



**STAFF REPORT  
ACTION REQUIRED**

**Film, Television & Digital Media: 2013 Year in Review**

<b>Date:</b>	April 4, 2014
<b>To:</b>	Economic Development Committee
<b>From:</b>	General Manager, Economic Development and Culture
<b>Wards:</b>	All
<b>Reference Number:</b>	

**SUMMARY**

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The purpose of this report is to update City Council on the success of Toronto’s screen-based industries in 2013. This important creative sector which includes production, financial services, and business and professional service companies, as well as suppliers, unions and guilds, film festivals and cinemas, employs about 25,000 full-time workers. It is also linked to the Tech sector through digital media and technology advancements and to the Education sector through capacity building programs and initiatives provided by colleges, universities, private sector institutions, industry associations and community groups. These organizations provide education and training to develop and expand the industry’s human resource capacity and help incubate and accelerate new firm formation.

In 2013, screen based production companies invested \$1.19 billion in on-location filming in Toronto, exceeding the \$1 billion mark for the third consecutive year. The 2013 expenditures were almost identical to the \$1.20 billion level reached in 2012. Importantly, investment in major domestic productions reached \$515 million, exceeding the \$500 million level for the first time ever, and exceeded spending by major international productions (\$439 million) by \$76 million. The success of Toronto’s screen based industries also enhances the visibility and profile of the city attracting tourism, creative talent and investment in many other sectors.

These results are a tribute to the quality, and the depth and breadth, of the talent available in Toronto both in front of and behind the camera supported by the collaborative efforts of the many individuals, companies, producers, directors, investors and advisors, unions, and guilds, industry associations such as FilmOntario, our representative in Los Angeles, our Provincial and Federal partners such as the Ontario Media Development Corporation and Telefilm Canada, and the leadership of the Toronto Film Board.

**Film, Television & Digital Media – 2013 Year in Review**

The staff of the Toronto Film, Television and Digital Media Office, and their colleagues throughout the City's ABCCDs, and related agencies such as the Toronto Region Conservation Authority, Greater Toronto Airports Authority, and Toronto Hydro, are also to be congratulated for their collaborative efforts to support this important industry.

The support and assistance of City Councillors, their staff, residents and local businesses is also acknowledged. Toronto continues to be indisputably the third largest screen-based production centre in North America out performed only by New York City and Los Angeles. It is also an industry poised for future growth.

## **RECOMMENDATIONS**

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### **The General Manager, Economic Development & Culture recommends that:**

1. City Council, through the Toronto Film Board, congratulate the Toronto screen-based industries for the quality of its talent, in front of and behind the camera; its collaborative efforts to promote Toronto and attract investment; and for surpassing the \$1 billion level for on-location production spending in Toronto for the third consecutive year;
2. City Council direct the City Clerk to write the Ontario Minister of Tourism, Culture and Sport and the federal Minister of Canadian Heritage to acknowledge and thank them for their ongoing support of this important sector.

### **Financial Impact**

There are no financial implications resulting from the adoption of this report.

### **COMMENTS**

With more than 25,000 people directly employed in film and television, Toronto is a full service jurisdiction and home to superb talent both in front of and behind the camera, including digital animation and special effects, and home to many of the best production and post production facilities in the world.

In 2013 direct investment in Toronto's screen-base industry reached \$1.19 billion, almost identical to the 2012 level, and exceeding the \$1 billion mark for the third consecutive year. Importantly, investment in major domestic productions reached \$515 million, exceeding the \$500 million level for the first time ever; and exceeding spending by major international productions (\$439 million) by \$76 million.

**Table 1: Toronto 2013 – Total Production Investment**

<b>Major Productions</b>	<b>2009 (millions)</b>	<b>2010 (millions)</b>	<b>2011 (millions)</b>	<b>2012 (millions)</b>	<b>2013 (millions)</b>
Major Productions	\$739.7	\$726.5	\$957.8	\$1,014.9	\$948.1
Commercials	\$83.4	\$89.8	\$97.7	\$98.2	\$131.0
Music Videos	n/a	\$1.9	\$1.2	\$1.2	\$5.8
Animation	n/a	\$85.3	\$72.0	\$81.0	\$103.0
<b>Total</b>	<b>\$823.10+</b>	<b>\$903.50</b>	<b>\$1,128.7</b>	<b>\$1,195.3</b>	<b>\$1,187.9</b>

**Table 2: Toronto 2013 – Domestic & International Production Investment**

<b>Major Productions</b>	<b>2009 (millions)</b>	<b>2010 (millions)</b>	<b>2011 (millions)</b>	<b>2012 (millions)</b>	<b>2013 (millions)</b>
Domestic Productions	\$434.0	\$403.9	\$427.4	\$499.4	\$515.2
International Productions	\$228.5	\$360.5	\$530.4	\$515.5	\$438.8
<b>Total</b>	<b>\$662.50</b>	<b>\$764.40</b>	<b>\$957.80</b>	<b>\$1,014.90</b>	<b>\$954.00</b>

With two major ‘tent pole’ productions, Pacific Rim and RoboCop, completing their shooting near the end of 2012, investment in Major Productions (domestic and international feature films, movies made-for-television, TV series, mini-series, and TV specials) started slow 2013. However, the year closed strong and at year end, total Major Production investment was \$948 million, still hovering around \$1 billion level, but ~\$66 million below 2012. The reduction in Major Production spend in 2013 was offset by increases in Commercials (+\$32 million), Animation (+\$15 million) and Music Videos (+4.6 million)

Television production dominates investment in Toronto. Of the total investment of \$1.19 billion in productions with on-location filming almost two-thirds, 62% or \$730 million, was for television series productions. TV series productions in Toronto include Defiance, Hemlock Grove, Hannibal, Orphan Black, Copper and the Transporter, Listener, Nikita, Covert Affairs, Suits, XIII, Warehouse 13, Lost Girl, Murdoch Mysteries, Strain and Downton Abbey.

In addition to film, television and digital media production, Toronto is home to the Toronto International Film Festival (TIFF). TIFF has grown from a small 10-day event with an audience of 35,000 when launched in 1976 into a world renowned cultural institution and the third largest film festival in the world, and in true Toronto style, the largest public film festival in the world. It attracts about 1.6 million attendees annually from over 130 countries including 1,100+ media and contributes significantly to Toronto's international reputation.

Toronto is also home to HotDocs, Canadian International Documentary Festival. Presenting over 200 films from 43 countries of production, to a total audience of about 180,000, HotDocs is the largest documentary film festival in North America. In 2013, HotDocs presented 64 films made by first time filmmakers as well as high-profile films such as *The Manor*, *Unclaimed*, *Downloaded* and *Good Ol' Freda* from world renowned filmmakers. HotDocs Schools Festival has expanded to include over 300 schools and reach more than 78,000 students from across Ontario.

Anchored by major festival like TIFF and HotDocs, Toronto now hosts over 80 Film Festivals showing everything from shorts to feature films, comedy to drama, animation to documentary, and multilingual to silent films throughout the year. In addition to showing films to develop audiences and provide entertainment for residents and visitors, many film festivals also include industry capacity building elements such as panel sessions and seminars on directing, script writing, pitching investors, and the business of filmmaking as well as outreach to youth and schools for educational purposes and to inspire another generation. The Toronto Film Festival Association, established in 2012, is a not-for-profit initiative of the Toronto Film Board, which helps individual festivals to increase their outreach, expand and improve, better serve Toronto's diverse communities and provide a showcase for many more filmmakers.

The inaugural Canadian Screen Awards (CSAs) Week was held in Toronto in 2013. The week long series of events celebrate and showcase Canada's talent in all aspects of film, television and digital media. The CSAs, established by merging the formerly separate Gemini Awards for television and Genie Awards for film, attracted about 5,000 industry leaders and participants and brought international attention to the Canadian screen industry and Toronto. The Awards ceremony had a telecast reach of 2.9 million and viewership of 800,000.gala event. Trending on twitter in Canada and Los Angeles generated over 52 million social media impressions.

The inaugural Canadian International Television Festival, Canada's first only public television showcase, was also held in Toronto in 2013. Recognizing the major contribution of television to the Canadian screen industry the CITF celebrates current and classic Canadian television. It provides a forum to screen Canadian series, promote Canadian talent and launch new TV projects. The festival also engages the public by creating opportunities for fans to connect with celebrities from their favourite programs. The CITF program includes professional development and networking opportunities for established and emerging television professionals and an outreach to students.

Consistent with the guiding vision articulated in the City's recently adopted economic growth strategy, *Collaborating for Competitiveness*, we look forward to working with all of our partners to identify synergies and develop joint initiatives to further grow this key industry.

## **CONTACT**

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## **SIGNATURE**

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Economic Development and Culture