CFO)[105] was created in 1980 and is a division of the Department of Cultural Affairs and Special Events (DCASE), which is a cabinet-level department within the City of Chicago municipal government. The Commissioner of DCASE is a political appointee and reports directly to the Mayor of Chicago, making the **CFO part of a broader strategy to develop the city's cultural, creative and economic ecosystems**.

The CFO's primary mission is to attract and retain film and television productions in the city, streamline the permitting process and ensure that filming aligns with municipal regulations. They maintain a locations database of city properties and land and is the

[105] The Chicago Film Office.

key liaison with the city's departments and organizations, such as the police and fire departments and other key public entities.

The CFO is the main agency for accessing filming permits for the 77 districts that make up the city of Drives Chicago. This allows a single process for applying for permits, creating an efficient process for productions requesting permissions.

4.6.2. Filming in Chicago

The CFO has a reputation as a professional service and is very effective at coordinating the city department's responses to filming, even with the high number of productions and complex requests. Long-running series such as Chicago PD (2014-present) and Chicago Fire (2012-present), and more recent international hits like The Bear (2022-present), shoot in multiple locations in the heart of the city. The CFO carefully balances these location requests while maintaining minimal disruption to the city and its businesses.

The surge in high-end productions in the last five years highlights the city's appeal as a major US production centre, due to its strong infrastructure, studio capacity and supportive local government agencies.

Recently, DCASE has faced significant political turbulence. Staff turnover had risen significantly, with about 25% of employees exiting within a year, including the Deputy Commissioner for Film, triggering alarm in the arts and production community.[106]

4.6.3. Economic Development

Film and television production plays a strategic role in Chicago's broader economic development agenda, contributing to cultural visibility, job creation, local business stimulation, urban revitalization and workforce diversification. Embedded within the city's vision of becoming a vibrant, equitable and globally competitive destination, the film and TV industry aligns with multiple pillars of Chicago's long-term growth strategy and directly aligns with the Mayor of Chicago's long-term economic plans.

4.6.4. Illinois Film Office

The Illinois Film Office (IFO) is a department of the Illinois Department of Commerce and Economic Opportunity, placing the film and TV industry within its economic priorities for the state, with Chicago as the key business hub. The CFO collaborates with the IFO on promotional and marketing initiatives.

The **IFO also delivers a Workforce Training Program**, providing training to highly competent, diverse and vetted production assistants to make them available to productions filming in Chicago. Every IFO trainee has undergone a rigorous selection process with Illinois film organizations. Everyone receives between 80-100 hours of training in relevant set etiquette, standard practice, and mock set experiences for both set and office settings and working directly with industry professionals.

4.6.5. Key Takeaways

- The CFO is the single permitting authority for the greater Chicago area, providing a one-stop shop for most of the film requests

[106] *Chicago's Cultural Affairs Department Hits Crisis Point.* The Art Newspaper, 22nd April 2025.

- Due to the CFO being part of DCASE, it has suffered from the overall issues of the department, with unrest around the wider arts and cultural institutions in Chicago targeting DCASE and its Commissioner
- The Chicago Parks District controls filming access to specific parks and public lands in the city and is not linked to the CFO's wider permitting system
- The CFO collaborates with the IFO to provide trained Production Assistants to shows shooting in Chicago, creating job opportunities and career pathways for local talent

4.7. Atlanta

4.7.1. Overview – Atlanta Film Office

The Atlanta Film Office (AFO) is part of the Mayor's Office of Film, Entertainment and Nightlife,[107] and it serves as the central hub for all film, television, commercial, and entertainment-related production activity in the city of Atlanta.

The Director of Film, Entertainment and Nightlife reports directly to the Mayor of Atlanta and is responsible for setting and delivering policy and strategy initiatives and liaising with other municipal departments.

Atlanta has become a production powerhouse, thanks in large part to Georgia's aggressive state-level film tax incentives and the rapid expansion of film studio developments, fuelled by private capital. The AFO mainly provides administrative services to the production sector in the city of Atlanta, issuing permits and providing direct liaison services with its municipal departments and organizations, such as the police and parks departments.

4.7.2. Filming in Atlanta

Metro Atlanta is made up of 29 districts. While the AFO only deals with permitting in the city limits, the Georgia Film Office (GFO) helps to coordinate filming requests across the state through a program called Camera Ready Georgia, which is a network of Film Liaison Officers based in municipalities who offer a liaison service and issue permits for filming in their areas.

The GFO is responsible for the international promotion of Georgia, with Atlanta as its key production hub. The AFO also collaborates closely with the GFO on workforce development programs, DEI initiatives and screen tourism.

4.7.3. Economic Development

The AFO is an integral part of the city's economic development strategy. Working with the GFO and the Georgia Production Partnership, it aims to enhance Atlanta's position as one of the key locations in the US for film and TV production. The AFO's other priority economic drivers are ensuring job creation and workforce development for vendors and the local community.

The AFO supports the Mayor of Atlanta's broader priorities of job creation, community empowerment and cultural vitality, making it a cornerstone of Atlanta's creative future and reinforcing its vision of being the 'Hollywood of the South'.

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[107] The Atlanta Film Office.

4.7.4. The Georgian Film Office

The GFO Is the lead agency for the state and is a department of the Department of Economic Development. It is also the lead agency for the promotion and marketing of the state to the global film industry and administers the state's tax credit.

In an innovative move, the GFO introduced a 10% uplift in the available credit to productions, if they meaningfully contributed to the promotion of Georgia through storyline, the use of real locations and if the production gives a prominent placement of the Georgia peach logo, in the film's credit roll.

There has also been some political backlash from the industry, due to the State introducing legislation to restrict abortion rights and the overhauling of voting rights, restricting voting access to residents of Georgia. Some of the legislation did not pass, but several productions chose to relocate away from filming in Georgia. While the wider threats of boycotts from the studios and streamers did not materialize, this could be an issue in the future if similar laws were proposed. This will have a major impact on the city's production levels.

4.7.5. Key Takeaways

- The AFO is a cabinet-level position and reports directly to the Mayor of Atlanta. They provide oversight and strategic direction that aligns with the city's priorities for Economic Development and Workforce Equity.
- SetSouth is AFO's public-facing portal and holds a lot of information regarding filming taking place in the city and is a resource for community engagement and training opportunities for residents.
- The AFO publishes a Hotspots Map on their website. This gives producers a real-time indication of areas in the city that are currently not accepting permit requests. Therefore, producers can amend their filming plans before making applications for permits.
- Camera Ready Georgia is a state-run program that provides a clear access point to all the resources in Georgia and clear information to film liaison officers in local communities.
- The city of Atlanta was directly affected by the industry objections to certain amendments to state laws, directly affecting the citizens of Georgia. While not directly production related, it had a damaging effect on the reputation of Georgia as a politically stable location for business.

4.8. Vancouver

4.8.1. Overview – Vancouver Film Commission

The Vancouver Film Commission (VFC) was created in 2016 with the mandate of strengthening the film industry by acting as the primary interface between the city and the industry. The VFC was not responsible for permitting productions (see **Section 4.8.2**).

The VFC was a core department of the Vancouver Economic Commission (VEC), a stand-alone not-for-profit entity owned by the city of Vancouver. The VEC played a central role in promoting and supporting Vancouver's thriving film, television and digital media industry. It was chaired by the Mayor of Vancouver, and the Film Commissioner was a Director-level role in the VEC and a non-political appointee.

The VEC provided strategic leadership toward maintaining Vancouver's position as a top North American production destination and delivered business development initiatives to promote the city as a leading destination for filmmaking. The VEC also advocated for infrastructure investment that aligned with the city's broader economic development goals.

In 2023, a decision was taken to wind down the VFC and to transfer the Film Commissioner role to the City Managers' Office, in order to ensure continuity of service and a closer link with the city's film permitting office, the Parks Board and the operational departments of the municipality and the Vancouver Police Department.[108]

In March 2025, the Film Commissioner role was completely removed. There has been severe backlash from the local industry as well as the Motion Picture Association, which represents the large US studios and streamers. A review board has been convened with all the key industry partners to reassess that decision and re-instate the role; as of the time of writing, its position within the city structure is unclear.

Creative BC is the provincial agency dedicated to supporting and developing the Creative Industries across BC. It has a widespread mandate to support the film, publishing and music sectors. While the VRC collaborated with Creative BC on the promotion of the province, it had the specific mandate of supporting the screen-based sectors of film and TV production, VFX and post-production.

4.8.2. Filming in Vancouver

The greater Vancouver region has 21 individual municipalities with dedicated Film Liaison Officers and permitting processes. There have been attempts to introduce a single permitting process for all the municipalities, but the differing administrative systems and by-laws have not facilitated that.

The VFC delivered business development initiatives and international promotional activities, benefitting the wider Metro region. The city of Vancouver Filming and Special Events Department is responsible for the day-to-day requests for filming and permitting. They are also the main liaison agency for any of the municipal departments or services. Separately, the Vancouver Parks Board also has a filming team who are responsible for permitting filming in the city's parks and green spaces. There have been regular calls from industry to streamline the permitting system and process of both agencies into one common system.

The city of Vancouver has **a strong focus on sustainability through all its services and community initiatives.** The film and TV industry and all its stakeholders in BC are strong supporters of Reel Green, Creative BC's sustainability initiative supporting environmentally responsible practices in film and television production. It provides training, tools and resources to reduce industry carbon footprints, promote green innovation and align the province's screen sector with global environmental standards, fostering a more sustainable and climate-conscious creative economy.

In 2022, metro Vancouver introduced a Clean Energy Discount for production companies, offering a $500/day discount, for up to two days, on filming permits for productions that replace diesel generators with clean energy sources. This initiative

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[108] *City to wind down Vancouver Economic Commission*. City of Vancouver, 22nd September 2023.

aims to reduce greenhouse gas emissions, improve air quality, and cut down noise pollution at filming locations.[109]

Similarly, the city of Vancouver introduced a Clean Energy Incentive in 2020. Productions that can demonstrate the use of clean energy sources (such as battery systems, grid power tie-ins, or the city's clean energy kiosks) may qualify for a 50% discount on both the daily filming fee and late surcharges. To qualify, at least 50% of on-site energy must be from clean sources.[110]

4.8.3. Economic Development

Vancouver and the BC industry have suffered from complacency in recent years. It was consistently ranked number 3 in the top production centres in North America, behind Los Angeles (number one) and New York (number 2).[111] Apart from the VFC, there was little focus on targeted business development with the studios and streamers. Toronto is now universally recognized as the number 3 production hub and continues to grow, whereas Vancouver's growth has slowed as the overall industry has rebounded.

The province experienced a prolonged boom in production choosing to base in BC and there was a belief this would continue. Toronto is the main competitor of Vancouver for attracting business to Canada.

An issue that is common across Canada, is the disparity of data collection methods. Different organizations trying to track and determine the size and impact of the industry use different methodologies and base data sets that did not capture the full industry and included multipliers and estimates, which gave an incomplete overview of the sector. In 2017, the VEC worked with PWC's global media team to create a new methodology based on payroll and workers compensation data for the film industry. This led to a more accurate yearly set of data to determine the size of the sector in BC.

In 2019 the VEC published a games strategy.[112] The strategy was focussed on expanding the city's reputation as a global hub for interactive entertainment by supporting talent pipelines, fostering industry-academic collaboration, and attracting investment in video games, AR/VR, and digital media.

4.8.4. Key Takeaways

- VFC was an integral part of the VEC and delivered initiatives, priorities and advocated for the Creative Economy for the city of Vancouver
- The Vancouver Film Commission had the focussed mandate of supporting the film and TV, VFX and post-production sectors
- VFC was transitioned into the City Manager's office to align closer with core economic and cultural development policies of the Mayor
- Founded in 2006 by Creative BC and industry partners, Reel Green is one of the world's leading sustainability initiatives for the motion picture industries. The city of Vancouver is an active partner in its practices and policies
- Vancouver has 25 power kiosks in key locations across the Metro area, and base camps allowing compliance and participation in sustainable filming practices

[109] *Clean Energy Discount*. Metro Vancouver.
[110] *Film Production Clean Energy Network*. City of Vancouver.
[111] *Profile of Sector Film & TV*. City of Vancouver, 2020.
[112] *Vancouver Economic Commission Releases Esports Strategy*. Techouver, 22nd February 2021.

and targets set by their customers; Creative BC also offers a CA$10,000 grant to businesses that are interested in installing power tie-ins for film productions
- Through the Metro Vancouver Clean Energy Discount, production companies can save $500/day (up to two days) on filming permits by using clean energy sources instead of diesel generators
- Through the city of Vancouver Energy Incentive, productions using at least 50% clean energy can receive a 50% discount on both daily filming fees and late surcharges
- In 2021, the city of Vancouver recently simplified its fee structure, helping productions to plan their shoots and budgeting more efficiently, especially if they had multiple location requests
- The full potential of the collaboration between the city of Vancouver's Film Commissioner and CreativeBC has not been fully utilized for its joint strength in promoting the Province and Vancouver as its main production hub
- Over the last few years, the TFO has delivered a targeted business development strategy, with the key networks, streamers and studio providers, alongside international initiatives, using the full participation of the Mayor's Office, all supported by local industry; this has been lacking in Vancouver
- The city of Vancouver film permitting office works closely with the various Business Improvement Associations in the city to minimize disruption to local businesses from film production
- Launched in 2016, the Motion Picture Community Initiative (MPCI) came together as a volunteer industry task force to recognize, appreciate, profile and celebrate the BC communities that help make the province's film and television production sector thrive. Several community appreciation events are held in communities with high location filming activity
- ScreenBC, along with Destination Vancouver and industry partners, are developing a screen tourism strategy to develop products and campaigns to use film and TV as a tool to attract increased tourism to the province.

5. PERSPECTIVES ON THE TORONTO FILM OFFICE

5.1. Overview of the Toronto Film Office

The TFO is Toronto's primary entity for the servicing and promotion of the city's screen production industry. Founded in 1979, its remit covers film, television, visual effects, animation and commercial productions. It sits in the Film and Entertainment Industries section in the Economic Development and Culture Division ("**EDC**") of the City of Toronto, and is responsible for maintaining a film-friendly, best-in-class environment for global and domestic production in Toronto through:

- Providing specific facilitation services to domestic and foreign service producers, including one-stop shop public permitting
- Driving the international marketing and promotion of Toronto as an attractive filming destination
- Devising and managing sector programs for workforce development
- Facilitating studio capacity growth
- Enabling sustainable practices in screen production in line with city and provincial initiatives.

The TFO's first key responsibility is to provide **comprehensive support services for screen productions**, including arranging permits for filming on public property; they ensure that filming activities are conducted legally and with minimal disruption to the public and the environment[113] (productions apply for film permits through FilmPal, the City of Toronto digital portal).[114] The TFO offers a 48-hour turnaround time on issuing permits within normal operations, which is consistently met.

They provide **location filming support, guidelines and a code of conduct for filming in Toronto** and work closely with City departments and stakeholders to secure as safe and smooth filming operations as possible.

The TFO's second key responsibility is to promote the city as a top-tier production destination, playing a vital role in attracting investment. Using the **'xoTO' brand** in its international marketing to spotlight Toronto's unique selling points, it has been able to plan and execute some initiatives like the xoTO House at the Toronto International Film Festival (TIFF) and recent missions led by Mayor Chow.

The TFO is also heavily involved in ongoing **workforce development**, with particular emphasis on diversity, equity and inclusion (DEI) through initiatives such as xoTO Screen Industry Pathways, a City-backed program offering training to underrepresented communities.[115]

The TFO **collaborates on the development of studio infrastructure**, working to protect employment lands and expedite new builds and expansions. Part of its mandate involves advancing sustainable practices, such as reducing reliance on diesel generators through the installation of electrical power drops.[116]

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[113] *Film*, City of Toronto.
[114] *Using FilmPal.* City of Toronto.
[115] *Toronto's screen production industry sets record with more than $2.5 billion in direct spending in 2021.* City of Toronto, 25th March 2022.
[116] *Why Film in Toronto*. City of Toronto.

The TFO receives industry advisory support from the Toronto Film, Television, and Digital Media Board ("**Film Board**"), which is comprised of appointed members of the public and city council. They meet quarterly to discuss strategies and provide recommendations to the City on how to foster growth opportunities and developments in the industry.[117]

The TFO shares a Los Angeles-based consultant with Ontario Creates, who facilitates their presence in the city, working with filmmakers, studios and other key stakeholders on their behalf.

5.2. The City of Toronto and the Toronto Film Office's Commitment to the Screen Industry

The City of Toronto demonstrates a strong and sustained commitment to supporting and investing in its screen industry, ensuring that it thrives as a major contributor to local employment, economic development and cultural identity. This commitment is evident in the planning, financial support and coordinated cross-departmental efforts and partnerships that are essential for the industry's continued success, where the TFO plays a central role.

The City invests directly in the industry through culture and sector development grants, including sponsorship commitments to TIFF and other key festivals, as well as equity- and employment-focused workforce programs. The city also advances infrastructure growth through the EDGE program, which funds new or significantly expanded facilities such as soundstage development. Sustainability and climate-focused initiatives have supported the installation of power drops at key on-location sites, reducing emissions from production base camps.

Land use planning highlights the city's ambition. Ten acres of publicly owned land in the Port Lands have been dedicated to film, leading to the planned development of a 300,000-square-foot soundstage complex by one of the world's leading developers. This facility is expected to generate 2,700 jobs annually, reinforcing Toronto's global competitiveness.

Day-to-day delivery of services to all screen stakeholders relies on extensive collaboration between City Divisions and the TFO:

- **City Planning** integrates film-friendly features into new developments
- **Transportation Services** and **Parks and Recreation** coordinate with the TFO to permit filming on streets and in parks
- The **Toronto Parking Authority** provides spaces for base camps and on-street parking, generating revenue that helps fund the TFO
- **Corporate Real Estate Management** makes civic landmarks available for filming
- **Toronto Employment and Social Services** contributes to workforce initiatives.

Partnerships also extend beyond City Divisions; the Toronto District School Board (TDSB) and Toronto Catholic School Board provide access to schools and parking, with TDSB further engaging in the TFO-facilitated xoTO Schools co-op program.

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[117] *Toronto Film, Television & Digital Media Board*. City of Toronto.

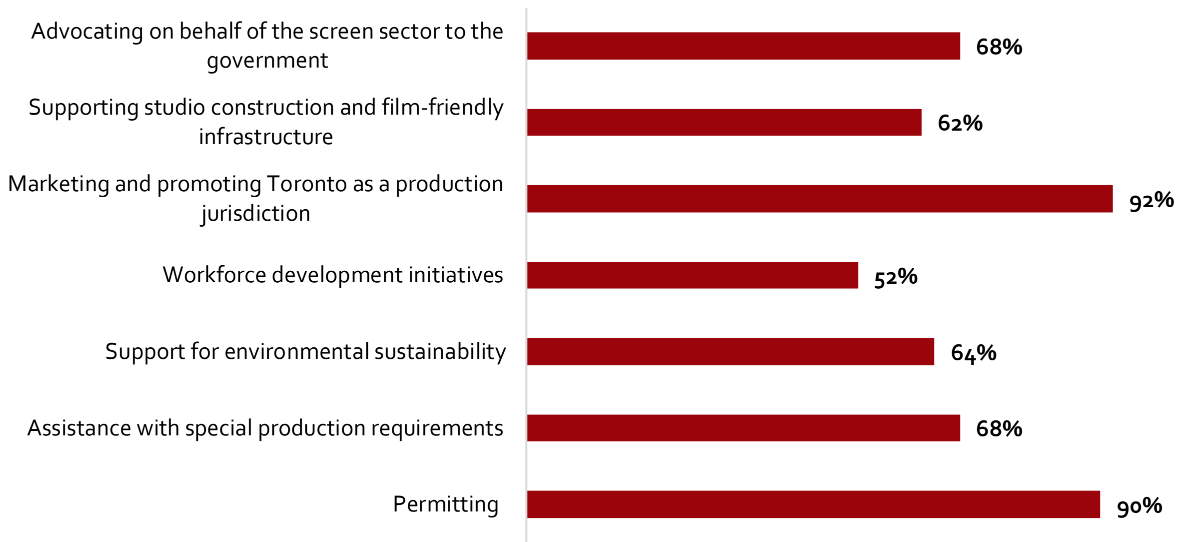
These initiatives demonstrate a holistic and City-wide approach, but the opportunity now lies in going further**. Stronger partnerships and more regular cross-departmental collaboration can amplify impact, ensuring that all Divisions, units and resources are working together for the benefit of the screen industry.** The City's investment in the creative industries also needs to be maintained, especially for ongoing workforce development.

With the TFO at the centre of these networks, it is well-positioned to lead this next phase by deepening coordination, unlocking new synergies and maximizing the city's collective contribution to screen industry growth.

5.3. A Leading Role in the Toronto Screen Industry's Future

According to consultee feedback from confidential consultations, roundtable sessions and the online survey, the **TFO is widely recognized for its proactive advocacy and promotional efforts, particularly in positioning the city as a global production hub**. Further, survey feedback indicated that marketing and promoting Toronto as a production location and permitting are the two top responsibilities of which stakeholders are aware (**Figure 9**).

Figure 9 – Awareness of the TFO's Services (survey responses) [118]

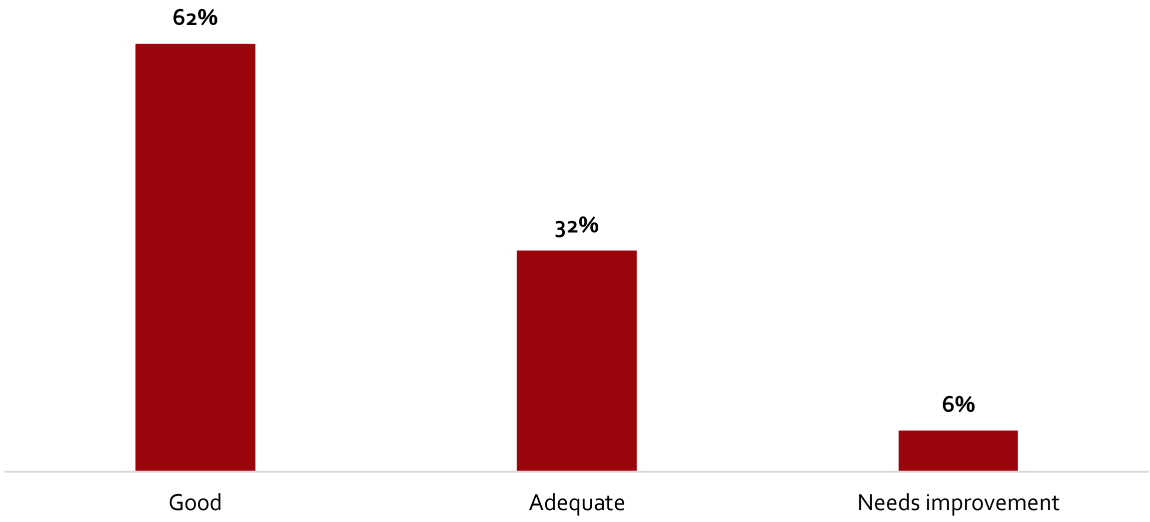


Source: Olsberg•SPI (2025), % of respondents (n=50)

Many interviewed consultees reported a positive working relationship with the TFO, praising its outreach and missions in Los Angeles and the UK, and its role in attracting and facilitating major studios such as Netflix, Apple and Amazon. This is reflected in the survey responses to the TFO's overall performance in **Figure 10** below, with a combined 94% of survey responders satisfied.

[118] The charts in this section map the feedback from the online survey only, and they support the findings from roundtable sessions and individual consultations.

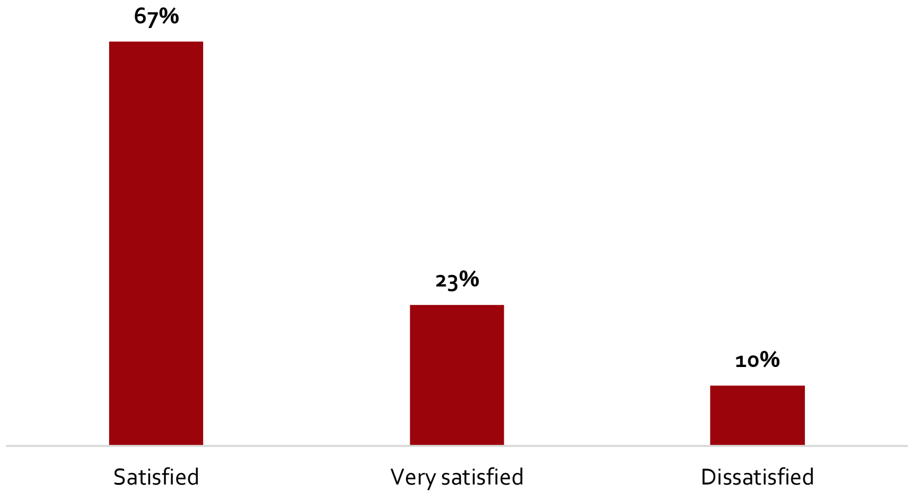
Figure 10 – The TFO's Overall Performance (survey responses)



Source: Olsberg•SPI (2025), % of respondents (n=47)

The TFO has demonstrated strong performance in responding to direct requests, with a high response rate and timely replies, as indicated by a combined 90% satisfaction in **Figure 11** below. Consultee feedback was consistent in their appreciation for the TFO's responsiveness and ability to provide information or support.

Figure 11 – Satisfaction with the Timeliness of the TFO's Responses (survey responses)

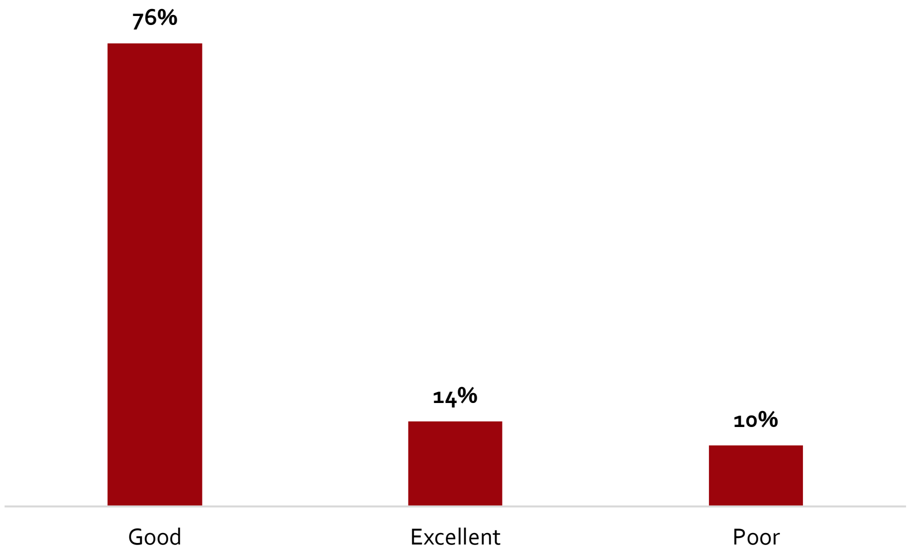


Source: Olsberg•SPI (2025), % of respondents (n=30)

Feedback is consistent that the TFO is instrumental in enabling productions to operate efficiently and build connections in the city. Consultees have used a range of different services, and surveyed consultees have especially used workforce development initiatives and permitting.

The TFO is also seen as having built a 'gold-star' reputation as a one-stop concierge service for US clients. Several consultees emphasized the TFO's value as a facilitator and relationship builder and expressed the need for continued advocacy, expanded services and connections.

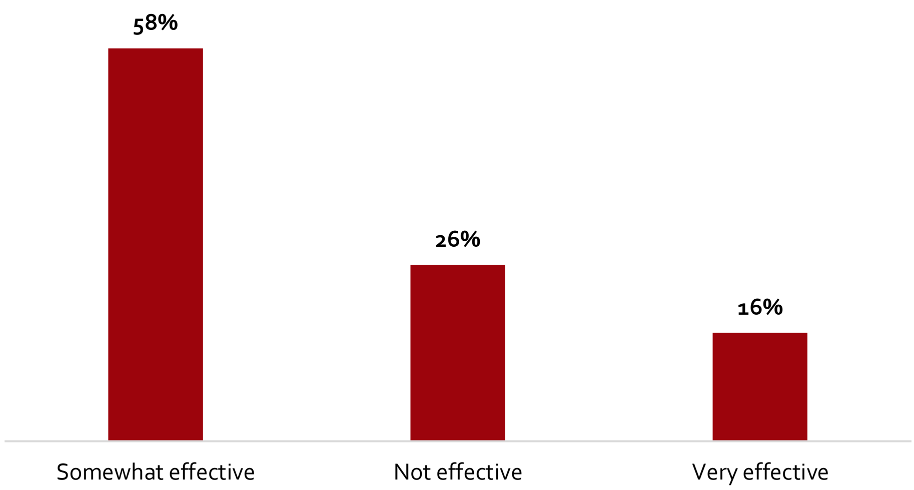
Figure 12 – Clarity and Helpfulness of Information the TFO Provides When Responding to Requests (survey responses)



Source: Olsberg•SPI (2025), % of respondents (n=50)

While stakeholders generally value the services provided by the TFO, **several consultees indicated a desire for more regular and proactive communication**; 58% of surveyed respondents report that the TFO is somewhat effective at keeping stakeholders regularly informed. Strengthening stakeholder engagement through clearer, consistent updates would help reinforce awareness of available resources and opportunities.

Figure 13 – The TFO's Effectiveness at Keeping Stakeholders Informed (survey responses)



Source: Olsberg•SPI (2025), % of respondents (n=50)

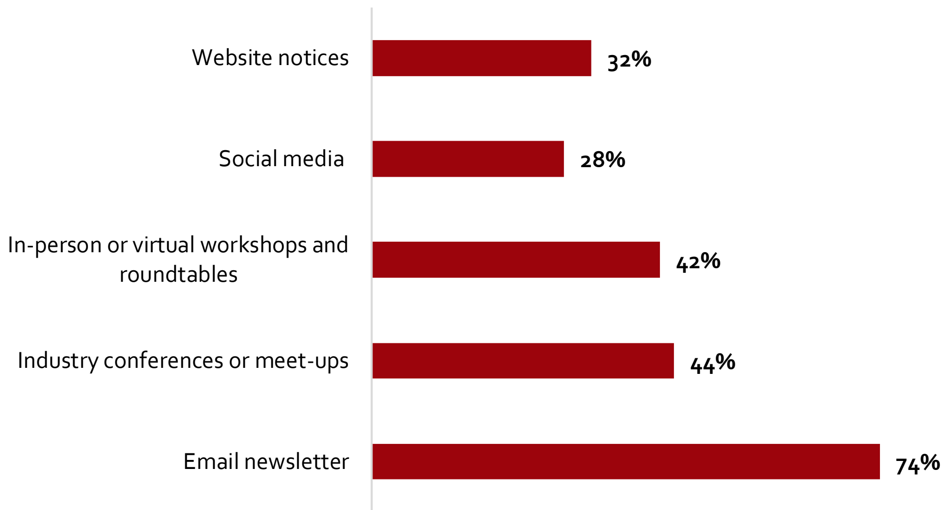
Interestingly, while stakeholders strongly preferred receiving updates via an email newsletter, several were unaware that such a platform already exists. This suggests **a disconnect between existing communications and audience awareness**, pointing to the need to more effectively promote and position the newsletter as a primary channel.

Stakeholders have underlined the need to **create a segmented audience strategy and develop tailored communications streams**. To cater to these different audiences and communication streams, tailored marketing materials could be developed.

Several stakeholders have reported a **need for community platforms such as workshops, roundtables or town halls.** This could offer a low-barrier way to foster alignment, transparency and collaboration across Toronto's domestic screen industry. By bringing together stakeholders regularly, the TFO can create a shared space for dialogue and problem-solving. For the broader screen industry, these platforms could help surface common challenges such as infrastructure gaps, permitting pain points or workforce needs, and allow for collective prioritization in a less formal setting. These events can also double as networking opportunities, strengthening community ties while aligning the industry around a unified vision for growth.

Visualizing and communicating efforts and initiatives of the Film Board would also help ensure that stakeholders are kept informed and better equipped to navigate the screen industry.

Figure 14 – Preferred Communication Channels for Receiving Updates (survey responses)



Source: Olsberg•SPI (2025), % of respondents (n=50)

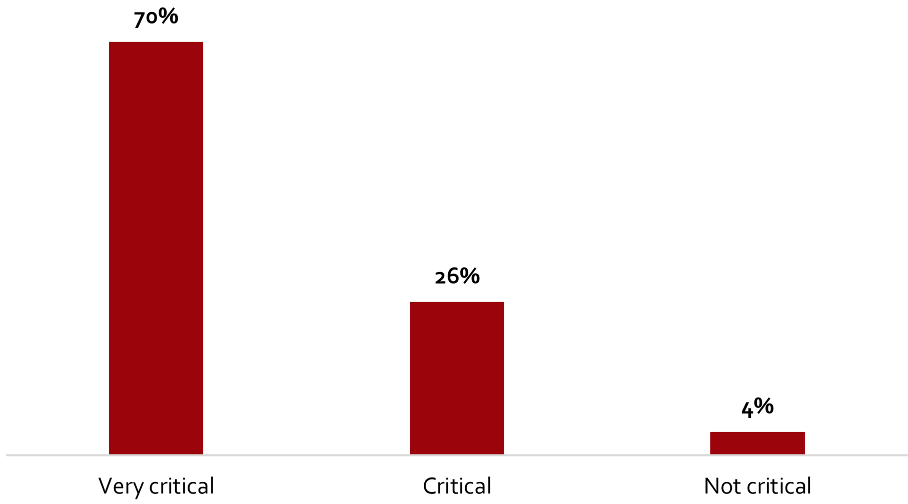
Many stakeholders view the TFO as an essential pillar of the Toronto screen industry. Its role in facilitating productions, advocating for the industry and serving as a liaison between government and industry is seen as vital to maintaining a healthy, competitive and film-friendly screen ecosystem.

However, stakeholders also note that **to stay proactive and not just responsive to an ever-changing global screen industry, the TFO requires greater operational**

flexibility and autonomy in its marketing and promotional activities. While existing municipal structures provide accountability and oversight, the current procedural constraint limits the TFO's ability to move at the speed of industry, particularly regarding content creation, brand alignment and international positioning.

More flexibility to manage and oversee its own content strategy, including the ability to initiate, produce and distribute promotional materials, run targeted campaigns and build partnerships independently, would allow the TFO to respond in real time to industry opportunities, position Toronto more proactively in an ever-changing market, and build long-term and sustainable co-branding opportunities.

Figure 15 – The TFO's Critical Role in Supporting the Health and Growth of Toronto's Screen Sector (survey responses)



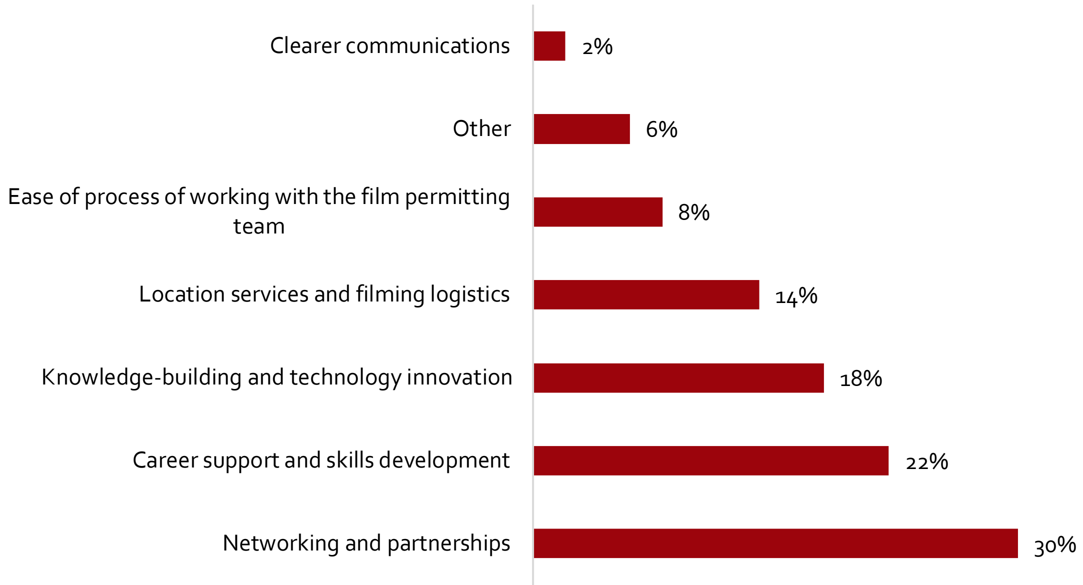
Source: Olsberg•SPI (2025), % of respondents (n=50)

Although communication is not the top priority for change, as shown in **Figure 16**, this should not obscure the fact that more consistent, proactive updates would help ensure that stakeholders are fully aware of the resources, programs and opportunities available. In other words, while stakeholders are calling more urgently for other types of improvements, **enhancing communication is still essential to building trust and confidence between the TFO and its stakeholders**. Making information-sharing a routine and reliable practice would increase engagement and ensure the industry fully benefits from the city's ongoing investments.

Stakeholders suggested that the TFO could further enhance its impact by increasing its visibility, resourcing and capacity around consistent networking and building partnerships, location services and career support and skills development.

In addition to internal capacity-building, such as expanding training and workforce initiatives and broader strategic planning, stakeholders encourage the **TFO to maintain a consistent outward-facing role**, attending industry events, hosting local roundtables, and representing the city at major screen markets to build visibility and attract new opportunities**. This is an important way for the TFO to promote the city, stay attuned to evolving trends, and foster stronger connections with both domestic and international stakeholders to remain an industry leader.**

Figure 16 – Changes or Improvements Respondents Would Like to See From the TFO Over the Next Five Years (survey responses)



Source: Olsberg•SPI (2025), % of respondents (n=50)

5.4. Comparing Key Operational and Service Areas – The TFO and Film Offices in Case Studies

Taking into consideration the review of the operations and perceptions of the TFO, and the case studies of comparable cities and film offices presented in **Section 4**, the following table highlights some key areas of comparison. While this is by no means an exhaustive list, it provides a high-level indication of the TFO's offer in relation to these examples.

Table 2 – Comparison of the Key Operational and Service Levers Between the TFO and Case Study Film Offices

	Toronto Film Office	**Film London**	**FilmLA**	**Melbourne Film Office**	**MOME – NY**	**Chicago Film Office**	**Atlanta Film Office**	**Vancouver FC**
Operational								
Film office sits in the city or Mayor's Office				✓	✓	✓	✓	
Standalone website and brand identity		✓	✓					
Full or co-funded satellite office in Los Angeles	✓							
Services								
One-stop shop for public permits	✓					✓		
Funds training for workforce	✓	✓			✓			
Focuses on sustainability practices in productions	✓	✓			✓			✓
Produces public industry research and reports	✓	✓	✓		✓	✓	✓	

6. STRATEGIC GOALS FOR THE TORONTO FILM OFFICE TO SUPPORT THE SCREEN INDUSTRY 2025-2030

6.1. Overview

Based on the program of research and analysis carried out for this Study, SPI has identified four areas of strategic focus for the TFO's leadership role in the industry's continued development over the next five years. Each of these four Strategic Goals has specific Actions and Recommended Tactics, and these are described further below.

The four Strategic Goals are:

1. **Strategic Goal One – Secure and Maintain Toronto's Position as a Leading Global Production Hub**
2. **Strategic Goal Two – Expand the TFO's Marketing and Communications Responsibilities and Activities**
3. **Strategic Goal Three – Refocus and Increase the TFO's Support for the Domestic Production Sector**
4. **Strategic Goal Four – Create Optimal Operating Conditions for the TFO in its Economic Development and Culture Division Home.**

6.2. Strategic Goal One – Secure and Maintain Toronto's Position as a Leading Global Production Hub

Strategic Goal: Having established its position among the world's leading production hubs as an overall attractive location for valuable portable productions from the US and elsewhere, the focus is on constantly improving the city's offer. It is important to ensure that Toronto maintains and continues to strengthen its position over the next five years, including through attractive incentives and first-class physical infrastructure, and continuously improving its film-friendliness. This is an increasingly challenging task in the face of substantial global competition.

Action 1:

Leveraging its convening powers and its deep knowledge of stakeholder needs, **the TFO to strengthen working relationships with key City Divisions to address and resolve highlighted challenges that are within the municipality's control**, using a highly collaborative approach.

Recommended Tactics:

- **Work closely with Transportation Services, Parks and Recreation, Corporate Real Estate Management** and third-party organizations like the **Toronto District School Board** to improve all processes related to issuing film permits across Divisions on a timely basis; ensure access to the public realm is available to productions in a way that fulfils Toronto's identity as a film-friendly city.
- **Work closely with the Environment, Climate and Forestry Division** to advance sustainability initiatives (see Action 6 below) and ensure consistent coordination with their wider strategies.
- **Work closely with City Planning** to support the preservation of employment lands as the sole areas zoned for this use, and the adoption of film-friendly features across the city

- Continue to maintain **high customer service standards for permitting**.

Action 2:

Advocate for the addressing and resolution of key identified issues that are outside of the TFO's control that have a direct impact on the city's film friendliness.

Recommended Tactics:

- Aim to find **workable solutions to address traffic congestion and management** challenges through coordination across multiple stakeholders: city planning, transport authorities, police, private operators and key stakeholders.

Action 3:

Focus on physical infrastructure by working to ensure Toronto's offer of studio space continues to meet and satisfy demand from international clients.

Recommended Tactics:

- Establish a **program to monitor and track the various metrics that define Toronto's studio offer**, including occupancy rates of existing spaces and availability of spaces suitable for retrofits. Accurate and consistent data collection is a critical tool to empower the TFO and its partners to make informed decisions about adjusting studio space as the market evolves over the next five years.

Action 4:

Maintain a competitive talent base, as well as a diverse and balanced workforce, to continue servicing productions filming in Toronto; introduce or expand actions to track and measure the demand for labour in order to inform workforce development initiatives for the next five years.

Recommended Tactics:

- **Undertake a regular labour gap study** to address data gaps and identify current and potential future likely undersupply of talent and crew positions. Determine with key partners exactly what data should be consistently collected, so that a baseline can be established for consistent measurement and future skills gap identification.

- **Continue to invest in talent development** initiatives that keep building on the Toronto crew base's strengths, as this one of the primary draws for filming in Toronto; at the same time, **amplify external communication about these programs** to not only signal the TFO's role in this key area, but also to identify professionals from other industries for upskilling into the screen sector and help recruits find pathways into employment.

- Maintain a **strong focus on equity-seeking creators** as an ongoing priority to ensure access to emerging technology, city-wide talent showcases and other identified resources; continue to collaborate with relevant organizations on workforce development programming that also can provide wraparound support services, including mentorship, housing, financial and mental health support and more.

- Consider establishing a **workforce hub in partnership with community organizations**, skills agencies and the relevant unions to maintain a rigorous focus on ensuring clear pathways into the industry; include cross-program skills tracking and possibly a training fund aligned to opportunities for independent filmmakers.

- Develop a **centralized, contract-based jobs board** to support access to transferable roles during off-peak periods, thereby supplementing existing union-managed lists and working with the cyclical nature of screen production.

- Establish an **Animation Skills Council that could help to better align educational programs with industry requirements** and manage enrolment levels; for example, develop shared animation facilities by repurposing vacant industrial space, which would benefit independent and emerging producers.

- Focus on **mid-career upskilling, re-skilling,** or other initiatives to prepare workers for the senior ranks of the workforce.

- Address **skills-building and upskilling in evolving technologies** at an entry and more advanced levels, involving appropriate partnerships with colleges and universities.

Action 5:

Advocate for tax credit stability by contributing, where and when possible, to ensuring the accessibility and competitiveness of Ontario's tax credit, in line with industry expectations and international best practice.

Recommended Tactics:

- Advocate for and align with relevant industry partners to produce and disseminate regular **evidence-based impact reports** highlighting the return on investment, economic impacts (macro and micro) and employment effects of Ontario's tax incentives for the city of Toronto. Examples would be to produce Economic Ripple and Vendor Hear Map analyses, evidencing the wide scope of benefits emanating from the productions.

Action 6:

Own and lead on expanding Toronto's position on sustainability and green production by building on existing sustainability initiatives and closing key gaps (e.g., EV infrastructure, renewables), signalling Toronto's aspiration to be a leader in green production.

Recommended Tactics:

- Review how the current **Toronto Green Standards** (TSG – Toronto's sustainable design requirements for new private and city-owned developments) could be applied more directly to screen production.

- Accelerate partnerships with infrastructure providers and utility companies to **invest in EV charging stations** at frequently used production locations.

- Contribute to partner **recognition schemes where possible for productions** that significantly reduce carbon footprints, innovate in sustainability and achieve high sustainability standards.

- Work with relevant industry partners on ongoing **sustainability and technical skills training** to support the sector in achieving broader sustainability goals, particularly in areas such as energy literacy and clean power solutions for producers, unit managers and technical crew.

Action 7:

Convene industry tables focused on new and advanced production technologies (AI, virtual production, R&D, etc.) to share knowledge, build fluency, ensure up-to-date awareness and create the conditions for collective progress, acknowledging both the inherent challenges as well as the opportunities.

Recommended Tactics:

- Explore publishing a **quarterly information sheet on relevant global trends and developments in digital tech innovations** that might affect domestic and service production in Toronto, potentially in partnership with an established educational institute.

- Leveraging the VFX, Post, and Animation Working Group within the Film Board, establish an **online Screen Industry Innovation Advisory Group** of selected global production leaders to regularly generate and report internally new insights on industry trends and technologies. This can support the TFO in staying connected to the rapid evolutions taking place and identifying areas for action.

- Work with industry partners, including unions and guilds, to develop **public-private training partnerships focused on re-skilling and up-skilling the local workforce** in new technologies, particularly mid-career professionals. Collaborate with industry partners, including unions and guilds, to map current and anticipated skills gaps in areas such as virtual production, AI-assisted workflows, and sustainable production practices. Use these findings to design targeted public-private training initiatives, delivered through short courses, mentorships and on-set training programs, aimed at re-skilling and up-skilling mid-career professionals.

- Create **annual industry forums or technology showcases** to promote knowledge-sharing and visibility for cutting-edge production practices.

Action 8:

Work with relevant partners to **enact or lobby for the safe and equitable adoption and use of emerging technologies in Toronto**, with strong rights protections for all screen professionals, while ensuring the city remains competitive.

Recommended Tactics:

- **Monitor how AI may affect the permitting process** and remain vigilant regarding any parameters or protections that may be required in the future.
- Convene a **standing 'AI in Screen' working group** with unions (ACTRA, DGC, IATSE), post/VFX, independent producers, broadcasters/streamers and local AI labs, tasked with sharing learnings and aligning with evolving union agreements and market practice.
- Working with colleges and universities, unions, guilds, industry and community partners, **develop or support mechanisms for knowledge-sharing and skills-building with respect to AI**, working toward a collaborative and cohesive approach to upskilling the industry for constructive opportunities, while also maintaining necessary protections.
- **Align economic development with creative tech** by partnering with intra-divisional partners, universities and accelerators to position Toronto as a hub for trustworthy creative-AI tools, prioritizing solutions that reduce costs and emissions without displacing protected roles.

6.3. Strategic Goal Two – Expand the TFO's Marketing and Communications Responsibilities and Activities

Strategic Goal: Build on existing efforts by instituting a more consistent and proactive program of outreach, including communications tools and channels, in-person and virtual events, trade missions, and travelling to participate in international screen festivals and markets, with the express goal of promoting Toronto to new targets and keeping the city and its offer top of mind to existing clients. This is a critical goal to maintain Toronto's competitiveness and is in line with standard operating practice for film commissions and offices all over the world.

Action 1:

Ramp up marketing and global promotion strategies by expanding targeted marketing efforts to attract more international productions, diversifying market outreach and educating the public on the sector's value.

Recommended Tactics:

- Develop an **annual calendar of screen festivals and market visits** to promote Toronto to new international targets and existing clients, working with industry and other levels of government as appropriate. Tactics include expo-style booths, scheduling one-on-one meetings, holding group presentations and hosting networking events, as relevant. Leverage each travel opportunity to **raise the city's profile at no additional cost by participating in market panels and presentations** through reaching out to organizers (this reinforces the value of having an annual calendar, so planning can be done months in advance).

- Maintain a **regular program of outreach missions to key client bases,** such as those undertaken recently to Dublin and London, as well as to Los Angeles and New York. Continue to keep Toronto top of mind through regular annual in-person interventions with the physical and post-production decision-makers. **Aim to add or switch in at least one new target location annually.**

- **Advocate for maintained or increased annual funding commitments for major film institutions, festivals and markets facing precarity**, amplifying their roles in domestic talent development and advancing projects through targeted programs.

- Explore with relevant stakeholders the potential **to expand Toronto's closer collaboration with provincial and federal partners as appropriate**, with a particular goal of assisting domestic producers with their networks (see the following section).

- **Segment marketing audiences** and develop promotional assets and materials tailored to the audience groups, such as International Producers/Domestic Creators/Post and VFX/Animation.

- Develop and evaluate the current **ad buy strategy to cater to segmented audiences**.

Action 2:

Enhance communication strategies for key stakeholder groups by improving communication through regular forums, town halls and proactive outreach.

Recommended Tactics:

- Co-develop, with appropriate partner stakeholders, **industry-focused town halls and networking** to foster collaborative discussions around industry challenges and strategic alignment.

- Implement a **multi-channel communication strategy** tailored to identified stakeholder groups (e.g., producers, government, unions) with qualitative feedback loops and satisfaction scores for government, producers and unions.

- Produce a **periodic newsletter on TFO news and trends**, such as green production best practices, training or partner opportunities and news on emerging tech.

- Consider a **bi-annual webinar or podcast** on sector data, trends, emerging tech and funding.

Action 3:

Continue to drive evidence-based policy and industry monitoring by implementing robust sector monitoring, regular industry reporting, and coordinated advocacy to ensure policy development is data-driven and responsive to market changes.

Recommended Tactics:

- Develop a clear **data strategy** for collecting key information on a consistent basis, in collaboration with partners. Key for establishing baseline and enhancing evidence-based advocacy positions.

- Implement dashboards or accessible **data visualizations** on the TFO's website to clearly communicate Toronto's ongoing production metrics.

- Establish a comprehensiv**e annual industry survey** and publish the data publicly to track industry health, growth and emerging issues.

- Produce **case studies and short visual economic reports** to illustrate Toronto's 'success stories' with live examples, particularly highlighting sectors such as commercial production, animation/VFX and post-production.

6.4. Strategic Goal Three – Refocus and Increase the TFO's Support for the Domestic Production Sector

Strategic Goal: The domestic production sector is facing a range of headwinds from various sources, including broadcaster entrenchment and international competition. The TFO must ideally collaborate with stakeholders to better understand the issues, improve communication and address these factors.

Action 1:

Work to strengthen the domestic production sector by collaborating on various efforts and initiatives with key stakeholders.

Recommended Tactics:

- Establish a Working Group within the Film Board to identify the **city-specific constraints inhibiting the development of domestic producers** and identify policies and actions that could alleviate such factors.

- Following this, host a **town hall event** to identify a program of goals and actions aimed at improving business conditions, in alignment with relevant partners; target Toronto's producer businesses.

- Linked with marketing goals and actions, expand **Toronto's international co-production efforts** with a particular goal of assisting domestic producers with their networks, collaborating with provincial and federal partners, as appropriate.

- Facilitate **regular networking and matchmaking sessions** (virtual and in-person) between domestic producers and international co-production partners and distribution platforms.

- **Establish or expand current communication channels** (e.g., newsletters, dedicated sections on the TFO website) to keep domestic stakeholders informed about global opportunities, funding and market developments.

Action 2:

Advocate for the continued support for and investment in **critical provincial and federal funding programs for domestic production.**

Recommended Tactics:

- Aligned with industry partners, leverage the City's influence with other levels of government to **advocate for the maintenance and growth of funding for the domestic screen industry**.

- Propose the establishment of a **fund for Toronto-based producers focused on project development**; such an initiative would help to strengthen and expand the number of domestic productions that can be made in Toronto in the long term.

6.5. Strategic Goal Four – Create Optimal Operating Conditions for the TFO in its Economic Development and Culture Division Home

Strategic Goal: Build on the unique advantages of being located within the municipal government of one of the world's most innovative, fast-growing and multicultural Western cities, while also addressing operational challenges.

Action 1:

Expand and deepen communication to leadership throughout the City of Toronto about how the TFO's goals serve larger City strategies around key areas, including economic growth, workforce development, sustainability and innovation, strengthening alignment in continued service of the screen industry and wider city success.

Recommended Tactics:

- **Strengthen outreach to and collaboration with City Divisions and partner agencies** to reduce frictions, resolve outstanding practical issues within the City's control, and improve the operational experience for all productions; over time, these actions will deepen Toronto's reputation as a film-friendly city.

Action 2:

Increase the TFO's ability to meet expectations and standards common to competing film commissions related to its responsibility as the marketing and outreach entity for Toronto's industry in the international marketplace.

Recommended Tactics:

- **Advocate internally for greater operational autonomy for the TFO** through defined delegation of authority for routine decisions related to external communications, including social channels, advertising, and other assets.

- Through an annually approved budget allocation for travel, **provide delegated authority for TFO to determine and execute priorities for attending relevant festivals and markets**, selected to best advance Toronto's annual production volume.

- Publish an **annual operational review report that is fully aligned to municipal objectives,** to showcase achievements, improvements and progress against strategic objectives, as well as further integrate into city operations for facilitation and problem-solving.

7. APPENDICES

7.1. Project Methodology

To inform the development of Toronto's five-year strategy for its screen production industry, a **comprehensive program of research and engagement** was undertaken between Q1 and Q3 2025. This included extensive desk research, targeted industry consultations through one-to-one meetings and broad-based sector engagement through roundtable sessions to ensure that the final strategy is robust, evidence-led and reflective of industry needs across the value chain.

The **desk research** phase focused on identifying and synthesizing insights from key policy, industry and economic documents related to Toronto's screen industry. Notable sources included Toronto's Screen Industry 2019: A Record Year, the Toronto Screen Industry Workforce Study (2021), and Toronto's Film Industry: Protecting a Valuable Asset (2022). Additional reference was made to broader cultural and economic policy frameworks, such as Culture Connects: An Action Plan for Culture in Toronto 2025-2035, and statistical releases from Ontario Creates, including annual production expenditure data.

Collectively, these reports provided a foundational understanding of historic trends, current performance and strategic gaps across production, workforce, infrastructure and post-production segments, including VFX and animation.

The research was complemented by **seven in-person roundtables held in Toronto**, engaging a total of 43 stakeholders across the domestic production community, union representatives, and specialists in VFX, animation and postproduction and marketing and communications. A virtual roundtable was conducted on **Sustainability and Green Production**, and key professionals were engaged for their views on **Emerging Technology**.

To capture global industry perspectives, **25 one-to-one consultations** were conducted with senior executives from international studios, streamers, and production service companies who regularly film in the city. This helped situate Toronto's position within wider global production shifts and identify future competitiveness priorities.

Engagement with the Client and key advisors was continuous throughout the duration of the Study. This included nearly 20 working meetings with the TFO, two sessions with the Toronto Film, Television, and Digital Media Board, and three meetings with the Film Strategy Working Group, which included feedback on early findings, strategic direction and detailed reviews of the report drafts.

To broaden participation and provide some quantitative context, an **online survey was distributed to 200 industry professionals**, yielding 65 responses that provided valuable quantitative and qualitative insights into workforce development needs, TFO perceptions and priorities, and future-facing challenges. Respondents were predominantly industry leaders, with 57% working in production roles (such as producers and senior line producers) and holding senior positions, including founders of production companies and Deans of film schools.

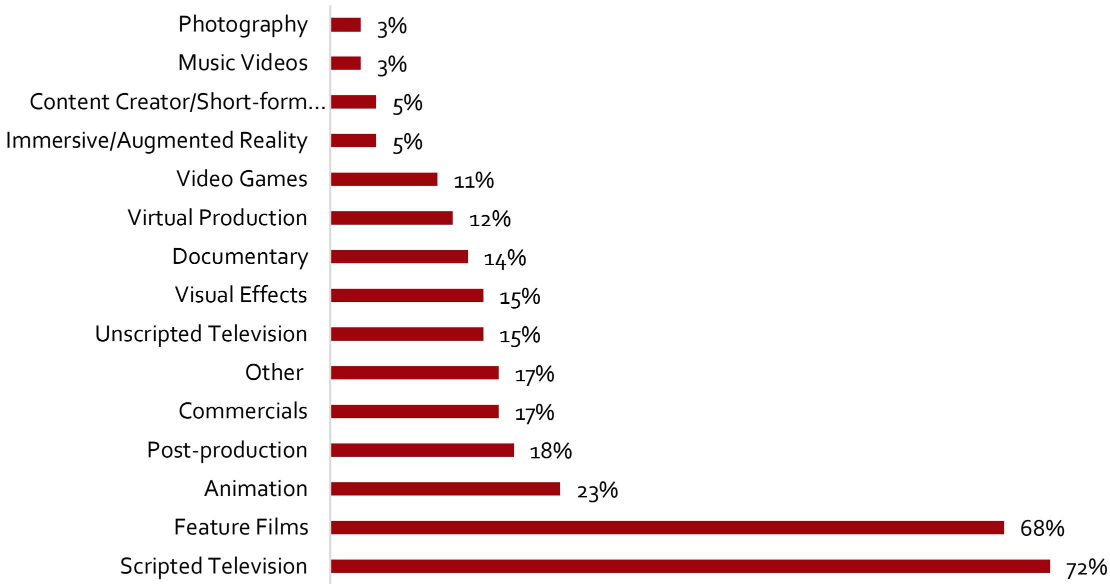
This high calibre of respondents, combined with input from a range of technical and creative roles, offers a strong overview of industry conditions. While the survey size means it does not capture the full breadth of perspectives across Toronto's screen production industry, the seniority of participants ensures the findings are informed by individuals with substantial oversight of and deep experience in the industry.

Table 3 – Survey Participants' Role In The Screen Production Section

Role	Count	% of Respondents
Production & Executive Leadership	**37**	**57%**
Technical & Post-Production	10	15%
Creative & Design	10	15%
Direction & Creative Leadership	5	8%
Writing & Editorial	3	5%
Total number of respondents	**65**	**100%**

Survey participants predominantly worked in scripted television (72%) and feature films (68%), reflecting Toronto's established status as an international centre for both sectors of screen production (**Figure 2**). Moreover, 68% of respondents reported engagement across multiple forms of screen production, underscoring the participants' versatility and breadth of expertise.

Figure 2 (example) – In Which of the Following Areas of Screen Production do you Work?



Source: Olsberg•SPI (2025), % of respondents (n=65)

This multi-layered research approach ensures that the strategy is grounded in both data and lived industry experience, reflecting the needs and ambitions of Toronto's diverse and evolving screen ecosystem.

7.2. About the City of Toronto Film Office

The Toronto Film Office is Toronto's primary entity for the servicing and promotion of the city's screen production industry. Founded in 1979, its remit covers film, television, visual effects, animation and commercial productions. It sits in the Film and

Entertainment Industries section in the Economic Development and Culture Division ("**EDC**") of the City of Toronto, and is responsible for maintaining a film-friendly, best-in-class environment for global and domestic production in Toronto through:

- Providing specific **facilitation services to domestic and foreign service producers**, including one-stop shop public permitting
- Driving the **international marketing and promotion of Toronto** as an attractive filming destination
- Devising and managing sector **programs for workforce development**
- Enabling **sustainable practices in screen production** in line with city and provincial initiatives
- Facilitating **studio growth**.

The TFO currently provides the following programs and services:

- **Film permitting** as a one-stop concierge service to coordinate all location filming on or using city-owned property
- **Marketing Toronto's screen industry** via e-blasts, social media and traditional advertising, and hosting networking events like xoTO House at the Toronto International Film Festival (TIFF) and the Mayor's Mission to Los Angeles and other jurisdictions
- Bolstering the industry with **grants and sponsorships** that support local organizations that provide services, training, and support to the film industry
- Workforce development programs (**xoTO Screen Industry Pathways**) that match community groups with local film training institutions like unions and guilds to provide practical crew training, emphasizing the inclusion of equity-deserving communities
- Keeping Toronto film-friendly with the **xoTO Givebacks program**, which helps production provide benefits to residents in high-use or high-impact film locations
- Coordinating the **xoTO Schools program** with the Toronto District School Board, providing co-op placements, career talks and experiential learning opportunities to high school students
- Advocating to **advance a best-in-class production environment** in Toronto by lobbying to protect employment lands, supporting incentives like the EDGE Program, consulting on the impact of development on the screen industry, and serving on relevant working groups, committees and boards.