

Advancing Toronto's Screen Future: Key Findings for a Strategic Vision

Date: September 15, 2025

To: Toronto Film, Television, and Digital Media Board

From: Patrick Tobin, General Manager, Economic Development and Culture

Wards: All

SUMMARY

The film and television industry is a key economic and cultural driver, producing an annual direct spend as high as \$2.6 billion and meaningfully contributing to Toronto's cultural vibrancy. As the Economic Development and Culture Division develops a five-year Film Strategy in alignment with the priorities identified in both *Sidewalks to Skylines: An Action Plan for Toronto's Economy* and *Culture Connects: An Action Plan for Culture in Toronto*, it retained the services of Olsberg SPI Ltd. to ensure an informed approach based on the current industry and economic landscape. This report includes their key findings, based on comprehensive research, an analysis of the current state of film production in Toronto, and extensive engagement – including seven roundtables with 43 stakeholders, 25 one-on-one consultations with senior executives, and a sector-wide survey that reached 200 industry professionals.

The City acknowledges receipt of Olsberg SPI Ltd.'s report and the significant amount of research and insight from subject matter experts and industry leaders reflected in the report. The report is included as Attachment 1.

RECOMMENDATIONS

1) The General Manager, Economic Development and Culture recommend that the Toronto Film, Television, and Digital Media Board recommend the Economic and Community Development Committee to recommend that City Council receive this report for information.

FINANCIAL IMPACT

There are no current or known future year financial implications resulting from the adoption of the recommendation contained in this report.

The Chief Financial Officer and Treasurer has reviewed this report and agrees with the information as presented in the Financial Impact section.

DECISION HISTORY

At its November 13, 2024 meeting, City Council adopted Culture Connects: An Action Plan for Culture in Toronto, which recognized the need for sector-specific plans to play a primary role in the City support of given industries, such as film, and recommended that they be developed.

<https://secure.toronto.ca/council/agenda-item.do?item=2024.EC16.1>

At its November 13, 2024 meeting, City Council adopted Sidewalks to Skylines: An Action Plan for Toronto's Economy, which identified the growth of Toronto's global competitiveness in key anchor and high-growth sectors as a priority.

<https://secure.toronto.ca/council/agenda-item.do?item=2024.EC16.2>

At its February 6, 2025 meeting, the Film, Television and Digital Media Board received a verbal presentation from Olsberg SPI for information.

<https://secure.toronto.ca/council/agenda-item.do?item=2025.FB6.1>

At its May 20, 2025 meeting, the Film, Television and Digital Media Board received a presentation on City of Toronto Film Office Industry Strategy from Olsberg SPI for information. The presentation provided an update on the status of the development of Toronto's Film Strategy.

<https://secure.toronto.ca/council/agenda-item.do?item=2025.FB7.1>

COMMENTS

To ensure Toronto remains competitive in the screen production sector, the Economic Development and Culture (EDC) division conducted a competitive process and retained the consultancy Olsberg SPI Ltd. to undertake extensive research and engagement toward a five-year film strategy. Their report, in Attachment 1, provides findings that EDC can build on to ensure the sector remains globally competitive, raising productivity and creating good jobs. It will be formative in the development of the Film Strategy. *Sidewalks to Skylines: An Action Plan for Toronto's Economy* and *Culture Connects: An Action Plan for Culture in Toronto*, and other relevant City of Toronto strategic goals will also inform the strategy's development.

Methodology

- **Desk Research:** Research focused on identifying and synthesizing insights from key policy, industry, and economic documents related to Toronto's screen sector.
- **Roundtables:** Seven in-person roundtables were held in Toronto, engaging a total of 43 stakeholders across the domestic production community, union

representatives, and specialists in visual effects (VFX), animation and postproduction, and marketing and communications.

- **Consultations:** There were 25 one-on-one consultations conducted with senior executives from international and domestic studios, streamers, production service companies, leaders in technology, and other industry partners. This helped situate Toronto's position within wider global production shifts and identify future competitiveness priorities.
- **Survey:** A sector-wide online survey was distributed to a tightly targeted group of 200 industry professionals, yielding 65 responses that provided valuable quantitative and qualitative insights into workforce development needs, the City of Toronto Film Office (TFO) perceptions and priorities, and future-facing challenges.
- **Additional Engagement:** There were 20 working meetings with the TFO, the consultant appeared at two meetings of the Toronto Film, Television and Digital Media Board, and a Film Strategy Working Group was assembled consisting of leaders across industry segments. They contributed at the following touchpoints:
 - 1) Review of the Request For Quotations to which bidders would respond, including a description of the process for consultation, deliverables, and engagement with the Working Group
 - 2) With the consultant, review of the questions/topics for consultations and the proposed segments or groups to be engaged, and tools such as surveys, roundtables, and interviews
 - 3) Review of early findings and evolving recommendations
 - 4) Review of first draft
 - 5) Review of second draft

Key Findings

- **Workforce Development and Training in Toronto:** Toronto's workforce training and development landscape demonstrates several strengths, including a highly experienced senior crew base and strong training institutions. Meanwhile, there are ongoing challenges in mid-level talent development, skills alignment, upskilling or reskilling to respond to evolving technologies, data gathering and in adapting to cyclical labour patterns. Continued collaboration across the sector, alongside targeted training and strategic workforce initiatives, will be important for sustaining Toronto's competitive position and resilience in the next five years.
- **Ontario's Screen Incentives:** Overall, Ontario's comprehensive and stable incentive program remains a key element of its global competitiveness in film and television production across various segments. Nonetheless, some structural adjustments, such as in post-production and animation, may support continued growth in market share. It is also important to note jurisdictions across the world are enhancing their tax credits or initiating new credits in order to capture more production, challenging the competitiveness of Ontario's offering. 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.

- **Screen Production Infrastructure in Toronto:** Toronto's screen production infrastructure offers substantial capacity and technical capability that supports a wide range of production types. However, rising costs, decreasing availability of employment lands, recent loss of space, and other constraints present ongoing issues. Employment and annual production expenditure in Toronto can only be as big as studio capacity allows it to be. Addressing these challenges through coordinated policy and investment will be important to maintain Toronto's competitiveness as a production hub in a changing market.
- **Post-Production, VFX, and Animation Services in Toronto:** Toronto's VFX and animation sectors have demonstrated solid growth and possess strong technical capabilities and talent. Addressing ongoing challenges related to tax credit design, data availability, capacity planning, and workforce development will be important to sustaining and enhancing Toronto's position as a competitive global hub for post-production, VFX and animation. As with physical production, foreign direct investment can be a powerful tool to achieve growth.
- **Commercial Production:** While Toronto's commercial production sector remains a significant contributor to the local screen economy, it faces challenges related to labour, infrastructure capacity and operational efficiencies. Addressing these issues, alongside enhanced support for sustainability initiatives, would be key to sustain and grow commercial production activity.
- **Sustainability in Toronto's Screen Production Sector:** Toronto's screen industry benefits 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). However, 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.
- **Emerging Technology in the Toronto Screen Industry:** Global trends indicate strong investment and adoption of AI, virtual production, immersive storytelling, and transmedia strategies. Acknowledging potential employment, copyright, and ethical concerns, Toronto's film and television sector needs to engage with these technologies in order to remain competitive. Deep and current knowledge, consistent all-of-industry dialogue, and quality, targeted training will be needed to ensure sustainable adoption.
- **Promotion and Communications:** The Film Office's initiatives to promote Toronto's industry, such as the Mayor's Missions to Los Angeles or other centres, valuable networking events like xoTO House at TIFF, and others, are well

regarded. As the global market for service production becomes more competitive, greater presence at markets, more consistent and targeted client communications and missions are needed, including exploring working with other levels of government as appropriate, and more frequent engagement and events for local industry are desired.

- **Support Needed for the Local Industry:** The domestic film and television industry is highly valuable to Toronto, representing 20%-30% of annual production spend. Having been affected by impacts similar to those faced by the production services segment, it is now facing a contraction in production orders that challenges its stability and constrains growth. Intervention is needed to offer support specifically targeted to the domestic segment of the industry, as it is the medium for Toronto's local talent and stories to reach audiences worldwide.

Attachment 1 provides the data, competitive intelligence, industry feedback, and contextual insight needed to inform and define a five-year strategy that will accelerate Toronto's industry and grow its economic, creative, and social impact, thereby serving City of Toronto strategic priorities as outlined in *Sidewalks to Skylines: An Action Plan for Toronto's Economy*.

A staff report presenting a strategy based on the findings and recommendations in Attachment 1 is anticipated to be submitted to the Economic and Community Development Committee's October 28, 2025 meeting, concurrent with the submission of this report.

CONTACT

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SIGNATURE

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ATTACHMENTS

Attachment 1 - Toronto's Screen Future: A Strategic Framework for Continued Growth, 2025–2030