

TORONTO'S SCREEN FUTURE: A STRATEGIC PLAN FOR CONTINUED GROWTH

Frankenstein (2025), Netflix



2026—2030



WINNER

#1 Best Place to Live and Work as a MovieMaker
MovieMaker Magazine
2026

WINNER

Film Commission of the Year
Global Production Awards
2026

WINNER

City of Film
Global Production Awards
2026

“

Toronto is the best place to make movies.
—Guillermo del Toro

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Mayor Olivia Chow presents filmmaker Sarah Polley with the Key to the City (2025)

Message from the Mayor

On behalf of the City of Toronto, I am proud to celebrate the extraordinary strength and momentum of our film, television, and digital media industry. Toronto’s screen sector is one of our strongest economic and cultural engines—consistently among the busiest production centres in North America—generating up to \$2.6 billion in direct annual production spending, supporting tens of thousands of good jobs, and helping to tell stories that reflect who we are as a city.

In March 2026, City Council unanimously approved *Toronto’s Screen Future: A Strategic Plan for Continued Growth (2026–2030)*, reaffirming our shared commitment to a film-friendly Toronto. As filmmaker Guillermo del Toro said when I was honoured to present him with the Key to the City, Toronto is “the best place to make movies,” and this strategy will help ensure that remains true for years to come.

I want to thank the Toronto Film, Television and Digital Media Board, City staff, and the many industry and community partners who contributed their ideas and experience to this plan. Together, we are strengthening Toronto’s position as a world-leading screen production hub and creating the conditions for talent, creativity, and investment to flourish in every part of our city—so that stories made here can continue to be seen everywhere.

A handwritten signature in black ink that reads "Olivia Chow".

Olivia Chow
Mayor of Toronto

Toronto Film, Television and Digital Media Board

The Toronto Film, Television and Digital Media Board is an advisory body to Toronto City Council. The Board's mandate is to:

- Provide recommendations and advice to enhance the attractiveness and competitiveness of Toronto for the film, television and digital media industry;
- Seek input from the broader industry to provide coherent advice to City Council on issues and opportunities for the sector; and
- Monitor and track marketing strategies that could be used to attract new or returning film, television, and commercial production business to Toronto.

Members of the Toronto Film, Television and Digital Media Board include:

Paul Ainslie, Councillor, Mayor's Designate

E.J. Alon, Executive, Screen and Creative Industries

Matt Bishop, Co-Founder, Sinking Ship Entertainment

Lisa Broadfoot, Vice-President, Industry and Business Affairs, Canadian Media Producers Association

Rachel Chernos Lin, Councillor

Cynthia Clayton, Business Agent, Directors Guild of Canada – Ontario

Vincent Crisanti, Councillor

Paula Devonshire, Producer

Amir Endalha, Executive Producer

Sarah Farrell, General Manager, Pinewood Toronto Studios

Paula Fletcher, Councillor

Gail Hauptert, Director, Contracts & Production, ACTRA Toronto

Joan Jenkinson, Chief Executive Officer & Co-Founder, Black Screen Office

Samantha Leigh, Sustainability Consultant & Production Team Lead, Green Spark Group

Cynthia Lynch, Managing Director, FilmOntario

Angela Mastronardi, President, IATSE Local 873

Jayson Mosek, Business Agent, NABET 700-M Unifor

Wendy Noss, President, Motion Picture Association – Canada

Biju Pappachan, Executive Director, POV Film

Alma Parvizian, Managing Partner, Touchwood PR

Ramona Pringle, Director, The Creative School Innovation Studio, Toronto Metropolitan University

John Rakich, Location Manager

Kenneth Rogers, Associate Director, MBA Program in Arts, Media and Entertainment, York University

Magali Simard, Vice-President, Global Industry & Brand, Cinespace Studios

Jane Tattersall, Senior Vice-President, Formosa Group, and Managing Director, Picture Shop Toronto

Christa Tazzeo Morson, Executive VFX Producer, Rocket Science VFX



Message from the Chair and Co-Chair of the Toronto Film, Television and Digital Media Board

On behalf of the Toronto Film, Television and Digital Media Board, we are pleased to present *Toronto's Screen Future: A Strategic Plan for Continued Growth (2026–2030)*. This plan reflects our shared commitment to keeping Toronto a leading, film-friendly global production hub and a city where both culture and business can thrive.

Grounded in the realities facing the sector and the city, this Strategic Plan sets out clear actions to strengthen our workforce, protect and expand studio and employment lands, sharpen our global competitiveness, and lead on sustainability and innovation. As a joint commitment between the City and industry, the Board will continue to champion a film-friendly Toronto so it remains the best place to live and work as a filmmaker, and so that growth benefits the people who work in the sector and the communities where they live.

Paula Fletcher

Councillor Paula Fletcher
Ward 14, Toronto-Danforth
Chair, Toronto Film, Television and Digital Media Board

Jayson Mosek

Jayson Mosek
Business Agent, NABET 700-M Unifor
Co-Chair, Toronto Film, Television and Digital Media Board



Heated Rivalry (2025), Accent Aigu Entertainment



MADE HERE. SEEN EVERYWHERE.

About the Film Office

The City of Toronto's Film Office is the gateway to one of North America's top five production hubs. Embedded within City government, the Film Office connects filmmakers with Toronto's diverse locations, more than 3 million sq. ft. of world-class studios, a crew base of 40,000 skilled professionals, and award-winning post-production and VFX resources. With the continent's fastest film permit turnaround—just 48 hours—the Film Office streamlines access to locations, road closures, parks, and police services. By advancing infrastructure growth, film-friendly policies, inclusive workforce development, sustainability, and vital industry partnerships, the Film Office strengthens Toronto's reputation as a premier destination for global storytelling.

Learn more at toronto.ca/film



Star Trek: Section 31 (2025), Paramount+

EXECUTIVE SUMMARY

*Toronto's Screen Future: A Strategic Plan for Continued Growth (2026–2030)*¹ is a five-year roadmap to strengthen Toronto's position as one of the world's leading film and television production hubs. Developed through extensive stakeholder engagement and industry analysis conducted by Olsberg SPI, the Strategic Plan responds to an evolving global landscape with four strategic priorities and 13 actions designed to protect Toronto's market share, expand infrastructure and workforce capacity, enhance marketing, communications, and client engagement, and strengthen support for domestic production.

Endorsed by the Toronto Film, Television and Digital Media Advisory Board², the Strategic Plan was recommended by the Economic and Cultural Development Committee in February 2026³ and adopted by City Council in March 2026⁴.

¹ City of Toronto, "Toronto's Screen Future: A Strategic Plan for Continued Growth 2025-2030," Report for Action, Item EC26.1, Background File 264810 (February 9, 2026), <https://www.toronto.ca/legdocs/mmis/2026/ec/bgrd/backgroundfile-264810.pdf>.

² City of Toronto, Film, Television and Digital Media Advisory Board, Item FB8.1, "Advancing Toronto's Screen Future: Key Findings for a Strategic Vision" (September 15, 2025), <https://secure.toronto.ca/council/agenda-item.do?item=2025.FB8.1>.

³ City of Toronto, Economic and Community Development Committee, Meeting 26, Item EC26.1, "Toronto's Screen Future: A Strategic Plan for Continued Growth 2025-2030" (February 24, 2026), <https://secure.toronto.ca/council/#/committees/2563/27210>.

⁴ City of Toronto, City Council, Item EC26.1, "Toronto's Screen Future: A Strategic Plan for Continued Growth 2025-2030" (March 25-26, 2026), <https://secure.toronto.ca/council/#/committees/2462/27171>.



Boston Blue (2025), CBS

BACKGROUND

Toronto: The Best Place to Make Movies

Toronto’s film and television industry is one of the city’s most valuable cultural and economic engines, generating up to \$2.6 billion in annual direct spend and supporting a skilled workforce of 40,000. Decades of strategic investment by the City have helped establish Toronto as one of the top five largest production hubs in North America, with world-leading talent servicing over 3 million sq. ft. of studio space. Toronto’s industry is globally competitive, with local talent winning Oscars, Emmys, Golden Globes, and Canadian Screen Awards for work done here.

In 2026, *MovieMaker Magazine* named Toronto the “#1 Best Place to Live and Work as a Movie Maker,”⁵ recognizing the city’s full production ecosystem—from crews, sound stages, and tax incentives to film schools and a vibrant local film scene. This success reflects sustained collaboration and investment from the City of Toronto, federal and provincial governments, domestic and international partners, and Toronto’s screen sector workers themselves.

⁵ Tim Molloy, “The Best Places to Live and Work as a MovieMaker in 2026,” *MovieMaker Magazine*, January 13, 2026, <https://www.movie-maker.com/best-places-to-live-and-work-as-a-moviemaker-2026/>.

TORONTO'S SCREEN FUTURE: A STRATEGIC RESPONSE

To protect and grow Toronto's industry, the City has developed *Toronto's Screen Future: A Strategic Plan for Continued Growth (2026–2030)*, a new five-year strategy aligned with broader economic and cultural priorities and plans, including [Sidewalks to Skylines: An Action Plan for Toronto's Economy](#), the [Mayor's Economic Action Plan in Response to United States Tariffs](#), and [Culture Connects: An Action Plan for Culture in Toronto](#). The Strategic Plan provides a high-level roadmap to maintain Toronto's global competitiveness as one of the world's leading and most film-friendly production centres through 2030 and beyond.



Law & Order Toronto: Criminal Intent (2026),
Cameron Pictures



Participants of POV's Media Training Program (2025)

Methodology

The Strategic Plan was developed through a comprehensive nine-month research and consultation process led by Olsberg SPI, a world-leading consultancy specializing in creative industries sector development.

The development process included:

- **Extensive industry engagement** – 7 roundtables with 43 local leaders across workforce development, post-production and VFX, sustainability, studios and infrastructure, domestic and service production, animation, and evolving technologies
- **Stakeholder interviews** – 25 one-on-one interviews with international and local clients and partners
- **Industry survey** – Targeted survey circulated to 200 industry members
- **Jurisdictional analysis** – Comprehensive research and jurisdictional scans comparing Toronto to competing production hubs
- **Advisory Board engagement** – Regular updates and endorsement from the Toronto Film, Television and Digital Media Advisory Board
- **Strategic collaboration** – Close collaboration with a Film Strategic Plan Working Group composed of local industry leaders with cross-sectoral expertise

The consultant’s findings and staff recommendations were presented to the Toronto Film, Television and Digital Media Advisory Board on September 15, 2025, where the strategic priorities were endorsed⁶.



The Handmaid's Tale (2025), Disney

⁶ City of Toronto, Film, Television and Digital Media Advisory Board, Item FB8.1, “Advancing Toronto’s Screen Future: Key Findings for a Strategic Vision” (September 15, 2025), <https://secure.toronto.ca/council/agenda-item.do?item=2025.FB8.1>.

Key Findings

Presented by Olsberg SPI as *Toronto's Screen Future: A Strategic Plan for Continued Growth (2026–2030)*⁷, the research and consultation process identified Toronto's screen industry strengths, challenges, and opportunities:

Strong Fundamentals

- Toronto's screen industry is anchored by a mature, globally competitive production ecosystem that has demonstrated strong resilience through recent disruptions, with direct production spend reaching a record \$2.6 billion in 2022—13% above pre-pandemic levels—signaling sustained investor confidence and rapid recovery
- Toronto outperformed key North American competitors, including Los Angeles and British Columbia, in post-pandemic growth, supported by a powerful combination of competitive incentives, a highly skilled workforce of more than 40,000 professionals, world-class studio and soundstage infrastructure, and leading post-production and VFX capabilities
- This integrated ecosystem enables Toronto to support the full production lifecycle across all scales—from domestic projects to large-budget international productions—positioning the city as a top-tier global hub for screen production
- The Toronto Film Office plays a central role in sustaining Toronto's global market position, proactive international outreach, supporting continued investment from major international studios and platforms and reinforcing the city's reputation as a reliable, production-ready jurisdiction
- The City's film-friendly approach is a core competitive advantage, with a 94% industry satisfaction rate reflecting consistent, high-quality service delivery, particularly in efficient permitting and forward-thinking policies

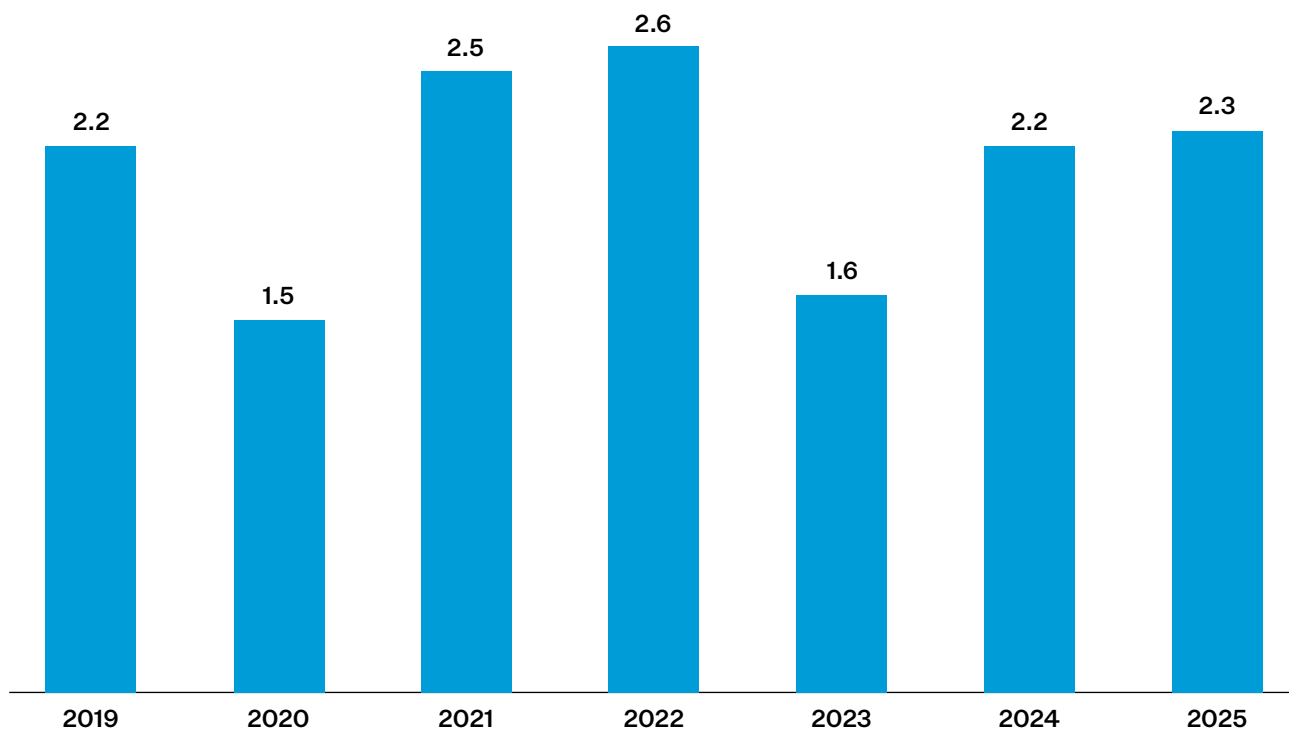


Figure 1: Annual Film Production Spend in Toronto (in billions of dollars, CAD)⁸

⁷City of Toronto, Film, Television and Digital Media Advisory Board, "Toronto's Screen Future: A Strategic Framework for Continued Growth 2025-2030," Attachment 1 to Item FB8.1, Background File 258079 (September 15, 2025), <https://www.toronto.ca/legdocs/mmis/2025/fb/bg8d/backgroundfile-258079.pdf>.

⁸City of Toronto, Economic Development and Culture Division, "2024 and 2025 Program Summary."

Current Challenges

- Intensifying global competition from jurisdictions expanding incentives and studio capacity
- High real estate costs limiting new studio development and affecting workforce affordability
- Ongoing trade uncertainty, including U.S. efforts to retain domestic production
- A 14.9% decline in English-language Canadian content production from 2023 to 2024 linked to reduced broadcaster commissions
- Film Office capacity constraints impacting promotional reach and responsiveness compared to competing jurisdictions

Opportunities for Growth

- Expand studio capacity to meet growing demand and protect market share
- Advance targeted workforce development based on labour gaps, including diverse and inclusive talent pipelines
- Increase Film Office presence at international markets and strengthen year-round marketing
- Broaden client base and investment through proactive international outreach and co-productions
- Strengthen support for domestic production to enhance industry stability
- Improve Film Office operational flexibility and autonomy to move at industry speed

The full report can be read [here](#).

In response to these findings, the Strategic Plan provides a comprehensive framework to strengthen Toronto's competitive position and secure long-term industry growth.

Strategic Framework

Adopted by City Council, *Toronto's Screen Future: A Strategic Plan for Continued Growth (2026–2030)* includes 13 actions, with metrics, across four strategic priorities:

- 1. Expand Ongoing Strategic Initiatives to Grow Toronto's Industry** – Expand production and studio capacity, workforce development, incentives, sustainability, and client outreach to meet growing demand and defend and grow Toronto's market share.
- 2. Drive Expanded Marketing, Communications & Client Engagement** – Strengthen Toronto's global profile and proactive industry engagement.
- 3. Increase Support for the Domestic Production Sector** – Provide targeted support to diversify and stabilize the industry.
- 4. Enhance Operating Conditions for the Film Office** – Strengthen the Film Office's operating conditions to move at the speed of industry, securing long-term investment, quality jobs, and broad community benefits.



Murdoch Mysteries (2025), Shaftesbury

STRATEGIC PRIORITY 1

Expand Ongoing Strategic Initiatives To Grow Toronto's Industry

Decades of strategic investment by the City, industry, and federal and provincial governments have established Toronto as a leading production hub in North America and globally. As competition intensifies, the fundamental strengths that drove Toronto's success must be maintained and expanded.

Leading production hubs are built on key pillars: studio space, skilled workforce, competitive incentives, strong international partnerships, excellent client service, sustainability, and responsible technology adoption. These pillars were prioritized in the City's previous strategy, *Spotlight: An Action Plan for Toronto's Film, Television, and Digital Media Industry*. The new Strategic Plan builds on that foundation while addressing emerging challenges and opportunities.

Actions:

- **Action 1.1: Enhance Toronto’s Position as a Film-Friendly City** – Ensure Toronto fully delivers on its identity as a “film-friendly” city by engaging across divisions and with Councillors to ensure the value of the film industry to the City is fully understood, and the many tools the City has to support the industry are fully leveraged to increase the benefits it provides to residents.
- **Action 1.2: Support Studio Capacity to Meet Demand** – Ensure Toronto’s studio space continues to grow relative to demand to capture the full economic and employment opportunity available to the industry and the City. Toronto’s industry can only be as big as its studio capacity allows it to be. Expanding studio space to meet demand allows Toronto to maintain and grow market share, resulting in more investment and jobs. Creating conditions for studio development is progressively more challenging as employment lands face pressure for redevelopment for housing and other uses, and the cost of real estate is relatively high in Toronto.



Netflix’s *FUBAR* (2025), shot at Pinewood Toronto Studios



The Toronto skyline from Cinespace Studios



Accent Aigu Entertainment’s *Heated Rivalry* (2025), shot at Dark Slope Studios



- **Action 1.3: 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 help maintain Toronto’s skilled workforce by developing or supporting effective and targeted workforce development initiatives responsive to imperatives around equity and inclusion, labour demand, evolving technology, and awareness of workforce demographic shifts.
- **Action 1.4: 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 1.5: 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).
- **Action 1.6: 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).



Nirvana the Band the Show the Movie (2025), Elevation Pictures

STRATEGIC PRIORITY 2

Drive Expanded Marketing, Communications & Client Engagement

Actively marketing a city to the global film industry is essential to attracting productions and maintaining market share—a core function of any leading film commission. Toronto’s Film Office is recognized as a standard-bearer among film offices, with successful flagship initiatives including the Mayor’s Missions to key jurisdictions like Los Angeles, London, and Dublin, and networking events like xoTO House at the Toronto International Film Festival. However, in an increasingly competitive landscape, more sustained and strategic outreach is required to protect and grow Toronto’s position.

The Film Office will expand its marketing efforts through more frequent and targeted communications, participation in international festivals and markets, trade missions, and enhanced stakeholder engagement with the industry and other levels of government. This approach will strengthen Toronto’s global profile, build deeper industry relationships, and ensure the city remains one of North America’s top five film-friendly production hubs.

Actions:

- **Action 2.1: Maintain and Expand Successful Outreach Initiatives** – Maintain existing, successful approaches to in-market promotion and outreach while also responding to changing market dynamics by creating targeted new initiatives to attract more international productions and diversify markets for Toronto’s film industry.
- **Action 2.2: Increase Stakeholder Engagement** – Enhance communication strategies for key stakeholder groups by initiating regular forums, town halls, and proactive outreach.
- **Action 2.3: Improve Access to Data for Communications, Decision-making and Advocacy** – Advance evidence-based decision-making, advocacy, communications, and reporting by working both independently and with partners to improve data gathering and analysis.



The Mayor's Mission visits High Commission of Canada in the United Kingdom at Canada House in London, England (2025)



xoTO House during the Toronto International Film Festival (2025)



Late Bloomer (2025), Blink49 Studios

STRATEGIC PRIORITY 3

Increase Support for the Domestic Production Sector

Toronto's domestic production industry is a creative powerhouse, with local creators succeeding on the world stage and telling stories that reflect Canadian values and perspectives. Support for domestic production strengthens and diversifies Toronto's screen industry, particularly as global market dynamics evolve.

While the sector benefits from the Film Office's broader supports—including permitting, workforce development, and film-friendly initiatives—there is an opportunity to further enhance targeted supports to position domestic production for future growth, particularly as the industry adapts to reduced broadcaster and buyer commissions, evolving CRTC Canadian content regulations, and a changing funding landscape.

Actions:

- **Action 3.1: Collaborate with Industry to Identify Actionable Challenges** – Maintain consistent communication with the domestic industry in order to remain informed of challenges as they evolve and enable intervention when City support can be appropriate and effective.
- **Action 3.2: Advocate for Continued Government Support** – The City should advocate to other orders of government for continued and enhanced investment in critical provincial and federal funding programs for domestic production.



Law & Order Toronto: Criminal Intent (2026), Cameron Pictures

STRATEGIC PRIORITY 4

Enhance Operating Conditions for the Film Office

Toronto's Film Office has a strong track record of sector-leading service, benefiting from its unique position within the municipal government of one of the world's most innovative and multicultural cities. To maintain Toronto's competitive edge, the Film Office must continue to evolve how it operates.

Strengthening the Film Office's operations is essential to sustain Toronto's reputation as a premier film destination and respond effectively to emerging industry challenges. By enhancing operational efficiency, deepening collaboration across City divisions, and expanding marketing capacity, the Film Office will deliver excellent client service, move at the speed of industry, and ensure the sector continues contributing to Toronto's economy and cultural vitality.



“
 We had a great time
 in Toronto. The crew
 in Toronto was a
 straight 10.
 —Arnold Schwarzenegger

FUBAR (2025), Netflix

Actions:

- **Action 4.1: Ensure Awareness of the Industry’s Value** – Continue to ensure awareness across City Divisions, City leadership, and among Councillors of the alignment of Film Office goals and film industry outcomes with wider Economic Development and Culture divisional and City strategic priorities.
- **Action 4.2: Ability to Compete** – Increase the Film Office’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.

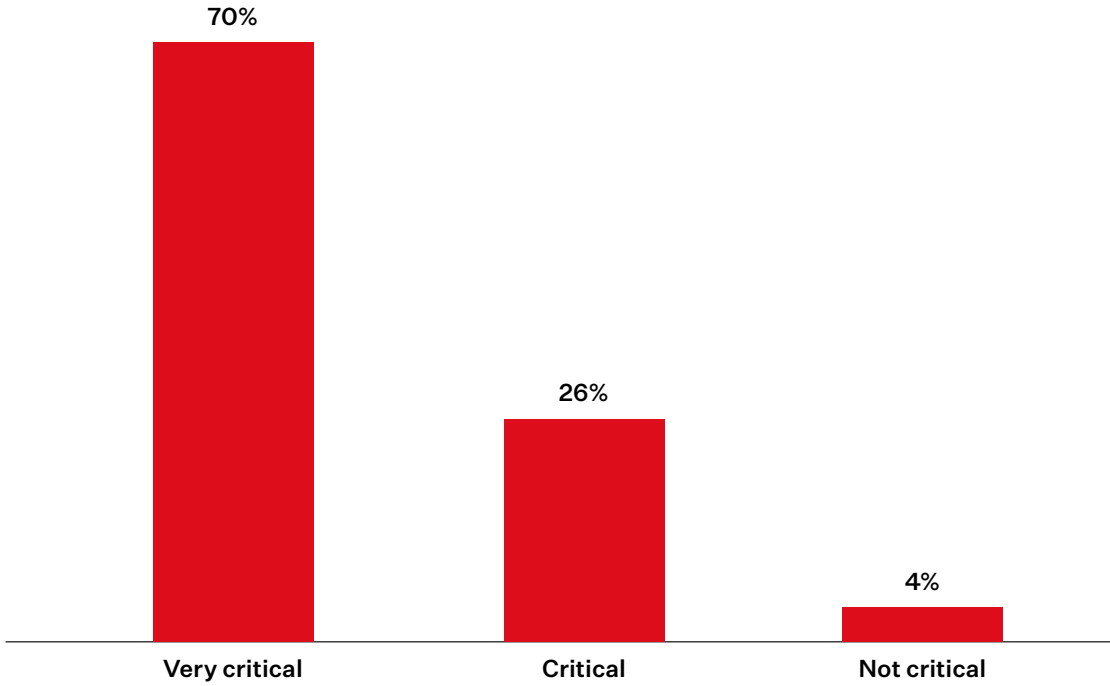


Figure 2: Film Office’s Role in Supporting Toronto’s Screen Sector (Survey Results)⁹

⁹Olsberg SPI, 2025. Results shown as a percentage of respondents; n=50

IMPLEMENTATION & MONITORING



Paw Patrol (2013—), Guru Studio

Implementation of the Strategic Plan will be managed by Economic Development and Culture, with progress updates presented to the Toronto Film, Television and Digital Media Board and Economic and Community Development Committee, and onward to City Council as appropriate. The Strategic Plan employs a comprehensive metrics framework tracking both Film Office performance in delivering actions and sector health indicators to ensure Toronto remains one of the world's leading and most film-friendly production centres through 2030 and beyond.

A young man and woman are embracing in a studio setting. The woman has curly hair and is wearing a black puffer jacket. The man is wearing a dark jacket and jeans. They are both smiling and looking at each other. The background is a blurred studio with a large mural and a stool.

LOOKING FORWARD

Toronto's screen sector has always thrived on collaboration, creativity, and resilience. *Toronto's Screen Future: A Strategic Plan for Continued Growth (2026–2030)* builds on this foundation with concrete actions to meet the moment: expanding infrastructure, developing talent, leading on sustainability, and deepening partnerships across the industry ecosystem.

The global production landscape is evolving rapidly, but Toronto’s advantages remain clear: world-class crews, diverse locations, competitive incentives, film-friendly infrastructure, and a city that understands the value of storytelling. This Strategic Plan ensures these strengths translate into lasting economic impact, quality jobs, and cultural vibrancy for all Torontonians.

As the industry adapts to new technologies, shifting market dynamics, and emerging opportunities, Toronto is positioned not just to compete, but to lead. From supporting homegrown stories that reflect our communities to attracting the biggest international productions, the vision is unified: to remain the best place in the world to make movies—today, in 2030, and beyond.

Learn more at toronto.ca/film



Star Trek: Section 31 (2025), Paramount+

Endorsed by the Toronto Film, Television and Digital Media Advisory Board, *Toronto’s Screen Future: A Strategic Plan for Continued Growth (2026–2030)* was recommended by the Economic and Cultural Development Committee in February 2026 and adopted by City Council in March 2026.

The full report can be read [here](#).

