

Film Strategy Recommendations

Director of Entertainment Industries

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Origin of Recommendations

Recommendations in this presentation are derived from ***Toronto's Screen Future: A Strategic Framework for Continued Growth 2025-2030*** produced by Olsberg SPI. In addition to Olsberg SPI's expertise and research, the insights in the report resulted from industry roundtables, interviews, an industry survey, and the guidance of the Film Strategy Working Group and the Toronto Film, Television, and Digital Media Board.

The recommendations are, in part, a continuation of the existing, Council-approved film strategy, *Spotlight: An Action Plan for Toronto's Film, Television, and Digital Media Industry*. They are also strongly aligned with direction in major, City-wide, Council-approved reports:

- Sidewalks to Skylines: An Action Plan for Toronto's Economy (November 2024)
- Culture Connects: An Action Plan for Toronto's Culture (November 2024)
- And the Mayor's Economic Action Plan in Response to US Tariffs (April 2025)

Key Recommendations

City of Toronto Film Office 2025 – 2030 Strategic Goals

1. Expand Ongoing Strategic Initiatives to Grow Toronto's Industry
2. Drive Expanded Marketing, Communications, and Client Engagement
3. Increase Support for the Domestic Production Sector
4. Create Optimal Operating Conditions for the City of Toronto Film Office

1) Expand Ongoing Strategic Initiatives to Grow Toronto's Industry

Introduction

Resulting from decades of strategic investment by the City, Toronto has become a leading production jurisdiction in North America and globally. As the competitive landscape intensifies, the strengths that drove Toronto's success must be maintained and grown. These are the pillars of any leading production hub: **studio space, workforce, incentives, dynamic branding, strong international partnerships, outstanding customer service, sustainability, and ethical technological advancement.** Each of these pillars is prioritized for action in the preceding Council-adopted strategy, *Spotlight: An Action Plan for Toronto's Film, Television, and Digital Media Industry (Spotlight)*.



1) Expand Ongoing Strategic Initiatives to Grow Toronto's Industry

Introduction cont'd

- ***Toronto's Screen Future: A Strategic Framework for Continued Growth 2025 - 2030*** includes data that shows the actions the Toronto Film Office took in response to 'Spotlight' are regarded as highly effective. These fundamentals will be updated and expanded to respond to the competitive landscape from 2025 to 2030.
- The Actions below are also strategically aligned with actions in the Council-adopted *Sidewalks to Skylines: An Action Plan for Toronto's Economy 2025-2035* (*Sidewalks to Skylines*).
 - One of the three pillars of *Sidewalks to Skylines* is, 'Global Competitiveness – Supporting Toronto's high-value, innovative and specialized sectors and reputation by providing excellent resources and advocacy to ensure these enterprises can locate, expand, and thrive in the city.' Within this pillar, creative industries are named specifically related to the direction to, 'Grow Toronto's global competitiveness in key anchor and high-growth industries.' The actions that follow are fully aligned with these strategic imperatives.

1) Expand Ongoing Strategic Initiatives to Grow Toronto's Industry

Action 1: Enhance Toronto's Position as a Film-friendly City

Ensure Toronto delivers on its identity as a 'film-friendly' city by engaging with Councillors and across Divisions to ensure the value of the film industry to the city is understood, and the many tools the City has to support the industry are leveraged to increase the benefits it provides to residents.



Action 1 – Enhance Toronto's Position as a Film-friendly City, Tactics:

- Protect 48-hour service standard for the issuance of film permits through adequate resourcing and continuous improvement of the Film Office.
- Improve inter-Divisional systems related to film permitting to accelerate appropriate access to City assets such as buildings, roadways, and parks.
- 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 traffic congestion or the cost of living.
- Sustain and grow collaboration with City entities such as City Planning, CreateTO, Strategic Public and Employee Communications, Transportation Services, Solid Waste, and Environment, Climate, and Forestry to ensure the Film Office is engaged and contributing throughout the development and implementation of corporate policies, programs, and strategies.

1) Expand Ongoing Strategic Initiatives to Grow Toronto's Industry

Action 1 – Enhance Toronto's Position as a Film-friendly City, Tactics:

- Continue to inform Council regarding the industry and the economic, cultural, and social benefits it brings to the Toronto and its residents.
- Leverage the City's strengths in terms of the capacity to engage and influence other levels of government to achieve film industry goals.
- Access feedback from clients wrapping projects to understand areas for improvement and things that are working well, for action and to build the value of Toronto's offering.
- Continually educate the public on the sector's value, while encouraging productions to engage with Film Office programs like xoTO Givebacks, allowing residents to directly experience the industry's appreciation of Toronto as a welcoming city for film.



Photo Andrew Gainor

1) Expand Ongoing Strategic Initiatives to Grow Toronto's Industry

Action 2: Support Studio Capacity to Meet Demand

- Monitor Toronto's studio space relative to demand, and support growth when demand for studio facilities approaches or exceeds existing capacity.
- Toronto's industry can only be as big as its studio capacity allows. Monitoring to ensure Toronto's studio space is sufficient to meet demand, has leading technology and skills, while supporting expansion as necessary, allows Toronto to maintain and grow market share, resulting in more investment and jobs. This also supports a key City strategic priority in [Culture Connects: An Action Plan for Toronto's Culture](#) (*Culture Connects*), 'Over the next ten years, the City will support the development of one million square feet of new cultural space in Toronto.'



1) Expand Ongoing Strategic Initiatives to Grow Toronto's Industry

Action 2 – Support Studio Capacity to Meet Demand, Tactics:

- Continue to advocate for the preservation of employment lands to ensure capacity for expansion, new jobs and to deconflict land uses.
- Work with City partners to ensure opportunities for Foreign Direct Investment (FDI) in studios and other physical infrastructure are maximized when needed.
- Explore advocacy for incentives from other levels of government to support the growth of soundstage space.
- Develop communications tools to ensure industry awareness of studio development opportunities related to available land or buildings suitable for retrofits.
- Establish method to obtain consistent data regarding Toronto studios' occupancy rates, global trends, and the evolving studio development marketplace.



1) Expand Ongoing Strategic Initiatives to Expand and Grow Toronto's Industry



Action 3: Advance Demand-driven, Equity-focused Workforce Development

- Toronto's workforce has the creative and competitive advantage of being highly diverse, and the Film Office must maintain Toronto's skilled workforce by developing or supporting effective programming driven by equity and inclusion, labour demand, responsiveness to evolving technology, and awareness of workforce demographic shifts.
- Film Office engagement in workforce development is aligned with and supports the accomplishment of multiple actions in *Sidewalks to Skylines*:
 - Action 4 - 'Collaborate with external partners to reduce barriers to economic inclusion
 - Action 16 – Build opportunities for Toronto's Youth
 - Action 17 – Foster industry-academia partnerships

1) Expand Ongoing Strategic Initiatives to Grow Toronto's Industry

Action 3 – Advance Demand-driven, Equity-focused Workforce Development, Tactics:

- Undertake labour gap analyses to identify current and potential undersupply of crew positions, participation of underrepresented groups, demographic shifts in the workforce, impact of evolving technology, and other issues affecting workforce.
- Work with community partners to refresh strategic approaches to advancing inclusion and advancement for people who have been historically faced barriers to participation in the film industry.
- Retain or grow funding to programs with union, guild, industry, and community partners that build Toronto's crew strengths in data-driven and inclusive ways, such as xoTO Schools or xoTO Screen Pathways.
- Expand communications about these programs to capture new recruits, enhance awareness of upskilling and reskilling opportunities for those in mid-career, include wraparound supports in certain programs, and engage professionals from other industries to offer pathways into employment.
- Address skills in evolving technologies at entry and more advanced levels, involving partnerships with colleges and universities.
- Focus on mid-career upskilling, re-skilling, or other initiatives to prepare experienced workers for the senior ranks.
- Leverage the Film Office's convening power to ensure alignment between industry need, college/university curriculum and enrollment, and the suite of programs undertaken by community partners.
- Explore supports for the seasonal aspects of employment in film, such as supporting workers' awareness of contract-based jobs during off-peak periods and maximizing employment pathways across the breadth of the culture sector.

1) Expand Ongoing Strategic Initiatives to Grow Toronto's Industry

Action 4: Advocate for Stable and Competitive Incentives

In collaboration with industry partners, advocate for tax credit stability and competitiveness with awareness of comparative international incentives and client insights, and support the maintenance or growth of other incentives or funds that support infrastructure or domestic production.

Action 4 – Advocate for Stable and Competitive Incentives, Tactics:

- Leverage the City's ability to speak inter-governmentally to advance industry needs.
- Collaborate to leverage industry partners' evidence-based impact reports highlighting return on investment, economic impacts, and employment effects of government support such as Ontario's tax incentives and funding from provincial and federal sources.
- Maintain awareness of shifts in the production incentives landscape and maintain ongoing communication with clients about potential pain points, advantages, or improvements available to Ontario's offering.

1) Expand Ongoing Strategic Initiatives to Grow Toronto's Industry

Action 5: Accelerate Sustainability

- Expand Toronto's work on sustainable production practices by building on existing initiatives and closing key gaps (e.g., EV infrastructure, renewables, circularity).
- This initiative is aligned with Toronto's *Net Zero Strategy*, *Toronto Green Standard*, and *Sidewalks to Skylines Action 10 – Advance climate action*, and *Action 25 – Drive the adoption of green technologies*. The shared objectives across strategies have the potential to create partnerships, tools or programs that could be adapted or used by the film industry to help achieve key City priorities.



1) Expand Ongoing Strategic Initiatives to Grow Toronto's Industry

Action 5 – Accelerate Sustainability Tactics:

- 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.
- 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 installation of EV charging stations at frequently used production locations.
- 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 crew.
- With industry partners, explore the development of a recognition scheme rewarding productions that significantly reduce carbon footprints or innovate in sustainability.
- 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 practices; facilitate the engagement of the film industry in the development of future City strategies towards these goals.

1) Expand Ongoing Strategic Initiatives to Grow Toronto's Industry

Action 6: Share Knowledge to Advance Engagement with Evolving Technology

- Convene expertise and perspectives on evolving advanced technologies from across industry segments and develop information-sharing initiatives to support industry knowledge, discernment, and ethical applications of advanced production technologies (AI, virtual production, R&D); support prudent next steps such as appropriate training initiatives.
- The *Mayor's Economic Action Plan* highlights the need for Toronto's key industries to stay current, competitive, and informed with respect to evolving technologies. This action plan expresses the intent to, 'Increase adoption of new technology through an AI Advisory Table, and the Mayor's Innovation Challenge'. This offers opportunities for collaboration within Economic Development and Culture, where appropriate, allowing both Film and Entertainment Industries and Business Growth Services to find partnerships and work together, and with industry partners including unions, guilds, colleges, and universities to support advancement, understanding some goals may be shared while some are distinct.

1) Expand Ongoing Strategic Initiatives to Grow Toronto's Industry

Action 6 – Share Knowledge to Advance Engagement with Evolving Technology, Tactics

- Convene a Screen Innovation Advisory Group, with a sole focus on film and television production, with leaders from tech-oriented industry segments and union and guild leaders, colleges and universities, producers, and subject matter experts to share understanding of coming trends, issues, and key areas of focus.
- Share information with industry through outreach including industry forums or panels and ongoing communications.
- 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.



2) Drive Expanded Marketing, Communications, and Client Engagement

One of the **primary roles of any film office is to market and promote the jurisdiction to drive investment and jobs.**

Toronto's Film Office has a successful history of **Mayor's Missions to Los Angeles**, and now to London and Dublin as well. The Mayor's personal support has been greatly appreciated by the industry.

However, in **increasingly challenging market conditions**, greater international engagement is needed, or there is a **risk of losing market share.**

This is supported by the **Mayor's Economic Action Plan**, specifically, 'Expanding global markets for Toronto businesses, working with industry and partners', and 'Working with other levels of government for export development opportunities'. The *Mayor's Economic Action Plan in Response to US Tariffs* also calls for market diversification. This is also supported in **Culture Connects**, 'Promote and advance Toronto talent and industry locally, nationally, and internationally'. *Culture Connects* also calls for the City to, 'Facilitate greater engagement, export, and international collaboration for culture and creative industries'.



2) Drive Expanded Marketing, Communications, and Client Engagement

Action 1: Maintain and Expand Successful Outreach Initiatives

- Maintain existing, successful approaches to in-market promotion and outreach and, in keeping with the call for market diversification in the Mayor's Economic Action Plan, expand initiatives to attract more international productions and diversify market outreach.

Action 1: Maintain and Expand Successful Outreach Initiatives, Tactics:

- Develop an annual calendar of screen festival and market visits to promote Toronto to new international targets and existing clients, and explore working with partners including other levels of government.
- 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. Leverage Toronto's diaspora advantage by aiming 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.
- Segment initiatives to target specific audiences and develop promotional assets and materials tailored to post-production, VFX, and animation.
- Develop and evaluate the current ad buy strategy to cater to segmented audiences.

2) Drive Expanded Communications, Marketing, and Client Engagement

Action 2: Increase Stakeholder Engagement

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

Action 2 – Increase Stakeholder Engagement, Tactics:

- Develop industry-focused town halls and networking to foster collaborative discussions around industry challenges and strategic alignment and to enhance connection to other creative industries.
- Collaborate with Strategic Public and Employee Communications 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.
- 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.

Action 3: Improve Access to Data for Communications, Decision-making, and Advocacy

Advance evidence-based decision-making, advocacy, communications, and reporting by exploring and implementing approaches to improve data gathering. This challenge is also recognized in *Culture Connects* through the objective, 'Track, understand, and tell the story of culture through robust research and data.'

Action 3 – Improve Access to Data for Communications, Decision-making and Advocacy, Tactics:

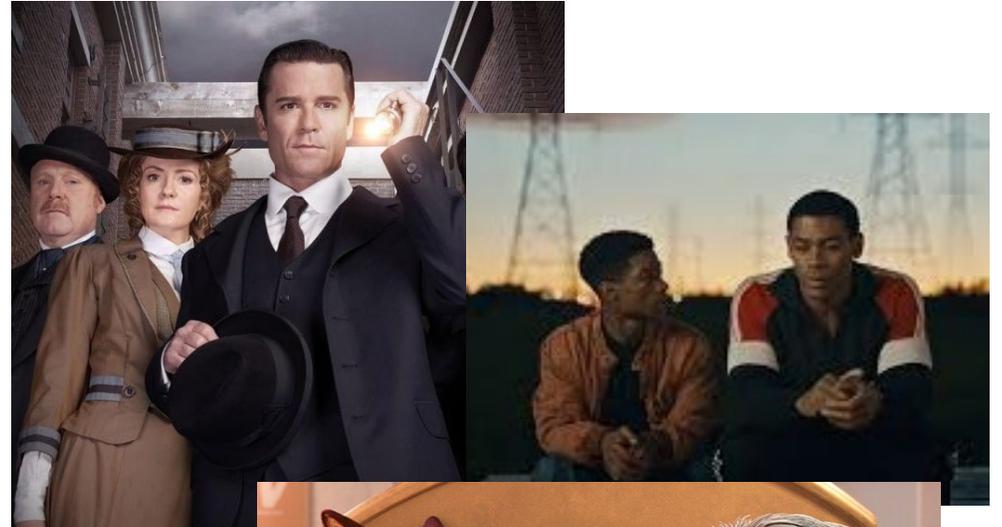
- Develop a data strategy that identifies key data points or information needed, the availability of or barriers to accessing this data, and solutions to build toward consistent access to relevant, credible data.
- Define intent and approach for sharing data with industry to build shared insights and awareness.

3) Increase Support for the Domestic Production Sector

Toronto's domestic production industry is a creative powerhouse. Economically, domestic production diversifies Toronto's industry, insulating it somewhat from the impact of external forces, while culturally, it enables domestic filmmakers to tell Canadians stories at a point where cultural sovereignty is increasingly important.

This valuable industry is facing significant headwinds. The 2024 Profile Report produced by the CMPA indicated a 14.9% year-over-year drop in English-language domestic production. This trend may accelerate with budget pressures facing federal funding agencies. The domestic industry benefits from the Film Office's work on film permitting, workforce development, and advancing the 'film-friendly' city, but more targeted supports to serve this segment of the industry are needed.

This strategy supports the City strategy expressed in *Culture Connects*, 'Promote and advance Toronto talent and industry locally, nationally, and internationally.'



3) Increase Support for the Domestic Production Sector

Action 1: Collaborate with Industry to Identify Actionable Challenges

Tactics:

- Using available data, and engaging domestic industry stakeholders to deepen problem analysis, identify key issues that the City could help address, including City-specific constraints.
- Identify policies, programs, or initiatives that could alleviate such factors.
- Subsequently host a town hall to share and test actions aimed at improving business conditions.
- Linked with marketing goals and actions, explore co-production promotion with the goal of assisting domestic producers with their networks.
- 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.
- Facilitate regular networking sessions (virtual and in-person)intended to support new business relationships.
- Explore the establishment of a fund for Toronto-based producers to support project development.

4) Enhance Film Office Operating Conditions

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: Ensure Awareness of the Industry's Value

- Continue to ensure awareness across Divisions, City leadership, and among Councillors of the alignment of Film Office goals and film industry outcomes with wider Divisional and City strategic priorities.



4) Enhance Toronto Film Office Operating Conditions

Action 2: Ability to Compete

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.

Action 2 – Ability to Compete, Tactics:

- Advocate internally for greater operational autonomy through delegation of authority for routine decisions related to external communications, including social channels, advertising, and other assets.
- Prepare and gain corporate approvals and resources for Mayor's missions and markets annual calendar to ensure necessary outreach, promotion, and planning of in-market business development.
- Publish an annual operational review report to showcase achievements, improvements and progress against strategic objectives.



Thank You!

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