

## Attachment 1 - Toronto's Screen Future: A Strategic Plan for Continued Growth 2025-2030

The table below outlines the four strategic priorities that form *Toronto's Screen Future: A Strategic Plan for Continued Growth 2025-2030*, the new Film Strategy for the City of Toronto. It also presents the following information for each strategic priority:

- Actions needed to advance strategic priorities and anticipated timeline.
- Tactics that the Film Office will undertake to implement the actions.
- Metrics associated with strategic priorities and tactics and distinguished as (a) 'Film Office's performance', which focus on advancing the tactics in the Strategy, (b) 'Sector performance', which focus on indicators to monitor Toronto's film industry. They are included as applicable, based on the action and how to best capture impact.

Note: Many factors that affect outcomes for the film industry are outside of the City's control, such as global and Canadian commissioning patterns, the application of tariffs, or competitors enhancing incentives. Additionally, data that could be useful to measure outcomes is often difficult to access. Recognizing these limitations but also the necessity to ensure evidence-driven decisions and responsive supports, the Film Office will monitor the economic impact of the film sector and how it fits within Toronto's economy (including the GDP growth rate as compared to other sectors and to Ontario and Canada). Through action 2.3, the Film Office will develop a Film Sector Data Monitoring Framework to continue to explore how to add and optimize metrics to monitor and inform the Film Office's and partners' work while considering the evolving industry realities.

The actions included in this Strategic Plan reflect recent City investments in Film Office capacity and sector-specific workforce development initiatives, including project funding through xoTO Screen Industry Pathways and the Creative Industries Funding grant program, as well as related municipal investments that underpin the sector's competitiveness, such as Port Lands studio development, protection of core employment lands, and competitive tools like the Economic Development and Growth in Employment (EDGE) Incentive Program.

By advancing the four strategic priorities, actions and tactics below, Toronto will be better positioned for global competitiveness—in alignment with *Sidewalks to Skylines: An Action Plan for Toronto's Economy*—and to protect, retain and build up creative industries—in alignment with *Culture Connects: An Action Plan for Culture in Toronto*. The Strategic Plan aims to ensure that the film sector contributes \$2 billion annually to Toronto's GDP for the next five years<sup>1</sup> and that Toronto remains one of the top five film-friendly cities in North America per industry-approved indices.<sup>2</sup>

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<sup>1</sup> EDC Estimates, Data from Ontario Creates

<sup>2</sup> Industry-approved indices such as the Global Ranking by MovieMaker Magazine, "Outstanding Film Commission" at the Location Managers Guild Awards and "Film Commission of the Year" at the Global Production Awards.

<b>Actions</b> (Timeline)	<b>Tactics</b>	<b>Film Office Metrics</b>	<b>Sector Performance</b>	<b>Financial Impact</b>
<p>1.1. <i>Enhance Toronto's Position as a Film-friendly City</i></p> <p>(Ongoing)</p>	<p>Maintain 48-hour service standard for the issuance of film permits.</p>	<ul style="list-style-type: none"> <li>90% or higher number of film permits processed within 48-hour service standard.</li> </ul>	<p>Increase (or no decrease) in production volume.</p>	<p>None.</p>
	<p>Improve inter-divisional systems related to film permitting to accelerate appropriate access to public realm such as City-owned buildings, roadways, and parks.</p>	<ul style="list-style-type: none"> <li>Successful development of at least one inter-divisional process change that contributes to maintaining the current 48-hour permit service standard.</li> </ul>		
	<p>Continue to collaborate with Divisions and Agencies on City-wide or broader challenges that affect the film industry, but which the Film Office cannot affect on its own, including cost and availability of housing for sector workers, traffic congestion, or the increasing cost of living, through contributing to the development and/or implementation of relevant City strategies.</p> <p>Examples include: partnership with CreateTO for the ongoing McCleary District development, Memorandums of Understanding with City Divisions such as Toronto Water to improve film permitting delivery.</p>	<ul style="list-style-type: none"> <li>Successful establishment and/or renewal of regular communication, memoranda of understanding, or other partnerships or cross-divisional agreements needed to deliver the actions in "Toronto's Screen Future: A Strategic Plan for Continued Growth 2025 2030" (Action 1, 2.2, 3.1 and 4).</li> </ul>		
	<p>Strengthen Toronto's production ecosystem through soliciting feedback from clients and other external</p>	<ul style="list-style-type: none"> <li>Successful development and launching of a</li> </ul>		

	<p>stakeholders after wrap via surveys and/or individual outreach to understand strengths and areas for improvements.</p>	<p>production client- specific survey by Q4 2027.</p> <ul style="list-style-type: none"> <li>80% or higher satisfaction rate in surveys for production clients.</li> </ul>		
	<p>Increase public understanding of Toronto film industry’s value by actively educating and engaging residents, through digital communications and Film Office programs such as xoTO Givebacks, that allow communities to directly experience productions' appreciation for filming in their neighbourhoods.</p>	<ul style="list-style-type: none"> <li>Increase in the number of digital communications (e.g. social media, newsletters, website updates, etc.) showcasing Film Office’s program/initiatives.</li> </ul>		
<p><i>1.2. Support Studio Capacity to Meet Demand</i> (Ongoing)</p>	<p>Continue to advocate for the protection of employment lands as vital areas zoned for studio use, and for the adoption of film-friendly features across the city.</p>	<ul style="list-style-type: none"> <li>Increase in the number of formal meetings and/or submissions per year focused on protecting film-supportive employment lands or film-friendly features.</li> </ul>	<p>Increase (or no decrease) in amount of studio space in Toronto year-over-year.</p> <p>Increase (or no decrease) in number of new FDI in studios and other physical infrastructures.</p>	<p>None.</p>
	<p>Work with City partners to ensure opportunities for Foreign Direct Investment in studios and other physical infrastructure are maximized.</p>	<ul style="list-style-type: none"> <li>Successful completion of at least two City or partner-led investment missions, roadshows or pitches per year, subject to available budget and suitable opportunities, where FDI opportunities in studio or production infrastructure are featured.</li> </ul>	<p>Increase (or no decrease) in number and share of film sector jobs located on lands protected from employment uses.<sup>3</sup></p>	

<sup>3</sup> Source: Toronto Employment Survey

	<p>Advocate for incentives from other orders of government to support the growth of soundstage space.</p>	<ul style="list-style-type: none"> <li>Annual update of advocacy priorities to General Manager, to be shared with the City Manager's Office.</li> </ul>		
	<p>Develop communication tools to ensure industry awareness of studio development opportunities related to available land or buildings suitable for retrofits.</p>	<ul style="list-style-type: none"> <li>Number of missions, market appearances and stakeholder meetings held by Film Commissioner to support industry awareness of studio development opportunities related to available land or buildings suitable for retrofits by Q4 2027.</li> </ul>		
	<p>Establish internal method to obtain consistent data regarding Toronto studios' occupancy rates, global trends, and the evolving studio development marketplace.</p>	<ul style="list-style-type: none"> <li>Identification of data sharing opportunities with studio partners on data regarding Toronto's studio occupancy rate, global trends and evolving studio development marketplace identified and implemented.</li> </ul>		
<p><i>1.3. Advance Demand-driven, Equity-focused Workforce Development</i></p> <p>(Ongoing, adjusted annually for industry need)</p>	<p>Undertake periodic labour gap analyses, informed by industry demand, to identify current and potential undersupply of talent and crew positions, participation of underrepresented groups, demographic shifts in the workforce, impact of evolving technology, and other key issues affecting workforce, delivered through external research consultants.</p>	<ul style="list-style-type: none"> <li>Successful completion of a minimum of two labour gap analyses by 2030, published on the City's website within 6 months of completion.</li> </ul>	<p>Increase of percentage of workers in the Film Sector from equity-deserving groups.</p>	<p>None.</p> <p>Program can be executed within existing resources, given 2025 enhancement. Grants from other levels of government are being pursued for any</p>

<p>Strengthen Toronto's screen workforce through sustained funding and partnerships with unions, guilds, industry, and community organizations to deliver inclusive, data-driven programs that expand career access and advancement opportunities for underrepresented and equity-deserving talent.</p>	<ul style="list-style-type: none"> <li>• 60% or higher program participants of xoTO Schools or xoTO Screen Industry Pathways being members of equity-deserving groups.</li> </ul>		<p>expansion. If unsuccessful, programs will be confined to those within existing resources.</p>
<p>Expand communications about xoTO programs to capture new recruits, enhance awareness of upskilling and reskilling opportunities for those in mid-career, and engage professionals from other industries to offer pathways into employment.</p>	<ul style="list-style-type: none"> <li>• Establishment of regular awareness sessions held for new recruits, mid-career professionals and those from other industries.</li> <li>• Number of participants in awareness sessions held.</li> </ul>		
<p>Address skills development in evolving technologies at entry and more advanced levels, involving partnerships with colleges and universities.</p>	<ul style="list-style-type: none"> <li>• Increased engagement with academic institutions maintained to strengthen skills development in evolving technologies at entry and more advanced levels.</li> </ul>		
<p>Deliver mid-career upskilling, re-skilling, or other initiatives to prepare experienced workers for the senior ranks of the workforce.</p>	<ul style="list-style-type: none"> <li>• Increased number of successfully funded projects focused on mid-career training under the Creative Industries Funding program.</li> </ul>		

	Investigate the availability and nature of contract-based work for film workers during off-peak periods, including assessing the need for targeted investment or infrastructure support for this work.	<ul style="list-style-type: none"> <li>Completed focused scan (e.g. survey, interviews, or labour market review) on contract-based off-peak work for Toronto screen workers.</li> </ul>		
<p><i>1.4. Advocate for Stable and Competitive Incentives</i></p> <p>(As needed)</p>	Use the City’s intergovernmental voice to advocate for stable and competitive provincial and federal supports for film and television production, including tax credits and other financial incentives, informed by local industry needs.	<ul style="list-style-type: none"> <li>Continued attendance at monthly meetings with provincial-level film commission and industry advocacy organizations.</li> </ul>	No decrease to the value of the provincial and federal incentives for domestic or service production.	None.
	Collaborate with industry associations and partners to share evidence-based impact reports with other levels of government that demonstrate the return on investment, economic impacts, and employment outcomes of provincial and federal film and television tax credits and financial incentives, and use these materials to support advocacy with other orders of government.	<ul style="list-style-type: none"> <li>Participation in at least two tables, attended by other orders of government and industry, focused on federal or provincial incentive programs.</li> </ul>		
<p><i>1.5. Accelerate Sustainability</i></p> <p>(Medium Term)</p>	Explore using the film permitting process to motivate smaller production units, greater use of sustainable infrastructure such as power drops, minimizing any potential to cause traffic congestion, and other sustainable practices.	<ul style="list-style-type: none"> <li>Secured membership of the Film Permitting team in the “Sustainable Best Practices” subcommittee on the Ontario Green Screen advisory.</li> </ul>	<p>Increase in use of City-owned powerdrops.</p> <p>Increase in plug-ins available to production.</p>	<p>None.</p> <p>Any new costs would be born by partners or through grants from other levels of government.</p>
	Explore the City’s inter-divisional capacity to advance sustainability through assets such as available energy tie-ins, access to unused buildings or land for circularity initiatives, or the	<ul style="list-style-type: none"> <li>Increased number of sustainability initiatives delivered over five-year term.</li> </ul>		

	<p>installation of EV charging stations at frequently used production locations.</p>			
	<p>Align with industry partners to support the expansion of sustainability training in areas such as energy literacy, environmental stewardship positions, and clean power solutions for producers, unit managers and technical staff.</p>	<ul style="list-style-type: none"> <li>• Increased number of Film Sector team membership on the Ontario Green Screen Advisory Committee.</li> <li>• Increased number of sustainability programs funded by Creative Industries Funding program over a five-year term.</li> </ul>		
	<p>With industry partners, explore the development of a sustainability best-practice recognition program rewarding productions that significantly reduce carbon footprints or innovate in sustainability.</p>	<ul style="list-style-type: none"> <li>• Completion of the discovery and design phase of a sustainability best-practice recognition program by Q4 2027.</li> <li>• Establishment of a sustainability best-practice recognition program by Q4 2028.</li> </ul>		
	<p>Explore City strategies such as the TransformTO Net Zero Strategy and Toronto Green Standards for applicability to screen production and opportunities to access inter-divisional collaboration to accelerate the advancement of green production</p>	<ul style="list-style-type: none"> <li>• Number of engagement opportunities of the film industry in development of sustainability-focused City strategies.</li> </ul>		

	practices; facilitate the engagement of the film industry in the development of future City strategies towards these goals.			
<p><i>1.6. Share Knowledge to Advance Engagement with Evolving Technology</i></p> <p>(Ongoing)</p>	<p>Convene an Innovation Advisory Group, with a sole focus on film and television production, with leaders from technologically oriented industry segments such as post, VFX, and animation, union and guild leaders, colleges and universities, producers, and subject matter experts to share understanding of coming trends, issues, and key areas of focus.</p>	<ul style="list-style-type: none"> <li>Establishment of an Innovation Advisory group with participation of stakeholders from technologically oriented industry segment by Q2 2028.</li> </ul>	N/A	<p>None.</p> <p>Work will occur within existing resources. 2025 enhancement is appropriate for this work.</p>
	<p>Share information with industry through outreach activities, including industry forums or panels and ongoing communications.</p>	<ul style="list-style-type: none"> <li>Increased participation in number of industry forums/panels etc.</li> </ul>		
	<p>Work with industry partners, including unions and guilds, to develop training partnerships focused on skills development in new technologies, and map current and anticipated skills gaps in areas such as virtual production, AI-assisted workflows, and sustainable production practices</p>	<ul style="list-style-type: none"> <li>Increased number of industry partners participating in Film Office innovation initiatives.</li> <li>Development of labour gap analyses, to include assessment of current and emerging skills gaps in related areas by Q4 2027.</li> </ul>		
<p><i>2.1. Maintain and Expand Successful</i></p>	<p>Develop an annual calendar of screen festival and market visits to promote Toronto to new international targets and existing clients and explore working with</p>	<ul style="list-style-type: none"> <li>Annual calendar of screen festivals and market visits established to promote</li> </ul>	<p>Improvement in Toronto's position as film production hub on key international indices.<sup>4</sup></p>	<p>None.</p> <p>This work will be done within existing</p>

<sup>4</sup> Key International Indices may include: the Global Ranking by MovieMaker Magazine, "Outstanding Film Commission" at the Location Managers Guild Awards and "Film Commission of the Year" at the Global Production Awards

<p><i>Outreach Initiatives</i></p> <p>(Ongoing)</p>	<p>partners including other levels of government.</p>	<p>Toronto to new internal and existing clients.</p>		<p>resources and is also substantially supported by industry sponsorships.</p>
	<p>Subject to available budget and suitable opportunities, maintain an annual program of at least 1 Film Office-led outreach mission and at least 1 mission led by partners/the provincial government to key client bases, with intention to add or switch in new locations as market conditions require, and explore supports or partnerships available from domestic or international industry partners and other levels of government.</p>	<ul style="list-style-type: none"> <li>• 80% or higher satisfaction rate in surveys for delegates attending City-led missions.</li> </ul>		
	<p>Develop, implement, and refine a paid and organic advertising strategy that combines broad awareness efforts with segmented campaigns, tailoring promotional assets, messaging, and ad buys to priority audiences, including post-production, VFX, and animation.</p>	<ul style="list-style-type: none"> <li>• Demonstrate year-over-year improvement in the performance of paid and organic campaigns targeting priority audiences, as shown through reach and engagement indicators, starting in 2027.</li> </ul>		
<p><i>2.2. Increase Stakeholder Engagement</i></p> <p>(Medium term)</p>	<p>Develop industry-focused town halls and networking events to foster discussions around industry challenges and strategic alignment to enhance connection to other creative industries.</p>	<ul style="list-style-type: none"> <li>• Increased number of industry-focused townhalls and networking events developed.</li> <li>• 80% or higher satisfaction rates in client surveys amongst partners and participants.</li> </ul>	<p>N/A</p>	<p>None.</p>

	Collaborate with City Divisions to implement a multi-channel social media strategy to respond to industry events or issues in real time, and to continually promote Toronto as a premier production jurisdiction.	<ul style="list-style-type: none"> <li>Establishment and implementation of a multi-channel social media strategy by Q4 2027.</li> </ul>		
	Produce a consistent, targeted newsletter for production clients that provides updates on Toronto's industry, the Toronto Film Office, improvements to service, new program launches, sustainability achievements, etc.	<ul style="list-style-type: none"> <li>Increased number in newsletter subscribers.</li> </ul>		
<i>2.3. Improve Access to Data for Communications, Decision-making, and Advocacy</i>	Develop a data strategic plan that identifies key data points or information needed, the availability of or barriers to accessing this data, and solutions to build toward consistent access to relevant, credible data.	<ul style="list-style-type: none"> <li>Completion of the Film Data Monitoring Framework by Q4 2028.</li> </ul>	N/A	None.
(Medium term)	Define intent and approach for sharing data with industry to build shared insights and awareness.	<ul style="list-style-type: none"> <li>Completion of the Film Data Strategic Plan by Q4 2028.</li> </ul>		
<i>3.1. Collaborate with Industry to Identify Actionable Challenges</i>	Using available data and engaging with domestic industry stakeholders, identify key issues that the City could help address, including City-specific constraints.	<ul style="list-style-type: none"> <li>Identification and documentation of at least three priority issues and related City-specific constraints, validated through engagement with domestic industry stakeholders, by Q4 2027.</li> </ul>	Economic Momentum Score to measure whether Toronto's film sector is expanding its footprint through more businesses, more locations and sustained activity.	None.  Work will occur within existing resources. In some cases, industry sponsorships can support costs.
(Medium term)	Facilitate regular networking sessions and town halls to support new business relationships and gather stakeholder feedback on actions to improve business conditions.	<ul style="list-style-type: none"> <li>Pilot at least one town hall with domestic production stakeholders, including a brief participant feedback mechanism to inform</li> </ul>		

		future engagement approaches.	<i>Formula: Year-over-year change in the number of film-related businesses in Toronto.</i> <sup>5</sup>	
	Linked with marketing goals and actions, explore co-production promotion with the goal of assisting domestic producers with their networks.	<ul style="list-style-type: none"> <li>Increased participation in outbound missions to international jurisdictions.</li> </ul>		
	Establish or expand current communication channels (e.g., newsletters, dedicated sections on the Film Office website) to keep domestic stakeholders informed about global opportunities, funding and market developments.	<ul style="list-style-type: none"> <li>Achieve an 80% or higher satisfaction rate of Film Office among domestic industry stakeholders in targeted client consultation/survey.</li> </ul>		
3.2. Advocate for Continued Government Support  (Long term)	Monitor and analyze changes to the federal regulatory and funding landscape, including new Canadian Radio television and Telecommunications Commission (CRTC) rules to modernize Canada’s broadcasting framework, as well as evolving federal and provincial funding infrastructure, to identify impacts and opportunities for Toronto based creators and producers.	<ul style="list-style-type: none"> <li>Positive feedback from federal and provincial partners on the quality and frequency of collaboration with the Film Office, gathered through periodic check-ins or surveys.</li> </ul>	Maintain or increase the share of Toronto-based projects successfully accessing federal and provincial funding.	None.  Work will occur within existing resources. In some cases, industry sponsorship can support costs.
	Convene and participate in regular discussions with domestic producers, creators, broadcasters, streamers, and industry associations to gather evidence and perspectives on how regulatory and funding changes are affecting Toronto’s screen sector, and use this input to develop	<ul style="list-style-type: none"> <li>Increased number of structured discussions with stakeholders on regulatory and funding impacts on Toronto’s screen sector year over year.</li> </ul>		

<sup>5</sup> Source: Toronto Employment Survey

	evidence-informed advocacy positions that highlight the needs of Toronto-based creators and producers.			
<p><i>4.1. Ensure Awareness of the Industry's Value</i></p> <p>(Ongoing)</p>	Continue to collaborate across City Divisions on City-wide or broader challenges that affect the film industry, but which the Film Office cannot affect on its own, such as cost and availability of housing for sector workers, traffic congestion, or the increasing cost of living.	<ul style="list-style-type: none"> <li>Increased Film Office participation (number of projects) in City of Toronto inter-divisional projects where film is relevant.</li> </ul>	<p>Film Sector Specialization Index that measures how specialized Toronto's workforce is in film-related jobs compared to the rest of regional, provincial and national economy.</p> <p>Formula: Share of film jobs in Toronto compared to share of film jobs in the broader economy.<sup>6</sup></p>	None.
	Sustain and grow collaboration with City Divisions and agencies such as City Planning, CreateTO, Communications Division, Transportation Services, Waterfront Toronto, Indigenous Affairs Office, Solid Waste, and Environment, Climate, and Forestry to ensure the Film Office is engaged and contributing throughout the development and implementation of policies, programs, and strategies.	<ul style="list-style-type: none"> <li>Increased number of opportunities to contribute to and collaborate with City Divisions and agencies on policies, programs and strategies.</li> </ul>		
	Continue to inform Council regarding the industry and the economic, cultural, and social benefits it brings to the city through regular participation of Councillors and Film Office staff in Toronto Film, Television and Media Advisory Board meetings and related briefings.	<ul style="list-style-type: none"> <li>Regular updates to Film, Television and Media Advisory Board.</li> </ul>		

<sup>6</sup> Source: Statistics Canada, EDC Research Calculations

<p>4.2. Ability to Compete</p> <p>(Short term)</p>	<p>Maintain up-to-date digital communications on the City’s screen industry activities by regularly refreshing web content, public materials, and key marketing and business intelligence tools shared with external partners to encourage collaboration.</p>	<ul style="list-style-type: none"> <li>• Refreshed core screen industry web content at least once a year.</li> <li>• Updated screen industry “e-book”, which provides a comprehensive overview of the jurisdiction and the case for filming in Toronto, at least once a year.</li> </ul>	<p>Improvement in Toronto’s position as film production hub on key international indices.<sup>7</sup></p>	<p>None.</p> <p>All work within existing resources.</p>
	<p>Share and showcase achievements, improvements and progress made to internal and external stakeholders on an annual basis.</p>	<ul style="list-style-type: none"> <li>• Annual report to showcase achievements, improvements and progress against strategic objectives.</li> <li>• Annual highlights on achievements, improvements and progress on the City Website updated yearly.</li> </ul>		

<sup>7</sup> Key industry indices may include: the Global Ranking by MovieMaker Magazine, "Outstanding Film Commission" at the Location Managers Guild Awards and "Film Commission of the Year" at the Global Production Awards