

Cultural Industries Ontario North
2024

NORTHERN ONTARIO **WORKFORCE ASSESSMENT AND STUDIO INFRASTRUCTURE REPORT**

Working to cultivate a thriving
film and television ecosystem
in Northern Ontario





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Executive Summary

The Northern Ontario Workforce Assessment and Studio Infrastructure Report, completed by Cultural Industries Ontario North (CION) with support from Ontario Creates, presents a comprehensive analysis of the pan-Northern Ontario Film and Television industry by capturing valuable insights from a diverse range of stakeholders who have vested interest in the development and sustainability of the region's growing production crew workforce. The findings outlined in this report were informed through the consideration of essential feedback gathered from interviews conducted by CION's Workforce Assessment & Planning Officer with 16 key representatives; including support stakeholders; investors; filmmakers; producers; union representatives; crew members; services providers; vendors; and educators. Metrics and findings in this report were also aggregated from survey responses that CION collected from Film & TV production crew members who operate in Northern Ontario.

This workforce development study will identify pathways for workforce development through partnerships with Film & TV unions, regional post-secondary institutions, and job placement agencies by analyzing current skills/experience gaps and labour market demands. To ensure an expanded workforce capacity that serves the demands of new studio infrastructure, this study will also recommend on-site training programs for entry-level crew members that can be utilized in existing and new infrastructure spaces.



Introduction

The Province of Ontario is a pillar of global film and television development; a status supported by Ontario Creates' most recent Productions Statistics report, which revealed a record-breaking contribution of \$3.15 billion to Ontario's economy in 2022.¹ Although most Film & TV production activity is found in Southern Ontario (specifically the GTHA area), the province's northern communities (Greater Sudbury, North Bay, and Sault Ste. Marie, predominately, with residual activity occurring in other centres) continue to experience year-over-year increases (generating 137.27 million in Northern Ontario in production spend in 2022).

With its impressive ecosystem of production crew members, creative industries, and production expertise, Northern Ontario's growing production infrastructure, unique locations, experienced workforce, and generous financial incentives continue to attract high-level productions. Notable productions recently filmed in Northern Ontario include *Shoresy* Season 2 (2023), *SkyMed* Season 2 (2023), *Everything's Going to be Great* (2023), *My Animal* (2023), *Essex County* (2022), *The Lake* Season 2 (2022), *Letterkenny* Season 7 (2022), and *Resident Evil: Welcome to Raccoon City* (2021).

The Northern Ontario Heritage Fund Corporation (NOHFC) plays a crucial role in supporting the industry growth through the Film & Television Stream, which funded 160 projects with grants totaling \$130 million between 2012-2021.² The Film & Television Stream is designed to increase industry jobs and investment through funding (up to \$2 million) that is based on a project's total level of spending in Northern Ontario. Production development funds available through the NOHFC compliment generous tax credit incentives provided by both the Federal and Provincial Governments that foster production activity and encourage the hiring of talent from Northern Ontario.

Northern Ontario has emerged as one of the fastest-growing Film & TV production jurisdictions in North America. The natural progression of Northern Ontario as an increasingly competitive production jurisdiction is the investment in and introduction of state-of-the-art infrastructure—a progression supported by the emergence of pan-Northern studio interests.

Supported from a global perspective, the demand for filmed content has experienced an unprecedented increase in recent years, which has been accompanied by an equally unprecedented demand for production studio space. In Ontario, studios have been operating at full capacity since

¹ Ontario Creates. [2022 Film and Television Production Statistics](#). Accessed on July 20, 2023.

² CION provided data from the NOHFC related to 2012-2021 approved funding.



2016, resulting in hundreds of millions of production dollars being turned away and potential regional jobs being unfulfilled.

As studio infrastructure developments arrive in Northern Ontario a remarkable milestone in the region's journey towards becoming a recognized center for production excellence is achieved. The introduction of such facilities that both allow for the development of new training opportunities and provide year-round employment options for the regional workforce will allow Northern Ontario to contribute to the global entertainment industry like never before.

Methodology

The primary goals of the workforce development study are to demonstrate Northern Ontario's current and historical levels of production activity, assess the current state of Northern Ontario's production crew workforce, assess labour market gaps in the current workforce, and review methods to address identified gaps.

In assessing current and historical levels of production activity, CION utilized data provided by the NOHFC to determine the number of productions by format, annual production volumes, and overarching trends. CION's own production tracking mechanisms (including CION's Hotlist) were also used to categorize production trends by major district or municipality and assigned Budget Type Scales, from A-F based on production budgets. While these budget categories are in line with and estimated based on Director's Guild of Canada (DGC) Budget Tier categories, factors other than total budget (length of production shoot, key talent, etc.) apply, CION is using budget primarily as the metric to sort productions. The report also utilizes publicly available data on existing and planned studio infrastructure projects to assess the current state of Northern Ontario's studio infrastructure.

Following analysis of production trends, the report assesses current activity in Northern Ontario's production crew workforce through export and analysis of the Crew Database (CION's online resource for hiring regional production crew). For this study, wherein current workforce gaps are analyzed to inform impactful investment and development opportunities, CION grouped members of its Crew Database into three main categories: Creative, Administrative, and Technical (see Appendix B). The Crew Database was also used to establish baseline metrics relating to Northern Ontario's workforce capacity with respect to the major departments involved in the production of Film or TV projects.

To assess the level of work available to the existing production crew workforce base, and to determine the number of productions required for crew to maintain a full-time equivalent salary, CION conducted a survey that focused on the number of productions worked per year by regional crew. The survey was distributed to over 900 users of CION's Crew Database and yielded 50 responses. These



survey results are utilized to compare the average number of productions worked on by film crew members in Northern Ontario versus the stated (and projected) crew requirements for productions of various Budget Types.

To demonstrate existing workforce gaps and the number of production crew increases required to effectively service productions based on budget types, Northern Ontario's current crew capacity was compared to projected workforce demands that were calculated using available data from the Summer of 2022, when several large-scale projects experienced similar production cycles that caused labour market demands to outweigh the regional capacity.

To further assess workforce gaps, CION interviewed key industry stakeholders from Ontario's Creative, Administrative and Technical workforce. The three core topics of CION's interviews with stakeholders included: 1) the current state of Northern Ontario's Film & TV production industry, 2) proven gaps and challenges that hinder the sustainability of Northern Ontario's Film & TV production industry, and 3) the necessary preparations prior to the arrival of a new studio infrastructure in Northern Ontario.

To ensure that the perspectives reflected in this study were informed, well-rounded, and relevant to the lived experiences of Northern Ontario's diverse Film & TV production crew workforce, CION utilized a curated approach in soliciting stakeholder interviews that encompassed both historic contributors to the industry and equity-seeking collaborators. From this, producers, directors of photography, key accountants, production designers, costume designers, key scenic artists, animators, BIPOC filmmakers, equipment service providers, DGC Ontario Caucus Representatives and I.A.T.S.E. Business Agents were interviewed, with each offering insight into the regional workforces' Creative, Administrative, and Technical capacities. Using publicly available planning information, the report lists upcoming studio infrastructure projects planned for construction, with a focus on Freshwater Production Studios (FPS) —a purpose-built production studio conducive to year-round employment for regional production crew members for which CION supported market analysis and business plan development beginning in 2020. Since this work was completed, a number of new purpose-built and retrofit studio projects have been conceptualized across Northern Ontario. As part of this study, industry stakeholder interviewees were asked to assess how Northern Ontario's production crew workforce would need to grow to meet the needs of new purpose-built and retrofit studio projects,



About CION

Cultural Industries Ontario North (CION)

Cultural Industries Ontario North (CION) is dedicated to stimulating and promoting the production industries in Northern Ontario and providing educational programming to cultivate the advancement of Northern Ontario's emerging talent. CION works within the boundaries of Northern Ontario, which includes a population of nearly 800,000, millions of hectares of vast natural landscapes and six major cities to host film productions. CION actively connects music and film artists and practitioners with opportunities and resources, including outreach and consultations, to advance their projects and careers.

CION's ongoing advocacy for Northern Ontario's production output is carried out to contribute to further developing Northern Ontario's thriving cultural industries. Making significant progress in several key areas, CION provides up-to-date resources, professional development opportunities, networking events and diverse workforce training, both in-person and virtually for the film and music industries. Recently, CION expanded its digital infrastructure; enhancing the functionality of its online database for film crew and industry professionals; introducing a Regional Resources database for the production industry; initiating a dynamic Film and TV Project Pitch Exchange (connecting producers with municipal stakeholders to explore Northern Ontario's amenities, incentives, and locations); and actively contributing to the development of "Freshwater Production Studios (FPS).

CION's commitment to developing Northern Ontario's workforce has been at the forefront of its work since the organization's inception in 2012. CION's Crew Database represents a hotbed for hiring eligible production crew members to meet funding requirements, with over 1021 Crew Profiles to choose from. This commitment is also exemplified through the Media Arts Production: Practiced, Employed, Developed (MAPPED) initiative—a program designed to provide crucial support to the film and television production sector by subsidizing the wages of promising production crew members.



The Current State of Northern Ontario's Film & TV Production Industry

Film and Television Production in Northern Ontario

The film and television production industry's contributions to the provincial economy in 2022 generated 45,891 full-time equivalent direct and spin-off jobs for Ontarians.³ Competitive financial supports administered by the Federal and Provincial governments continue to attract foreign and domestic producers to the province, and Northern Ontario is no exception.

Northern Ontario has significantly bolstered the economic influence of provincial film and television productions, positioning itself as a vital contributor through two decades of successful servicing and attraction of incoming productions.

Recent mid to large-sized domestic television series that engaged Northern Ontario suppliers, vendors, and talent, and greatly contributed to Ontario's record-setting economic impact include *Essex County*, *The Lake*, *Letterkenny*, *Shorsey*, and *SkyMed*.

Northern Ontario has also witnessed an increased demand for production infrastructure and talent. As Subscription Video on Demand (SVOD) services compete by creating unique content, this trend presents opportunities for local filmmakers, crew members, and creative professionals to engage with globally recognized platforms.

³ Ontario Creates, [2022 Film and Television Production Statistics](#). Accessed on July 20, 2023.

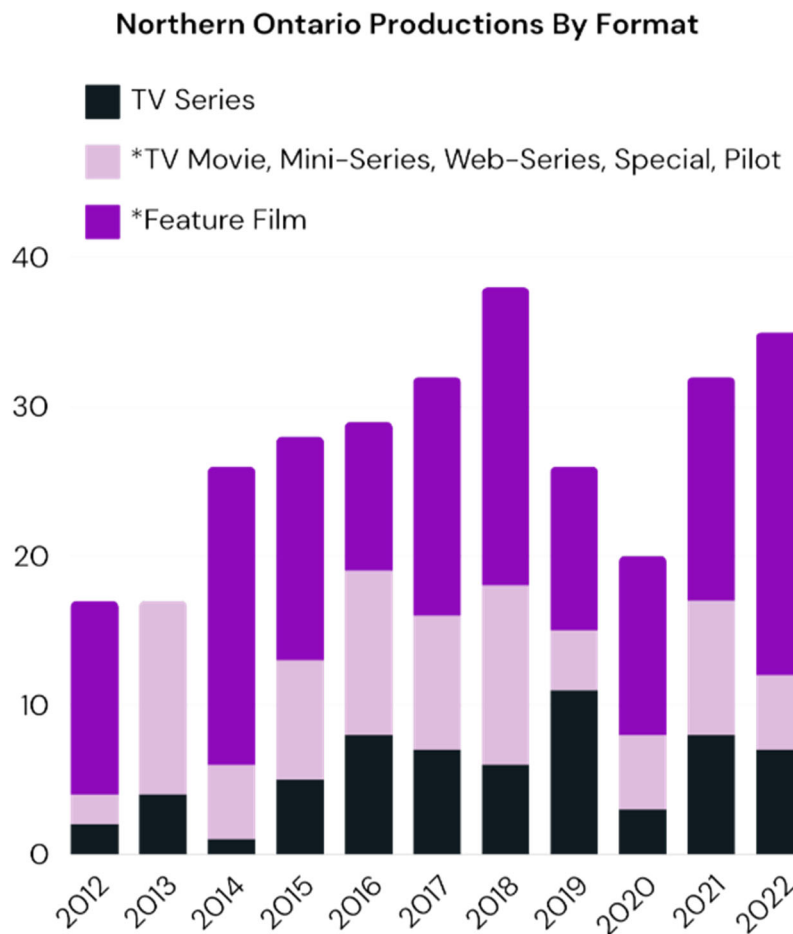


CHART A: Combined Domestic and Foreign Northern Ontario Productions by Format (2012-2022)

Features and Series Production Volume in Northern Ontario:

- 1.1 billion in total production spend from 2012-2022 in Northern Ontario
- 2022 saw a remarkable surge in feature film production (23)
- 2019 saw the highest number of television series (11)
- This period shows relatively stable growth with some variations (i.e. growth of television productions in 2019 came at the expense of fewer film productions. Decrease in 2020 resulting from the COVID-19 pandemic).

The volume of film and television productions in Northern Ontario since 2012 shows a consistent upward trajectory and accounted for 12% of Ontario's total production in 2018. From 2019 to 2022, it remained stable at 7% of Ontario's production.

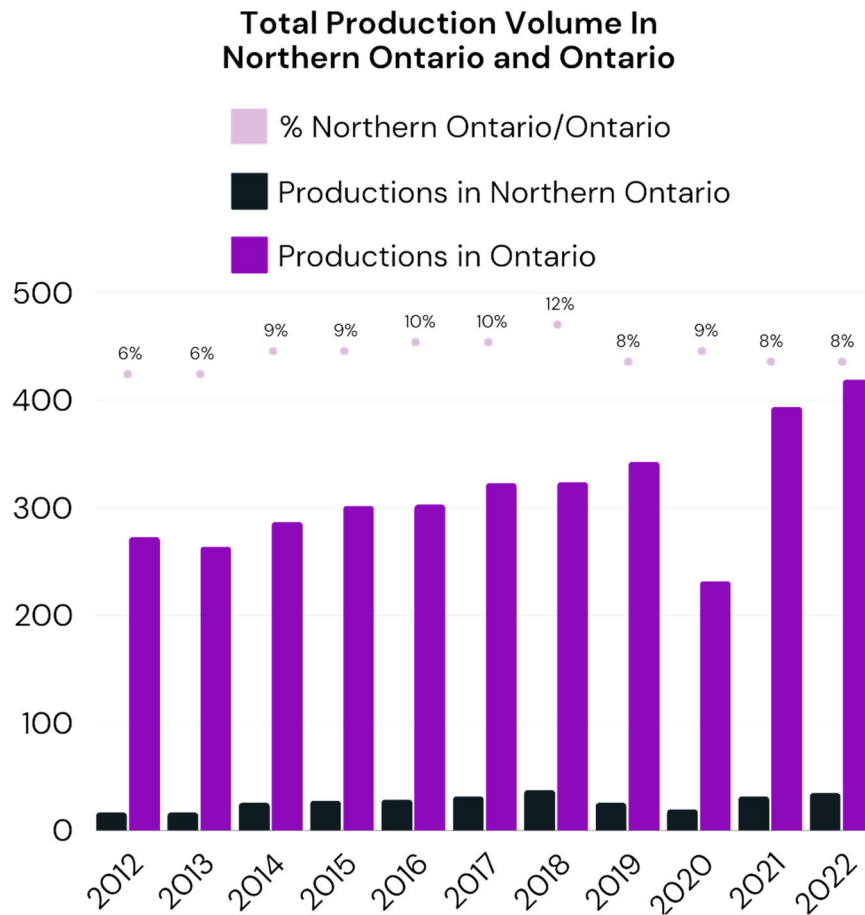


CHART B: Total Production Volume in Northern Ontario and Ontario

The Northern Ontario Heritage Fund Corporation (NOHFC)

The NOHFC introduced its film funding program in 2005 with the objective of advancing the development of a successful film and TV production industry in the North. Since 2009 the rate of production has increased consistently as producers from Ontario and beyond discovered the financial benefits of shooting in Northern Ontario.

The NOHFC's program has evolved to become even more attractive to producers. From a "50/50 grant/loan" funding formula (with a maximum of \$1M per production), to the recently announced maximum of \$2 million, the NOHFC has been instrumental in building the industry in Northern Ontario.



Northern Ontario Heritage Funding Corporation (NOHFC) Film and Television Funding Stream

The NOHFC's Film and Television Stream is designed to increase film and television industry jobs and investment and to support quality film and television productions in Northern Ontario. Funding is based on the project's total level of spending in the region.

The NOHFC has supported over 142 productions from 2013-14 to 2020-21 representing an estimated \$107.6 million in production costs.⁴ In 2020 alone, 28 film and television productions received over \$23 million of financial support from the NOHFC.

Chart C

Year	Feature Production	Television Production	# of NOHFC Funded Projects	Total of NOHFC Funded Projects
2020-2021	\$7,663,472	\$15,647,462	28	\$23,310,934
2019-2020	\$6,500,000	\$17,331,589	25	\$23,831,589
2018-2019	\$7,586,064	\$15,311,756	27	\$22,897,820
2017-2018	\$2,623,580	\$8,586,760	16	\$11,210,340
2016-2017	\$3,972,653	\$13,854,824	25	\$17,827,477
2015-2016	\$1,135,463	\$2,000,000	9	\$3,135,463
2014-2015	\$1,435,000	\$1,500,000	7	\$2,935,000
2013-2014	\$1,500,000	\$1,000,000	5	\$2,500,000

CHART C: NOHFC Funded Projects in Northern Ontario

The skill-sharing component of the NOHFC's Film & Television Funding Framework, in past years, featured a provision allowing individuals not from Northern Ontario to be considered an eligible expense for NOHFC cost reimbursement if they served as mentors to emerging crew who are residents of Northern Ontario (imparting their expertise and training to inexperienced workers in a

⁴ Total NOHFC Northern Ontario Project funding data provided by CION.



specific production). This provision applied to all above-the-line crew members (excluding Performers) and below-the-line crew. Today, NOHFC assistance is provided in the form of a conditional contribution up to 50% of eligible costs incurred by productions with workers, service-providers, and venues that are in Northern Ontario.

As such, the discontinuation of the NOHFC's Deeming/Mentoring Provision, taking effect with the NOHFC's April 30, 2023, intake round, offers a new opportunity to positively impact workforce development for the Northern Ontario film and television industry (and more specifically, Northern Ontario workers). By removing the deeming component, the NOHFC anticipates that more crew will be hired from Northern Ontario in key positions, rather than continually sourcing and deeming key positions from external markets. Supporting and expanding a base of skilled workers from Northern Ontario in key positions is the next logical step to foster long-term sustainability and greater efficiencies within Northern Ontario's production sector.

Consultations with the NOHFC reveal that program support for infrastructure projects could potentially extend to studio projects that align with the NOHFC's infrastructure development priorities and guidelines.

Northern Ontario Production Volume and Trends

The primary focus of this study is to assess Northern Ontario's capacity to service Tier I production studios and increases in annual production activity. Available data on annual production volumes, total project budgets, and crew sizes helped categorize Northern Ontario's current film and television workforce into 3 distinct categories: Creative, Administrative, and Technical. This method was used by CION to quantify regional workforce metrics relative to projected increases in film and television activity across Northern Ontario.

**CION used tax credit data, detailed film budgets and workforce metrics from the Crew Database and available crew lists to estimate current workforce statistics in Northern Ontario based on Production volume.*



Chart D

*Type Scale	*Aggregated Budget (\$)	Average Workforce Size
A	30 mil or more	220
B	15 mil or more	170
C	10 mil or more	112
D	5 mil or more	82
E	2.75 mil or more	72
F	1 mil or below	65.50

CHART D: Production Budget & Workforce Overview

*F Type Scale does not include short films, documentary, commercials, or music videos.

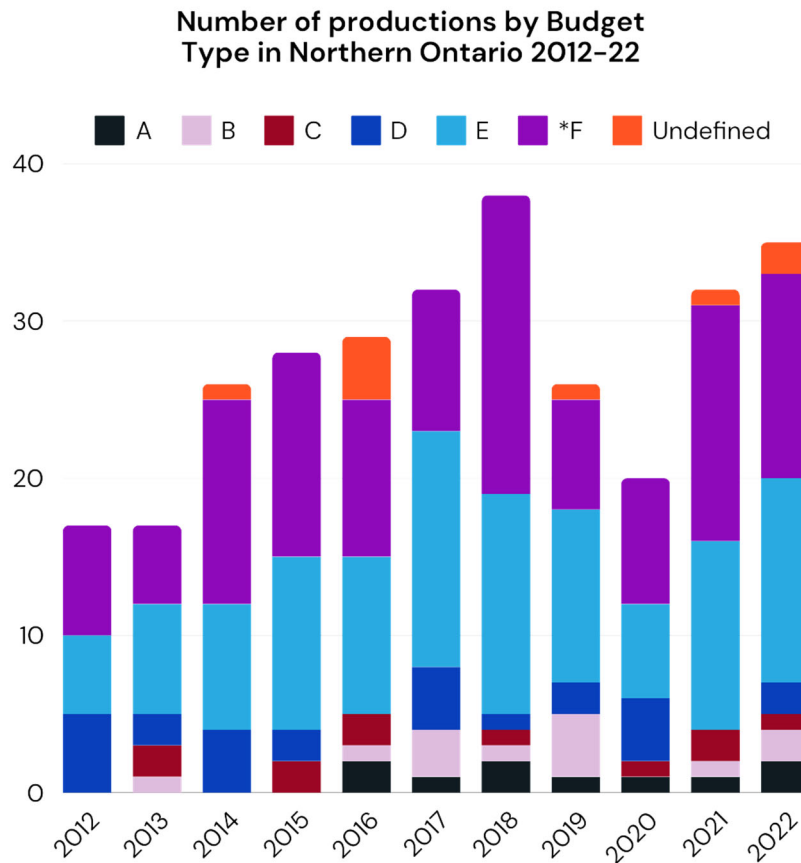


CHART E: Number of Productions by Budget Type in Northern Ontario 2012–2022



Interviews with industry stakeholders reveal that most crew hires on film and television projects in Northern Ontario consists of the local workforce: “I would say about 75 percent. It was pretty high up there. A lot of the people are also adjacent, as you see them, they have residents there, but they may not necessarily always be.” – Assistant Production Manager/Accounting, DGC Ontario Member

However, specialized crew positions that require higher levels of experience are harder to address with Northern Ontario’s current workforce pool: “There are certain areas that really you need to bring in and address with managers because there’s just not the scale and scope and the expertise. So, this is where the 25% falls into play and the ability for people to get experience and to produce their own and grow.” – Regional Producer

Efforts to address technology gaps, studio space limitations, and union-related hurdles will be vital to sustaining the industry’s growth and success in the region. The industry primarily relies on on-the-job training and entry-level assistant positions for workforce entry, requiring a continuous pipeline of new talent. As such, collaborative initiatives and mentorship programs have and will further support a thriving and skilled workforce for the Northern Ontario Film and TV industry.

75% Based on key stakeholder feedback, roughly 75% of total crew hires for productions filming in Northern Ontario are individuals with permanent residency within the region.

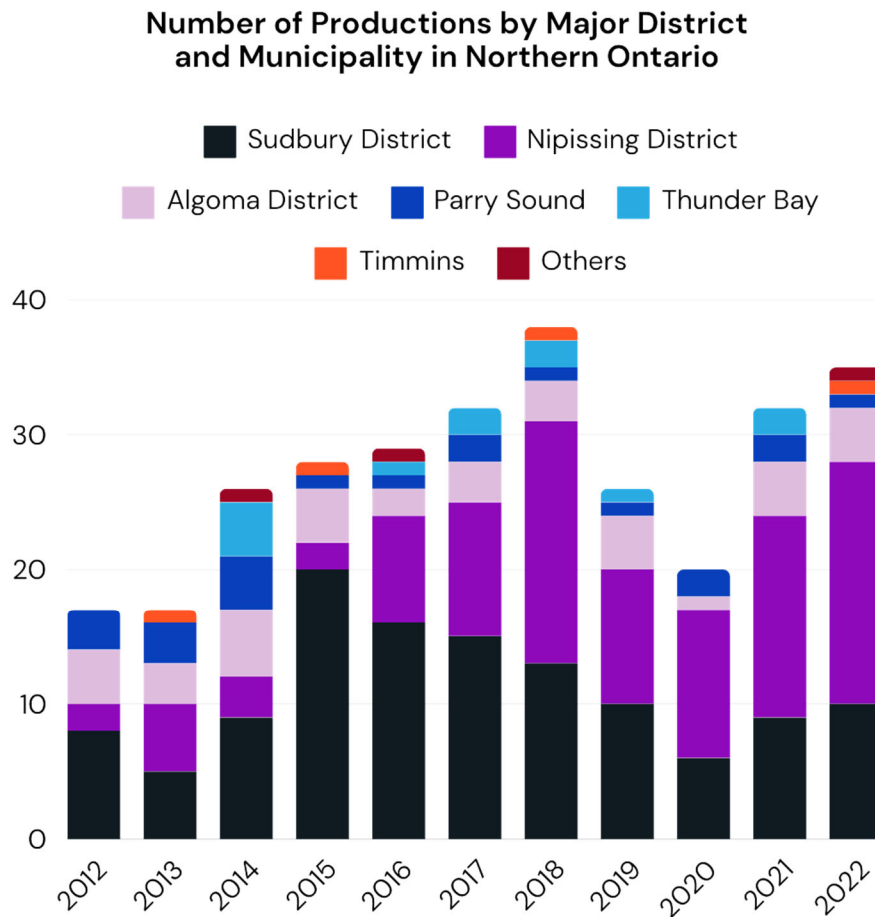


CHART F: Number of Productions by Major District and Northern Municipality in Northern Ontario

I.A.T.S.E. Local 634 has on average 3 keys for each workforce category (Creative, Administrative, Technical as described above) who reside in Northern Ontario and can run their own crew. The industry has a shortage of experienced workers during busy times, leading to the need to attract and train new participants. As such, Local 634 and other production crew unions are working with CION to deliver training programs that provide skills development for Northern Ontario's workforce.

Northern Ontario Workforce Trends and Characteristics

CION's production data as of Aug 30, 2023, shows a 2/3 distribution ratio between two major production centers: Sudbury District (for the purpose of this study, Sudbury District refers to the City



of Greater Sudbury and surrounding municipalities and towns) and Nipissing District⁵ (which includes North Bay and surrounding municipalities and towns) with increasing growth in off-site facilities, infrastructure, and pan-northern filming locations. Additionally, Crew Database metrics reveal that the bulk of Northern Ontario's film and television workforce resides in Greater Sudbury or North Bay, with many workers traveling between the two municipalities to service productions.

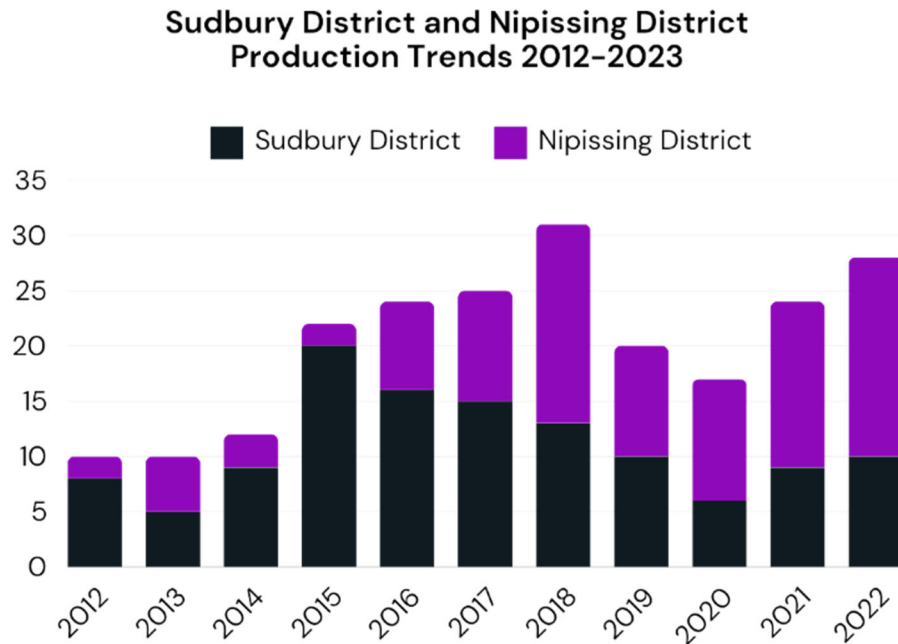


CHART G: Sudbury District and Nipissing District Productions Trends 2012-2023

The increasing popularity of both North Bay and Sudbury as production destinations capable of servicing higher frequencies of film and television projects reveals a new challenge: a free-flow workforce composed of crew from multiple municipalities is not a sustainable option if production numbers continue to rise. Production centers like North Bay and Sudbury, to accommodate higher levels of production activity, must foster an established crew base within their respective communities while proactively addressing entry-level worker shortages.

The budding of film and television productions taking place in North Bay and Greater Sudbury has necessitated the free-flow movement of labour from surrounding districts to meet staffing needs,

⁵Bay Today. [Local Film and Television Productions Receive Provincial Boost](#). Accessed on October 22, 2023.



including incidental labour from surrounding communities to fill entry-level positions. These trends underline the challenges of maintaining a skilled workforce in Northern Ontario's production hubs. The advancement of established crew in the North is the next logical step for creating workforce growth and opportunities for essential training, opening the door for new workers to enter the industry as entry-level crew members.

It should be noted that significant sharing of crew resources exists not only between Greater Sudbury and North Bay (separated by a roughly 8-minute drive along Highway 11), but also between other active production municipalities in Sault Ste. Marie, Parry Sound, Thunder Bay, and Timmins.

Analysis of Workforce Characteristics

As outlined above, to quantify the fluid nature of regional film and television production workforce metrics, CION aggregated data from the Crew Database and categorized workforce experience/capability into the following categories: Creative, Administrative, and Technical. Using production volume data (excluding short films, documentaries, commercials, or music videos), production budget data, and average crew size per production budget type data, CION can estimate current production crew shortages in Northern Ontario (by category) to help inform future workforce development initiatives designed to meet labour market demands before the introduction of Tier-1 purpose-built production studios.

The Creative category comprises all the key players and skilled creatives who bring artistic vision, imagination, emotion, and visual storytelling into the filmmaking process.

The Administrative category comprises professionals who ensure the smooth functioning of a project and handle the logistical, financial, and administrative aspects of film production.

The Technical category comprises skilled technicians and artisans who manage the technical facets of filmmaking, like lighting, grip, camera work, on-set, and special effects.



Chart H

Creative Category	Administrative Category	Technical Category
Directors, Production Designers, Art Directors, Art Dept, Graphic Designer, Animator, Music Supervisors, Visual Effects Artists, Costume Designers, Set Decorators, Set Dressers, On Set Art, Prop Masters, Scenic Artists, Hair, Makeup Artists, EPK, and Others.	Producers, Production Managers, 1st Assistant Director, Accounting, Locations, Assistant Directors, Department Coordinators, Production, Set PA, Transport Coordinators, Script Supervisors, Security, Casting Assistants, Craft Services, and Others.	Cinematographer, Camera Department, Focus Pullers, Camera Operators, Gaffers, Grips, Electrics, Construction, SPFX Coordinator, Unit Driver, Generator Operator, Digital Imaging Technician, Digital Compositors, Sound Mixers, Boom Operators, Best Person, and Others.

CHART H: Workforce Categories

*CION utilized production data sourced from the NOHFC and positioned projects into budget categories based on spend. While these budget categories are in line with DGC Tiers, factors other than total budget apply, CION is using budget primarily as the metric to sort productions.

**Estimated Average Film & TV Crew Jobs
In Northern Ontario By Budget Type**

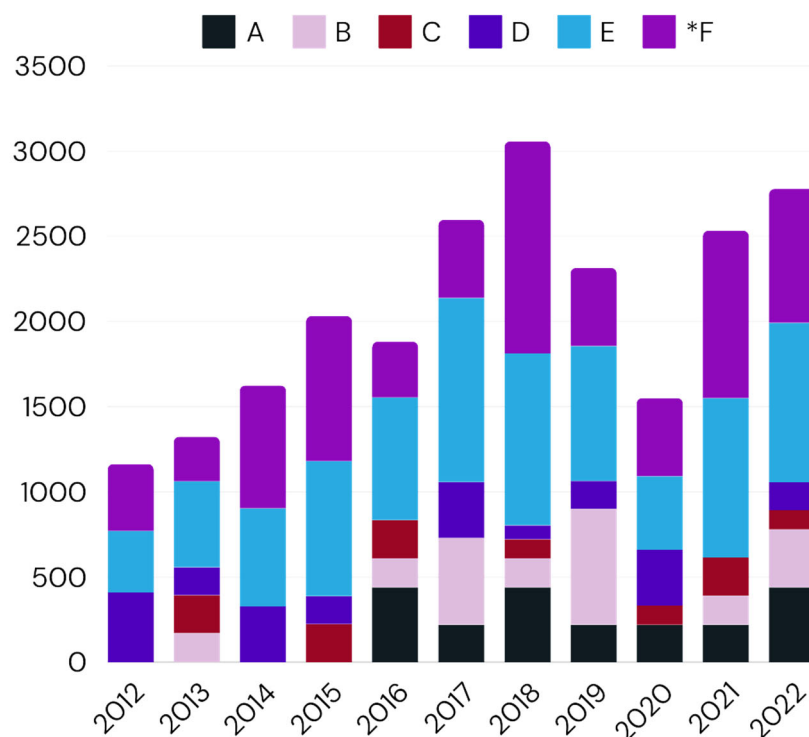


CHART I: Estimated Average Film & Tv Crew Jobs In Northern Ontario By Budget Type



Production volume and trends

Stakeholder feedback, available production crew listings, and responses to a survey distributed to Northern Ontario's film and television production workforce suggest that the average Feature Film/TV Series hires 75% of its crew from the local workforce base. Additionally, survey responses reveal that, on average, a crew member from Northern Ontario must work on 3.25 projects annually to have a full-time career in the film and television industry.

3.25 On average it is estimated that crew members need to work on 3.25 productions per calendar year to make a full-time career as a Film & TV crew member.

**Estimated Full-Time Equivalent Workforce
By Budget Type In Northern Ontario**

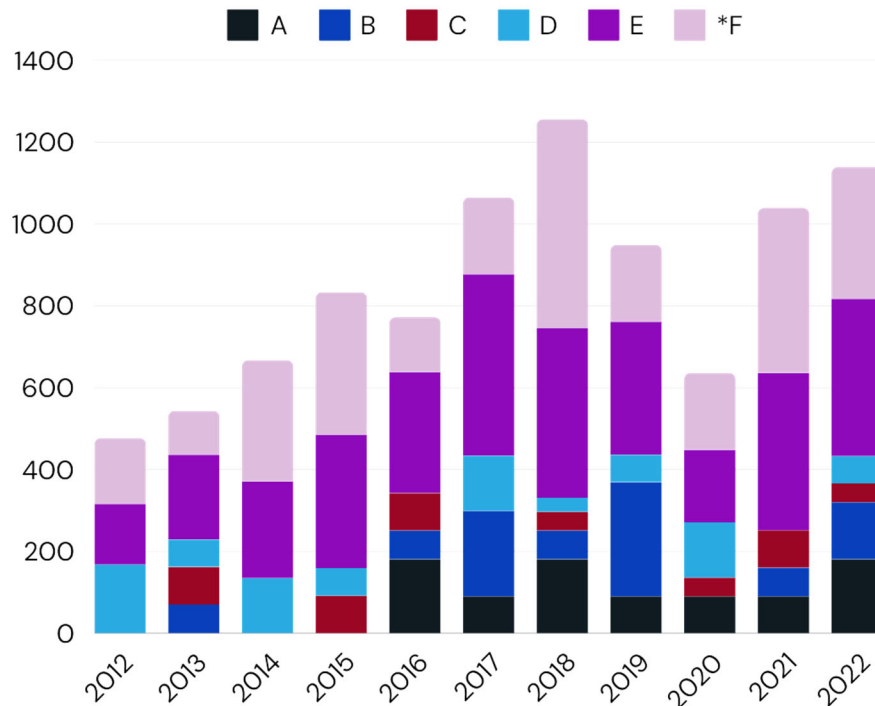


CHART J: Estimated Full-Time Workforce By Budget Type In Northern Ontario

*Calculated at 3.25 productions per calendar year average from CION crew database and 75% labor from Northern Ontario



Crew Opportunities in Nipissing and Sudbury Districts

CHART K illustrates crew sharing between Nipissing and Sudbury Districts since 2018 and the distribution and utilization of Pan-Northern assets, infrastructure, and skills-sharing in these locations. This showcases the expanding opportunities and partnerships in Northern Ontario's major production centres.

**Estimated Full-Time Equivalent (FTE) Film & TV Positions
By District Or Municipality In Northern Ontario**

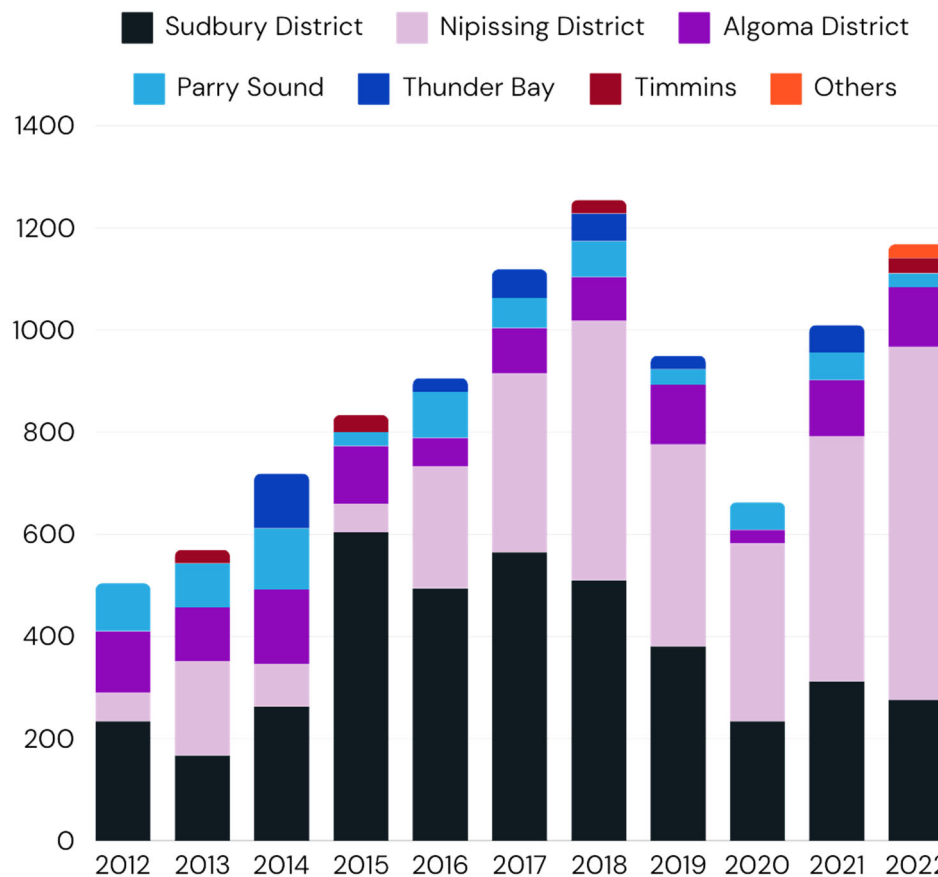


CHART K – Estimated FTE Film & TV Positions by District or Municipality in Northern Ontario

In 2015, the Sudbury District had the highest amount of estimated full-time film and television workers at 520 (working an estimated 3.25 projects per year). By 2018, the Nipissing District closed the gap by reaching 508 FTEs while the Sudbury District dropped to 510 FTEs. By 2022 and following the production pause resulting from the COVID-19 pandemic, the Nipissing District's film and television industry generated 691 FTEs.



With consideration to planned infrastructure additions in Northern Ontario designed to service larger projects and facilitate more frequent production endeavors, it becomes clear that the need for coordinated efforts in training and retaining a skilled workforce throughout Northern Ontario is imperative.

Studio Space in Northern Ontario

Although Ontario has a wide variety of production studio space available for rent, (primarily in the Greater Toronto Area) provincial stakeholders have long recognised the need for additional studio infrastructure. “If on-screen industry uses are to thrive, it is imperative that additional studio infrastructure be added in the near term to offset the displacement of existing studios while a suitable supply of larger sites remains available. The longer it takes to establish additional studio infrastructure, the more difficult it will be to encourage future on-screen industry growth in Northern Ontario.” ⁶

To assess the current state of the industry and its ability to support year-round film and television production, this report analyzes three tiers of film studios in Northern Ontario as defined below. ⁷

⁶ Hemson Consulting Ltd. [Study of Film and Screen Industry Studios in the Port Lands and South of Eastern Employment Area](#). Accessed on May 20, 2023.

⁷ Hemson Consulting Ltd. [Study of Film and Screen Industry Studios in the Port Lands and South of Eastern Employment Area](#). Accessed on May 20, 2023.



Chart L

Tier 1

- Compliant with all health and safety regulations
- Sound attenuation on stages
- Adjacent support space and parking for all vehicles
- Perimeter security of studio lots
- Free of non-film related tenants
- Clear span or non-structural beams that can be removed
- Useable height of 25 feet or greater
- Potential for backlot or water tanks locations

Tier 2

- Compliant with all health and safety regulations
- Sound attenuation on stages
- Some support space and parking for unit trucks
- Clear span or non-structural beams that can be removed
- Useable height of 20 feet or greater

Tier 3

- Compliant with all health and safety regulations
- Sound attenuation on stages
- Some support space and parking for unit trucks
- Clear span or non-structural beams that can be removed
- Useable height of 20 feet or greater

CHART L: Studio Tier Characteristics

In Northern Ontario, Tier 2 and Tier 3 studios contribute to the overall industry ecosystem. In recent years more studio infrastructure in North Bay catering to a range of production needs was made available. Production studios within these Tier groups include the Northern Ontario Film Studio (Greater Sudbury and North Bay), Mukwa Studios (North Bay), and Stardust Pictures Studio (Sault Ste. Marie). These facilities offer varying sizes and tiers of stages that can most effectively service small to mid-sized projects. Strategic investments and improvements in Tier 2 and Tier 3 studios can enhance their technical capabilities and competitiveness.

Emerging Tier 1 studio developments could lead to significant industry growth, elevating Northern Ontario's position in the film and TV industry and potentially attracting high-profile projects and renowned industry professionals, while Tier 2 and Tier 3 studios continue to play essential roles in supporting diverse production requirements.



Chart M

Studio	Stage(s)	Tier I, II, III	Region	Estimated sq. ft.	Truck Doors	Clearance	Active sq. ft.	Active/Planned
Freshwater Production Studios (FPS)	Stage A	Tier I	Sudbury District	20000	1	35'		Planned
Freshwater Production Studios (FPS)	Stage B	Tier I	Sudbury District	20000	1	35'		Planned
Freshwater Production Studios (FPS)	Stage C	Tier I	Sudbury District	18000	1	35'		Planned
Freshwater Production Studios (FPS)	Mill Shop	Tier I	Sudbury District	8000	1	35'		Planned
Trillium Pictures	Stage 1	Tier I	Nipissing District	30000	1	N/A		Planned
Trillium Pictures	Stage 2	Tier I	Nipissing District	20000	1	N/A		Planned
Trillium Pictures	Stage 3	Tier I	Nipissing District	20000	1	N/A		Planned
Northern Ontario Films Studios (NOFS)	Back Lot	Tier II	Nipissing District	N/A	N/A	N/A	N/A	Active
Stardust Pictures Studio	Stage A	Tier II	Algoma District	16500	Entry	25'		Planned
White Owl Studios	Stage 1	Tier II	Sudbury District	20000	1	35'		Planned
Mukwa Studios	Stage 1	Tier III	Nipissing District	14000	2	N/A	14000	Active
Northern Ontario Films Studios (NOFS)	School	Tier III	Nipissing District	2400	Entry	15'	2400	Active
Northern Ontario Films Studios (NOFS)	Stage 1	Tier III	Sudbury District	20000	3	20'/26'	20000	Active
Stardust Pictures Studio	Stage B	Tier III	Algoma District	9000	Entry	15'		Planned
Capreol Arena (Letterkenny Lease)	Rink 1	Tier III	Sudbury District	13125	1	20'/26'	13125	Active
TOTAL:				288996	ACTIVE:		77616	

CHART M: Existing and Planned Studio Infrastructure in Northern Ontario by Tier



Chart N

Studio Infrastructure	2019	2020	2021	2022	2023	Avg. Productions Per Year in Studio	Avg. Annual Northern ON Studio Jobs	Est. Jobs in Studio 2019-2023
NOFS (Nipissing District)	4	3	7	3	2	3.8	242	1,208
NOFS (Nipissing District)	2	1	1	4	1	1.8	165	823
Capreol Arena Rink 1 (Sudbury District)	1	0	2	1	1	1.0	125	627
NOFS Back Lot (Nipissing District)	1	0	2	0	1	0.8	67	336
Mukwa Studios (Nipissing District)				3	1	2.0	90	448
Grand Total	8	4	12	13	7	1.7	133	3,982

CHART N: Estimated Workforce in Studio from 2019-2023 and Average Annual Northern Ontario Studio Jobs



IN PERSPECTIVE: Freshwater Production Studios and William F. White, A Sunbelt Rentals Company

As the population in Northern Ontario continues to grow and various developments take place, the introduction of a Tier I studios such as Freshwater Production Studios ("FPS") would be a game-changer. This state-of-the-art facility, encompassing an impressive 100,000 square feet, will house three sound stages and a range of accompanying support spaces. Moreover, the management of FPS will be in the capable hands of William F. White, a Sunbelt Rentals Company – the most extensive and technologically advanced equipment rental company in the country. With the convergence of these factors, Northern Ontario is poised to witness an unprecedented era of cinematic and small-screen excellence, taking its rightful place on the entertainment stage.

FPS is a film and television production studio set to be constructed on a 24-acre lot in Greater Sudbury, Ontario. In Phase One, the 116,000 sq. ft. facility will feature three clear span soundstages (20,000 sq. ft., 20,000 sq. ft. and 18,000 sq. ft.) with 40' ceilings. There will be 23,000 sq. ft. of production and soundstage offices in addition to wardrobe, mill, paint, and other ancillary spaces. The property is ideally located- close to the Sudbury Airport, off Highway 17, and is conveniently located near the downtown core of Greater Sudbury and highways to Toronto. The environmental assessment has been completed on the property and appropriate zoning is in place.

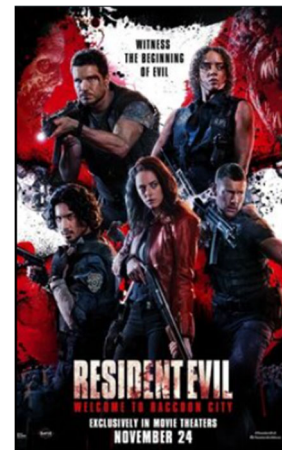
About William F. White International (WFW), a Sunbelt Rentals Company

William F. White International Inc. (WFW), a Sunbelt Rentals company⁸, is a leading film and television equipment and iconic studio property company in Canada, servicing productions of all sizes in the film and television industry by providing state-of-the-art cameras, lighting & grip, specialty equipment, location support, package trucks, ariel lifts, virtual production volumes and more. In the last decade, the company has established strong relationships with Northern Ontario's primary production service providers and continues to work closely with visiting foreign and domestic film and television productions as the region's leading equipment rental facility.

⁸ William F. White International Inc., a Sunbelt Rentals Company. [William F. White International and Movietech join forces in the UK Film and Television rental market](#). Accessed on May 5, 2023.

In addition, WFW demonstrates a commitment to fostering Northern Ontario's workforce by playing a key role in administering training programs for local film and television production crews. WFW works with all types of productions: tentpole studio feature films, major television network productions and experimental proof-of-concept web shorts and everything in between. WFW currently has six equipment rental facilities strategically located across the country.

WFW Services Productions in Northern Ontario



In 2018, recognising that their clients were in desperate need for studio space, WFW started providing studio facilities. Seeing the opportunity to not only build Canada's infrastructure and support its clients, but also to strengthen its multi-service model, WFW launched their studio business. WFW operates a growing portfolio of state-of-the-art production studios in the Vancouver, Calgary, and Toronto area that can handle projects of any size. With over 30 sound stages and ample mixed-use high-ceiling warehouse space spread across its twelve facilities, WFW Studios manages over 1.4 million square feet of production-ready studio space (which run at approximately 96% capacity).

WFW has long-standing relationships with a wide network of clients including Netflix, FX/Disney, CBC, E One, Sony, ABC, Apple, Amazon, Paramount, HBO, NBC, and CBS.



WFW in Sudbury⁹

The Northern Ontario Heritage Fund Corporation collaborated with industry stakeholders in 2013 to establish rules of engagement for vendors to be present in the community to promote the growth of the film and television industry. WFW responded by establishing a presence in the region, promoting Northern Ontario and Greater Sudbury as a hub for film and television production.

In 2014 WFW partnered with Northern Ontario Film Studios (NOFS) to introduce an equipment rental facility in Greater Sudbury, Ontario. This was a strategic move by WFW to establish a presence in Northern Ontario, which was emerging as a hub for film and television production in Canada. The partnership allowed WFW to tap into the local industry and offer its services to the growing number of productions in the area.

⁹ William F. White International Inc., a Sunbelt Rentals Company. [Contacts and Locations, Sudbury](#). Accessed on April 20, 2023.



WFW and Workforce Training

William F. White International Inc. (WFW) was the equipment sponsor for the workforce training program conducted by Cultural Industries Ontario North (CION) and REEL Canada.¹⁰ As an outlet established in Greater Sudbury, WFW was able to coordinate with course instructors the rental and travel logistics for equipment required to facilitate training in Greater Sudbury, North Bay, and Sault Ste. Marie in early 2023.

Congruent with the opening of the FPS facility, CION plans to develop outreach programs in Northern Ontario including initiatives related to sustainability, community welfare and promotion of the region as a filmmaking hub. As part of this report, CION conducted an interview with WFW to review currently offered workforce training programs and discuss the potential for future training; the feedback provided in this conversation is detailed in the GAPS & CHALLENGES and ADDRESSING THE GAPS sections below.

¹⁰ Northern Ontario CTV News. [Upcoming free workshops look to fill job vacancies in the northern Ontario film industry](#). Accessed on July 20, 2023.



SUMMARY – The Current State of Northern Ontario’s Film and Television Workforce

Aside from attractive funding incentives, and Northern Ontario’s ability to verify its production capacity with the success of the notable film and television projects that have been produced in the North future growth of the regional sector is now largely being propelled by stakeholders who have cemented their place in Northern Ontario’s production landscape. Media exposure, endorsements from municipal officials, and collaborations with educational institutions have also contributed to elevating the industry’s prominence. Consequently, this heightened visibility has not only drawn the attention of individuals residing in Southern Ontario, but also piqued the interest of aspiring film school students.

The surge in production volume poses a dual challenge within Northern Ontario’s film and television industry. It necessitates the training of more personnel, and an excess of production can lead to a shortage of available regional crew members. To support future production growth, stakeholders are frequently drawn to an opportunity to extend the annual production window (like other national production jurisdictions, Northern Ontario’s production sector is largely seasonal, with a high-degree of production activity taking place between late-spring through to late-fall). This compressed production window places natural strains on the ability of production companies operating simultaneously to access crew, and while growth of crew-based inventory continues to feed new talent into the production ecosystem, the greater frequency of larger scale productions finding home in the North (Tier 1, Tier 2 and major television series’) makes it imperative to effectively address workforce and infrastructure gaps, which will be identified in the following section.

Addressing and Meeting Talent Demand

From producers to entry-level production crew members, unions to post-secondary institutions, investors to local business owners, there is an increasing demand for additional film and television production infrastructure that supports year-round project development in Northern Ontario, which can be achieved with the development of new studio space. This would not only invite producers to capitalize on the incentive to use winter months for production needs, but it would also diminish the outflow of local crew to other production centres that can accommodate project development during winter months because of available studio space.



Advancement of Northern Keys

While Northern Ontario has found incredible success in developing a pool of production support talent, historically, key positions such as cinematographer, production designers, accountants, etc. have been sourced from outside the region. As outlined above, it is anticipated that more crew will be hired within Northern Ontario in higher positions with the recent removal of the NOHFC deeming program. This is an important transition, not just as Northern Ontario prepares to introduce new studio space, but for the long-term sustainability of the region's film and television sector. From the perspective of outside production companies, the ability to access key talent from within Northern Ontario will create cost saving efficiencies.).

The emergence of new key talent from within Northern Ontario's borders will pay dividends in filling and replenishing entry-level gaps that are created by industry expansion. As keys assume more direct control over hiring for their departments, the recruitment efforts they undertake will be drawn from known contacts, and from their knowledge of the community at large.



Gaps and Challenges in Northern Ontario's Film & TV Production Industry

Introduction

Through training programs like CION's workforce development initiatives, and the MAPPED funding program, crew talent continues to develop in Northern Ontario. Currently, trends show a labour gap from increased production activity across the North. When there is not enough labour from within the region, producers are required to crew from elsewhere, to the detriment of a production budget and the talent development of Northern Ontario's workforce.

Methods to mitigate the gap between estimated regional crew numbers and anticipated production volume in Northern Ontario will be explored below, which include the training and hiring of skilled workers who operate (or study) in adjacent industries. When hiring crew, it is imperative that a prospective hire exhibits the right personality, work ethic, and desire to cooperate; values that are often more highly regarded by hiring managers than previous experience or level of education. Introducing, on a more frequent basis, the residents of Northern Ontario to the career options that support film and television production will promote new, local entry-level crew hires. These individuals, in turn, can grow within the industry and gain the experience required to one day become a key who hires the next generation of local talent.

Workforce Challenges in Northern Ontario's Production Industry

Based on discussions with industry stakeholders conducted by CION for the purposes of this report, the following primary workforce challenges were identified.

Infrastructure

- **Infrastructure Needs:** The region lacks dedicated studio spaces, requiring productions to adapt industrial spaces. Infrastructure for off-site departments like set construction and costume design is limited.
- **After-Hours Access to Editing:** Post-Production facilities in Northern Ontario have limited access to editing suites after hours.
- **Access to Specialized Equipment:** The availability of film-specific equipment and products is inadequate, often necessitating trips to larger cities for sourcing.



- **Transportation and Vehicle Inventory:** Limited vehicle rental options and inventory during off-peak seasons pose challenges for production logistics.
- **Local CNC (Computer Numerical Control) Machines:** The absence of in-house CNC machines to prep construction assets in studio items necessitates outsourcing machines including plotters from other cities for the art department.
- **Competition in Tech Supplies:** The region would benefit from increased competition and availability of lighting, cable, grip, printers, and camera supplies.
- **Security and Equipment Protection:** Due to the high cost of camera equipment, improved security measures, including steel doors and break-in proofing, are necessary.

Workforce Development

- **Hands-On Experience Shortages:** The local workforce lacks hands-on experience with established productions, necessitating opportunities on lower-end projects. Addressing this gap includes offering opportunities for hands-on experience on set, working on local programming, and continued mentorship with trainees.
- **Skill and Expertise Gaps:** Graduates often lack essential industry skills like working under pressure, collaboration, and artistic abilities. Insufficient specialized skills training in areas like compressed production scheduling, understanding the craft, experience as breakdown artists, and proficiency in various production processes hinders the workforce's ability to meet industry demands.
- **Sourcing Crew from Outside Northern Ontario:** Limited depth in the workforce often creates the need to bring in people from other cities, hindering local talent from moving up the ranks, and creating a shortage of pathways without bringing in assistants or team members, particularly from junior positions.
- **Crew Sharing in Northern Ontario:** Productions often must pay per diems and hotels for northern residents who are not local to the municipality in which a project is filming, which can offset the financial incentives of producing in Northern Ontario.
- **Access to Industry Connections:** Limited access to industry connections impedes the networking and career progression of Northern Ontario residents. There is a need to establish platforms, events, and pathways for collaboration with industry professionals to facilitate connections and job creation.
- **Distribution of Talent:** The distribution of technicians is spread out across different regions in Northern Ontario, with North Bay and Sudbury being the main hubs. However, certain factors like proximity to Toronto and infrastructure can affect the attractiveness of a region for film productions.



- **Support for Entry-Level Positions:** The absence of financial support and partnerships to sustain consistent training initiatives for entry-level positions hinders workforce retention and growth. According to the DGC/CPMA Standard Agreement 2023-2025 in Ontario, workforce models like Letters of Understanding No. 4 "Workforce Development in Post-Production" should be adopted¹¹. This means that producers for Tier A Productions engaging in post-production in Ontario during the Standard Agreement should provide trainee positions in post streams, like Trainee Assistant Picture Editor (TAPE), Trainee Assistant Sound Editor (TASE) or Post-Production Assistant (PPPA), for up to six weeks or the duration of the post period. This initiative will improve career opportunities for newcomers in the industry. NOHFC funding and programs including CION's MAPPED Funding program provide key financial assistance to organizations to develop individuals in entry-level assistant roles.
- **Inadequate Training Opportunities:** The shift to remote work presents challenges for hands-on learning experiences. According to the CION's Workforce Survey, 80% of respondents identified that Film crew mentorships/training opportunities were missing from Northern Ontario Film & TV industry that could provide a structured learning environment. Mentorship programs that pair experienced editors, directors, designers, and producers with emerging talent can significantly enhance skills development and confidence among the regional workforces.
- **Understanding of Lateral Skills for Film Industry:** Formal education is not deemed necessary for entering the film and television production industry. A survey conducted by CION identified 26% of respondents (local production crew members) have a high school education or secondary diploma, 44% have a college diploma, 24% have a university diploma, and 6% have a master's diploma). However, there may be a lack of understanding from educational institutions regarding lateral skills needed to transition individuals into becoming crew and how to pursue a career in the industry (i.e. skilled trades, accounting, graphic design, etc.)
- **Purpose-Built Studios and Longer Timelines:** Purpose-built studios and lengthier production timelines for TV series could enhance post-production support and structured learning.

Workforce Needs

- **Missing Key Creative Positions:** Northern Ontario lacks creative Professionals "Above the Line" who can provide visionary leadership and mentorship to productions, who can lead and manage with the region's best interests in mind. Key positions include Production Manager, 1st AD, Production Designer, Art Director, DOP, Camera Operator, Accountants, Key Grip, and Script

¹¹ DGC [Ontario, DGC/CPMA Standard Agreement: 2023-2025](#). Accessed on June 5, 2023.



Supervisors. These roles contribute to diversifying content and expanding the skill set of artists in the region. Addressing this gap requires individuals who can provide direction, mentorship, and creative leadership.

- **Shortage of Specialized Technicians:** A scarcity of Gaffers (Lighting Department Heads) hinders the capability to support larger-scale productions, emphasizing the need for skilled technicians in lighting departments to support diverse productions and versatile lighting solutions.
- **In-Demand Script Supervisor:** The high demand for script supervisors is met with challenges due to their technical and highly skilled nature, gaining specialized experience, making it crucial to establish training programs and hands-on opportunities for individuals to bridge this skills gap, developing screenwriters and local programming in the process.
- **Infrastructure Technicians and Camera-Related Roles:** While there are skilled technicians in Northern Ontario, there is a shortage of professionals in roles like grips and camera operators, highlighting the importance of collaborative efforts among unions, productions, and technicians to meet this demand.
- **Set Design and Art Department:** Specialized roles such as Set Designers, and architecturally trained Art Directors are missing in the art department. This necessitates the need for training programs focused on the art department and developing skills aligned with the demand for these roles' requirements.
- **Breakdown Artists and Costume Coordination:** The need for breakdown artists as an essential role in creative departments including costumes, props, scenic and art. The need for skilled professionals who can age fabric, distress costumes, and possess a toolkit to effectively fill these gaps when working on production.
- **Sound and Special Effects Technicians:** Although these technicians are in different departments, the positions are in high demand and share a requirement of hands-on experience. Training initiatives and opportunities for hands-on learning can bridge the skills gap.
- **Partnerships and Collaborations:** Partnerships with educational institutions, schools, colleges, and local TV programming and theater groups are pivotal for fostering workforce development, attracting talent, and offering essential training opportunities.
- **Infrastructure and Equipment Access:** Dedicated space for departments like set deck, construction, paint, props, and costumes is indispensable to create an enabling environment for skill development and production support. Flexibility in weekend access was identified by stakeholders as essential for postproduction facilities.
- **Local Screenwriting and Production Workshops:** Promoting local productions and storytelling in Northern Ontario can open doors for regional talent, diversifying the industry and fostering growth.



Industry Growth

- **Competition:** As the industry grows, competition for projects and talent can become fierce. Established studios and production companies may have a competitive advantage in attracting new projects.
- **Infrastructure and Resources:** Expanding production activities requires sufficient infrastructure, equipment, and resources. The challenge lies in ensuring that these elements keep pace with industry growth.
- **Regulatory Hurdles:** Regulatory and permitting challenges can slow down expansion efforts. This includes environmental regulations, location permits, and labor laws. **Industry Perception:** There is a perception that the local workforce in Northern Ontario is less skilled or experienced than those from larger production centers. CION's Crew Database provides a robust tool for incoming producers to find crew, and ongoing efforts are being made to promote the expertise of the local workforce and attract more productions to crew from within certain municipalities and the broader Pan-Northern ecosystem. It is also important to note that this perception has shown signs of diminishing in recent years, as Northern Ontario has become a more competitive production.

IN PERSPECTIVE: 2022's Workforce Availability Gap

In 2022, due to the rising demand of workers by productions shooting in Northern Ontario, the regional workforce implemented crew sharing between municipalities to effectively address the heightened challenges brought about by a period of increased production activity. One of the primary concerns during this surge in production was crew availability and capacity.

Specifically, Northern Ontario experienced a balloon of production activity during the summer of 2022 across multiple municipalities (reference chart below). In August 2022, 12 film and television projects were concurrently in production, which depleted Northern Ontario's current crew base.

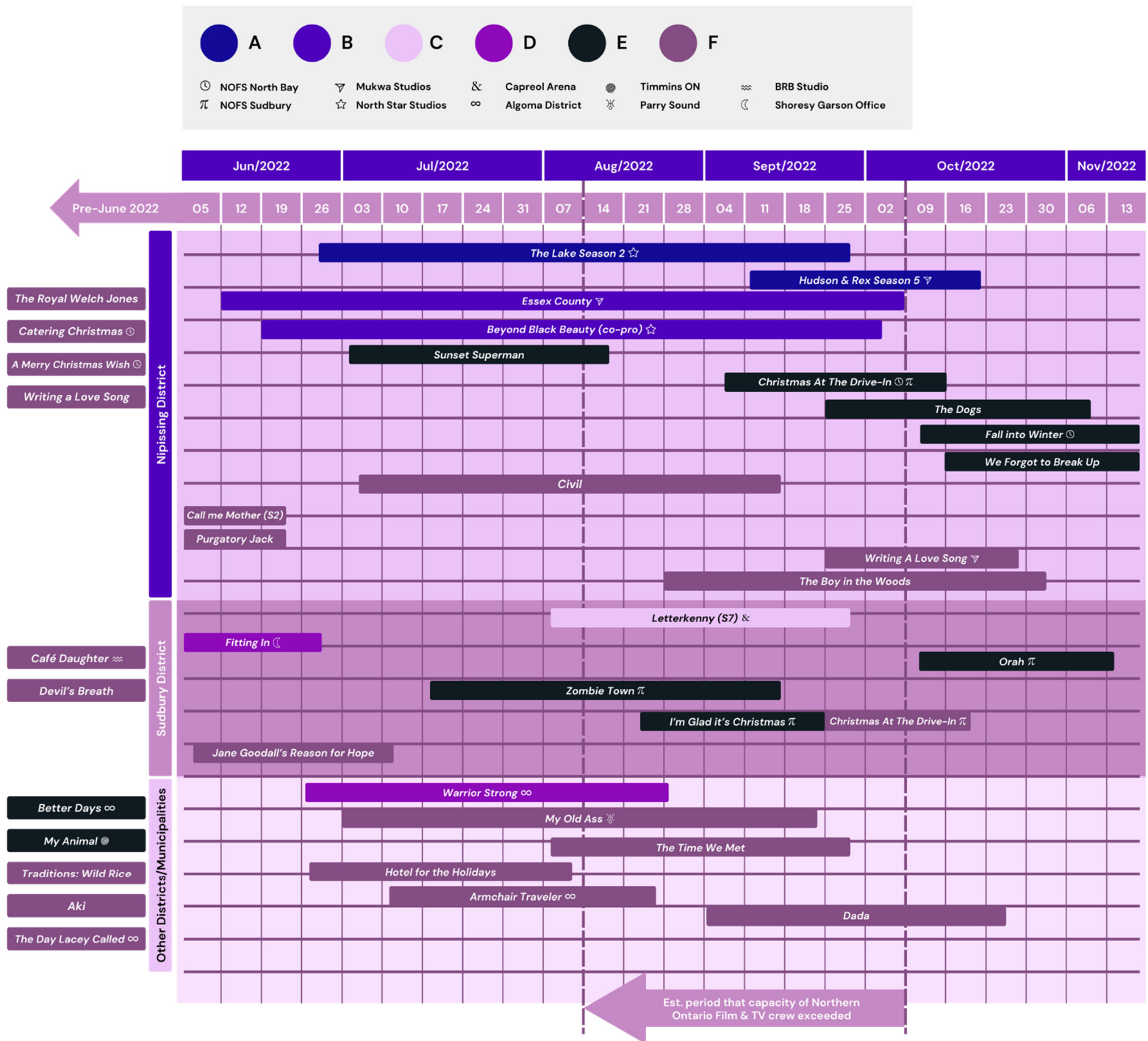


CHART O: Simultaneous Production Activity in Northern Ontario in 2022



Chart P1

	2022 Workforce Demand	*CION Crew Inventory Estimate	2022 Workforce Gap	2022 FTE GAP
Total	1173	1021	152	47
Creative	390	333	57	17
Administrative	379	317	62	19
Technical	404	371	33	10

CHART P1: 2022 Workforce Gap in Northern Ontario

*Estimated data relating to total crew inventory is based on total crew listing on CION's Crew Database (acknowledging not all crew are active and not all crew participants are reflected on the database).

152 In the summer of 2022, CION estimates a workforce gap of 152 film and television crew members in Northern Ontario, based on total production volume and the availability of regional crew. Additionally, an Estimated Full-Time Equivalent (FTE) Gap of 47 is calculated based on an average crew member working on 3.25 productions per year, considering that 75% of production crew members on projects in Northern Ontario are local.



Chart P2
Estimate 2022 Workforce Demand and Gap Analysis

Budget Type	# Productions 2022	Creative	Administrative	Technical	Total Workforce Demand
A	2	160	140	140	440
B	2	110	110	120	340
C	1	37	35	40	112
D	3	78	78	90	246
E	13	325	286	325	936
*F	12	240	276	270	786
Demand Subtotal	33	950	925	985	2,860
2022 Gap Analysis	=3.25*75%	390	379	404	1,173

CHART P2: Estimated 2022 Workforce Demand and Gap Analysis in Northern ON Workforce

Studio Infrastructure Workforce Gaps Analysis

IN PERSPECTIVE: FPS and WFW – Workforce Gap Analysis

When interviewed for this report, stakeholders from WFW identified several potential workforce gaps or shortages that could arise in terms of skilled personnel for handling specialized equipment before a Tier 1 studio arrived in Northern Ontario. One of the major challenges is not having enough trained technicians that live in the north. As a result, there is a shortage of experienced mechanics who know how to do repairs, operate cranes or aerial lifts, wire, reconnect, or solder equipment. Moreover, there is a need to balance the priority of production, such as DOP and Camera Department to film a scene, with operating maintenance of expensive rental equipment.

Additionally, it takes time to build up jobs in the workforce class with training experience on set. This shortage is particularly challenging in Northern Ontario, where there is a limited pool of qualified



professionals. Generator operators also lack knowledge of how to check the unit properly, leading to an increased risk of equipment failure and production delays.

To address these challenges, the stakeholders suggested several types of training programs or initiatives that could be developed to prepare the workforce for Freshwater Production Studios (FPS) and address potential workforce gaps. For instance, courses on generator operation are already being provided twice a year in Toronto and once per year in Northern Ontario. Specialized lighting is supplied directly from Toronto with skilled personnel and training for handling equipment. The stakeholders also suggested courses on lighting and dolly use.

In summary, before future studio developments arrive in Northern Ontario, Northern Ontario needs to address the shortage of skilled personnel to handle specialized equipment. A focused effort is required to train local technicians and mechanics, who will be responsible for the maintenance and operation of the rental equipment. WFW has expressed interest in contributing to future training programs that address these gaps.

SUMMARY – Workforce Gaps and Challenges in Northern Ontario’s Film & TV Production Industry

Northern Ontario’s film and television industry is grappling with several critical gaps that hinder its full potential. Key missing elements include a shortage of skilled workers across various departments, limitations in workforce expansion and career advancement, inadequate infrastructure, and technological resources, and a need for increased investment and support. While workforce shortages are not in any way unique to Northern Ontario, they must be addressed to support an increase in production activity.

Uneven crew availability, seasonal employment patterns, and gaps in expertise and knowledge also contribute to the industry’s challenges. Addressing these missing elements through focused training, collaboration, improved infrastructure, targeted incentives, and enhanced industry recognition is essential for the growth and sustainability of Northern Ontario’s film and television sector.



Addressing the Gaps – Preparing for New Studio Space and Workforce Needs

Introduction

To address the gaps identified above, consistent workforce development training opportunities must work hand in hand with upcoming infrastructure development opportunities to ensure that both workforce and infrastructure capacity can keep up with a higher amount of film and television production.

The following sections will assess existing workforce development programs that can help alleviate workforce gaps, analyze how studio infrastructure development (especially purpose-built infrastructure) can both create opportunities and challenges for workforce gaps, share stakeholder feedback on what is needed in Northern Ontario in terms of workforce before the arrival of Tier 1 infrastructure, and present future workforce models that can be employed to help address gaps.

Existing Workforce Development Programs

Film Crew Training Sessions

The Northern Ontario Film Crew Training Sessions, facilitated by CION with support from REEL CANADA, took place in January and February of 2023. The program, which includes practical teachings from active members of film and television production unions like I.A.T.S.E 634, 667, 411, and DGC Ontario, is designed to equip participants with the skills and knowledge to accept entry-level production crew member positions on upcoming projects.

This first edition of the program offered to residents of Greater Sudbury, North Bay and Sault Ste. Marie free training for entry-level positions that allow for rapid career growth in the following departments: Grip and Electric, Production Assistance, and Art Department¹². In the fall of 2023, Cultural Industries Ontario North (CION) and REEL CANADA partnered once again to facilitate the 2nd iteration of the Northern Ontario Film Crew Training Sessions program in Greater Sudbury, North Bay,

¹² Northern Ontario CTV News. [Upcoming free workshops look to fill job vacancies in the northern Ontario film industry](#). Accessed July 20, 2023.



and Timmins.¹³ In total, the Northern Ontario Film Crew Training Sessions produced 187 graduates in 2023, with over 50 having found work in the regional film and television industry as of January of 2024.

Program Partners and Details

- I.A.T.S.E. 634
 - Props
 - Sets
 - Costumes
 - Construction 101
 - Scenic Painting 101
 - Hair and Makeup 101
 - Lighting 101
 - Grip 101
 - Sound 101
 - SPFX 101
 - Set Orientation Permit and Sustainability (VIRTUAL)
- DGC Ontario: Also offers the Guild Apprentice Program (GAP), a 12-month program permitting non-DGC members to work on Guild productions in the PA/Trainee category.
 - Introduction to DGC
 - Set PA Fundamentals
 - Building a Respectful Workplace
 - Art Department Fundamentals 101
 - Graphic Design
 - Locations
- I.A.T.S.E. 411
 - Craft Services Fundamentals
 - Office PA Fundamentals
 - Script Supervising Fundamentals
- I.A.T.S.E. 667
 - Camera Fundamentals (667)

MAPPED Program

CION's Media Arts Production: Practiced, Employed, Developed (MAPPED) fund provides production assistance funds to help film and television producers provide on-the-job training to Northern Ontario

¹³ Cultural Industries Ontario North. [Free Film Crew Training in Fall 2023 for Northern Residents](#). Accessed on October 6, 2023.



residents looking to work in the industry. With funding from FedNor, MAPPED seeks to supplement existing funding sources to hire and train emerging film and television workers by providing partial funding for Northern Ontario crew trainees to a maximum of \$10,000 per production.

National & Provincial Training Programs

Academy of Canadian Cinema & Television - Women in Post Program: provides higher-level industry access and professional development for emerging to mid-level women-identifying and non-binary creatives working in all areas of post-production. Programming includes strategic learning modules, creative and technical skills building, and hands-on mentorship at a post-production company and/or shadowing a post-production-related role.¹⁴

DGC Professional Development and Training: DGC Ontario's robust Professional Development & Training program offers a wide variety of courses to members; from fine-tuning technical expertise to diversity and inclusion training to building confidence via empowering leadership workshops. DGC's Training Course Catalogue¹⁵ includes dozens of applicable training programs for crew in areas including health and safety, sustainability, accounting, graphic design, art department fundamentals, set design, assistant directing, locations, picture editing, sound editing, and more.

I.A.T.S.E. 634: Local 634 offers free training in such as Set Etiquette Permit Orientation, Spring Generator Seminar with certificate of competition from William F. Whites, and paid training like On-Set: Grip & Electric, to learn "how to use a variety of industry-standard equipment including LED, tungsten, and HMI lighting systems, C-stands, flags and hardware, and through a series of demonstrations and exercises...learn to design, shape, bounce, and diffuse light", in addition to working at heights, lift tickets, and specific departmental training.

I.A.T.S.E. 667: Local 667 is committed to providing the membership with regular training and seminars to ensure we remain on the leading edge of technology and provide production companies with highly skilled camera people who are not only professional, but proficient in the use of all camera systems.¹⁶

- Training Program for Camera Trainees: A camera trainee in I.A.T.S.E. is a trainee member working on I.A.T.S.E. 667 signatory productions with professional film crews. The trainee will be enrolled in the I.A.T.S.E. Training Program. This program focuses on field training and

¹⁴ Academy of Canadian Cinema & Television. [Women in Post Program](#). Accessed on September 12, 2023.

¹⁵ Director's Guild of Canada. [DGC Ontario Course Catalogue](#). Accessed on September 12, 2023.

¹⁶ I.A.T.S.E. 667. [Seminar and Training Programs](#). Accessed on September 12, 2023.



provides an entry position into a motion picture career for those who aspire to be Camera Assistants and ultimately Cinematographers.

Women in Film and Television (WIFT-T)¹⁷

- **Leadership Development Series:** This program is geared toward mid-level media professionals as well as those re-entering the work force or looking to transition within the industry into management. Focuses on the training of Junior Series Producers, Line Producers, Story Editors, Showrunners, and those looking to move into Executive Producer or Broadcast Executive.
- **Media Business Essentials:** The Media Business Essentials (MBE) program is a career-enhancing learning experience for emerging media professionals who want to deepen their knowledge of the business of film, television, and interactive media production. Focuses on Production Management, Production Accounting & Tax Credits, Business Affairs & Financing, Marketing & Distribution.
- **LIGHTS! CAMERA! LEARN!:** Created with WFW and in conjunction with NABET 700 and I.A.T.S.E. 667, the course is designed to engage all those who identify as women with the departments (lighting, camera, grip) that historically have been male-dominated.

WFW – Supported Programs

February Freeze: Launched in 2002, this widely anticipated exhibit is held at the WFW Centre in Toronto and is known for bringing together production professionals with the very latest innovations and technologies. Several vendors participate in this event that also includes workshops, open houses, and networking opportunities with industry peers and titans. Every year WFW organizes tours for schools and has welcomed many students from the Northern Ontario region.

Northern Ontario Film Training Symposium: WFW actively participates in this symposium created to educate and train those interested in working in the film and television industry. I.A.T.S.E. organizes workshops to promote the regional industry and WFW has historically provided required equipment for the event, while sending WFW ambassadors to support independent and emerging filmmakers. Additionally, WFW's National Director of Technical Support and Development, Mike Harwood, typically performs electrical standards training courses for interested students.

¹⁷ Women in Film and Television. [Programs & Events](#). Accessed on September 12, 2023.



Independent/Emerging Filmmaker Support: Due to the attractiveness of Northern Ontario's film and television tax credit, WFW aligns themselves with independent and emerging Ontario producers to encourage them to film up north. WFW's Client Services Coordinator, Emerging Filmmakers/Digital Content, Greg Jeffs, works directly with Northern Ontario clients to maximize the potential of their budget when filming in the region. WFW has built strong client relationships with production companies like JoBro Productions, Film Finance, and New Metric Media, who continue to produce content across Northern Ontario.

National Grants Program: WFW supports post-secondary institutions, specifically their media arts programs, and industry-related festivals of various types as a form of corporate sponsorship. Equipment grants are designed to assist filmmakers by offsetting or alleviating equipment rental costs. As of January 1, 2017, a new annual national "giving cap" of \$300,000 has been implemented for the National Grants Program with Toronto and Sudbury receiving the maximum share of \$140,000 per year.

Educational Support: WFW's commitment to serving as a thought leader for the industry is reinforced via support towards various education bodies spread across Canada. Workshops, tours, National Grants program among others are some examples of involvement within the education space. In Northern Ontario, WFW has helped build and supply many of the schools, hotels, theatres, and entertainment facilities through their project departments.

Educational Institutions – Film Training and Lateral Skills

Weengushk Film Institute, Manitoulin Island

Weengushk Film Institute, situated on Manitoulin Island in Northern Ontario, is a notable training institution with a primary focus on nurturing Indigenous leadership through comprehensive programs. These programs are designed to impart participants with skills encompassing creative storytelling, business acumen, and practical production within the film and TV industry, fostering both personal growth and professional development. The institute's diverse offerings include courses like "Indigenous Governance (Online)" emphasizing Indigenous leadership and governance, "The 'Art' of Documentary Storytelling (Online)" delving into creative documentary filmmaking, "The Business of Film (Online)" encompassing content creation, finance, and distribution aspects, along with hands-on labs such as "Lab 1: Certificate in Film Production" for guiding short film creation and "Lab 2: Certificate in Television Production" offering specialized TV production training.

Canadore College, North Bay



Canadore College offers a range of film industry-related programs, from Digital Cinematography, Acting for Stage and Screen, Post-Production to Visual Effects.¹⁸ Toronto Film School recently welcomed the opportunity to collaborate in the north with Canadore College on education pathways to address the industry demand for a significant increase in trained, talented, and available crew members in Northern Ontario.¹⁹

Confederation College, Thunder Bay

Confederation College offers an *Interactive Media Development*²⁰ program to foster a strong foundation in graphic design, interactive design, web, and mobile development, as well as 3D design, photography, audio/video storytelling and motion design. As well as Film Production²¹ hands-on training, graduates of the program go on to a variety of entry-level positions including Production Assistant, Editing Assistant, Camera Assistant and Sound Assistant.

Cambrian College, Greater Sudbury

Cambrian College offers a diverse range of programs to effectively prepare Northern Ontario students for careers in the film and TV industry:

- *Media Communications, Music, Arts, and Design*²², programs provide students with transferable skills applicable to graphic design, animation, as well as visual arts and design fundamentals, allowing individual to further their careers in the Art Department.
- *Business and Information Technology* programs, including *Business Administration – Accounting*²³ equip students with the necessary skills for production roles, such as Production Assistants, Production Co-ordinators, or General and Payroll Accountants Coordinators
- *Skilled Trades Training* programs like *Carpentry Renovation Techniques* provide hands-on experience for roles within the Construction Department.
- *Animation Program*, program is based on the curriculum of Sheridan's renowned Animation program at the diploma level.
- *Continuing Education* offerings like *Project Management* impart organizational skills crucial for roles such as Production Co-ordinators and Location Managers.

¹⁸ Toronto Film School. [Toronto Film School Teams Up with Canadore College to Bolster Film Industry in Northern Ontario](#). Accessed on July 10, 2023.

¹⁹ CTV News. [Partnership between Canadore College and Toronto Film School aimed at helping students get jobs](#). Accessed on Aug 30, 2023.

²⁰ Confederation College. [Interactive Media Development Program](#). Accessed on Aug 30, 2023.

²¹ Confederation College. [Film Production Program](#). Accessed on Aug 30, 2023.

²² Cambrian College. [Creative Arts, Music & Design](#). Accessed on Aug 30, 2023.

²³ Cambrian College. [Business Administration – Accounting](#). Accessed on Aug 30, 2023.



- *Food Services Worker* program caters to those interested in joining Craft Services.

McEwen School of Architecture, Greater Sudbury

The McEwen School of Architecture is one of 12 accredited architecture school in Canada. Laurentian's tri-cultural mandate; conducting design studios in both French and English, as well as working with Elders and guests who are First Nations and Métis, provides a further array of cultural and educational perspectives. Architectural Studies include key features like design-build and community-design projects to expose students to real community issues and hands-on building experiences.²⁴

Sault College, Sault Ste. Marie

Sault College offers a 2-year Digital Film Program²⁵ that teaches essential skills in directing, idea development, scripting, production, and distribution for both film and television. The program provides industry standard advanced technology and software and hand on classes; including courses on film fundamentals including lighting, shot composition, types of shots, moving shots, colour correction, art direction, production design, props, make up, wardrobe, screenwriting, visual effects, practical special effects, locations, sets, sound, music, titles, and actor performance.

Toronto Film School – Film Production Diploma²⁶

- Film & Television Director
- Commercial Director
- Cinematographer
- Producer
- Editor
- Production Designer/Art Director
- Post-Production Supervisor
- Camera Operator
- Assistant Director
- Sound Mixer
- Grip/Gaffer
- Production Manager

²⁴ Laurentian University. [Architectural Studies](#). Accessed on Aug 30, 2023.

²⁵ Sault College. [Digital Film Production](#). Accessed on Aug 30, 2023.

²⁶ Toronto Film School. [Film Production Program](#). Accessed on September 12, 2023.



- Production Coordinator
- Assistant Cameraperson

Indigenous Training Opportunities

ImagineNATIVE

- Northern Ontario's Below-the-Line Mentorships²⁷: program provides selected applicants direct ship by department leads, while showcasing their skills on a series production. This mentorship program provided opportunity for 2 Indigenous creatives to gain on-set experience on Season 7 of *Letterkenny*.²⁸

The Shine Network Institute²⁹

- TV & Film 101: A series of 10 videos featuring Adeline Bird and Jennifer Podemski, focusing on the basics of the film and television industry.
- Producing Accelerator Indigenous Lens: Crafted specifically to empower Indigenous producers and content creators on their professional journey, this immersive 4-day virtual course places a strong emphasis on cultivating skills in show-running, producing, writing, directing, and nurturing narrative sovereignty.
- Indigenous Women in Media: Candid and intimate dialogues featuring Indigenous women who share their insights and reflections on their journeys within the film and television industry.

Indigenous Screen Office (ISO)

- Cinespace Technician Roster: Selected trainees will receive training via I.A.T.S.E. Local 873 prior to being placed on a production. Total time commitment will be up to 12 weeks, full time. Trainees will be deemed a permittee with I.A.T.S.E. Local 873 and remunerated accordingly.
- Director Fellowship Registry in partnership with the Directors Guild of Canada: This Fellowship creates an opportunity for the Director Fellow to actively observe on a DGC signatory episodic production and to work with a network of expert collaborators and a veteran television Director. The Director Fellow will be provided access and be engaged in meaningful collaboration through inclusion in all aspects of pre-production, production, and

²⁷ First Nations Drum. *imagineNATIVE Institute Announces Mentees of the GTHA Below-the-Line Mentorship Supported by Netflix and IATSE-873*. Accessed on July 14, 2023.

²⁸ imagineNATIVE [@imagineNATIVE]. (2022/08/12). *The Northern Ontario Below the Line Mentorship*. Twitter.

²⁹ Shine Network Institute. *Training & Advocacy*. Accessed August 15, 2023



where possible, post-production and the Director's Cut, creating an invaluable experience for the Director Fellow.³⁰

Reelworld Screen Institute

- Reelworld Training Lab: presented by Amazon Studios is a new training program for both Canadian producers and writers. The program will offer training and upskilling opportunities to racially diverse and Indigenous talent in Canada and will foster a pipeline of Canadian production talent and help support Amazon Studios' projects in Canada.³¹

Studio Infrastructure Development & Impact on Workforce

The current state of Northern Ontario's crew-sharing system between municipalities is the result of infrastructure development in Greater Sudbury and North Bay. In 2010, producer David Anselmo established Northern Ontario's first production studio, the Northern Ontario Film Studios (NOFS), increasing the region's ability to service Film & TV productions at an unprecedented rate. By 2015, NOFS expanded with the opening of a retrofit production studio in North Bay. From this, both Greater Sudbury and North Bay emerged as leading production jurisdictions in Northern Ontario, and, consequently, higher volumes of film crew members established permanent residency within the municipalities.

Higher production volumes and crew capacity within these jurisdictions also influenced additional infrastructure developments in adjacent communities that compliment and support Northern Ontario's film and television production ecosystem. In Powassan, roughly 30 kilometres from North Bay, an era-accurate western backlot was constructed for the TV Series *When Hope Calls* (2019) and continues to service incoming productions. When *Essex County* and *SkyMed* Season 2 were in search of a production facility in Northern Ontario, Mukwa Studios (Tier III Studio) emerged in Nipissing First Nation.

What follows is a comprehensive overview of existing and planned soundstages within Northern Ontario capable of servicing Film & TV projects of all sizes.

³⁰ Indigenous Screen Office. [Director Fellowship Registry in partnership with the Directors Guild of Canada](#). Accessed on August 12, 2023.

³¹ Reelworld. [Reelworld Training Lab presented by Amazon MGM Studios](#). Accessed on August 12, 2023.



TIER I infrastructure in Northern Ontario (PLANNED)

a. Freshwater Production Studios (Sudbury District) PLANNED

FPS is set to house 23,000 square feet of production and soundstage offices, along with auxiliary spaces such as wardrobe, mill, and paint shops. A marketing analysis was completed by CION in 2022, moreover, FPS will be managed by William F. White, renowned for having the most extensive and technologically advanced rental inventory in the country. Tier I studios provide state-of-the-art facilities, and as planned FPS spans an impressive 100,000 square feet, will feature three spacious sound stages with 40-foot ceilings, spanning 20,000, 20,000, and 18,000 square feet, respectively.³²

b. White Owl Film Studios (Sudbury District) PLANNED

Situated within the Wahnapiatae First Nation, Volume Global have teamed with White Owl Film Studios, an Indigenous-owned multimedia company that represents Wahnapiatae First Nation, on a new production facility. The 20,000-square-foot soundstage features 35-foot-high clear span and provides the space for LED Volume for productions of all budget ranges.³³

c. Trillium Pictures (Nipissing District) PLANNED

Trillium Pictures is a proposed Tier I, 16-acre production studio that will include three sound stages: two at 20,000, 20,000, and 30,000 sq. ft. respectively. The facility will include office space, screening rooms, equipment rentals, solar panel-covered parking, and other amenities.³⁴

TIER II infrastructure in Northern Ontario

a. Stardust Pictures Studio (Algoma District) EXISTING

Stardust Pictures in Sault Ste. Marie is currently renovating the former CTV building and in development of two new studios and office space to support productions³⁵

b. Canadore College | Mix Stage (Nipissing District) EXISTING

The post-production facility includes a Dolby Atmos mix stage with 70,000 watts of power along with 41 speakers, color correction room, dialogue replacement, and specialized computer and

³² Cultural Industries Ontario North (CION). [Freshwater Production Studios](#). Accessed on April 20, 2023.

³³ Deadline. [Pop-Up Soundstage Specialist Volume Global Teams with White Owl Film Studios for New Facility In Canada's Wahnapiatae First Nation Territory](#). Accessed on October 13, 2023.

³⁴ My North Bay Now. [Film studio complex planned for Callander](#). Accessed on June 29, 2023.

³⁵ Soo Today. [City gives \\$100K to film studio renovating old CTV building](#). Accessed on June 5, 2023.



software equipment.³⁶

c. Northern Ontario Film Studios (Nipissing District) EXISTING

Northern Ontario Film Studios (NOFS) incorporated new facets into its operations. The expansion includes the acquisition production offices on Harvey St. (former King George Public School) ³⁷ and a mobile facility on Jane St., production offices, establishment of an off-site carpentry shop, mobile off-site departments, expanding their offerings with Interior apartment loft set, office lobby sets. NOFS introduced Northern Ontario's inaugural permanent studio backlot, positioned in Powassan, as a turn-of-the-century studio backlot.³⁸

TIER III infrastructure in Northern Ontario

a. Northern Ontario Film Studios (Sudbury District) EXISTING

NOFS features a 16,000 sq. ft single span main stage floor, on and off-site production offices, a hair and makeup room, a prop shop, a craft kitchen, laundry facilities and ample parking. There is 2,000 sq. ft of auxiliary space and fibre optic wi-fi service throughout the studio. Furthermore, NOFS (Sudbury) impresses a vast single-span studio floor (200' x 100' x 30') and essential amenities, including four onsite offices, two loading doors (: 10' x 10', 1 : 12' x 12'), 600 amp/3-phase electrical power, gas heating, and seamless fiber optic internet, all backed by a robust security system with a locked gate and 24-hour video surveillance³⁹

b. Mukwa Studio (Nipissing First Nation) EXISTING

Situated within Nipissing First Nation, this Tier III studio space hosted Essex County and SkyMed Season 2, and offers a vast 30,000 sq. ft. space, with new studio bathrooms, makeup space, and office space in development. This studio has structural columns. Located 71 Hwy 17, North Bay.⁴⁰

c. Capreol Community Centre Arena (Sudbury District) EXISTING

New Metric Media leased Capreol Community Centre Arena as its studio space in Greater Sudbury, hosting multiple standing sets and props for productions *Letterkenny* and *Shoresy*.⁴¹

³⁶ Canadore College. [Post Production at Canadore](#). Accessed on April 23, 2023.

³⁷ Bay Today [Training seminars groom talent for the local film industry](#). Accessed on April 23, 2023.

³⁸ Sudbury.com. [Northern Ontario's Hideaway Pictures inks new \\$150M, 25-picture production deal](#). Accessed on April 23, 2023.

³⁹ The Northern Ontario Film Studios. [Creating Long Lasting Cinema in the North](#). Accessed on April 23, 2023.

⁴⁰ Anishinabek News. [Golden Harvest and Mukwa Studios present sky-high opportunities on Nipissing First Nation](#). Accessed on April 23, 2023.

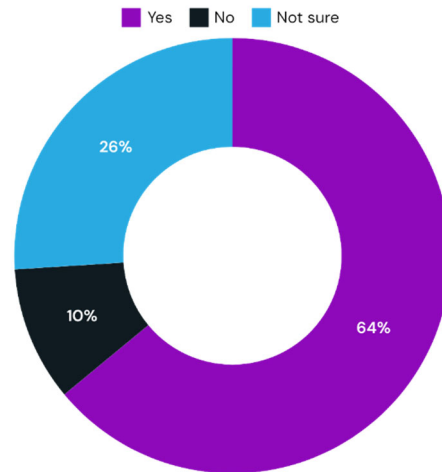
⁴¹ CTV News Northern Ontario. [Letterkenny producers seek lease to film at Capreol Arena](#). Accessed on July 26, 2023.



IN PERSPECTIVE: Benefits of a Purpose-Built Studio like FPS for the Local Workforce

Will additional studio infrastructure with available rental options and centralized facilities address some of the challenges faced by Northern Ontario's Film & TV industry?

50 responses



**Taken from CION's survey of existing Crew Database contacts.*

Job Opportunities: A purpose-built studio creates a hub for film and TV production, leading to a higher demand for local talent, crew members, and support staff. This can significantly increase employment opportunities for the local workforce.

Stable Employment: The film and TV industry often operates on project-based contracts. A purpose-built studio can offer more consistent work opportunities, reducing the seasonality of jobs in the sector.

Skill Development: With increased production activities, the local workforce has access to more projects, leading to skill development and specialization. This enhances the reputation of Northern Ontario as a skilled workforce hub.

Training and Apprenticeships: Purpose-built studios can collaborate with local educational institutions to provide training and apprenticeship programs, ensuring a pipeline of skilled workers.



Impact of FPS on Growth, Jobs, and Community Well-being

Economic Growth: A Tier 1 studio attracts production companies, leading to increased economic activity in the region. This includes spending on accommodations, catering, equipment rentals, and more.

- **Construction:** A spend of approximately \$31.6 million is anticipated on construction of the facility; employing engineers, architects, tradespeople and purchasing supplies from local businesses. In this case study, the construction of FPS is anticipated to create 135 new jobs in Sudbury with an increased GDP of \$32.548 million, generating labour income of \$20.856 million. See *Appendix A Economic Impact of FPS Construction on Greater Sudbury*.

Job Creation: Beyond direct production jobs, there are indirect employment opportunities in hospitality, transportation, and local businesses, bolstering the overall job market.

- **Operations:** Once built and operational, FPS would directly employ 14 individuals full-time in new jobs as well as engaging tradespeople and professionals, purchasing goods and services in the community. FPS intends to hire eight (8) full-time employees and six (6) contract employees. In addition, FPS will employ various tradespeople including plumbers and electricians on a regular basis. See *Appendix A Table 6: Economic Impact of FPS Direct Employment on Greater Sudbury*

Community Well-being: Economic growth and job creation have a positive impact on community well-being by reducing unemployment rates, increasing disposable income, and enhancing local infrastructure. See *Appendix A: Table 2: FPS Studio Benefits*

Facility's Role in Skill Enhancement and Career Growth

Skill Enhancement: A purpose-built studio can offer workshops, training programs, and on-the-job learning opportunities. This helps individuals enhance their skills, making them more competitive in the industry.

Knowledge Sharing: Studios often foster a collaborative environment, encouraging experienced professionals to share their knowledge with newcomers. This mentorship can accelerate career growth.

Career Advancement: With a steady flow of projects, individuals have the chance to climb the career ladder, taking on more significant roles and responsibilities within the studio and the wider industry.



Additionally, a studio can provide exposure to international projects, broadening career prospects.

Stakeholder Feedback – What is Needed Before Tier 1 Studio Introduction

In preparation for the arrival of a Tier 1 studio in Northern Ontario, key considerations have been identified through a comprehensive stakeholder analysis from various production perspectives. These insights emphasize the importance of workforce development, infrastructure readiness, regional collaboration, sustainability, and cost-effective practices.

Additional union workshops and training opportunities, such as three-day or week-long classes, can be beneficial for skills development. Hands-on experience on sets and practical training can enhance the workforce's knowledge and capabilities. Mentoring and knowledge transfer from experienced professionals from other cities can also help grow the local workforce. Training programs should be developed to prepare the workforce for the specific needs of a purpose-built studio.

Workforce Challenges and Infrastructure Gaps

- Solve Sessional/unpredictable nature of employment through year-round opportunities in studio.
- Encourage diverse content and larger-scale productions to provide technicians with steady work and skill development opportunities.
 - “Environments like Toronto or the GTHA you have a robust non-union independent world. That's traditionally where somebody cuts their teeth and learns the trade on a non-union independent film set, but that kind of doesn't exist up here in the North. It's predominantly run by the union. So, getting required days to even apply as a permit or a trainee can be difficult” - DOP, TECHNICAL STAKEHOLDER CATEGORY
- Encourage local equipment providers and improve accessibility to enhance production capabilities.
- Invest in purpose-built studios and facilities to enable a more conducive learning and production environment and accelerate workforce development activity.
- Alleviate infrastructure limitations for off-site departments like construction, costumes, and set deck, thereby expanding the region's ability to host larger-scale productions.
- Explore exceptions and opportunities for international workers, particularly those with experience from underrepresented communities, to bring their skills and connections to Northern Ontario.



Workforce Development and Infrastructure Readiness

- Utilize the NOHFC tax credit to incentivize the free-flow movement of Northern crew and offer tax benefits for producers who require crew to work in other regions.
- Prioritize the implementation of workforce infrastructure and development initiatives or programs before the construction of a purpose-built studio.
- Develop a skilled workforce by identifying key job positions required to support productions and provide training and mentorship for long-term sustainability.
- Engage in partnerships with established companies like William F. White's/Sunbelt and Ontario Camera North to drive workforce growth and expand studio facilities.

Regional Collaboration and Sustainable Growth

- Foster cooperation among cities in Northern Ontario to ensure long-term industry sustainability and workforce development.
- Promote private industry-owned studios, incentivizing their expansion to drive demand for workforce training and industry growth.

High-Quality Facilities and Niche Development

- Emphasize the importance of high-quality facilities within a purpose-built studio to attract productions and top-tier talent.
- Consider niche genre development, such as horror films, to distinguish the region and attract specialized projects.

Resource Utilization and Efficient Practices

- Assess the availability and capacity of existing studios and alternative spaces for productions.
- Focus on practical on-set experience, learning opportunities, and workshops to enhance the workforce's skills and capabilities.
- Adapt to new technologies, such as LED screens and virtual production, through proper training and implementation.

Community Engagement and Economic Impact

- Collaborate with vendors, suppliers, and the regional community to support workforce development and industry growth.
- Nurture regional agencies that actively promote Northern Ontario as a filming destination, maximizing benefits to the regional community.



Flexible Workforce and Balanced Cost Management

- Develop a flexible workforce capable of covering all job positions to accommodate multiple simultaneous productions.
- Balance hiring local crew members with recruiting from outside the region based on demand and availability.

Workforce Development Models to be Employed Before Tier 1 Studio Introduction

To address workforce gaps identified above, stakeholders recommended offering training programs such as specialized lighting, dolly, and generator courses. WFW suggested purchasing new lighting kits for a purpose-built studio such as Freshwater Production Studios (FPS) to be kept annually on site and maintained regularly by technicians. Lastly, a purpose-built generator is required as a backup power supply for the building.

- **Training Programs and Workshops:** Comprehensive training programs and workshops tailored to the specific needs of various job positions in the film and TV industry. These programs can cover technical skills, creative aspects, safety protocols, and set etiquette. Collaborate with local unions, educational institutions, and industry professionals to design and deliver effective training sessions.
- **Mentorship and Apprenticeship:** Implement mentorship and apprenticeship programs that pair experienced industry professionals with newcomers. This hands-on approach allows aspiring individuals to learn from seasoned experts and gain practical experience while working on real projects. Training opportunities include hands-on experience and task-based learning. Rather than just shadowing, individuals are given tasks and encouraged to problem-solve with support from experienced professionals. Initiatives like MAPPED assist in reaching out to potential workforce members and providing them with opportunities to work in the industry.
- **Preparing Workforce for Working in Studio:** Equipping Tier 1 studio with a router and operator to laser cut material for factory use and creating an assembling line of artisans to create sets for in studio paint and construction building for large and small scaled commercial projects and larger Tier productions.
- **Train the Trainer Approach:** Create a "Train the Trainer" approach, where experienced professionals within the industry become trainers themselves, passing on their knowledge



and skills to the next generation of workers. This approach helps to sustain a skilled workforce in the long term.

- **Weekend Seminars:** Host continued weekend seminars in partnership with local unions and regional stakeholders in studio to limit the amount of training on the job. Examples include how to read a call sheet, shooting schedules, set etiquette, clearances and protocols, department fundamentals.
- **Partnerships with Educational Institutions:** Form partnerships with colleges and universities to provide relevant film and TV production courses and programs. Collaborate with educators to ensure that the curriculum aligns with industry demands and standards.
- **Diversity and Inclusion Initiatives:** Implement diversity and inclusion initiatives to promote equal opportunities and representation within the workforce. Encourage individuals from diverse backgrounds to join the industry and provide resources to support their career growth.
- **Internship and Co-op Programs:** Offer internships and co-op programs to students and recent graduates, providing them with practical on-set experience and exposure to the industry.
- **Professional Development Opportunities:** Encourage ongoing professional development for the existing workforce through access to advanced training and certification programs. Support the workforce in upgrading their skills to meet industry advancements.
- **Cross-Training and Skill Diversification:** Encourage cross-training and skill diversification among crew members. This allows individuals to be versatile and capable of handling multiple roles, making them more employable and adaptable to different productions.
- **Outreach and Recruitment:** Engage in outreach programs to attract individuals from the regional community to the film and TV industry. Work with schools and community organizations to promote career opportunities and raise awareness about the benefits of working in the creative sector.
- **Industry Networking Events:** Organize industry networking events, conferences, and job fairs to connect aspiring professionals with potential employers and industry leaders. These events provide opportunities for networking, learning, and career advancement.

By employing a combination of these workforce development models, Northern Ontario can foster a skilled and diverse talent pool. CION will continue to outreach to industry stakeholders and educational institutions to identify opportunities to deliver the above approaches directly to new and experienced film crew members from within Northern Ontario's skill workforce.



Crew Needed to Support the Introduction of a Tier 1 Production Studio

*To calculate quantitative gaps, CION estimated workforce numbers from 2022 and added an estimated 2 Type A productions per year being added from the introduction of Tier 1 purpose-built studio, estimating a gap of 1142 people, and needing on average 350 film and TV crew per year trained to meet the demand in 3.25 years.

Chart R

Budget Type	2022 Workforce Demand	*CION Crew Inventory Estimate	Workforce Forecast ('22 Demand +2 'Type A' Productions)	Workforce Gap Before Arrival of Tier 1 Studio
Total	1,173	1,021	2,053	1,032
Creative	390	333	710	377
Administrative	379	317	659	342
Technical	404	371	684	313

CHART Q: Workforce Gap In Northern Ontario By Category

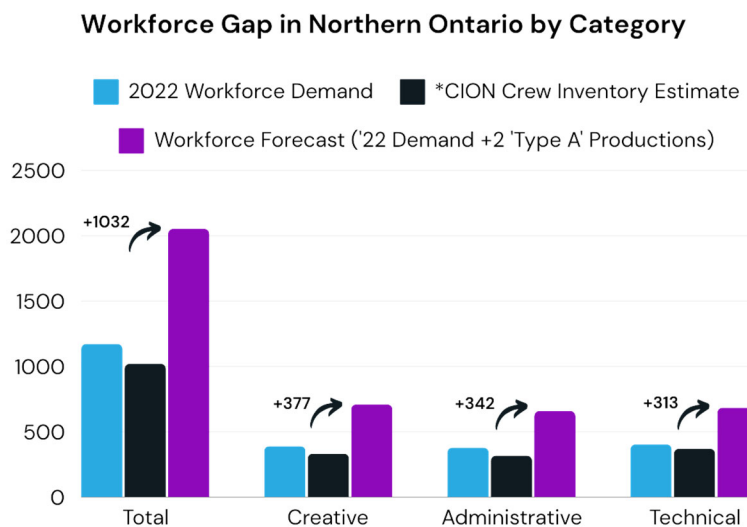


CHART R: Estimated Tier 1 Studio Workforce Gap

*Estimated data relating to total crew inventory is based on total crew listing on CION's Crew Database (acknowledging not all crew are active and not all crew participants are reflected on the database).



350 Approximately 350 film and TV crew need to be trained per year for the next four years to meet the Workforce Forecast gap, to sustain the amount of Northern production activity and operate a Tier I production studio at two (2) productions per year.

*These numbers are based on CION's most recent film and crew training, if continued with 2 (175) workforce training sessions per year.

To sustain the production activity collaboration and skills-sharing among Pan-Northern communities within Northern Ontario is crucial. These trends underscore the challenges of maintaining a skilled workforce in Northern Ontario's production hubs, which can be alleviated through the simultaneous development of workforce and infrastructure capacity.



IN PERSPECTIVE: CION Timelines for Workforce Training to Support Upcoming Studio Infrastructure

2024	<ul style="list-style-type: none">• Partnerships with REEL CANADA, WFW, Weengushk, ISO, Black Screen Office (BSO), and Disability Screen Office (DSO) are solidified to continue delivering crew training multiple times per year – including new and diverse candidate pools.• Film and TV crew training programs continue with the goal of training 350 individuals per year.• Gap reduction: 350 trained individuals + 175 previously trained individuals = 525 trained individuals in Year 1.
2025	<ul style="list-style-type: none">• Film and TV crew training continues, with another 350 individuals trained.• Gap reduction: 525 trained individuals + 350 newly trained individuals = 875 trained individuals in Year 2.• Tier 1 studio is established.
2026	<ul style="list-style-type: none">• Film and TV crew training continues, with another 350 individuals trained.• Gap reduction: 875 trained individuals + 350 newly trained individuals = 1,225 trained individuals in Year 3.• Estimated gap: 1,225 trained individuals – 1,142 estimated gap = 83 individuals more than needed to fill the gap.
2027	<ul style="list-style-type: none">• Film and TV crew training continues, with 350 individuals trained.• The excess workforce from the previous year helps to meet any additional demands or attrition.

By the end of this anticipated period of workforce training and infrastructure development, the workforce gap of film and television technicians in Northern Ontario would be effectively filled, with an additional 83 trained individuals to spare. This timeline assumes the training rate remains consistent and that partnerships with new and existing training stakeholders are effective in supporting continuous workforce development.

Outcomes

The Northern Ontario film and television industry faces crucial gaps in its workforce and infrastructure, impacting its growth potential. Northern Ontario is currently missing key creative professionals who can lead and manage productions with the region's best interests in mind. Addressing this gap requires individuals who can provide direction, mentorship, and creative leadership. By discontinuing the Deeming/Mentoring Provision as part of the NOHFC's Film &



Television stream, it is anticipated that more crew members will be hired from Northern Ontario for higher positions.

According to an interview with WFW regarding studio infrastructure needs, lighting and grip, dollies, generators, and package trucks are the most rented equipment categories in Northern Ontario. In terms of workforce gaps, not having enough trained technicians who live in the north, mechanics on duty knowing how to do repairs, and operating cranes or aerial lifts are challenges.

The introduction of a Tier I studio space in Northern Ontario could significantly attract film and television productions, promote training, and contribute to the growth of a pan-Northern workforce. Addressing labor shortages in the film and television industry from a pan-Northern perspective involves collaboration among industry stakeholders and partners. It is crucial to collectively work on developing and nurturing the local labor force in Northern Ontario. This effort aims to ensure that skilled crews are readily available to service multiple productions, reducing the reliance on external resources.

By the end of this anticipated period of workforce training and infrastructure development, the workforce gap of film and television technicians in Northern Ontario would be effectively filled. This timeline assumes the training rate remains consistent and that partnerships with new and existing training stakeholders are effective in supporting continuous workforce development.



Appendix A – Economic Impact of a Tier I Production Studio – Case Study (FPS)

In August 2021, CEI Management Inc. prepared a study on behalf of CION to provide a third-party assessment of the economic impacts of a Tier I studio associated with the construction and operation of Freshwater Production Studios Ltd. (FPS) in Sudbury, Ontario. This report concluded that in five years, FPS will annually generate 1,384 jobs and contribute \$106 million to Northern Ontario's economy.

Table 1: Summary of Results

	Total GDP (000's)	Labour Income (000's)	Jobs
Construction Impact	\$12,404	\$7,717	135
Direct FPS Employment	\$1,553	\$0.983	20
Film and Television Production	\$92,193	\$70,918	1,229
TOTAL	\$106,150	\$78,635	1,384

In addition to the employment effects and contribution to the regional economy, FPS will generally promote the region, augment training opportunities, foster innovation and mitigate out-migration.

**Table 2: FPS Studio Benefits**

Employment Effects	Contribution to the Regional Economy	Wider Benefits
Construction	Increased Gross National Product	Film-Induced Tourism
FPS Direct		Promotion of Northern Ontario
Film & Television Production	Increased Federal, Provincial and Municipal Taxes	Skills, Education and Training
Indirect	Contribution to Culture	Creative Innovation
Induced		Positive Demographic Change
		Retention of the Creative Class

- Construction: Tier I studio infrastructure will spend approximately \$31.6 million constructing the facility; employing engineers, architects, tradespeople and purchasing supplies from local businesses. In this case study, the construction of FPS is anticipated to create 135 new jobs in Sudbury with an increased GDP of \$32.548 million, generating labour income of \$20.856 million.
- Operations: Once built and operational, FPS would directly employ 14 individuals full-time in new jobs as well as engaging tradespeople and professionals, purchasing goods and services in the community.
- FPS intends to hire eight (8) full-time employees and six (6) contract employees. In addition, FPS will employ various tradespeople including plumbers and electricians on a regular basis.
- Film and Television Production: In addition, FPS will drive new film and television production to the region. An important aspect of this analysis is to demonstrate how many jobs and how much economic activity will be generated by the productions that come to FPS, which would not have shot in Northern Ontario save for the existence of FPS. The anticipated indirect economic impact of FPS is far greater than a typical capital investment or business startup. Tier I studios trigger significant increases in film and television production. With the additional film and television production activities will come numerous indirect economic activities through further employment within the local and wider Ontario economy. Wider economic benefits are more generally associated with the film and television industry, such as film and business tourism and the promotion of Northern Ontario. To date the productions that have shot in Northern Ontario have, for the most part, been location-based productions.



Tier I studios offer the opportunity for primarily studio-based productions to shoot in Northern Ontario.

The benefits of Tier I extend beyond the initial and ongoing spending to promote long-term economic growth and productivity in Northern Ontario. In particular, the establishment of FPS will promote the development of related businesses on and off campus.

Production Expenditure Impact on Related Businesses

Film and television productions spend monies in the majority of all industry sectors. Productions rent cars and trucks, buy construction supplies for set construction, rent office equipment, stay in hotels and hire local caterers. The economic impact studies conducted on three films shot in Northern Ontario and summarised in Table 10 indicated an average of 215 vendors were used in those productions with 82 local Northern Ontario vendors.

**Table 8: Estimated Impacts Greater Sudbury & North Bay (2012/2013–2015/2016)**

Estimated FTE Direct Jobs	1,196	Key to the growth of the Northern Ontario industry has been the availability of experienced and trained crews. Currently, there are approximately 1021 people registered with the CION Crew Database, the majority of whom live in the North. 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 high salaries. A head carpenter or hair stylist earns about \$100,000 per year, a generator operator approximately \$108,000 per year, a production accountant \$90,000, set production assistants \$43,000 and a production manager \$108,000. The Northern Ontario crew-base is spread across almost all departments and includes accountants, art directors, camera operators, carpenters, script supervisors, location managers, props masters, composers, drivers and sound mixers to name only a few positions.
Estimated FTE Indirect Jobs	1,400	
Estimated FTE Induced Jobs	415	
	3,011	
Direct Production Industry		
Labour Income (000's)	\$71,792	
Spin-Off Labour Income (000's)	\$ 70,762	
	\$142,554	
Gross Domestic Product (Direct)(000's)	\$81,125	
Gross Domestic Product (Spin-Off) (000's)	\$112,892	
	\$194,017	

Economic Impact Studies of Film Produced in Northern Ontario

The Canadian Media Producers Association engaged MNP LLP to evaluate the economic impact of three films on the economy of Ontario and on Northern Ontario. These studies determined that on average, \$1 spent on film production in Ontario contributed over 1.5 times to the overall GDP of the province and over 2 times to output. Eighteen full-time equivalent jobs (direct and indirect) were created for every million dollars of expenditure. It is important to note that the study covers films with principal photography in Northern Ontario and while production occurred in multiple regions, the resulting metrics remained reasonably consistent.

**Table 9: Summary of Economic Impact Studies**

(000's)	BORN TO BE BLUE	PYEWACKET	INDIAN HORSE	TOTAL
Direct Production Expenditure - Ontario	\$4,200	\$2,800	\$4,900	\$11,900
Total Output - Ontario	\$9,500	\$5,400	\$9,100	\$24,000
Total GDP - Ontario	\$6,700	\$3,700	\$6,000	\$18,400
Total FTE - Ontario	101	47	77	225
Total Vendors - Ontario	160	60	425	645
Total Vendors - Local	80	39	128	247



Appendix B – CION Crew Database by Creative, Technical, Administrative Categories

Creative	333	Technical	371	Administrative	317
1st Assistant Art Director- Sets	2	1st Assistant Camera-Focus Puller	8	1st Assistant Accountant-General	6
1st Assistant Art Director- Graphics	7	2nd Asst. Camera-Clapper/ Loader	11	1st Assistant Accountant-Payroll	4
Art Department Coordinator	4	Animal Wrangler	2	1st Assistant Director	6
2nd Assistant Art Director	10	Assistant Editor	3	1st Assistant Production Coordinator	5
Animator	5	Best Person Electric	3	2nd Assistant Accountant	8
Art Director	7	Best Person Grip	4	2nd Assistant Director	6
Trainee Assistant Art Director	11	Boom Operator	11	2nd Assistant Production Coordinator	3
Assistant Costumes	8	Camera Utility/ Loader	6	3rd Assistant Director	4
Assistant Hair	6	Camera Operator	3	4th Assistant Director	9
Assistant Make Up	6	Steadicam Operator	4	Accountant	3
Assistant Picture Editor	3	Camera Trainee	9	Accounting Trainee	4
Assistant Props Master	6	Carpenter	11	Assistant Location Manager	8
Assistant Set Decorator	5	Cast Driver	14	Assistant Production Coordinator	7
Carpenter	11	Cinematographer	10	Assistant Production Manager	3
Composer	4	Construction Coordinator	4	Associate Producer	3
Costume Buyer	3	Craft Assistant	3	Cast Driver	4
Costume Designer	4	Craft Service	7	Casting Director	3
Costume Set Supervisor	4	Data Imaging Technician	6	Casting Assistant	4
Costume Truck Supervisor	3	Data Management Technician	3	Researcher	2
Digital Video editor	3	Dialogue Editor	2	Catering	7
Director	6	Digital Imaging Technician	1	Craft Services	12
Director of Photography	3	Digital Management Technician	1	Creative Producer	2
EPK	3	Digital Outreach Assistant	1	Extras Casting	3
Extras Casting	2	Director of Photography	2	Executive Producer	5



Documentary					
Filmmaker	3	Directors Assistant	8	Filmmaker	7
Filmmaker	4	Dolly Grip	5	Locations Scout	6
Graphic					
Artist/Illustrator	5	Driver	23	Line Producer	4
Graphic Designer	6	Drone Operator	7	Location Manager	9
				Location Production	
Greens-Person	5	Editor	4	Assistant	13
Hair	6	Electric	12	Location Support Personnel	11
Hair Department					
Head	4	Electric Daily	4	Location Scout	5
Head Carpenter	5	Rigging Electric	4	Office Production Assistant	13
Key Hair	3	Set Wireperson	1	Office Trainee	4
				On-Set Covid Safety	
Key Hair Stylist	4	Assistant Gaffer	3	Cleaner	3
Key Makeup Artist	4	Gaffer	6	Other	2
Key Scenic Artist	3	Generator Operator	7	Picture Car Supplier	3
Location Scout	2	Grip	16	Post Production Assistant	2
Make Up	9	Key Grip	5	Post Production Supervisor	3
		Location Production			
Make up Assistant	3	Assistant	6	Producer	12
Makeup Department					
Head	4	Make up Assistant	3	Co-Producer	3
Musician/Composer	3	Medic / Set Medic	5	Line Producer	2
		Office Production			
On-set Carpenter	2	Assistant	22	Producers Assistant	3
On-set Decorator	3	Picture Car Driver	8	Production Accountant	7
On-Set Painter	3	Picture Cars Captain	3	Production Assistant	12
On-Set Props	3	Picture Editor	2	Production Covid Officer	3
Other	7	Playback Operator	2	Production Coordinator	8
Painter	8	Production Assistant	4	Production Manager	6
Photographer	2	Props Key On-Set	3	Security	4
Picture Editor	6	Rigging Grip	5	Script Supervisor	4
Production Designer					
PD	12	Script Supervisor	8	Script Assistant	2
Prop Builder	3	Security	3	Set Production Assistant	9
Props Buyer	2	Set Medic	6	Stunt Coordinator	1
				Trainee Assistant	
Props Master	8	Sound Editor	9	Accountant	3
				Trainee Assistant Art	
Scenic Artist	3	Sound Mixer	5	Director	2
Scenic Painter	5	SPFX Coordinator	2	Trainee Assistant Director	2
Screenwriter	2	SPFX Make Up	6	Transport Captain	6



Set Costumer	4	SPFX Technician	4	Transport Coordinator	7
Set Dec Trainee	6	SPFX On-Set	3	Unit Production Manager	2
Set Decoration Buyer	4	Stills Photographer	5	Travel Coordinator	3
Set Decorator	13	Stunt Coordinator	3	Co-Captain / Head Driver	3
Set Dresser	22	Stunt Performer	7	AZ Unit Mover	4
Sewer	2	Trainee Assistant Editor	2	Swamper	3
Personal Makeup Artist	3	Unit Driver	4		
Period / Personal Hairstylist	2	Video Editor	3		
Writer	9	Videographer	2		
		Visual Effects	2		
1st Assistant Art Director- Sets	2	1st Assistant Camera-Focus Puller	8	1st Assistant Accountant-General	6
1st Assistant Art Director- GFX	6	2nd Asst. Camera-Clapper/ Loader	11	1st Assistant Accountant-Payroll	4
Art Department Coordinator	3	Animal Wrangler	2	1st Assistant Director	8
2nd Assistant Art Director	9	Assistant Editor	3	1st Assistant Production Coordinator	3
Animator	5	Best Person Electric	3	2nd Assistant Accountant	8
Art Director	7	Best Person Grip	4	2nd Assistant Director	6
Art Trainee	11	Boom Operator	15	3rd Assistant Director	9
Assistant Costume Designer	17	Camera Dept	3	4th Assistant Director	4
Assistant Hair	3	Camera Operator	19	Production Accountant	3
Assistant Make Up	6	Camera Trainee	16	Accounting Trainee	4
Assistant Picture Editor	1	Carpenter	11	Art Department Coordinator	3
Assistant Props Master	3	Cast Driver	14	Assistant Director	3
Assistant Set Decorator	1	Cinematographer	13	Assistant Location Manager	8
Carpenter	11	Construction Coordinator	4	Assistant Production Coordinator	7
Composer	4	Craft Assistant	1	Assistant Production Manager	3
Costume Buyer	1	Craft Service	7	Associate Producer	1
Costume Designer	10	Data Imaging Technician	6	Cast Driver	2
Costume Set Supervisor	2	Data Management Technician	2	Casting Director	2
Costume Truck Supervisor	2	Dialogue Editor	2	Casting Assistant	2



Costumes	2	Digital Imaging Technician	1	Clearances Coordinator	1
Digital Video editor	3	Digital Management Technician	1	Catering	7
Director	6	Digital Outreach Assistant	1	Craft Services	12
Director of Photography	3	Director of Photography	2	Creative Producer	2
EPK	3	Directors Assistant	1	Driver	3
Extras Casting	2	Dolly Grip	3	Editor	1
Filmmaker, Documentary	3	Driver	23	Educator	1
Filmmaker	4	Drone Operator	1	Extras Casting	3
Graphic Artist/Illustrator	5	Editor	4	Executive Producer	5
Graphic Designer	6	Electric	12	Filmmaker	7
Hair	6	Electric Daily	1	Locations Scout	6
Hair Department Head	4	Rigging Electric	2	Line Producer	4
Head Carpenter	5	Set Wireperson	1	Location Manager	12
Key Hair	3	Assistant Gaffer	3	Location Production Assistant	13
Key Hair Stylist	4	Gaffer	6	Location Support Personnel	14
Key Makeup Artist	4	Generator Operator	7	Location Scout	5
Key Scenic Artist	3	Grip	20	Office Production Assistant	13
Location Scout	2	Key Grip	5	Office Trainee	4
Make Up	9	Location Production Assistant	3	On-Set Covid Safety Cleaner	3
Make up Assistant	2	Make up Assistant	3	Other	7
Makeup Department Head	4	Medic / Set Medic	5	Picture Car Supplier	1
Musician/Composer	3	Office Production Assistant	22	Post Production Assistant	1
On-set Carpenter	2	Other Labour	1	Post Production Supervisor	1
On-set Decorator	3	Photographer	1	Producer	12
On-Set Painter	3	Picture Car Driver	3	Producer, Co-Producer	1
On-Set Props	2	Picture Cars Captain	8	Producer/Short Films	1
Other	16	Picture Editor	2	Producers Assistant	3
Painter	3	Playback Operator	2	Production Accountant	7
Photographer	2	Production Assistant	4	Production Assistant	12
Picture Editor	6	Props Person	1	Production Assistant/Covid Officer	1



Production Designer					
PD	12	Rigging Instructor	5	Production Coordinator	14
Prop Builder	3	Script Supervisor	8	Production Manager	6
Props Buyer	1	Security	3	Security	4
Props Master	8	Set Medic	6	Script Supervisor	4
Scenic Artist	3	Sound Editor	9	Script Assistant	2
Scenic Painter	3	Sound Mixer	5	Set Production Assistant	12
Screenwriter	2	SPFX Coordinator	4	Stunt Coordinator	1
Set Costumer	4	SPFX Make Up	6	Trainee Assistant	
				Accountant	3
				Trainee Assistant Art	
Set Dec Trainee	6	SPFX Technician	4	Director	2
Set Decoration Buyer	4	SPFX On-Set	6	Trainee Assistant Director	2
Set Decorator	13	Stills Photographer	2	Transport Captain	6
Set Dresser	22	Stunt Coordinator	7	Transport Coordinator	7
Sewer	2	Stunt Performer	3	Unit Production Manager	2
Trainee Assistant Art	2	Trainee Assistant Editor	2	Travel Coordinator	3
Personal Makeup					
Artist	3	Unit Driver	1		
Period / Personal					
Hairstylist	2	Video Editor	3		
Trainee Assistant Art					
Director	5	Videographer	2		
Writer	11	Visual Effects	2		