

OLSBERG • SPI

The strategy consultancy for the creative industries

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

Presentation to the Toronto
Film, Television & Digital Media
Board by Olsberg • SPI

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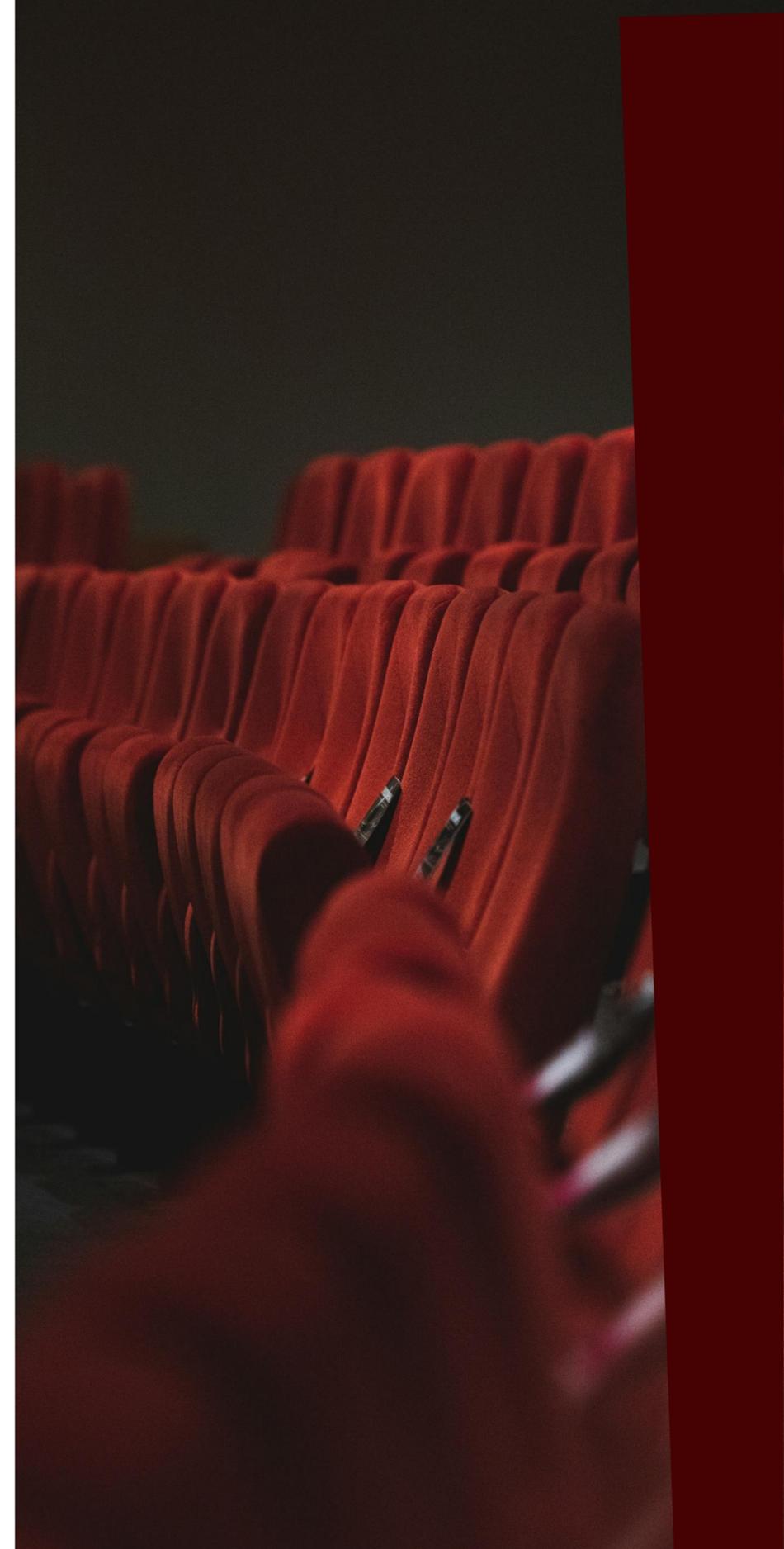
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1. Introduction

- In January 2025, the City of Toronto Film Office (“**TFO**”), within the Economic Development and Culture (EDC) Division, engaged Olsberg•SPI (“**SPI**”) to develop a five-year Industry Strategy for Toronto’s film, television, and digital media production sector.
- Today’s presentation provides the Toronto Film, Television & Digital Media Board with a **high-level assessment of the Toronto screen industry’s assets, performance and future direction**, based on six months of research and analysis.
- These findings form the foundation for the TFO’s strategy for the next five years.



2. Toronto Screen Industry: Current State

Production Spend

- CA\$2.2bn (2019) → CA\$1.5bn (2020, pandemic)
- Rebounded to record CA\$2.6bn (2022)
- 2024 forecast: CA\$2.2bn

Workforce Growth

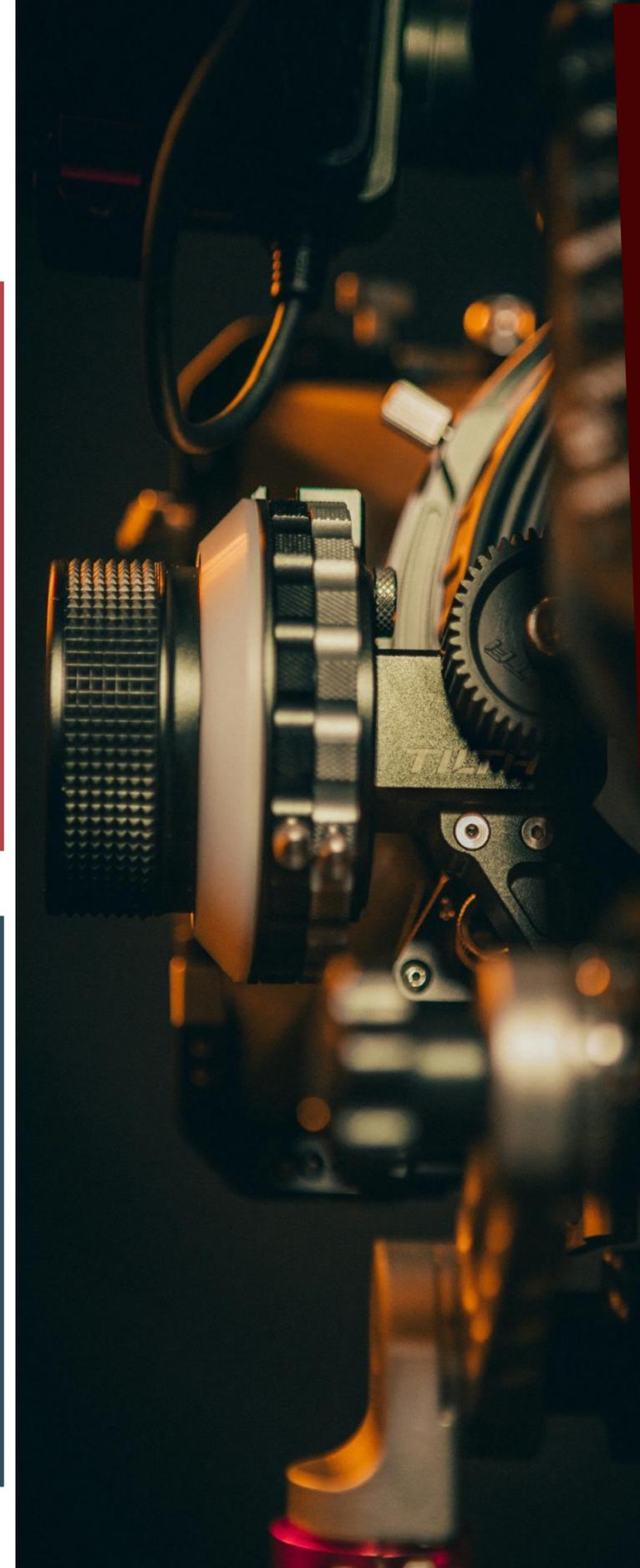
- 25,400 (2019) → 35,000 (2022) → 40,000 (2025)
- Supported by DEI and training initiatives (xoTO Pathways, unions, SIRT, CFC, York University, Toronto Film School)

Infrastructure Capacity

- About 3m sq ft of total studio space
- Internationally recognized post, VFX and animation services
- Leader in virtual production and advanced in-camera VFX

Sector Balance

- Diverse mix of domestic and int'l production, across film and TV
- Symbiotic relationship is important to overall sector health and success
- 89% of workforce on int'l projects, 84% on domestic (SPI survey data).



3. Toronto's Competitive Position

Strengths

- Skilled, diverse workforce with training support
- Competitive incentives and favourable exchange rate
- Extensive studio, VFX, post and virtual production capacity
- Proactive TFO with a strong facilitation role, especially permitting
- Wide range of filming locations
- Global visibility as key 'film city' via TIFF, schools and markets
- Expanding green production practices
- Strong wider creative industries cluster.



3. Toronto's Competitive Position

Weaknesses

- Skills gaps at entry and mid-career levels
- Rising labour, location and logistics costs
- Domestic producers under cost pressure
- May be permitting challenges in some municipal sites
- Limited TFO flexibility within the City system
- Lack of centralized, real-time sector data.



3. Toronto's Competitive Position

Opportunities

- Expand TFO's autonomy and marketing capacity
- Grow the global client base and outreach
- Safeguard and expand studio infrastructure
- Strengthen collaboration with the government and City divisions
- Address labour gaps via up- and re-skilling and DEI focus
- Leverage sustainability as a competitive differentiator
- Support domestic production through partnerships
- Advance and support tech innovation and virtual production
- Enhance public visibility of cultural/economic value.



3. Toronto's Competitive Position

Threats

- Global incentive and studio competition intensifying
- Workforce retention pressures from costs and instability
- Tech disruption reshaping roles
- Market volatility: streaming consolidation, US trade risks
- Risk of funding cuts at federal and provincial levels
- Challenges in attracting new soundstage investment.

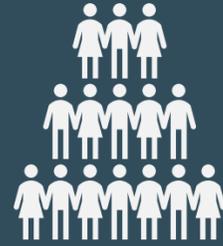


4. Performance of the Toronto Film Office



TFO Core Functions

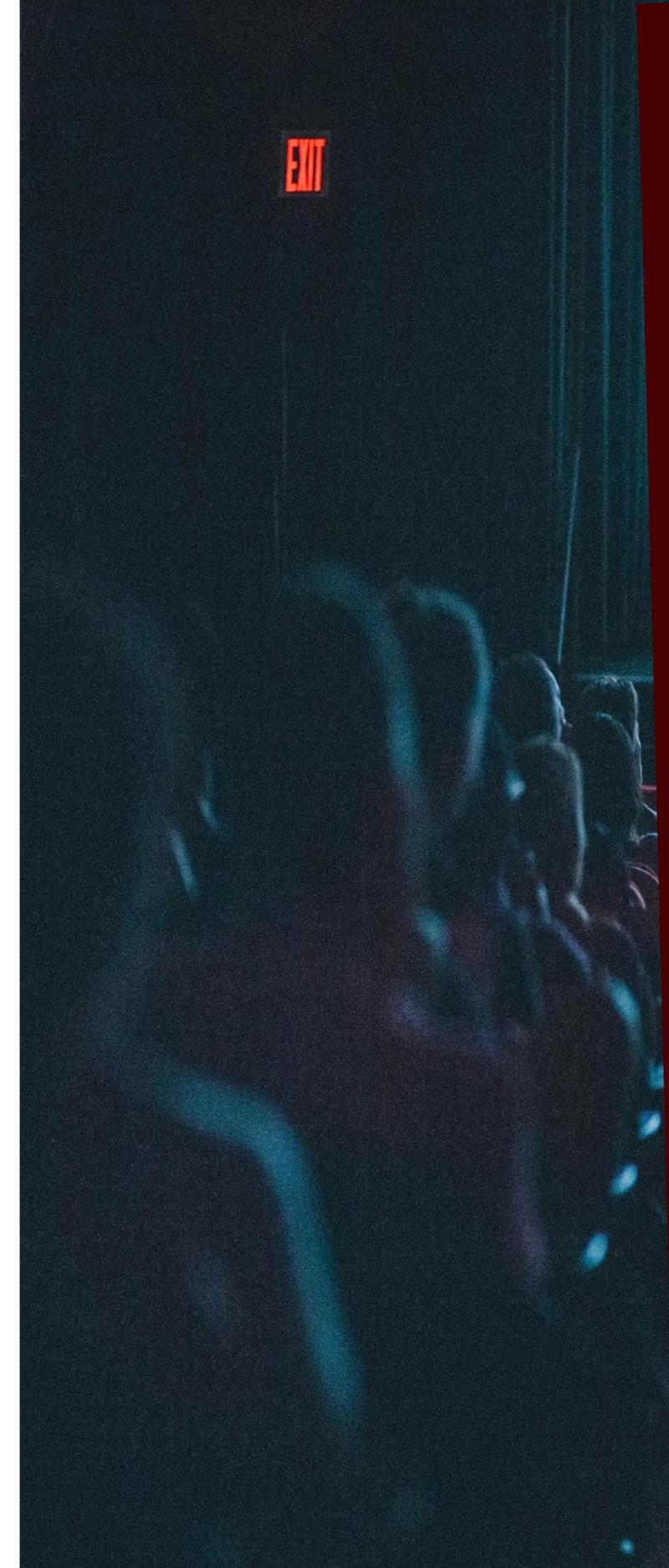
- **Permitting:** 48-hour turnaround, FilmPal one-stop shop
- **Marketing:** xoTO brand, TIFF etc., trade missions
- **Advocacy:** Within City Hall and with other levels of government
- **Workforce:** DEI pathways, training initiatives
- **Infrastructure:** Studio support, sustainability (power drops, land use protection)



Stakeholder Perspectives

- **94% satisfaction** with services (survey)
- **Strong** on permitting and international marketing
- **Praised** for advocacy and inward investment by large studio and streamer clients
- **“Gold-star”** concierge service for US clients
- **Areas to address:** Increase proactive communication; consider segmented marketing outreach; increase operational autonomy; expand support for the domestic sector.

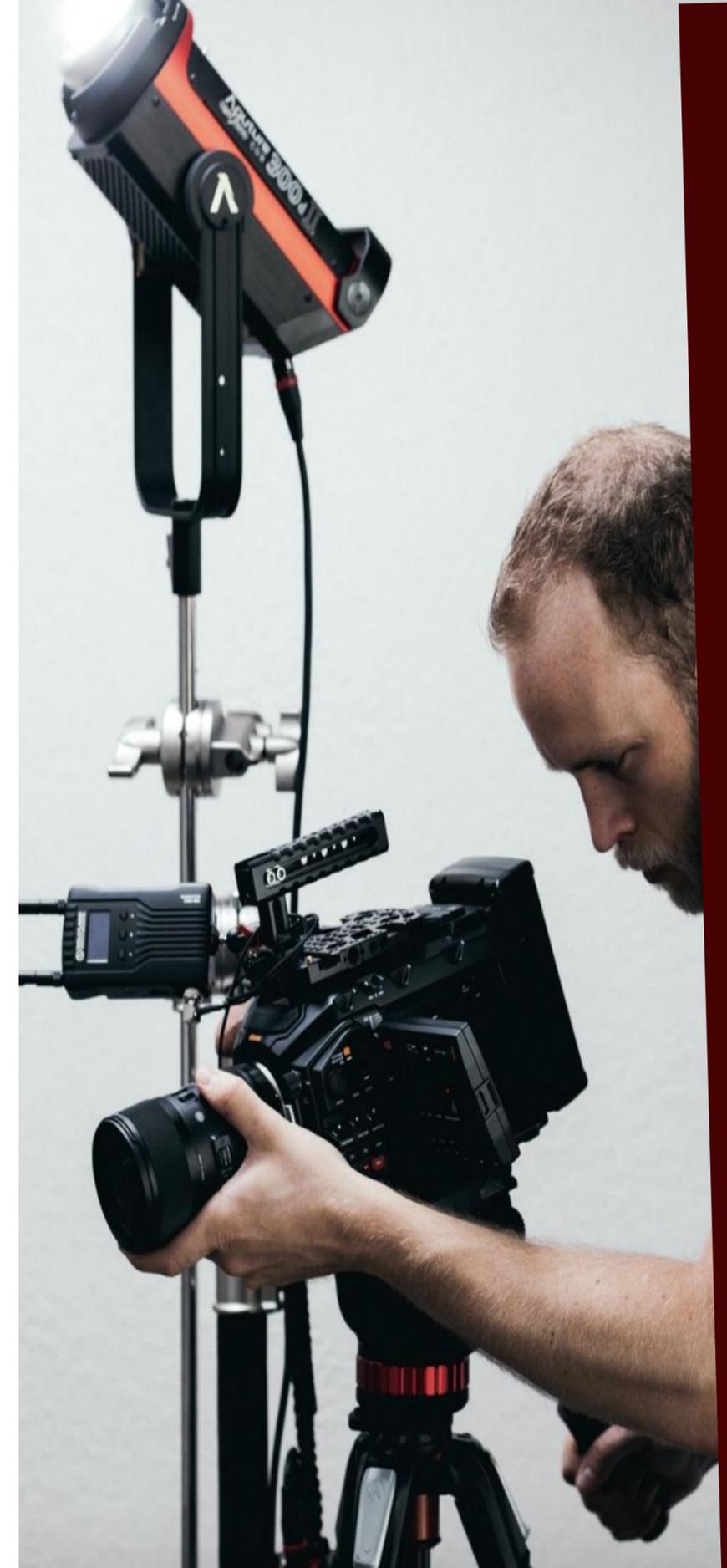
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4. Performance of the Toronto Film Office: Benchmarked

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

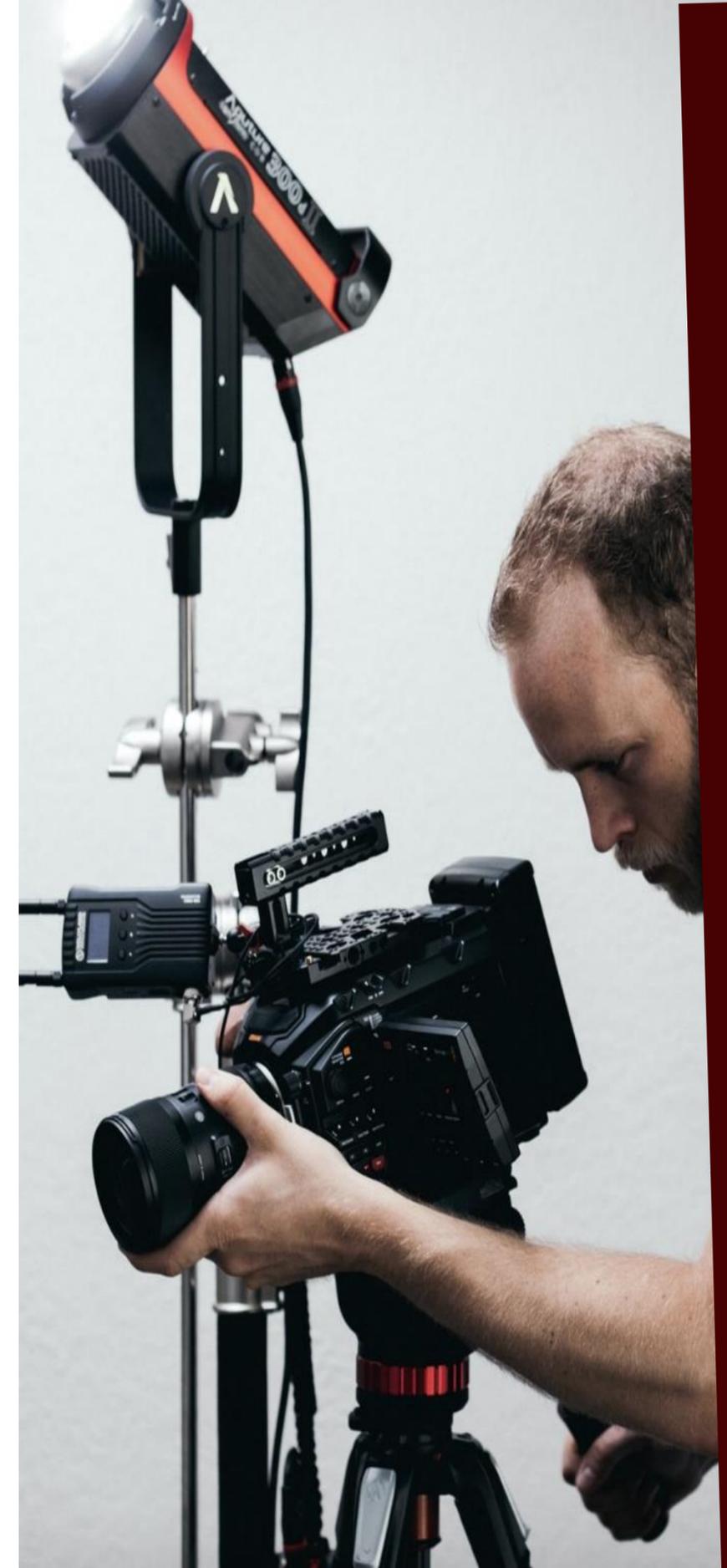
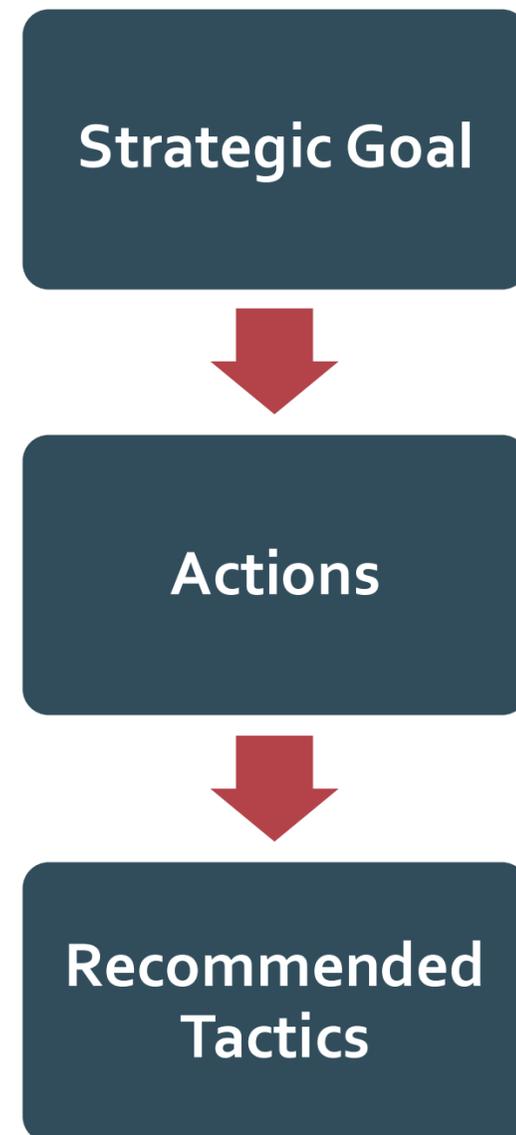
5. Setting the Stage for the Strategic Goals (2025-2030)



5. Setting the Stage for the Strategic Goals (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**.



Thank you!

For more information on this study, please contact
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