

An Assessment of  
Northern Ontario's

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**FILM & TELEVISION  
PRODUCTION  
INFRASTRUCTURE**

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**MFM** MUSIC  
AND FILM  
IN MOTION

A Division of Cultural Industries Ontario North

# INTRODUCTION

This research project seeks to identify and evaluate film/TV and media production resources in Northern Ontario. With enormous investments being made in the film/TV industries from both the public and private sectors, it is important for stakeholders that the results of their investments are quantified. It is hoped that this examination of the current environment in which these industries operate will help to identify the impact and benefits of their significant investments that are being made in Northern Ontario.

This report provides a snapshot that is inclusive of Northern Ontario's infrastructure and resource base as it existed in March 2017. It is very important to note that media infrastructure is continually being introduced to keep up with the demand of the burgeoning film/TV industry in Northern Ontario. With such evident growth comes the need to carefully evaluate the results of these investments and re-establish a practical direction facilitating continued progress and innovation in these industries.

For the purpose of this study, MFM has used the Northern Ontario Heritage Fund Corporation's [definition of Northern Ontario](#). "For the NOHFC, Northern Ontario is defined as all areas North of, and including, the districts of Parry Sound and Nipissing." See APPENDIX A: MAP OF NORTHERN ONTARIO for more information.



Funding for this study was provided by the Ontario Media Development Corporation. Any opinions, findings, conclusions or recommendations expressed in this material are those of Music and Film in Motion, a division of Cultural Industries Ontario North and do not necessarily reflect the views of the OMDC or the Government of Ontario. The Government of Ontario and its agencies are in no way bound by the recommendations contained in this document

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# 1.0 BACKGROUND AND HISTORY

## 1.1 History of Northern Ontario's Film and Television Production Industry

The year 2001 is often described as the year in which Northern Ontario's current film and television production industry was born. That is the year *Men with Brooms* (2002) was shot in Sudbury and Copper Cliff, giving the local workforce of artists and technicians a glimpse into the possibilities offered by the arrival of this exciting industry for the creative class.

In the following years, other communities such as Parry Sound, North Bay and Sault Ste. Marie began seeing production activity emerge in and around their communities, as producers discovered the wide array of new, unseen locations available within driving distance of Toronto. **Music and Film in Motion (MFM)**, at the time an upstart, regional non-profit, took notice and began to provide production advice and on-the-ground support for many of these early projects. Seeing the potential for prosperous growth in this sector, MFM, along with community leaders across Northern Ontario, worked to find access to regional funding for productions with the **Northern Ontario Heritage Fund** (NOHFC) leading the charge as an ideal partner. The agency was already well-positioned in this to take on this role with a mandate for job creation and regional economic development.

The **NOHFC** introduced its film funding program in 2005 with the objective to "advance the development of a successful film and TV production industry in the North". The independent feature *Barstool Words* was the first production to receive funding from the program in the form of a grant-loan combination of \$250,000. The initial structure of this program provided up to 50% of eligible costs, up to \$1 million, with half in the form of a repayable term loan, half in the form of a conditional grant. This formula attracted a small number of productions to shoot in Northern Ontario every following year and allowed for some of Northern Ontario's homegrown content to thrive. Case in point, NOHFC funding made it possible for Robert Budreau (originally from North Bay) to make his feature length directorial debut with *That Beautiful Somewhere* (2006). This debut proved to be catalyst significantly propelling Budreau's career, as he has since gone on to helm *Born to Be Blue* (2015), a Chet Baker biopic which starred Ethan Hawke.

With an eager regional workforce and a reliable source of funding from the NOHFC, the regional production industry began to set its roots and thrive with such projects as the francophone television series *Météo+* (2007) and *Les Bleus de Ramville* (2010) and notable indie features such

as *Oliver Sherman* (2009) starring Scott Speedman, and *Collaborator* (2009) starring Martin Donovan & Olivia Williams. Northern Ontario's early industry even featured an upstart animation company in March Entertainment, who was responsible for the animated series *Chilly Beach* (2004).

Since 2009, the rate of production has increased consistently as producers from Ontario and beyond discovered the benefits of shooting in Northern Ontario. Under the original NOHFC "50/50 grant/loan" funding formula (with a maximum of \$1M per production), most budgets ranged between \$3M and \$6M. The NOHFC formula was revised in 2012, eliminating the loan portion, but retaining the 50% matching grant with a maximum contribution of \$500,000 for most productions, (this structure still allowed some exceptions for television series, since they typically offer a longer term of employment). This revision to the funding formula may have reduced the number of some larger budget feature productions considering Northern Ontario, but it has provided access to funding for a higher number of small-budget productions. The volume of production activity and training opportunities for emerging Northerners has significantly increased since the new funding model was introduced.

There are many recent, notable low-budget feature film productions which have been produced under this new formula. Examples include the Cannes favourite and Thunder Bay homegrown *Sleeping Giant* (2014); the critically acclaimed wilderness thriller *Backcountry* (2013) by first-time director Adam MacDonald was shot in North Bay and surrounding area, *Remember*, (2014), Atom Egoyan's second Northern Ontario film, shot in Sault Ste. Marie; the Mattawa period horror feature *The Witch* (2014), which had an \$8M opening box office; and *Antibirth* (2015), the dark Sundance favourite starring Chloe Sevigny and Natasha Lyonne, which was service produced by Sudbury's Hideaway Pictures.

Television series producers are also seeing the benefits of shooting in Northern Ontario; TVO's *Hard Rock Medical*, which is loosely based on the relatively recent opening of Northern Ontario School of Medicine, is currently shooting its third season and collaborating with Canadore College to train and develop emerging local crew, *Letterkenny* (2016-), the CraveTV comedy series created by Jared Keeso is already shooting a third season in Greater Sudbury, and *Slasher* (2016), the serialized murder mystery recently debuted on Netflix after a fall 2014 shoot in Parry Sound and Sudbury. On the cable side, the Hallmark Channel's producers have become regular visitors to Sudbury and North Bay, with an extended roster of themed, popular Movies of the Week (MOWs) that are providing consistent, extended training and work opportunities for Northern Ontario film workers. Most recently, Hallmark and Hideaway Pictures have shot the

contiguous series of MOWs in North Bay, called the *Flower Shop Mysteries (2016-)*, starring the venerable American star Brooke Shields.

From cable television productions to art house features, Northern Ontario's emerging film and television workforce has been exposed to a remarkable range of crew opportunities in the past few years. This ongoing, on-set skills development is integral to the continued expansion and sustainability of the industry and to the continued attraction of diverse production types. The NOHFC has undoubtedly been a driving force in this regard and the economic spin-offs from this funding have proven to be a notable economic catalyst in numerous communities from Timmins to Parry Sound, Mattawa to Thunder Bay. To meet demand for vital long-term resources like adaptable space and crew inventory, public, private and educational institutions all increased their willingness to invest in Northern Ontario's industry.

In Sudbury, private sector investors were quick to show their support for the opening of **Northern Ontario Film Studios** in 2011, which has since established itself as a hub for a range of production services and activities. In North Bay, **Canadore College** introduced its new Digital Cinematography diploma program in 2012 to respond to the growing demand for skilled film technicians. The first cohort graduated in 2015 with an 80% employment rate, and most of these students are expressing a desire to stay and work in Northern Ontario.

2015 was widely considered a landmark year for Northern Ontario with an estimated record 36 film and television productions coming north, and 2016 proved to be equally busy. CTV's *'Cardinal'* detective series shot in Sudbury and North Bay until May 2016, (employing a crew of 80, half of which were local residents). The show has since captivated audiences across Canada, been sold to broadcasters in Europe, and CTV greenlit second and third seasons before the first season finale aired. Parry Sound's Muskoka North Studios expanded its operations to host the Tier 'A' NBC/USA series *'Eyewitness'*, which provided over six months of training, employment and spending for that municipality.

In addition to these high profile developments, MFM is also witnessing a rise in local, regional and Indigenous motion picture storytelling, screenwriting, documentary production and film-related entrepreneurial ventures. A positive sign for any emerging industry is the interest and action of individuals who are operating in tandem with or on the periphery of the larger production industry. In the case of motion picture production, a grassroots culture is emerging in communities as diverse as Chapleau, Manitoulin Island and Kenora, and it could be stated that this is, in large part, a result of Northern Ontario's newfound status as one of Canada's most

active production centres. While the regional industry is still in its infancy (as some have stated that it is akin to the state of the Toronto industry during the 1980's) it does offer a myriad of opportunities at many levels for filmmakers and workers.

As we see in many similar fast-growing industries, the regional infrastructure necessary to sustain this growth has not always kept up with the influx of activity. While the market can respond with agility to address some immediate demand for particular services or equipment, a more sustained evolution of the industry framework requires significant investment (e.g. tangible assets) and/or time (e.g. skills development) to develop. With over three hundred productions and more than sixteen years behind us, now is an opportune time to take stock of our assets, examine these accomplishments and determine how to build on this rich, young history of production in Northern Ontario.

## **1.2 Music & Film in Motion**

MFM is dedicated to fostering and promoting the music and film industries in Northern Ontario, as well as providing educational programming to cultivate the advancement of Northern Ontario's emerging talent. MFM works within the boundaries of Northern Ontario, which includes a population of approximately 760,000 people. MFM strives to connect music and film artists and practitioners with opportunities and resources to advance their projects and their careers. MFM's ongoing advocacy for Northern Ontario music and film production output is carried out with the primary objective of contributing to the further development of Northern Ontario's thriving cultural industries. MFM has used a number of the programs and services it offers to make some of the assessments contained in this report including:

**1.2.1 MAPPED (Media Arts Production: Practised, Employed, Developed):** MFM is currently offering funding to assist in training Northern Ontario residents who are embarking on careers in film and television production. With funding from FedNor (the Government of Canada's economic development organization for Northern Ontario), MFM provides work and training opportunities for Northern Ontario's media arts production crew members. The program is designed to supplement existing funding sources in order to further expand and develop the local skills base across Northern Ontario. Qualifying productions can receive partial funding for up to six (6) Northern Ontario crew trainees to a maximum of \$10,000 per production. All MAPPED Northern crew trainees and successful applicant productions are required to submit weekly and post-project reports, where MFM successfully captured and accumulated valuable data on productions' Northern spend as well as effectiveness of a trainee's on-set experience.

**1.2.2 Northern Ontario Sneak Peek Screening Series:** With funding from the NOHFC, MFM designed and manages the Northern Ontario Sneak Peek Program. The program was designed to see cast, crew, service providers and community leaders that hosted a Northern Ontario film production reunite to view the film that was created in their town or region. Representatives of the film production created in Northern Ontario can apply for a maximum amount of \$5,000 to help facilitate the screening. Similar to MAPPED, the Sneak Peek Program's application and follow up reporting process has allowed MFM to accumulate data to assess the impacts of Northern Ontario's film and TV production industry.

**1.2.3 Northern Ontario Film & TV Advisory Committee:** In an effort to more effectively assess and service all of Northern Ontario under MFM's, a committee of regional advisors has been assembled to represent each major production centre. The Northern Ontario Film & TV Advisory Committee's mandate is to provide advice and make recommendations to MFM to support the goals and objectives of MFM and its partner stakeholders. MFM appoints community minded film professionals as advisors based in each major Northern production centre to three year terms and meets as a committee quarterly. The Committee was called upon to distribute MFM's crew survey in their region to ensure strong representation in survey respondents from across the Northern Ontario. See **Appendix B: NORTHERN ONTARIO FILM AND TELEVISION ADVISORY COMMITTEE.**

**1.2.4 Film & Television Crew Database:** The Portal's Crew Database provides hiring producers with an up-to-date, accurate means of identifying active and available crew across Northern Ontario. Searchable by job category, name, production or city, it provides real-time information that ensures the readiness and ability of regional crews to support low to mid-range film and television productions (as these productions represent for Northern Ontario's production industry the greatest potential for future growth and sector sustainability). The database also provides detailed on-demand metrics for MFM's ongoing research, and tracking of crew activity. The number of visits has been increasing consistently over the long term and fluctuates with the busiest hiring periods in early spring and late summer.

## 2.0 METHODOLOGY

In producing this report, MFM initially cast a wide net to capture and process as large of a scope of research as possible. This broad picture consists of secondary research from supplementary sources, and more focused primary research gathered mainly through the implementation of the **Film Portal and Crew Database**, ongoing MFM **project consultations**, as well as **surveys** and **interviews** with regional stakeholders and filmmakers.

While this report is not intended to be a comprehensive economic analysis of the industry, it does include a focused assessment of the economic impact that has been derived from job creation and employment activity for the years 2012 to 2015 has also been conducted using models established by the Canadian Media Producers' Association in their annual economic reports.

### 2.1 Primary Research and Data

Primary research and original data collection has been underway in various capacities since 2014 as required for ongoing MFM operations and funding, reporting requirements for a variety of initiatives relating to MFM projects and activities.

Building on MFM's extensive knowledge of past Northern Ontario productions, our active social media platforms and our roster of industry contacts at all levels of production (from micro-budget independent to multi-million dollar series), and drawing from extensive user-generated information acquired through MFM's various engagement points (**Film Portal, Northern Ontario Crew Database, MAPPED & Sneak Peek**), the project team compiled a comprehensive list of stakeholders to be first surveyed and later interviewed. This sample represents the spectrum of communities that have hosted productions since the 2012 NOHFC review. Based on the breadth of the information obtained in Phase 1, the team developed two survey questionnaires which served as the core body of primary information for this study:

A **Short Form Survey Questionnaire** was distributed widely to 'support' stakeholders (crew, service providers, and vendors, hereafter called the 'Support Stakeholder' survey) with a goal of at least fifty (50) participants, or approximately 10% of the Northern Ontario production community. These surveys were presented in the form of a specialized survey distributed to MFM's crew database membership as well as Post-Project Reports for MAPPED employees. The total number respondents surpassed this goal, as 78 'support' stakeholders took part in the survey.

A **Long Form Survey Questionnaire** was distributed to twenty (20) 'leading' stakeholders (investors, producers, filmmakers, educators, etc) who have a proven track record in Northern Ontario. These surveys were presented in the form of MFM's Sneak Peek Application and Post-Project Reports for MAPPED employers.

## 2.2 Secondary Research and Data

Secondary research, and the compilation and analysis of data from secondary sources played an important role in the production of this report. MFM consulted documents, articles and reports published through many organizations and provincial and national stakeholders, including:

- The Northern Ontario Heritage Fund (NOHFC);
- The Ontario Media Development Corporation (OMDC);
- The Canadian Media Producers Association (CMPA);
- The Canadian Radio-Television and Telecommunications Commission (CRTC);
- The Social Sciences and Humanities Research Council (SSHRC);
- The Alliance of Canadian Cinema, Television and Radio Artists (ACTRA);
- International Alliance of Theatrical Staging Employees (IATSE);
- Directors Guild of Canada (DGC);
- The Greater Sudbury Development Corporation (GSDC);
- The City of North Bay;
- Statistics Canada; and
- FedNor.

Some articles and documents published by these organizations were sourced for the data that form the basis of the calculations and estimates in this report. MFM also consulted a wide variety of media outlets, trade journal articles, newspapers and relevant websites to enhance and support its secondary research.

For an outline of the project phases and structure of this research project, please refer to **APPENDIX C: PROJECT PHASES** and **APPENDIX D: REPORT STRUCTURE**.

## 3.0 GEOGRAPHY

### 3.1 Background

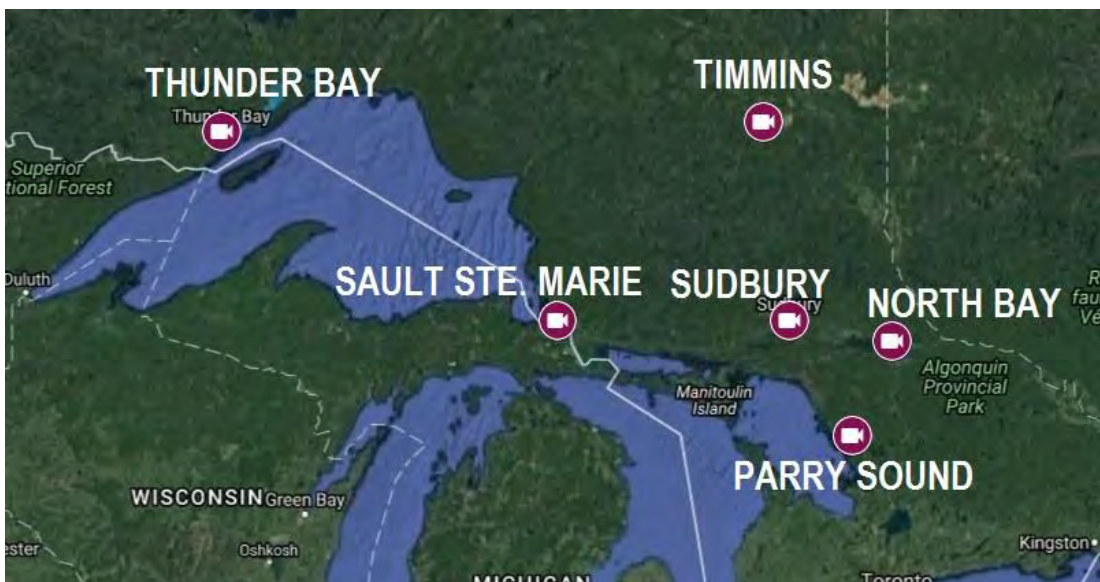
Northern Ontario is vast a region covering over 800,000 km<sup>2</sup>, an area larger than the state of Texas. Most of the communities that have hosted productions are situated near the central east-west transportation corridor, the Trans-Canada Highway 17. When producers start researching options for locations and crew, they often fail to grasp the long driving distances between communities and the enormity of the wilderness areas.

While the landscape does offer spectacular scenery, it also presents obvious logistical challenges for productions and crews. Rather than have costly location moves between cities, what has been effective for many productions is to choose one centre that can play for various towns or cities while still offering access to nearby wilderness locations for other scenes. Once a primary location has been selected, the proximity of urban and rural locations in the region presents a great advantage over Southern Ontario, which requires significant travel time to reach unique rural locations.

### 3.2 Largest Northern Ontario Cities and Primary Production Centres

The five most established production centres are the cities of **Greater Sudbury**, **North Bay**, **Sault Ste. Marie**, **Thunder Bay** and the town of **Parry Sound**. Many other communities have hosted a nominal number of one-off or location-specific productions including **Timmins** (*Two Lovers and a Bear*), **Burk's Falls** (*Running Mates*), **Attawapiskat** (*After the Last River*), **Geraldton** (*Coconut Hero*) and **Temiskaming Shores** (*Skating to New York*), among others detailed in this report.

Map 1. Northern Ontario's primary film and television production centres:



*Click to interact with a Google map of Primary Production Centres in Northern Ontario*

**3.2.1 Greater Sudbury:** The City of Greater Sudbury is the largest city and also the cultural and economic hub of Northern Ontario, with leading institutions in the health care, education, resources and financial services sectors. It is also home to the Northern Ontario Film Studios, the largest film studio north of the GTA. Situated at the crossroads of two significant Canadian highways, the east-west Trans-Canada 17 and the north-south 400/69, it is strategically located only four hours north of Toronto and a few hours away from two other production centres (Sault Ste. Marie approximately 3 hours and North Bay approximately 1 hour) where many transient crew are based. Location Managers have noted that the city lacks choices in historic urban architecture.

Notable Assets: Northern Ontario Film Studios/Hideaway Pictures, Music & Film in Motion, Cinéfest Sudbury International Film Festival, Thornloe University - Motion Picture Arts, Cambrian College & College Boréal - Theatre Arts, Clairmont Camera, William F. White International, Technicolor, MAS Casting & Acting Studio, Sudbury's mines and lakes also provide a unique selection of locations.

Notable Feature Film Productions: *Antibirth, Bank\$tas, Backcountry, Be My Valentine, Bloodwork, Born to Be Blue, The Captive, Cas & Dylan, A Dark Truth, High Chicago, House on the Hill 2, Ice Soldiers, The Intruders, The Lesser Blessed, The People Garden, The Privileged, The Returned, The Riverbank, Wolf Cop II*

Notable Television Productions: *A Perfect Christmas, The Amazing Race Canada, Amélie et compagnie, A Wish Came True, Bad Blood, Cardinal, Chilly Beach, Christmas at Cartwright's, Dark Rising: Warrior of the Worlds, For Love and Honor, Giving You the Business, Glowbies (Animated), Hard Rock Medical (Season 1), I'll Be Home for Christmas, Lazoo (Animated), Les Bleus de Ramville, Letterkenny, Mia and Me, Midnight Masquerade, Men With Brooms, Meteo+, The Music in Me, Slasher, Stepchild, St. Nickel, The Summit, What Would Sal Do?*

**3.2.2 Sault Ste. Marie:** 'The Soo' has a striking industrial riverfront and historic centre which make it a very attractive shooting destination, despite its distance from Toronto. It has remained competitive as a key production centre for the industry due to a skilled local crew base and its wide array of historic locations. Sault Ste. Marie's most recurring challenge is its struggle to compete with the studio and service infrastructure offered in Sudbury and North Bay. As a result, the city has seen many 'feast or famine' shifts in production volumes over the years, forcing many of its local crew to travel or move to find work.

Notable Assets: Proximity to American Border, Sault College - Digital Film Production Diploma & Production Hub, Algoma University, Shadows of the Mind Film Festival, soofilms.com, Edge Enterprises

Notable Feature Films: *Citizen Gangster, Coconut Hero, Compulsion, Fall, Foxfire, Happily Ever After, The Masked Saint, Mean Dreams, Remember, Midnight Sun, Painted Land: In Search of the Group of Seven, Pyewacket, Standoff, The Story of Luke, The Void*

Notable Television Productions: *Vikings, Mantracker*

**3.2.3 North Bay:** North Bay's proximity to Toronto via Hwy 11 and skilled local crew base make it a very competitive and attractive shooting destination. With a good selection of diverse urban and rural locations, beaches, military sites and its 'All-American' streetscapes, North Bay has become a favourite shooting destination for Hallmark productions. Canadore College has also exhibited a strong willingness to partner with productions and provide their students with valuable on-set experience for the next generation of Northern filmmakers. North Bay recently welcomed the expansion of Sudbury's NOFS to their city.

Notable Assets: NOFS North Bay Film Studios, Post Production North, Canadore College Digital Media & Film Production Programs (crew, facilities & equipment), Near North Mobile Media Lab & North Bay Film Festival, Beaumark Former Military Radar Missile Base, urban waterfronts, close by farm and wilderness locations combined with North Bay's All-American downtown provides a diverse plethora of locations.

Notable Film Productions: *And Now a Word from Our Sponsors, Algonquin, Bank\$tas, That Beautiful Somewhere, The Colony, Dark Rising, Dark Rising 2: Summer Strikes Back!, I'm Yours, Kids in the Hall: Death Comes to Town, Oliver Sherman*

Notable Television Productions: *Cardinal, Christmas with Tucker, Hard Rock Medical, Flower Shop Mysteries, Mantracker, Star Spangled Banners, Terry: Terry Fox Story,*

**3.2.4 Thunder Bay:** There is a rich tradition of documentary and independent filmmaking in Thunder Bay and its remote location could be said to inspire that spirit. This bold port city boasts two historic urban cores, dramatic industrial locations, sweeping views of Lake Superior and close at hand wilderness, making it attractive for productions seeking unseen locations. The small but skilled film community has close ties to Confederation College, which has been training filmmakers in Northwestern Ontario for close to fifty years.

Notable Assets: Confederation College - Film Production Program, Cinevate, Proximity to American Border, Bay Street Film Festival, Sleeping Giant Provincial Park, Rich Architectural History combined with authentic shipping ports that allow Thunder Bay to act as a number of different American cities.

Notable Productions: *Angelique's Isle, Fire Song, Return to Manomin, Sleeping Giant*

Notable Television Productions: *The Fifth Estate, Mantracker, Pete's Christmas, A Very Larry Christmas*

**3.2.5 Parry Sound:** Parry Sound has benefited greatly from its location between Toronto and Sudbury and its beautiful locations. It is home to the recently expanded Muskoka North Film Studios which serviced a Tier A TV series (*Eyewitness*) for the very first time.

Notable Assets: Proximity to GTA and City of Toronto, Muskoka North Film Studios, SIM Group, an abundance of authentic wilderness and water-based locations, region can play as rural Canada, small town USA and much more.

Notable Productions: *And Now a Word from Our Sponsors, Country Crush, The Dark, Dead of Winter, The Entitled, October Gale, People Hold On, Stage Fright, The Steps*

Notable Television Productions: *Eyewitness, Slasher*

**3.2.6 Timmins:** *Two Lovers and a Bear* has definitely put Timmins on the map as a filmmaking destination due to the high-profile cast, crew and the film's overall success. Timmins can use its colder climate and longer winters as a strength in attracting film to their region because the region can easily play as an Arctic or tundra environment, and Timmins experiences more snow for longer periods of time than most of Northern Ontario. This extra blast of winter may over the long term prove to be an effective draw for productions looking at the North for winter themed stories. Timmins Economic Development Corporation has identified film/TV as a main priority for driving economic success moving forward.

Notable Assets: Environment can play as Arctic settlement, longer snowy winter seasons, Timmins Economic Development Corporation prioritizing film/tv growth, mines for location scouting, Northern College.

Notable Productions: *Two Lovers and a Bear*

See **APPENDIX E: FULL LENGTH PRODUCTION STATS** for an at a glance look at all regional production activity.

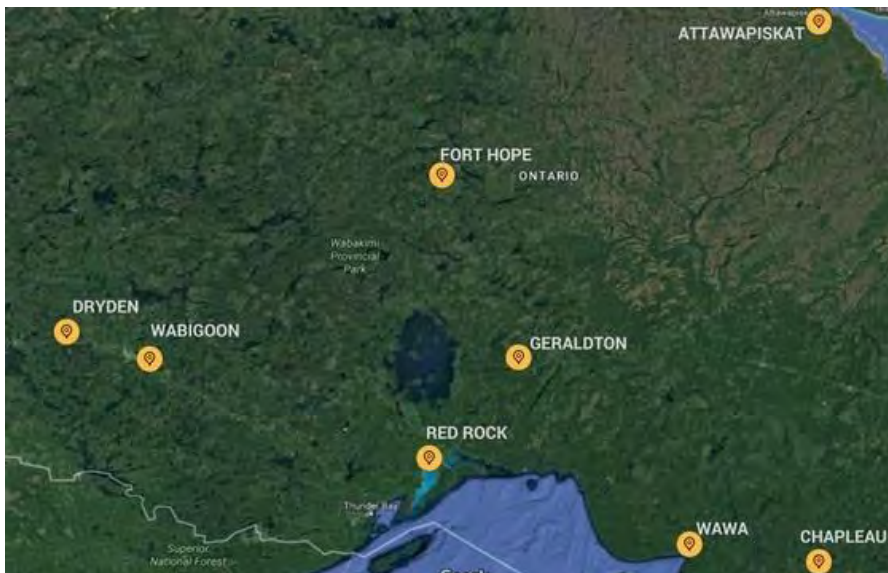
## Largest Northern Ontario Cities and Primary Production Centres: Key Stats

Municipality	City of Greater Sudbury	City of Sault Ste. Marie	City of North Bay	City of Thunder Bay	Town of Parry Sound	City of Timmins
Residents	164,689	79,800	78,159	121,621	6,191	41,788
Crew	257	68	73	25	32	3
Productions (full-length 2011-2016)	72	21	21	11	11	1
Commute to GTA (by car)	4 hours	1.5 hours	3.66 hours	15 hours	2.66 hours	7.25 hours
Commute to GTA (by air)	1 hour	1.5 hours	1 hour	2 hours	N/A	1.5 hours

### 3.3 Secondary Production Centres

Many smaller communities across Northern Ontario have experienced occasional film and television action over the past ten years. Chosen for their unique aesthetic or story-specific locations, these remote, rural communities with limited economic options have benefited greatly from the economic impact that short-term activity generates. Below is a listing of those communities.

#### Northwestern Ontario: Notable Productions



**Attawapiskat:** *After the Last River*, Documentary (2011-14)

**Chapleau:** *Backcountry* aka *Wild Men*, Feature (2015)

**Dryden & Wabigoon Lake First Nation:** *Fire Song*, Feature (2014)

**Geraldton:** *Coconut Hero*, Feature (2014)

**Red Rock:** *The Pineville Heist*, Feature (2014)

**Wawa:** *Snow Cake*, Feature (2006)

## Northeastern Ontario: Notable Productions



**Algoma Mills, Massey:** *Black Forest*, Feature (2012)

**Burk's Falls:** *Running Mates*, Feature (2009)

**Britt:** *The Bequest*, Feature (2015)

**Elliot Lake:** *Mantracker*, Various Episodes (2010-12)

**Mattawa:** *The Witch*, Feature (2014) & *Night Cries*, Feature (2014)

**Powassan:** *Backcountry*, Feature (2013)

**Temiskaming Shores & New Liskeard:** *Skating to New York*, Feature (2013)

**Temagami:** *Mantracker*, Series, Various Episodes (2010-2012)

## 4.0 ASSETS & RESOURCES

### 4.1 Production Facilities and Services

**4.1.1 Northern Ontario Film Studios (NOFS):** The largest production facility north of Toronto. Strategically located in Sudbury at the crossroads of the two main transportation arteries traversing Northern Ontario, it is a hub for production, equipment rentals and related services for the region.

NOFS features a 16,000 square foot single span main stage floor, two thousand square foot on-site production office suite, a hair and makeup room, a prop shop, a craft kitchen, laundry facilities, substantial parking area and fibre optic wi-fi service, provided by Agilis Networks, throughout the building.

In 2014, William F. White International established a branch on site, joining Clairmont Camera and Technicolor post-production house on site to service Northern Ontario productions.

The main single-span stage is 160' w X 100'd, with a 30' ceiling height, and two loading doors (10'X10' and 12'X12'). NOFS also offers a newly renovated production suite with eleven offices and a large boardroom. The facility is fully equipped with a locked gate and twenty-four-hour video surveillance of property.

**4.1.2 Muskoka North Film Studios (MNFS):** Located in Parry Sound, just north of the mid-point between Toronto and Sudbury, this strategic location offers easy access to both cities for servicing Northern Ontario and supplying productions from Toronto.

The MNFS facility includes an 8,000 square foot sound stage, a front office complex, metal shop, construction & paint shop, props, set decoration and wardrobe areas, and craft kitchen. The facility was recently retrofitted to accommodate the long term needs of a new Tier-A television series, *Eyewitness*, which shot in the Parry Sound area in the summer 2016.

In 2014, The SIM Group, a leading Canadian supplier of technology to the film and television industry, opened a Northern Ontario branch outlet at MNFS. The office features products and services from each of the SIM Group's operating units: SIM Digital, a supplier of cameras and other production gear; PS Production Services, a supplier of lighting, grip, generator and specialty products; and Bling Digital, a specialist in post-production technology and services. The SIM Group provides a variety of services to the facility, including support for its grid and green screen set up.

**4.1.3 Northern Ontario Film Studios (NOFS in North Bay):** The City of North Bay recently supported the expansion of Sudbury's NOFS to their municipality. The 6,000 square foot studio officially opened in October of 2016 and is currently servicing the industry, providing equipment, props, studio and turnkey office space.

## **4.2 Production Offices**

In the busier production centres, local entrepreneurs have been gradually responding to demand for production office space by adapting vacant space for turn-key offices in various locations.

Greater Sudbury has been leading the way in this regard due to demand, but other centres have adapted to offer spaces for single productions. In Sault Ste. Marie, a recently renovated warehouse proved to be an attractive option to productions seeking temporary offices in the facility. In North Bay, productions tend to locate in short-term, vacant offices and are required to set up infrastructure with each new production. Most often, these short-term spaces require productions to outfit their own offices with furniture and equipment rental, technical services and new communication services.

Currently, not all major and secondary production centres are offering purpose-built, designated, turn-key production offices. The production office facilities that are up and running may not always compete in scale or amenities to those available in Toronto, yet they are for the time being, serving the needs of typical small and mid-range productions.

Mentioned above, **Northern Ontario Film Studios (NOFS)** a leading example of this response to demand for quality production offices and has seen regular business since opening in 2013. Similarly, the studio operated by NOFS in North Bay is offering these services for productions in their region.

Closer to the GTA, Parry Sound's **Muskoka North Film Studios (MNFS)** also offers on-site designated production offices for typically scaled productions with open and closed concept offices.

**4.2.1 Copperworks Consulting, Sudbury:** Located in Sudbury, Copperworks offers a small but well-appointed turn-key office suite with boardroom, three private offices, and large flexible work space and reception area. The office serves very small productions requiring a full range of on-site services, high quality amenities and a central downtown location.

**4.2.2 NORCAT, Sudbury:** NORCAT is a Sudbury innovation facility providing similar amenities to Copperworks, but with multiple office spaces available at certain times of the year. While not restricted to film, this modern, well-appointed facility suits the needs of mid-sized productions with private and open offices, boardrooms and top notch communications. It is closely aligned with New Sudbury's Cambrian College and working in this facility certainly opens the door to endless opportunities for establishing relationships with some of Sudbury's business and innovation leaders.

**4.2.3 Collège Boréal, Sudbury:** Collège Boréal's Sudbury campus offers access to their "Boîte Noir" and recording studio. Boîte Noir is a multifunctional lab that can be used for a variety of activities such as recording sessions and film productions. It is equipped with lighting and sound systems, and rental of the facilities can include the assistance of an experienced engineer.

**4.2.3 Envirotek, Sault Ste. Marie:** This location has become a widely-used office space in Sault Ste. Marie for productions. On the main floor, this large industrial warehouse provides adequate space for set building, the property outside offers plenty of parking and the site is only a twelve-minute drive to the city core. Tenants must arrange for their own telecommunications services and Envirotek (a fibreglass supplier) operates their business' main office from a secure suite on the second floor.

**4.2.4 Sault College Digital Production Hub, Sault Ste. Marie:** This space features a kitchen, four lockable offices, large conference room, as well as three open area office spaces. It is furnished with tables, chairs, and multiple landline phones. Productions are responsible for setting up their own telecommunications services and there is no private parking available. Since the Digital Production Hub is a stand-alone structure on the campus of Sault College, productions utilizing the hub are granted access to some student amenities.

**4.2.5 Northern College Campuses (Timmins, Haileybury, Moosonee Kirkland Lake):** The private college has operated in the North for fifty years educating students in business, construction, technology and many other disciplines. Northern College has four campuses across the far North of Ontario with temporary turnkey office space available in Timmins and Kirkland Lake.

### 4.3 Education and Training

Practical work experience cannot be accelerated and must be rooted in incremental, ongoing training and mentoring over long periods of time. Until the industry matures, we will continue to see significant gaps in crew numbers and skills for some years to come. Nevertheless, this challenge is being addressed proactively on many fronts by educators, stakeholders, trade unions, funders and MFM.

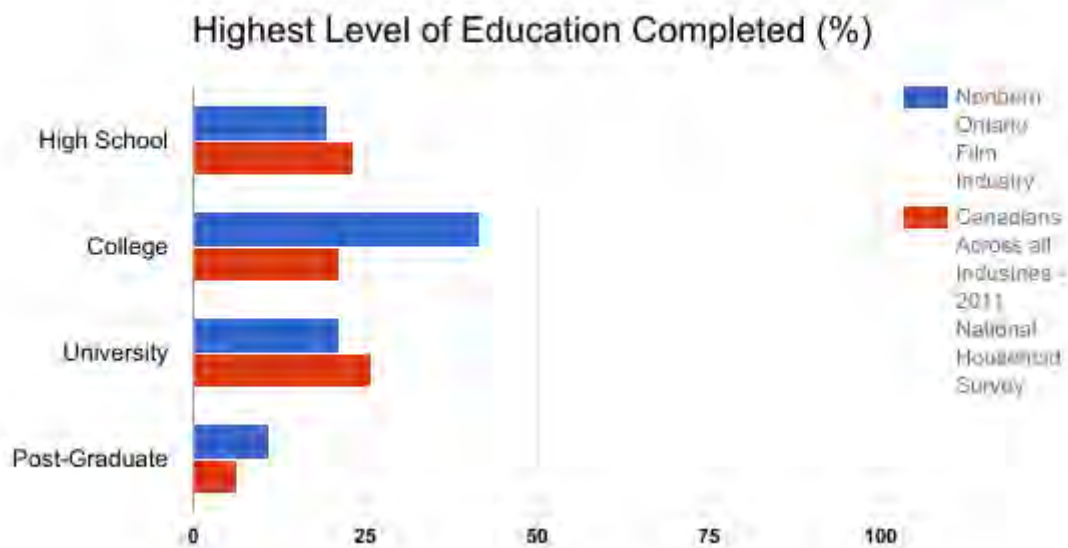
The NOHFC's Northern Ontario Business Opportunity Program for Film & Television includes a Trainee Provision with the objective to train Northern Ontario residents in crew positions where skills deficiencies currently exist. In this model, the Producer determines the individuals to be trained, the position for which they are to be trained and deems the respective mentor, an eligible spend for reimbursement with their grant.

Furthermore, in an effort to compliment the NOHFC's Training Provision, MFM manages a career-acclamation and training fund called MAPPED (made possible with funding from FedNor). This competitive training fund, designed to supplement existing funding sources (ie. NOHFC) in order to further expand and develop the local skills base across Northern Ontario, is eligible to productions shooting in Northern Ontario wishing to hire and train up to six Northern residents as new or emerging crew. After analyzing MAPPED post-reports from employers, MFM revised the program's application and review process, creating a listing of "Priority Positions in Northern Ontario" (**APPENDIX F: PRIORITY POSITIONS**) to more effectively guide applicants and disburse the fund.

It is understood by most producers shooting in Northern Ontario that they must commit to training some local crew on every production to contribute to the regional workforce and to participate fully in the regional labour economy, but there is a generally held consensus that Northern Ontario is missing a practical training system that fully satisfies all stakeholders.

As a long-term approach to generating new waves of industry supportive crew inventory, several post-secondary institutions are now offering a range of choices for students seeking to study motion picture production and related fields in accredited programs across Northern Ontario. Newly developed courses, such as those making up programs at **Laurentian University** and **Canadore College**, were established in direct response to the growing demand for a local, skilled production workforce. It is important to note that the flexible nature of a filmmaker's skill set has allowed individuals from all types of academic, artistic and technical backgrounds to find a place with a production and excel.

According to respondent data from the 'Support Stakeholder' survey, only **31.9%** of survey respondents claim to have graduated from a film related program at the postsecondary level, with that figure dropping to only **13.3%** for those graduating their post-secondary film program in the past three calendar years. This is not to say that the crew base in Northern Ontario is not formally educated, as **41.7%** report their highest level of education is a College Diploma, **23.6%** have a University degree. Instead it would seem to indicate that the industry's crew resource base has, in it's formative years, been comprised of early career youth and job seekers with varied skill sets that can be applied to specific departments.



For a full listing of Northern Ontario's Post-Secondary programs and course offerings that are relevant to or support Northern Ontario film and television production industry, please refer to **APPENDIX G: POST-SECONDARY EDUCATION.**

#### 4.4 Crew

Before all else, human resources are critical to forming a lasting foundation for this young industry while simultaneously growing Northern Ontario's creative class. As of February 8, 2017, the MFM Crew Database contained **six hundred sixteen (616)** unique crew profiles, with close to **80%** or **483** of those profiles being permanent residents of Northern Ontario.

The Northern Ontario crew-base is made up of individuals from all walks of life and backgrounds who often have been drawn to the industry's employment opportunities, and away from employment in other sectors. Evidence gathered from the MFM developed and administered

Northern Ontario Crew Database provides proof that the region's crew-base has its strengths and challenges, and is spread out across almost all departments and positions including:

- **Accounting**, Post-Production Accountant 10, Production/Assistant Accountant 8;
- **Animal Wrangling**, Animal Wrangler 3;
- **Art**, Art Director 12, Storyboard Artist 6, Production Designer 38, 1st Assistant Art Director 10, 2nd Assistant Art Director 10, 3rd Assistant Art Director 10, Trainee Assistant Art Director 7;
- **Assistant Directors**, 1st Assistant Directors 51, 2nd Assistant Directors 21, 3rd Assistant Directors 36;
- **Camera**, Stand-In 4, Camera Operator 27, Camera Trainee 22, Director of Photography 30, DIT 4, Data Management Technician 14;
- **Construction**, Carpenter 13, Scenic Artist/Painter 10;
- **Casting / Extras**, Background Performer 82, Background Casting 17, Casting Director 25;
- **Catering & Craft**, Catering & Craft 9, Craft Service 15;
- **Continuity**, Script Supervisor 15); Electric/Lighting (Best Boy (Electric) 4, Electric 17, Gaffer 10, Generator Operator 7;
- **Grip**, Best Boy (Grip) 4, Dolly Grip 3, Grip 31, Key Grip 10)
- **Hair & Makeup**, Assistant Makeup 8, Hair & Makeup 6, Make Up 8, Assistant Hair 4;
- **Locations**, Assistant Locations Manager 11, Security 24, Trainee Locations Manager 2, Locations Scout 10, Locations Manager 7, Locations Production Assistant 25;
- **Medical**, Set Medic 5;
- **Post-Production**, Post-Production Supervisor 2, Post-Production Assistant 3, Trainee Assistant Editor 4, 2nd Assistant Picture Editor 2, Assistant Picture Editor 8, Sound Editor 12, 2nd Assistant Sound Editor 1, Dialogue Editor 4, Composer 6, Music Editor 3, Picture Editor 17;
- **Production**, Director 41, Director's Assistant 12, Executive Producer 6, Line Producer 6, Producer 26, Production Coordinator 20, Producer's Assistant 13, Office Production Assistant 40, Production Associate 6, Co-Producer 8, Unit Production Manager 2, Researcher 1, Production Liaison 1, Production Manager 1;
- **Props**, Props Master 10, Props Buyer 5, Assistant Props Master 17;
- **Publicity**, Behind-the-scenes Videographer 8, Stills Photographer 4;
- **Set Decoration**, Set Dresser 34, Set Decorator 17, Set Dec Buyer 5, Assistant Set Decorator 11;
- **Sound**, Sound Cable Puller 4, Sound Mixer 18, Boom Operator 15;

- **Stunts**, Stunt Performer 7, Stunt Coordinator 2;
- **Special FX**, SPFX Editor 3, SPFX Coordinator 2, SPFX Technician 2;
- **Transport**, Transport Unit Driver 8, Transport Coordinator 7, Transport Captain 7, Transport Driver 36, Transport Cast Driver 20;
- **Wardrobe**, Costume Buyer 2, Costume Designer 10, Assistant Costume Designer 25;
- **Writers** 17

An increasing number of Northern Ontario residents are being hired as Leads of departments, with 61% of 'Support Stakeholder' survey respondents claiming to have been employed as department Head at least once. There still exist some deficiencies in the crew base when it comes to the Accounting, Continuity, Electric and Grip departments. In an effort to reduce these gaps in skilled candidates, MFM has created a set of Priority Positions to guide MAPPED Crew Training applicants when they are selecting Northern Ontario residents for training. This ensures that the MAPPED fund is being utilized to train efficiently and to fill necessary industry employment gaps as they are identified. To date, the MAPPED fund has directly employed 76 Northern Ontario resident as emerging crew members. In direct response to the crew base in Northern Ontario reaching critical mass, film industry unions such DGC Ontario, IATSE 411, 873, NABET 700 and ACTRA have increased their presence in the region as of late with some even opening full time chapters in the North. This is a positive sign moving forward as crew will receive close-to-home union guidance and protection as the industry seeks long-term sustainability.

## 4.5 Exhibitions and Promotions

**4.5.1 Cinéfest Sudbury International Film Festival:** Cinéfest Sudbury International Film Festival is a world-class celebration of arts and culture and one of Canada's premiere film events. The event encompasses all aspects of Northern Ontario's arts and culture community, with a recent focus on the considerable growth of Northern Ontario's film industry. Cinéfest is renowned for providing Canada's established and emerging filmmakers as an ideal venue to introduce their films, as the Festival's audience has developed the reputation of being highly representative of the general film going public. The event, currently in its 29<sup>th</sup> year, generates a multimillion dollar economic boost for Greater Sudbury. The Festival screens over 125 films in its nine day span. However, there are other initiatives that are integral to the Festival experience: Cinema Summit and Film Circuit support.

In 1992, the Festival began coordinating the Northern Film Circuit, which eventually developed with the Toronto International Film Festival Group to become the Film Circuit. The Film Circuit still has a significant presence at Cinefest as a number of film festival programmers from all over Ontario travel to the Festival each September to consider films for their home communities.

In 2010, Cinéfest introduced Cinema Summit— an exchange and development series devoted to the celebration, promotion and advancement of Canada’s new and emerging filmmaking talent. Cinema Summit is an opportunity for film students and emerging film talent in Northern Ontario to connect with established industry professionals.

**4.5.2 Northern Ontario Music & Film Awards:** MFM will host the 11th Northern Ontario Music and Film Awards (NOMFA) in May of 2017, the second edition to be held on a biennial basis. In 2008, MFM launched the conference component in conjunction with the awards programming to help facilitate growth in the music, film, and television industries in Northern Ontario. Mentors and panelists are brought in to provide guidance and insight into the inner workings of each sector; many working relationships have been established through connections made at NOMFA and programming as well as showcasing opportunities will evolve further in 2017.

**4.5.3 Emerging Film Festivals:** There has been a rise in the number of and subsequent promotion of film festivals taking place across Northern Ontario in communities of all sizes. In addition to Sudbury’s Cinéfest, Northern Ontario hosted the Bay Street Film Festival (Thunder Bay), North Bay Film Festival and Shadows of the Mind Film Festival (Sault Ste. Marie) in 2016.

**4.5.4 Recent Production Successes at International Events & Broadcast:** Productions that shot entirely or partly in Northern Ontario have been featured on popular streaming services like Netflix, Crave TV and others with undisputed success. *Letterkenny’s* series debut still holds the distinction of the most streamed debut in Crave TV’s history. The producers of *Letterkenny* recently debuted another series on Crave, *What Would Sal Do*. Many productions from the North such as *The Captive & Slasher* have been enjoyed on a mass scale by audiences, after being acquired by Netflix.

Northern Ontario’s crew base was provided an outstanding opportunity to practice their skills and share a set with some very experienced crew and producers from *Amazing Race Canada* travelled to Greater Sudbury in 2014. The episode filmed in Sudbury (Season three’s episode six), titled “Who is Alex Trebek?” was the most watched episode in the series history at the time of its airing in August of 2015.

More recently, Northern Ontario productions were named winners in 10 of their 30 total nominations at the 2017 Canadian Screen Awards. This was the highest total ever for the region, with a diverse mix of winning productions representing Northern Ontario; *Amazing Race Canada*, *Born to be Blue*, *Letterkenny*, *Painted Land: In Search of The Group of Seven*, *Slasher & Two Lovers* and *a Bear*. See **APPENDIX H: MAJOR AWARD-WINNING NORTHERN ONTARIO PRODUCTIONS**

**4.5.5 Sneak Peek Film Screening Program:** With support from the NOHFC, MFM manages the *Northern Ontario Sneak Peek Film Screening Program*. This program is designed to see cast, crew, service providers and community leaders that hosted a Northern Ontario film production reunite to view the film that was created in their town or region. Costs to coordinate, promote and enhance the screening are eligible to be funded by this program with the objective of further engaging the communities who hosted a production and celebrate the accomplishments of the crew while also providing networking and professional development components.

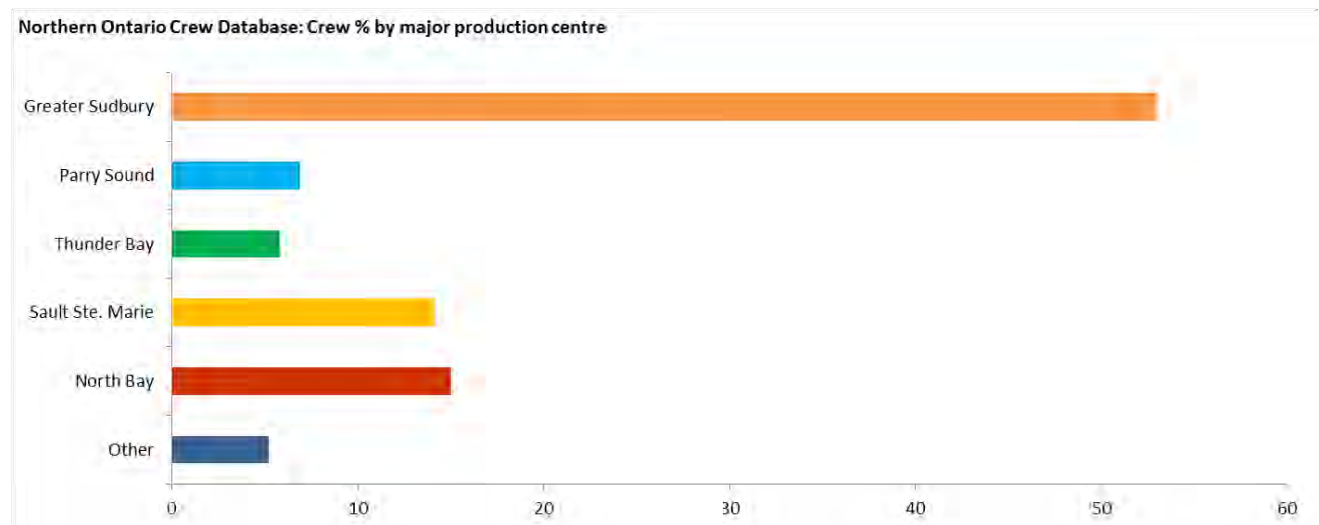
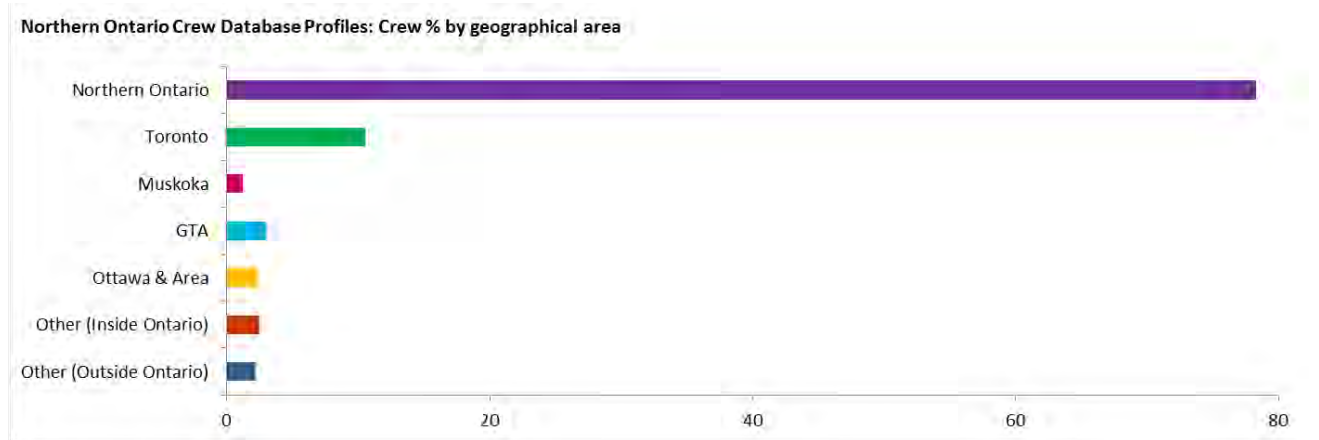
## **4.6 Digital Resources**

**4.6.1 MFM's Film Portal:** As an aggregator of current information, MFM's Film Portal has been an instrumental tool in the research contained in this report. Designed and implemented over two years to respond to growing demand from industry stakeholders (from crew to producers to vendors) this online tool is now the first stop for those looking to shoot anywhere in Northern Ontario.

The portal presents a complete inventory listing of Northern Ontario's crew, production assets, infrastructure, vendors, services and training and education facilities. Most of these assets and resources are located in one of the five main production centres of Thunder Bay, Sault Ste. Marie, Greater Sudbury, North Bay and Parry Sound. The portal is currently experiencing **2,116** sessions per month, with visits originating from **7** different countries (from November 2016 to February 2017 alone).

**4.6.2 MFM's Crew Database:** The Portal's Crew Database provides hiring producers with an up-to-date, accurate means of identifying active and available crew across Northern Ontario. Searchable by job category, name, production or city, it provides real-time information that ensures the readiness and ability of regional crews to support low- to mid-range film and television productions (as these productions represent, for Northern Ontario's production industry, the greatest potential for future growth and sector sustainability). The database also provides detailed on-demand metrics for MFM's ongoing research and tracking of crew activity.

The number of visits has been increasing consistently over the long term, fluctuating with the busiest hiring periods in early spring and late summer. Currently, the database is receiving an average of **246** sessions per month, this is up nearly **20%** from the May 2016.



**4.6.3 OMDC Locations Library:** The Ontario Media Development Corporation Location Database offers on-line virtual scouting from anywhere in the world, 24 hours-a-day. The service, which is also mobile friendly, features over 270,000 digital images and has revolutionized the way film and TV producers scout potential filming sites for their upcoming productions. Northern Ontario production centres benefit to varying degrees with their representation on the service, and regional listings are comprised of a diverse collection of natural and man-made locations listed on the OMDC’s Locations Library. Currently, Northern Ontario’s major production centres have the following representation, interact with the following links to browse through the recorded locations from each city: **Greater Sudbury:** [52 records](#), **Sault Ste. Marie:** [48 records](#), **North Bay:** [62 records](#), **Thunder Bay:** [10 records](#), **Parry Sound:** [23 records](#).

## 5.0 ECONOMIC IMPACT

### 5.1 Region wide assessments

2015 was the busiest year in history for Northern Ontario's growing film and television industry. In less than ten years, the region has grown to become Canada's fourth largest production centre with a record thirty-six (36) productions and an estimated total production value of \$55M. This rapid growth was not incidental. It is the result of a strategy implemented in 2006 by the NOHFC that continues to play out in 2017 with commendable results. The provincial agency has been instrumental in stimulating economic development by kick-starting this new regional industry which only requires modest investment to be widely successful. The return on the investment has been consistent and tangible and the long-term impact of that steady stream of production spending can be measured and quantified now, after some years.

In 2015-2016, thirty-four (34) of these productions were drawn to shoot in the region by the attractive funding opportunities provided by the NOHFC in the form of matching grants up to \$500,000. This grant leads to a financing formula that tends to attract smaller budget productions (under \$3M). (source: [2015-16 Annual Report, NOHFC](#)). Approximately \$21+ million was allocated by the NOHFC. As part of the NOHFC's mandate to support economic development through regional job creation, these funds (and private sector funds) must be spent directly in Northern Ontario on local crew labour, goods and services.

It is understood that the film and television production industry provides significant benefit to the regional economies in which it operates, yet there are some diverging opinions regarding how this can best be calculated and quantified. The Nordicity approach to estimating the direct and spin-off economic impacts is widely accepted with industry stakeholders and other researchers, and meets the objectives of this report, which aims to provide a realistic snapshot of the film and television production industries impact.

Nordicity has published a series of annual reports "commissioned by the Motion Picture Association – Canada, in collaboration with the Canadian Media Production Association." These studies "capture the impact of the entire industry value chain on the country's economy, including the direct, indirect and induced impacts of film and television production and distribution, manufacturing and distribution of content to consumers." (source: Nordicity: [The Economic Contribution of the Film and Television Sector in Canada, July 2013](#)). Utilizing the Nordicity model, the following estimates can be made about the impact of Northern Ontario's overall film and television production industry from 2012 through 2015:

## Summary of Economic Impact of Northern Ontario's Film and Television Production Industry (4 Year)

Model Baseline Figures	2012/13	2013/14	2014/15	2015/16	
CAVCO Model (50% of known regional production costs)	\$20,918,991	\$37,872,036	\$25,441,959	\$36,273,660	Note 1
Average FTE salary in Film / TV Production (Canada)	\$57,900	\$59,423	\$60,552	\$61,168	Note 2
Provincial adjustment factor (Ontario)	0.992	0.988	0.984	0.984	Note 2
Adjusted Average FTE Salary	\$57,437	\$58,710	\$59,583	\$60,189	Note 2

Estimated Impacts	2012/13	2013/14	2014/15	2015/16	Total	
Estimated FTE Direct Jobs	364	645	427	603	2039	Note 2
Estimated FTE Indirect Jobs	426	755	500	705	2385	Note 2
Estimated FTE Induced Jobs	134	195	158	222	709	Note 2
<b>Estimated Total FTE Jobs</b>	<b>924</b>	<b>1594</b>	<b>1084</b>	<b>1530</b>	<b>5133</b>	
Direct production industry labour income	\$21,075,600	\$38,332,020	\$25,855,649	\$36,863,476	\$122,126,745	
Spin-off labour income	\$21,846,224	\$37,023,655	\$25,627,248	\$36,169,875	\$120,667,002	Note 2
<b>Estimated Total Labour Income</b>	<b>\$42,921,824</b>	<b>\$75,355,676</b>	<b>\$51,482,897</b>	<b>\$73,033,350</b>	<b>\$242,793,747</b>	
Gross Domestic Product (Direct)	\$23,815,428	\$43,315,183	\$29,216,884	\$41,655,727	\$138,003,222	Note 2
Gross Domestic Product (Spin-Off)	\$35,484,988	\$55,165,247	\$38,184,599	\$62,067,034	\$190,901,867	Note 2
<b>Estimated Total Gross Domestic Product</b>	<b>\$59,300,416</b>	<b>\$98,480,429</b>	<b>\$67,401,483</b>	<b>\$103,722,761</b>	<b>\$328,905,089</b>	

Note 1 - model source: CAVCO as outlined by Nordicity reports commissioned by the CMPA

Note 2 - model source: Statistics Canada as outlined by Nordicity reports commissioned by the CMPA

## 5.2 Estimated Impacts by Municipality

The preceding assessment of the 4-year impact of Northern Ontario film and television production industry indicates that investments by the NOHFC (and, in many cases, the subsequent public sector investments made by the Ontario Media Development Corporation and Telefilm Canada) are attracting significant private sector investments in Northern Ontario's industry, and are generating substantial returns to the overall GDP.

While this impact is not felt in Northern Ontario alone (as public sector investments have been largely designed to attract established production companies from outside Northern Ontario), the industry's track record in developing a regional crew and service-support base, and of fostering the development and/or arrival of notable production support companies is ensuring that much of the overall impact is being felt in the region. See **APPENDIX I: NOTABLE PRODUCTION SUPPORT SERVICES**.

The following estimates of production activity impacts by municipality look at the total impact of a production (using Nordicity modeling) and not the direct impact felt by these municipalities. While these estimates are not meant to suggest that regional municipalities are in any way the sole beneficiaries of substantial production activity, they do illustrate two very important factors:

1) the pan Northern approach to production industry development and growth has been widely embraced across the region and; 2) that towns and cities impacted by film and television production activity have proven themselves capable of supporting the major investments of time, space, people and money that are required by mid-sized productions. The following is also a compilation of 4-year data to ensure that data estimates could maintain an accepted degree of integrity as the focus narrowed.

**Summary of economic impact in each major Northern Ontario production centre (2012/13 - 2015/16)**

Estimated Impacts	Greater Sudbury	Sault Ste. Marie	North Bay	Thunder Bay	Parry Sound	Other
Estimated FTE Direct Jobs	935	407	261	20	271	144
Estimated FTE Indirect Jobs	1094	477	306	23	317	169
Estimated FTE Induced Jobs	331	139	84	7	96	51
<b>Estimated Total FTE Jobs</b>	<b>2360</b>	<b>1024</b>	<b>651</b>	<b>50</b>	<b>685</b>	<b>364</b>
Direct production industry labour income	\$56,250,227	\$24,259,599	\$15,541,817	\$1,189,360	\$16,157,916	\$8,729,456
Spin-off labour income	\$55,574,105	\$24,029,637	\$15,187,581	\$1,178,853	\$16,136,853	\$8,561,781
<b>Estimated Total Labour Income</b>	<b>\$111,824,331</b>	<b>\$48,289,235</b>	<b>\$30,729,398</b>	<b>\$2,368,213</b>	<b>\$32,294,769</b>	<b>\$17,291,237</b>
Gross Domestic Product (Direct)	\$63,562,756	\$27,413,346	\$17,562,254	\$1,343,977	\$18,258,445	\$9,864,285
Gross Domestic Product (Spin-Off)	\$89,643,881	\$37,114,324	\$23,247,790	\$1,756,492	\$25,249,327	\$13,893,332
<b>Estimated Total Gross Domestic Product</b>	<b>\$153,206,637</b>	<b>\$64,527,670</b>	<b>\$40,810,044</b>	<b>\$3,100,468</b>	<b>\$43,507,772</b>	<b>\$23,757,618</b>

## 6.0 DEFICIENCIES & OPPORTUNITIES

The MFM project consultation has always been a valued core activity for the staff whether it occurs through online platforms, the phone or in person. It fulfills many of the organization's objectives while maintaining a strong connection to the artists, communities and stakeholders we serve. From the veteran Location Manager scouting for that perfect cottage, to the aspiring teen videographer pitching her first script, to the stressed producer hiring dailies for the next morning, each consultation raises questions about how to respond to current and anticipated challenges and how to design a relevant guiding framework to do so effectively moving forward. The opportunity to consult on so many different budgets, screenplays, business plans and passion projects allows MFM staff to stay as up to speed as possible while also prioritizing long-term infrastructure strategy and sustainability.

Since MFM's relaunch in 2014, a number of gaps in the regional production ecosystem have become apparent. More often than not, these service gaps fall squarely on deficiencies in production infrastructure. It has been remarked on numerous occasions that there is a 'wild west' atmosphere in this region where support services and infrastructure cannot possibly keep up with the accelerated pace of productions. This sense of urgency can sometimes be detrimental to local stakeholders as they are overlooked for business opportunities by visiting productions who prefer to use familiar, non-local vendors to taking a chance on a new local start-up. These deficiencies in service providers have not gone unnoticed by regional crew as **25%** of crew survey respondents reported owning a film related business venture operating in Northern Ontario with another **15.5%** claiming to have serious plans but no significant revenue to report.

### 6.1. Equipment Gaps

There is a notable lack of access to equipment in Northern Ontario, particularly for productions with micro and very low budgets (music videos, indie films, web series, docs, shorts, etc). Unless a filmmaker has trusted contacts, who are willing to lend or share their equipment, the only alternatives are to rent from an equipment house in Toronto and travel or ship to Northern Ontario, to borrow from an existing Northern Ontario film school (usually limited to current or former film production students), or to own your own equipment, which is not always affordable when considering the combined costs of camera, sound, grip and lighting packages.

More options are available for the established or visiting production companies producing television or features. Two of Toronto's leading equipment houses now have branch outlets in

Northern Ontario: William F. White at NOFS in Sudbury and PS Production Services MNFS in Parry Sound. Despite their presence in Northern locations, the inventory located at these outlets is, according to many Directors of Photography and Key Grips, subpar in comparison to their Toronto locations, and as such productions are often forced to make the trek back and forth to Toronto on numerous occasions for acceptable equipment packages. Further compounding this challenge, production companies will then rent their package trucks and camera trucks directly from Toronto for convenience. Even though this may reduce the production's 'northern spend' (and its ability to leverage funding from the NOHFC), this is still the most reliable and predictable equipment option for professionals who expect a certain level of quality in their work. As demand continues to grow, it can be assumed that the market will adapt and we will begin to see more services available for the various production types.

While it is anticipated that the industry will evolve to address equipment related challenges it should be noted the workable gear that is or likely will be parked in Northern Ontario should be regarded as reserved for larger productions and not suitable or affordable for smaller shoots. Options for professional camera and lens packages are almost non-existent in Northern Ontario despite a thriving independent film community. According to this report's crew survey, when asked if participants felt if there is enough accessibility to gear in Northern Ontario for independent filmmaking endeavors, **38%** felt that there is not while another **38%** did not consider themselves informed enough on the topic to comment. Furthermore, **55%** of survey participants report currently having an ongoing or potential passion project that would be ideal to develop in the North and **69%** of them claim that their current involvement in the film industry is not satisfying their creative outlet in life. This combination of untapped creativity and desire to produce Northern passion projects could certainly be addressed through increased accessibility to technical filmmaking equipment and gear.

## **6.2 Training**

**6.2.1 Training Gaps:** Through implementation of the MAPPED crew training program, MFM is noticing a serious gap in training opportunities in Northern Ontario. Larger cities such as Toronto will be able to support a very wide mix of training programs, but in Northern Ontario, there is a perception from certain unions and professional associations that there is not enough critical mass to make training viable. For many emerging production crew seeking to build up their skills set, conventional education is unaffordable or not practical. Other than the accredited two, three and four year programs, there is no regular, structured practical training or pathway to certification when required by a specialized trade. Trade unions and related organizations do,

on occasion, facilitate specific skills training events, but these are typically introductory in nature, or one-off events with little follow up or connection to the daily realities of production. MFM and Cinéfest have worked together to host high quality workshops and seminars with prestigious partners like DOC Institute of Canada, Liaison of Independent Filmmakers of Toronto (LIFT) and Interactive Ontario. MFM also launched and hosts the four-part Expert Film Panel Discussion Series in partnership with the Greater Sudbury Development Corporation (GSDC).

**6.2.2 Training Opportunity:** There is a high demand for different programs shaped to place people where the production pays minimum wage, while the trainee works on set to get hands on experience. The trainee is graded by their mentors, and placed on three shows before being assessed for membership). It would be advantageous to offer a short-term placement program for new trainees in film, to allow new potential employees to get their foot in the door. Since MFM's trial panel series in the City of Greater Sudbury has consistently generated strong attendance and engagement, MFM has an opportunity to expand the Expert Film Panel Series across Northern Ontario's key production centres. Crew survey respondents favoured training in Northern Ontario over travelling to the GTA overwhelmingly, with **66%** of respondents preferring to attend training and professional development workshops in a Northern Ontario municipality.

### **6.3 Travel Distance**

Crew must travel great distances to work across the region. With the high volume of production shooting in Northern Ontario, it is often necessary to hire crew members from other Northern communities to fully staff a production. This has forced a significant amount of crew to become very transient, which is not always a consequential phenomenon. With a better understanding of the strengths and weaknesses of each community regarding their film crew expertise, it may be possible to help address these deficiencies and support the incremental growth needed to sustain the industry.

In the Crew Survey, "driving in bad weather or long distances" was the second most popular answer to "Please list three negative aspects of working in Northern Ontario's film industry", with **27%** of respondents listing these issues. MFM has combatted this challenge of long distances in the past by directing its resources to transporting students to professional development activities taking place in Sudbury. In addition to this, MFM is currently developing a formal subscriber program where discounted rental cars & trucks as well as access to transportation vouchers and gas cards have been identified as priority perks for MFM's potential subscribers.

# APPENDIX A: MAP OF NORTHERN ONTARIO



SOURCE: Northern Ontario Heritage Fund Corporation

## **APPENDIX B: NORTHERN ONTARIO FILM & TELEVISION ADVISORY COMMITTEE**

### **Senior Film Advisor:**

Mark Palumbo (*MFM* Founding Partner)

### **Greater Sudbury Representative:**

Matt Ellis (Crew Member & *IATSE 634* Union Rep.)

### **North Bay Representative:**

Holly Cunningham (*Near North Mobile Media Lab*, Executive Director)

### **Parry Sound Representative:**

Wendy Morrow (*Muskoka North Film Studios*, Owner & Operator)

### **Sault Ste. Marie Representative:**

Jennifer Mathewson (Crew Member & *soofilms.com* Founder)

### **Thunder Bay Representative:**

Milosz Skowronski (*Imaginarium Studios*, Owner, Operator & Filmmaker)

## APPENDIX C: PROJECT PHASES

Each phase of research, some of which overlap between primary and secondary research, is summarized as follows:

### Phase 1: Broad Scope Research

- Identify main topics to be addressed and data requirements;
- Create lists of all stakeholders (Leading and Supporting);
- Review all relevant internal MFM documents , reports and research;
- Mapping of all regional production activities since 2001;
- Conduct scan of relevant reports and recent media coverage;
- Review and collate up-to-date crew and services data from new [portal metrics](#).

### Phase 2: Preliminary Report and Profile

- Establish early-view observations for further investigation;
- Develop quantitative method for ongoing coordination of data and stats;
- Develop preliminary report document for team review and presentation.

### Phase 3: Surveys (continuous through subsequent phases)

- Design and test long and short-form surveys;
- Distribute surveys to lead and support stakeholders;
- Promote survey participation for ongoing data collection.

### Phase 4: Interviews

- Translate survey data into quantitative and qualitative matrix of information;
- Revise and/or calibrate report as required.

### Phase 5: Analysis

- Collate and interpret research data for key topic points;
- Create comprehensive mapping and/or list of infrastructure, assets, crew;
- Develop economic impact using CIPA method;
- Establish findings and recommendations.

### Phase 6: Review

- Prepare draft final report for review.

### Phase 7: Presentation

- Present final report to OMDC and other stakeholders;
- Publish and distribute across various platforms and channels for the public record

## APPENDIX D: REPORT STRUCTURE

**1.0 Introduction:** contains a brief history of how Northern Ontario came to be a film and television production centre and describes the organization and contents of this report.

**2.0 Methodology:** outlines the process used for the quantitative and qualitative research conducted for this report using primary and secondary sources. We explain our processes, survey procedures, interviewee selection criteria, other studies and documents, etc.

**3.0 Geography:** provides an overview of the places and communities covered in this report. Northern Ontario is a vast area with diverse communities, many of which have played host to motion picture productions.

**4.0 Assets and Resources:** presents a profile of quantitative, comprehensive, detailed inventory of all Assets and Resources resulting from extensive outreach, surveys and interviews. This information is broken down as unique resource profiles sorted by all relevant variables including community, date established, frequency of use, production connections, ownership, value, etc.

**5.0 Economic Impact:** investigates the financial benefits generated for the region through the production activity presented in Part 3. While this report is not intended to be a complete economic analysis, it does provide a look at direct, indirect and induced economic impact of a sample of production centres with available information from 2009-2015.

**6.0 Opportunities and Deficiencies:** presents a qualitative review of the results with input from leading stakeholders, industry experts, etc. Assessment of strengths, deficiencies, capacity, etc. Recommendations made by the MFM team based on the key factors uncovered in this report.

## APPENDIX E: FULL-LENGTH PRODUCTION STATS

The following statistics represent known and tracked full-length film and television productions that have shot in whole or in part in Northern Ontario's largest cities and primary production centres from 2001-2016.

**Number of full-length productions in the largest Northern Ontario cities and primary productions centres (per year).**

	Greater Sudbury	Sault Ste. Marie	North Bay	Thunder Bay	Town of Parry Sound	Timmins	Total
2001	1	0	0	0	0	0	1
2002	0	0	0	2	0	0	2
2003	1	0	0	2	0	0	3
2004	3	1	1	3	0	0	8
2005	5	0	1	5	0	0	11
2006	1	0	0	6	0	0	7
2007	6	1	0	4	0	0	11
2008	3	0	1	4	0	0	8
2009	5	1	3	5	0	0	14
2010	4	4	2	3	2	0	15
2011	6	1	0	3	0	0	10
2012	11	4	4	0	3	0	22
2013	7	3	1	1	1	0	13
2014	10	6	2	4	4	0	26
2015	23	5	7	1	1	1	38
2016	15	2	7	2	2	0	28
<b>Total</b>	<b>101</b>	<b>28</b>	<b>29</b>	<b>45</b>	<b>13</b>	<b>1</b>	<b>217</b>

## **APPENDIX F: PRIORITY POSITIONS**

### **Northern Ontario Priority Crew Positions (as identified by MFM for MAPPED Crew Training Application Assessment)**

The following list represents film and television production crew positions that have been identified as currently in demand within Northern Ontario's film industry. These positions will be given priority over others when MAPPED Crew Training applications are assessed. This means that your application will score higher if Northern Ontario residents are hired in these listed priority positions. Note: Priority status will also be given to lead positions from several departments including Accounting, Art, Locations & Production.

To provide the most recent example, the following is a listing of priority positions most recently identified by MFM in its MAPPED funding guidelines:

1. Script Supervisor
2. Location Manager
3. Location Scout
4. Props Master
5. 1st Assistant Director
6. Production Manager
7. Costume Designer
8. Daily Picture Editor/Assistant Daily Picture Editor
9. Gaffer
10. Sound Mixer
11. Boom Operator
12. Production Coordinator
13. 2nd Assistant Camera
14. Lead Production Accountant
15. Assistant Production Manager

## APPENDIX G: POST-SECONDARY EDUCATION

**Algoma University, Sault Ste. Marie:** [English & Film \(BA, 4 years, theory\)](#)

**Thornloe University, Sudbury:** [Motion Picture Arts Production \(BFA, 4 years, theory and practice\)](#)

**Cambrian College, Sudbury:** [Theatre Arts - Technical Production \(Diploma, 2 years, practical\)](#)

**Canadore College, North Bay:** [Digital Cinematography \(Diploma, 3 years, theory & practical\)](#)

[Broadcasting - Television and Video Production \(Diploma, 2 years practical\)](#)

**College Boreal, Sudbury & Timmins:** [Theatre Arts - Technical Support and Stage Management \(Diploma, 2 years practical at Sudbury campus only\)](#)

[Hairstyling \(Diploma, 1.5 years, practical\)](#)

**Confederation College, Thunder Bay:** [Film Production \(Diploma, 2 years practical\)](#)

**Sault College, Sault Ste. Marie:** [Digital Film Production \(Diploma, 2 years practical\)](#)

[Hairstyling \(Diploma, 1.5 years practical\)](#)

**Modern College of Hairstyling & Esthetics, North Bay & Sudbury:** [Hairstyling \(Diploma, 1.5 years practical\)](#)

**Northern College, Haileybury, Kirkland Lake, Moosonee & Timmins:** School of Engineering Technology & Trades:

[Construction Engineering \(Diploma, 2 years practical at Timmins campus only\)](#)

[Electrical Engineering Technology \(Diploma, 1, 2 or 3 years practical\)](#)

**Weengushk Film Institute:** Manitoulin Island's Private Film Training School offers an alternative path tailored to the needs of Aboriginal youth. WFI offers tailored practical Film Production training with a [one-year Film Production Certificate Lab 1](#) from **Brock University**.

## **APPENDIX H: NOTABLE PRODUCTION SUPPORT SERVICES**

### **EQUIPMENT RENTALS**

Canadian Technical Solutions  
Cinevate Inc. (Thunder Bay)  
Clairmont Cameras (Sudbury)  
Cooper Equipment Rentals (Sudbury, North Bay, Timmins, Kapuskasing, Bracebridge)  
Inspired Image Picture Company  
Near North Mobile Media Lab (North Bay)  
Near North Video Productions (South Porcupine)  
The SIM Group (Parry Sound)  
William F. White International Inc. (Sudbury)

### **POST-PRODUCTION**

Technicolor  
PS Post Production  
Post Production North (North Bay)  
Kingly Post Production (Thunder Bay)  
Near North Video Production (South Porcupine)  
Dining Room Studios (Thunder Bay)  
Deluxe Post-Production  
Affinity Production group (Ottawa)

### **PRODUCTION SERVICES**

Applewagon Films  
Black Rock North Media  
Bush League Films  
Carte Blanche Films  
College Boréal's La Boite Noir  
Copperworks  
Edge Enterprises  
Epica Pictures  
Imaginarium  
Imagine Films  
Inspired Image Picture Company  
Gallus Entertainment  
Hideaway Pictures  
Lazajam Sonic & Technical Production  
MorVision Video Productions  
MotionArc Studios  
Near North Video Productions  
Nortario Films  
Outpost Media  
Sheba Films  
Spun Creative  
Theymedia  
Thunderpeg Creative  
Thunderstone Pictures  
Westfort Productions

## **APPENDIX I: MAJOR AWARD-WINNING NORTHERN ONTARIO PRODUCTIONS**

### **CANADIAN SCREEN AWARDS**

#### **2017**

##### *AMAZING RACE CANADA*

Best Reality / Competition Program or Series

(Episode 6 of Season 3, "Who is Alex Trebek?" which was #shotuphere in Sudbury was the most viewed episode in history at time of airing).

##### *BORN TO BE BLUE*

Achievement in Music – Original Score

Achievement in Music – Original Song

##### *LETTERKENNY*

Best Comedy Series

Best Direction in a Comedy Program or Series

Best Writing in a Comedy Program or Series

##### *PAINTED LAND: IN SEARCH OF THE GROUP OF SEVEN*

Barbara Sears Award for Best Editorial Research

##### *SLASHER*

Best Performance by an Actress in a Featured Supporting Role in a Dramatic Program or Series

##### *TWO LOVERS AND A BEAR*

Achievement in Art Direction / Production Design

Achievement in Editing

#### **2016**

##### *SLEEPING GIANT*

Best Performance by an Actor in a Featured Supporting Role

##### *REMEMBER*

Best Original Screenplay

#### **2013**

##### *STILL MINE*

Best Actor in a Leading Role

## **GENIE AWARDS**

**2010**

*ONE WEEK*

Best Actor in a Leading Role

**2007**

*SNOW CAKE*

Best Actress in a Supporting Role

## **GEMINI AWARDS**

**2010**

*THE SUMMIT*

Best Dramatic Mini-Series