



Film Services Feasibility Study

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Brampton Film Services Feasibility Study

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Executive Summary

In keeping with Vision 2040, the City of Brampton is exploring additional Economic Development streams, seeking to identify priority industries to drive growth in direct, indirect, and induced revenues, employment and workforce development, and the attraction of private sector capital investment. This study is reviewing the City of Brampton's current film + television activity, and assessing its capacity for growth, and the attendant opportunities for Brampton.¹

The incredible growth of online TV services, and their appetite for original screen entertainment content is driving up international production volumes and quality at a significant rate. Communities across Ontario are actively trying to prove themselves "Film Friendly" and attract this industry with varying degrees of success, appreciating its power as an economic engine, and value as a cultural force.

Film Friendliness is an international standard for lead film and television production jurisdictions defined as the ability to attract and service film and television productions in a quick turnaround one-stop-shop concierge manner, available 24/7, while quickly addressing any customer issues or community concerns related to location filming.

Thanks to stable National and Provincial film and television tax credits – triggered only when a production deal is in place - and fulsome production expertise, Canadian film and television production volumes continue to grow to record volumes year over year – almost \$9 Billion at last count, with over half of that work from foreign production partners.²

Ontario's volumes have grown over 23% in the past few years alone, and is expected to grow at a compound annual growth rate of 5.4% until at least 2022.³

There is tremendous industry appetite for fresh, Film Friendly location jurisdictions, close to airports and studios, and an immediate need for land for backlot and staging purposes. No municipal financial incentives are required to attract production.

¹ For the purposes of this report, digital media has not been included, but could be in future, as the industry presence in Brampton grows.

² CMPA Profile 2018: Economic Report on the Screen-based Media Production Industry in Canada. P 8

³ FilmOntario Economic Update 2018, p 4

These numbers are based on the Ontario Creates tax credit administration reports, and do not include television commercials, corporate videos, music videos, broadcaster in-house production, or small projects that fall outside the tax credit qualifying spend.

Brampton already has some significant advantages as a location jurisdiction, and has attracted close to \$3 million in production spending in 2019.⁴

City revenues from production activity have doubled over the same period – despite shoot days hovering around 100 - to just over \$300 thousand, indicating an increase to the quality and scale of productions looking to Brampton.

Policy tools, revenue and resource redirection, staffing adjustments, and physical office positioning, will work together to enable Brampton to scale up its locations offerings, market Brampton to the industry, and service significant growth in production volumes to deliver increased revenues, employment, job training, and private sector capital investment.

These volumes could double or triple in the next 24 months.

First step is a package of Policy tools, implemented together:

1. Council formally establishing an outward facing orientation that places priority on Film Friendliness, identifying the industry as an economic development driver, and ensuring its formal inclusion in the scope of work all departments, agencies, boards and Commissions.
2. Establish a formal Brampton Film + Television Office on the Main floor of City Hall, and review the re-direction of industry municipal building and parking rental fees to offset overhead and operations.
3. Formally recognize the current Film Specialist scope and ability to function as day to day liaison with all departments, agencies, boards and Commissions, including the Mayor's office, delegate to junior office staff, and actively co-develop with Economic Development the City's relationship and communications with the production industry nationally and internationally.
4. Establish a Brampton Film + Television Industry Advisory Board, co-Chaired by the Mayor or his Council designate, to assist with production attraction, workforce development, community outreach, labour data gathering, and attracting private sector capital

Working closely with the Ontario Film Commission, Brampton's Film Specialist can tag into their LA marketing efforts, and Locations Database to ramp up the Brampton offerings, including available lands for lease, range of buildings and streetscapes, as well as the many wonderful parklands.

⁴ Brampton Film Office Reports, 2018, 2019

The film + television industry is an excellent fit for the economic development Vision for the City of Brampton, internally and externally.

City revenues, with some categories diverted, should cover any overhead investments. Industry workforce development addresses the need for Brampton to deliver youth training and employment, and jobs for a wide range of residents. Give-back community programmes enhance and enrich City community offerings for its citizens. Land lease and development opportunities attract private sector capital driving more property tax revenues to the City.

Thanks to the incredible, sustained growth in Ontario's new manufacturing - Film + Television industry - Brampton has an opportunity and the capacity to transform into a Film Friendly jurisdiction that drives businesses, and attracts employment and job training, community outreach, and private sector capital.

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Introduction

In keeping with Vision 2040, the City of Brampton is exploring additional Economic Development streams, seeking to identify priority industries to drive growth in direct and indirect revenues, employment and workforce development, and the attraction of private sector capital investment.

The film and television production industry, referred to as the Film Industry, is one of Ontario's lead economic development drivers – the new manufacturing – delivering employment and workforce development, private sector capital, and increased global market share.

Communities across Ontario are actively trying to attract this industry with varying degrees of success, including Pickering, Markham, Mississauga, Ottawa, and further north, appreciating its power as an economic engine, and value as a cultural force.

Currently, Brampton serves a growing number of film shooting days per year – just over 100 days in 2019 – with the potential to double or triple that volume over the next 24 months and attract the attendant revenues, workforce development, and investment.

Study Mandate

This Feasibility Study is tasked with investigating the City of Brampton’s current film and television production activity⁵, assessing its capacity and offering recommendations for delivering “Film Friendliness” for large-scale domestic and international productions, for Economic Development and Council to consider.

Film Friendliness is an international standard for lead film and television production jurisdictions defined as the ability to attract and service film and television productions in a quick turnaround one-stop-shop concierge manner, available 24/7, while quickly addressing any customer issues or community concerns related to location filming.

Investigations included a review of internal reports, City of Brampton Master Plans, Film website, permit and locations documents, one-on-one interviews with Mayor Brown and over 21 departments, and on-site reviews of physical space and infrastructure. A detailed Methodology is in Appendix A. Benchmarking with similar municipalities has already been conducted internally, and is not repeated here⁶.

⁵ For the purposes of this report, digital media has not been included, but could be in future, as the industry presence in Brampton grows.

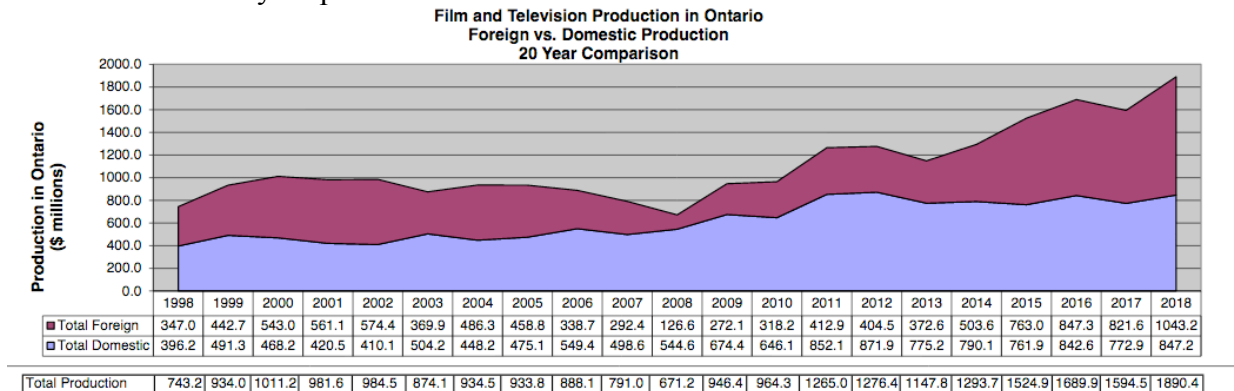
⁶ The City of Brampton’s Film Specialist and Economic Development have produced several internal reports regarding aspects of servicing film + television production, including basic volume data, which informed our investigation.

The Current Industry Picture

Thanks to stable National and Provincial film and television tax credits – triggered only when a production deal is in place - and fulsome production expertise, Canadian film and television production volumes continue to grow to record volumes year over year. ⁷ The total volumes of film and television production in Canada increased to an all-time high of \$8.92 Billion in 2017/18. All of the growth was due to another sharp increase in the volumes of foreign location service production; it rose by \$993 million to a high of \$4.77 Billion in 2017/18.⁸

Ontario offers a total package of talent, infrastructure, and incentives to attract production. This meant a growth in production volume of 23% from 2014 – 2017 to \$1.6 Billion in 2017, growing again in 2018 to \$1.9 Billion⁹ for film and television alone, representing one quarter of Canada’s total film and television production volume, and is expected to grow at a compound annual growth rate of 5.4% until at least 2022.¹⁰¹¹

Ontario Creates 20 year production stats chart



The chart above represents productions shot in Ontario which have received facilitation services and/or applied for tax credits from Ontario Creates

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CMPA Profile 2018: Economic Report on the Screen-based Media Production Industry in Canada. P 8

⁸ Ibid, p 8

⁹ Ontario Creates 2018 production report

¹⁰ FilmOntario Economic Update 2018, p 4

¹¹ These numbers are based on the Ontario Creates tax credit administration reports, and do not include television commercials, corporate videos, music videos, broadcaster in-house production, or small projects that fall outside the tax credit qualifying spend.

Explosion of online TV services

The incredible growth of online TV services, and their appetite for original screen entertainment content is driving up international production volumes and quality at a significant rate.

There are currently 25 online TV services, such as Amazon, Hulu, AppleTV, with Netflix taking a market share of over 70%.

Canada was the first market outside the United States in which Netflix launched, giving it a huge first-mover advantage over rivals that has led to a dominance seen in few, if any, other territories globally.¹²

Lead production jurisdictions such as Ontario are meeting that demand, and expanding their human and physical infrastructure to do so.

This includes expanding their selection for location shooting.

Economic Development Opportunity for Brampton

There is tremendous industry appetite for fresh, Film Friendly location jurisdictions, close to airports and studios. With the locations 'stock' becoming familiar in the Toronto, Hamilton and Dundas areas, the rapid increase in studio development coming on-line close to Brampton (north Toronto and Mississauga), and the immediate need for land for film backlot and staging purposes, growth is there for the taking – if Brampton takes the necessary steps to be able to service the volumes.

Without requiring investment in costly marketing, Brampton could choose to take the internal steps critically necessary in order to become identified as a Film Friendly jurisdiction, doubling or tripling the current permit days within 24 months, delivering a significant increase in rental and service volumes, local spending (catering, dry cleaning, taxis, location fees, extras casting, car and truck rentals, etc.), as well as community donations, employment and job training, and attraction of significant private sector capital investment, as the industry grows and invests in Brampton.

¹² PWC Entertainment and Media outlook, 2019 - 2023

Current Competitive Advantages for Brampton

Brampton has some distinct advantages over neighbouring jurisdictions, including:

- Proximity to Toronto and Mississauga studios
- Proximity to Pearson airport, and key transportation arteries
- Positive reactions from all Senior staff regarding the opportunity for increased film activity volumes
- Positive reactions from key external agencies, including Brampton Transit, Peel Regional Police, and TRCA – all keen to see expanded film + television production volumes.
- No permit fees, and a revenue-neutral approach for City services
- The ability for Film Office to deliver consolidated permitting to clients for all City services and locations
- Stable and reasonable fees for City owned property rentals
- Excellent Location and Property Use Agreements, already approved by Legal and Risk + Insurance departments
- A centralized enforcement unit for all municipal enforcement, including parking, road occupation, parks, and municipal licensing and property standards
- Industry standard broadband connectivity
- Land parcels of minimum 5-8 acres, either available or in transition, for production backlot and staging leases.
- Land parcels of minimum 10-12 acres available for private sector studio development
- Warehouses and buildings going offline for repurposed studio development consideration
- Diverse range of interior and exterior architecture and vast and numerous public spaces
- Diverse population for background/extra performers
- Available office space on the Main floor of City Hall to house a Brampton Film and Television Office (BFTO) and staff, with a customer service window
- Large windows in the proposed BFTO to showcase to the community the clips and posters of productions shot in Brampton
- Relationship with Toronto Global, the Economic Development Agency for the Toronto Region

Transforming into a Film Friendly Jurisdiction

So, how does a jurisdiction meet the goal of being Film Friendly, and driving Economic Development? It begins with exceptional customer service.

There are several aspects to be considered, not the least of which is developing a strategy that satisfies both key stakeholder groups: the industry, and the community.

Policy tools, revenue and resource adjustments, staffing adjustments, and physical office positioning, will work together to enable Brampton to scale up its locations offerings, market Brampton to the industry, and service significant growth in production volumes to deliver increased revenues, employment, job training, and private sector capital investment.

No municipal financial incentives are required to attract production.

1. Policy Tools – Leadership from the Mayor and Council

The first step is Council formally establishing an outward facing orientation that places priority on Film Friendliness.

We recommend that the following policy items be implemented as a package.

- a) Establish film and television industry as lead Economic Development file for Brampton, ensuring that the City consider the impact and implications of **any** programs, policies and budget decisions on the film and television industry in recognition of its significant economic and cultural impact for Brampton. This also serves to protect the Film Office and staff as a separate and distinct service.
- b) Council direct all departments, agencies, boards and Commissions to review relevant policies, procedures and activities with the expectation to add/ include film activity service in their scope of work.
- c) Ensure that provisions of by-laws such as zoning shall not be interpreted to exclude or prevent locations filming.
- d) Establish a Brampton Film and Television Office, with Film Specialist and staff
- e) Redirect municipal building and parking rental fees to the Brampton Film and Television Office to offset overhead and operations.
- f) Establish a Brampton Film and Television Industry Advisory Board.
- g) Protect Employment Lands zoning, to attract infrastructure activity and development.

Most of these policy tool functions are self-evident and do not require explanation here.

Let's unpack the Film Office, Film Commissioner, and Advisory Board items.

2. Brampton Film + Television Office (BTFO)

Lead jurisdictions and their clients know that it is critical to establish a formal Film + Television Office with both a physical and virtual presence, 24 hour response time for inquiries, permit deliverables within 48 hours, and access 24/7.

Film production touches almost every department within the City's administration, and almost every neighbourhood within the City boundaries.

Addressing client issues +/-or community concerns related to location filming promptly is essential, with the Film Office serving as an advocate for both clients and residents.

BFTO Physical Presence

Brampton's City Hall currently has some unused space and service counter on the Main Floor, including a public facing wall of windows. This space would be optimal for servicing productions, including scout and prep meetings, permit pickups, as well as raising the profile of this economic driver with City Council and staff and the community, with film posters, continuous show reels, etc.

BFTO Virtual Presence

The BFTO website will often be the first stop for information about filming in Brampton. As a primary marketing tool – to both industry and community – it is essential that the site and any/all social media be regularly updated directly by the Film Office. A link to this site should be included on all marketing materials and appropriate Brampton and industry sites, such as Ontario Creates Film Commission, Toronto Global, and Brampton Economic Development.

BFTO Function

The Film Office is the point of contact for all industry inquiries, scouting, and permit co-ordination, for all Brampton locations, including access to and use of City owned buildings, parks, recreation centres, etc. The office also co-ordinates parking, traffic control, Paid Duty police officers, Fire Department, and more.

Related Film Office activities include the provision of locations advice, dealing with the concerns of retailers and residents, liaising with the BIA, dealing with complaints, and troubleshooting on behalf of the industry, and responding to questions/problems from City Councillors.

While current software systems do not allow for a quick shift to a one-permit, one-invoice process, there is the capacity to have all permits go to the Film Office, where they would be consolidated onto one 'master' permit. Finance has recommended that permit invoicing remain as is, at present.

It is important for turn-around time efficiencies that all departments allow the Film Office staff to have access to viewing their road and facilities work and event schedules and activities.¹³

In keeping with best practices in other lead jurisdictions, and in recognition of the significant economic impact of the production industry, Brampton would maintain its no-fee policy for location filming permits, and continue to provide other services to the industry on a revenue-neutral basis.

In order to attract new clients, Brampton would maintain current rental service rates.¹⁴

Currently, thanks to the internal relationship work done by the Film Specialist, the various departments generally ‘make it work’ for film activity, with some departments rarely impacted, while others are more consistently involved. Interestingly, some consider this activity an ‘extra’, or somewhat outside the scope of the City’s work.

Council’s policy tools come into play here – all City departments would recognize film activity as part of the scope of Brampton’s Economic Development priorities, and would respond swiftly, as required by a Film Friendly jurisdiction.

In response to an industry permit request, the Film Office would check the appropriate schedules and then if it appears available, would inquire with the relevant department/agency directly. In the absence of any conflict with the use of the facility or location, the Film Commissioner would be able to inform the department/agency that a film would be shooting there.

The Film Office would send out daily City-wide email bulletins regarding location shoot activity, for their inclusion in their planning.¹⁵

¹³ In each of our meetings, departments were very willing to allow this; we understand that this approach is underway.

¹⁴ A review of rates in comparative jurisdictions was recently done by the Film Specialist, so will not be expanded upon here.

¹⁵ As result of our research and discussions, we understand that this approach is underway.

Permit and Revenue Data Gathering

In managing the Film permit activity, the Film Office can pay careful attention to capturing inquiry, scout, and production activity, in order to measure inquiry to scout ratios, and scout to permit ratios, along with reported production spend in Brampton.

Exit polls for each production will also deliver key feedback and insight for service improvements¹⁶.

City departments use a range of software programmes for scheduling and accounting. We have had discussions with Finance and together have determined a path to capture and report the film revenue generated by all departments, without the need to change current IT software programmes or supports.¹⁷

¹⁶ As a result of our research and discussions, we understand that this approach is underway.

¹⁷ This is a Vendor capture capability, where each production's name is used as Vendor identity. This can be reinforced for the client when issuing the consolidated permit, through the Film Office.

3. Industry Nomenclature “Film Commissioner” - The Face of a Film Friendly Jurisdiction

A Film Friendly City must deliver one-stop-shop, concierge service and a point of contact, available 24/7.

The Film industry values a specific figure with a direct relationship to the Mayor, and the power to ‘make it happen’ at City Hall and within Brampton, often referred to as Film Commissioner¹⁸.

It should be noted that Mayor Brown has always been aware of the economic benefits of cultivating a strong screen-based industry. This is evidenced, in part, by his visits to Brampton film location work, such as “Handmaid’s Tale”, and are important for building a Film Friendly reputation.

Currently, Brampton has a Film Specialist, working alone, deep within Economic Development, and without a direct relationship to the Mayor.

Remarkably, thanks to the Specialist’s industry background, and excellent ‘back channel’ relationships developed with staff across the City departments, to our knowledge to date Brampton has managed to grow to over 100 shoot days per year without a production walking away unhappy, a department crying foul, or a community asking for a moratorium on production activity.¹⁹

In keeping with industry standards, we recommend that the Film Specialist scope be formalized , and consider a title change as follows:

Traditionally, the Film Commissioner (in current case, Film Specialist) reports through Senior Economic Development to the Mayor’s Office, with the support and authority to establish and manage relations and communications with all City departments, agencies and Commissions in accordance with the new Film Friendly mandate, delegate to junior film office staff, and actively co-develop the City’s relationship and communications with the production industry nationally and internationally, and other relevant parties and governments.²⁰

¹⁸ It is understood that the word ‘Commissioner’ has a very specific connotation at a Canadian City Hall that is different from its common industry meaning. Some small jurisdictions refer to this role as ‘Film Manager’.

¹⁹ The Directors Guild of Canada – Ontario division: There have been no complaints reported by the DGC Locations Caucus (Locations Scouts and Managers).

²⁰ This work is currently being delivered by the Brampton Film Specialist with remarkable results given the lack of official authority, staff, or resources. An increase in

Continued outreach to clients – particularly in LA – is essential; promoting Brampton as a Film Friendly jurisdiction should be ongoing. This includes but is not limited to: conceive and produce messages (social media or otherwise) and materials to promote Brampton as Film Friendly, including working closely with Toronto Global Economic Development Agency, and the Ontario Film Commission marketing team, including their LA office, attending appropriate locations trade shows, developing FamTours (familiarity tours) for the domestic and international community, and business meetings to carry the message.

The Film Specialist also conducts Exit Polls for each production in order to continue to improve service and production experiences.²¹

Additionally, productions can be encouraged to include “Filmed on location in the City of Brampton” and City logo, in their credits.

Film Office Staff

Given the scope of work required, it will also be necessary to establish Film Support staff role(s), reporting to the Film Specialist, to assist with all deliverables as directed, including customer service to both industry and community.²²

An increase in the staff complement – which could be seconded from existing staff – allows for a marked improvement in customer service and satisfaction by creating more opportunities for one-on-one interaction with clients, and to address and monitor production footprint and community concerns on locations.

volumes could result in a drop in the level of service and could result in unwanted staff turnover.

²¹ Since we have been working with the Brampton Film Specialist, I understand that this is now in place.

²² This staff role could be seconded from elsewhere in the City.

4. Brampton Film + Television Industry Advisory Board (BFTO Board)

Another key step in driving economic development for this sector is the establishment of the Brampton Film + Television Industry Advisory Board, comprised of 14-16 relevant industry business leaders, Co-Chaired by the Mayor and an industry stakeholder, and 1 or 2 additional Councillors, and supported by Film Office staff, with a mandate to provide advice and advocacy on policy and strategies to ensure the competitiveness and viability of the Film industry in Brampton, and develop marketing, community outreach programs and infrastructure and workforce development.²³

This places the Mayor in a leadership role with the industry, and increases the profile of the industry in Brampton, nationally, and internationally, enabling quick action.

The BFTO Board would provide advice to Council through the Economic Development Committee.

An ideal Advisory Board would comprise industry leads from:

- Production and Labour (ie one from each industry Union and Guild, Producers and Production Manager);
- Support Services (ie equipment, studio owner/operator, legal, financial)
- Post secondary partners such as Sheridan and Ryerson

The Advisory Board can also work with the Film Office to respond to issues of concern from Councillors and community members, as well as identify industry issues in need of immediate action.

First project would be to develop a Strategic Action Plan covering customer service operations, marketing, community outreach, workforce and infrastructure development goals, along with inter-government advocacy as needed, and steps to achieve those goals.

²³ The scope could be expanded to include digital media, but for the purposes of this study, the focus remains film + television production.

Industry Workforce development planning starts with the Advisory Board.

Working with the Film Commissioner, crew Unions and Guilds, such as IATSE 873 and Nabet 700 Unifor (technical), IATSE 667 (camera), IATSE 411 (including Production Assistants, Food service), Directors Guild of Canada (including Art Department, Locations, Editorial, Production Accounting), and ACTRA (on camera performers and stunt talent), can offer info sessions at middle and high schools, participate in local Career/Job Fairs, and arrange some job shadowing opportunities on larger shows. Job categories urgently available currently include, for example, truck driving, carpentry, bookkeeping, and accounting.

These partners can also share their members' postal region information, to assist in gathering data on Brampton residents working in the industry.

In partnership with Ontario Creates, the unions and guilds have initiated a workforce development strategy for 7 key regions, including the GTHA. Brampton could take an active role in this work almost immediately.

Attracting Private Sector Film Infrastructure Investment

When a Film Friendly jurisdiction delivers well for location production activity, physical infrastructure development inquiries begin.

An industry developed Strategic Action Plan should include goals to attract private sector investment for satellite offices (such as equipment), and physical infrastructure development, such as retrofit and purpose-built studios, land leases for backlot, support and staging purposes.

Community outreach programmes

The Advisory Board assists with the design and implementation of community outreach programmes, such as “give-back” programmes to assist with community development (such as adding new playground equipment), where production activity has been busy, and engage in green initiatives to reduce and reuse resources, and other targeted outreach to improve community relations.

Once Brampton is identified and operates as Film Friendly, jobs, workforce development and investment in the City will follow.

Locations Inventory Driving Production Volumes

As noted earlier, the industry is thirsting for new and varied locations, close to airports, transportation routes, and studios. The Film Specialist and staff will be able to tackle this work swiftly, to ramp up opportunities for Brampton.

1. Working more closely with Ontario Creates

The Province's creative industry development agency, Ontario Creates, is home to the Ontario Film Commission, which works with production leads to source locations, studio space, and to assist with all aspects of permits and other requirements. Brampton's Film Specialist can develop a strong rapport with the Ontario Film Commissioner, speaking regularly, to ensure that Brampton is top of mind.²⁴

2. Ontario Locations Database

They have a robust database of over 80 Film Friendly municipal and regional agencies and jurisdictions from across Ontario.

Brampton currently has some locations posted in this database, and these locations have attracted production. The more varied the locations offered in a Film Friendly jurisdiction, the more production activity is attracted, since establishing a base camp for production reduces the need for (and expense of) unit moves.

We have met with the Ontario Film Commissioner, Justin Cutler, to share what we have learned about Brampton's current advantages for location shooting, and he is delighted and committed to working closely with Brampton to expand locations postings.

Currently, in-demand locations include 4-8 acre parcels for backlots and staging, warehouses, and warehouses for potential studio retrofit.²⁵

They will now include Brampton's Film Specialist in all communications and production searches, to improve production opportunities.

3. Ontario LA Development Office

They will also ensure that Brampton's Film Specialist has an opportunity to connect directly and regularly with their LA development office, and marketing activities, to enable a proactive approach to attracting production.

²⁴ Over the course of our research, we facilitated a formal meeting for the Film Specialist, and the Manager of Tourism/Events/Ec Dev/Culture, to meet with the Ontario Film Commissioner and review Brampton's current competitive advantages and ignite a new relationship.

²⁵ See Appendix B for industry developed Studio Tiers Classification.

4. FamTours

FamTours (familiarity tours) have become an industry standard practice. Ontario Creates will assist Brampton's Film Commissioner in developing FamTours for Ontario Location and Production Managers, and include Brampton where appropriate for the annual LA Producer FamTours.

5. Working with Brampton's Realty Department

Taking a deeper dive into Brampton's land 'stock', our meeting with Brampton's Realty team was extremely positive.

In keeping with Brampton's 2040 Vision Master Plan, Brampton is purchasing and assembling land parcels with an eye for strategic development. Many of these land parcels are in "transition", meaning that they are earmarked for development, perhaps even sold, but are not slated for immediate development – in some cases, for 10 or 20 years.

Keeping the Film Office up to speed on available lands is a wonderful opportunity to add significant advantage to Brampton's locations stock, and infrastructure development potential, as well as leasing revenues.

If a significant number of additions are made to the Locations Inventory and uploaded to the Ontario Creates database, then City revenues could increase exponentially almost immediately.

Economic Impact of Film + Television Industry in Brampton

Brampton has developed several Master Plans, to guide its future, including a Financial Master Plan to manage growth and sustainability.²⁶

The film and television industry is an excellent fit. City revenues, with some categories diverted, as noted in Policy section, earlier, should cover any overhead investments. Industry workforce development addresses the need for Brampton to deliver youth training and employment, and jobs for a wide range of residents. Give-back community programmes enhance and enrich City community offerings for its citizens. Land lease and development opportunities attract private sector capital driving more property tax revenues to the City.

Significant production activity with high profile series can also help drive “production tourism”, and enhance the overall Brampton Tourism offerings.

Direct Spend

Direct Spend includes all production spending in a jurisdiction, including local labour, goods and services. Film and television production is labour intensive, employing hundred of people per production – roughly 50% of a production budget. Productions also purchase goods and services from other industries (lumber, flooring, catering, trucks, fabric, paint, etc.), which in turn generates spin-off, or indirect economic impacts (labour, goods and services) beyond the production sector.²⁷

The goal for a modest sized Film Friendly jurisdiction is to actively pursue one or two television series to Brampton, as their primary location (in addition to locations, back lot leases, base camp leases, and warehouse use) in order to enjoy increases in direct and indirect spending, (labour, goods and services) in the jurisdiction.

This must be carefully done – to remain competitive and attract big players, Brampton must strive to maintain City services on a revenue neutral basis, and maintain current location use rates for the foreseeable future.

²⁶ See Appendix A.2 for a list of Brampton studies and reports reviewed

²⁷ Currently, there is no Brampton data for labour specific to film and television production, so it is not possible to estimate the direct and indirect jobs at this time, and their GDP. Our assessment will, therefore, focus on the reported production spend and revenues in Brampton.

A Note about Economic Impact calculations

The ‘direct’ economic impact for film + television comes only from the labour spending, to labour in the jurisdiction.

The ‘indirect’ economic impact comes from spending in the jurisdiction on things other than labour (truck rentals, catering, lumber, etc).

The ‘induced’ economic impact comes from labour income (in supplier companies) created by the non-labour spending.

As no ‘direct’ film and television Brampton labour data currently exists, we will take a look at the reported production spend data on indirect spending - goods and services - and reported data on City revenues from this spending.

Working with the Brampton Film + Television Industry Advisory board union and guild members, it would be possible to gather Brampton industry labour data, to begin to map “direct” spending.

So how has Brampton fared?

With no formal Film Office or supports, and one full-time experienced production staffer, Brampton has done surprisingly well.

Reported production “spend” in Brampton has seen significant increases since 2013, from a reported production spend of only \$315,6640 in 2013 to just under \$3 million in 2019.²⁸

Production revenues to the City itself currently go to the specific department (ie parking fees to the parking division), rather than general revenues; there is a variety of software used across City departments, as with scheduling, and to date, not all departments have indicated a separate line item for industry activity. As a result, it has been difficult to accurately determine production revenues to the City.

We have had discussions with Finance, and together have determined a path to capture and report the film revenue generated by all departments, without the need to change current IT software, programming, or supports.²⁹ Each film or television project will be treated as a separate Vendor, and Finance will be able to gather info as needed.

²⁸ 2018 Brampton Film Office Annual Report, p 4, Brampton Film Office Report 2019

²⁹ It is my understanding that this approach is now being implemented.

Production revenue to the City reported to the Film Specialist in 2019 was \$310,591.41 – just under double the 2018 revenues of \$160,535.11³⁰. This is due to an effort to post some City facilities and property on the Ontario Creates locations database, and the City’s ‘make it work’ approach. For example, City Hall West Tower and the Williams Parkway Operations Centre delivered revenues of \$76,000.00 in a three-month period in 2019.

Redirecting municipal building and parking rental fees to the Brampton Film and Television Office could be used to offset overhead and operations.

Interestingly, while permit days have remained near the 100 days mark in 2018 and 2019, the production spend and revenues to the City have significantly increased – a signal that larger, better funded productions are selecting Brampton for their locations work.

With Brampton indirect production spend growing from \$2 million in 2018 to just under the \$3 million mark in 2019, and City revenues doubling, with little marketing or support, there is definitely opportunity to actively double or triple production spend – and deliver even higher volumes if a series chooses to make Brampton their home.

³⁰ 2018 Brampton Film Specialist Annual Report, p6, Brampton Film Office Report 2019

Conclusion

Film + Television is a good fit for the economic development Vision for the City of Brampton, internally and externally.

Overall, with an increase to the staffing compliment, and strategic policy tools, the City has the capacity to double or triple its production volumes within 24 months. An annual evaluation of the structures, changes and progress of the implementation of this report will identify strengths, results, shortcomings, and any further improvements that may be warranted.

With leadership from Council, policy tools, revenue and resource redirection, staffing adjustments, and physical office positioning, can work together to enable Brampton to scale up its locations offerings, market Brampton to the industry, and service significant growth in production volumes to deliver increased revenues, employment, job training, community development, and private sector capital investment.

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Appendix A

A.1 Methodology

In addition to reviewing the existing City of Brampton Master Plans (Vision 2040, Financial, Economic Development, and Culture), and various reports from the Brampton Film Specialist, we consulted with Mayor Patrick Brown, and 21 City of Brampton and Peel Region department teams, Ontario Creates (the Ontario industry development agency for film, television, interactive media, books, music and magazine publishing), and the Directors Guild of Canada Ontario branch Locations Caucus Representative. The full list is offered in Appendix A.2.

There is no current data regarding the number of industry workers who live in Brampton, in order to calculate Full-Time Employment equivalents or GDP. As noted earlier, this could be tackled with the Brampton Film + Television Advisory Board union and guild leaders.

Indirect production spend information is gathered when issuing a location film permit, but is not as reliable as film and television tax credit administration reporting in aggregate done by Ontario Creates. That said, Ontario Creates does not capture, television commercials, corporate videos, music videos, in-house broadcaster production, or small screen content activity spending below tax credit qualifying thresholds. For our purposes, then, we used the reporting provided by the Brampton Film Office.

Induced impact typically includes the employment and GDP generated within industries that supply goods and services to the production sector. Without the direct labour spending data, induced spending cannot be calculated.

A.2 Interviews

Peel Regional Police (Corporate headquarters – 7150 Mississauga Rd.):

- Natalie Muzyczka (Supervisor, Central Paid Duty & Alarm)
- Mario Ferrante (Manager, Central Paid Duty & Alarm)
- Michael Mckenzie (Sergeant – Community Events 22 Division)

Region of Peel – Traffic Engineering:

- Sally Eshak (Technical Analyst, Traffic Engineering)
- Brian Melnyk (Technical Analyst, Traffic Engineering)

City of Brampton Traffic Services:

- Kevin Minaker (Manager, Traffic Operations & Parking)
- Shane Loftus (Supervisor, Municipal Parking Operations)
- Lenka Nielsen - Senior Operations Technician - Roads Maintenance, Operations & Fleet

Commissioner of Community Services

- Al Meneses (Commissioner, Community Services)

Facility Operations & Security Services

- Dave Salt (Supervisor, Operations)
- Alyssa Fiorini (Supervisor, Facility Services)

Finance

- Kartik Sengar (Manager, Client Services)
- Mustafa Yaqubi (Senior Advisor, Client Services)

Risk & Insurance:

- Deborah Tracogna - Manager, Risk & Insurance
- Jeff Lane – Risk Management Analyst

Legal:

- Christopher Pratt (Legal Counsel, Realty, Property, Communications, Development)

IT & Contract Systems:

- Nicki Todd McVean (Administrator, Enterprise Systems)

Brampton Library:

- John Simone (Director, Business Management & Operations)

Downtown Brampton BIA:

- Suzy Godefroy (Executive Director)

Toronto Regional Conservation Authority

- Doug Miller (Senior Manager, Conservation Parks)

Enforcement:

- JeanPierre Maurice (Manager, By-Law Enforcement)

Parks:

- Jim Pitman (Manager, Parks Maintenance)
- Cindy Chambers (Supervisor, East Parks Maintenance)
- Joe Ferreira (Central Operations)

Fire Prevention & Emergency Measures:

- Andrew Von Holt (Division Chief, Fire Prevention)
- Alain Normand (Manager, Emergency Measures)

Realty & City Facility Allocation:

- Vicki Wong (Senior Manager, Realty Services)
- Randy Rason (Director, Building Design & Construction)
- Cindy Binnell (Manager, Building Design & Construction)
- Britta Meir (Project Coordinator, Building Design & Construction)

Security Services:

- Jason Keddy (Manager, Security Services)
- Prabhjot Dhanauta (Coordinator, Security Operations)

Recreation & Rentals:

- Derek Boyce (Director, Recreation)
- Dave Cooper (District Manager, Recreation)
- Anand Patel (Manager, Recreation Planning) – Oversees Rental Office

Peel District School Board:

- Kelly O'Boyle (Manager, Facility Rentals)

Economic Development & Culture:

- Clare Barnett (Director, Economic Development & Culture)
- Denise McClure (Senior Manager, Economic Development)
- Kelly Stahl (Senior Manager, Culture)
- Laura Lukasik (Manager, Tourism & Special Events)
- Michael Ciuffini (Film Specialist)

Brampton Transit:

- Vincent Rodo (Director, Transit)
- Ivana Tomas (Manager, Marketing & Customer Communications)

Ontario Creates:

- Justin Cutler (Ontario Film Commissioner)

Directors Guild of Canada – Ontario

- John Rakish (Location Manager/DGC Ontario Locations Caucus Representative)

The Office of Mayor Patrick Brown

- His Worship, Mayor Patrick Brown
- Justin Heran, EA to Mayor Brown

A.3 Brampton reports

2018 Brampton Film Office Annual Report”, dated February 22, 2019
 2019 SWOT – Film Industry in Brampton
 1984 – Current – Filmed in Brampton
 2018 Film Inquiries and Permits
 2018 Film Services Review – Road Occupancy and Access Permit Process
 2019 Brampton Film Office Summary
 Brampton Parks and Recreation Master Plan, 2017
 Brampton Vision 2040, 2018
 Brampton Economic Development Master Plan, 2018
 Brampton Culture Master Plan, 2018
 Brampton Long Term Financial Master Plan, 2017
 Brampton film and television website
<https://www.brampton.ca/EN/Business/filmithere/Pages/Welcome.aspx>
 Brampton Film Office Report 2019

Appendix B – Studio Tier categories, as defined by industry

Tier One

- Compliant with all health and safety regulations
- Sound attenuation on stages
- Adjacent support space and parking for all vehicles
- Capacity for security of studio
- Free of non-film related tenants
- Clear span or non-structural beams that can be removed
- Useable height 20 feet or greater

Tier Two

- Compliant with all health and safety regulations
- Some sound attenuation
- Some support space and must have parking for unit trucks
- May have columns that are not removable
- Useable height minimum 20 feet

Tier Three

- Compliant with all health and safety regulations
- May not have any sound attenuation on stages
- May not have adjacent support space or parking for any vehicles incl unit trucks
- May have columns or barriers
- Useable height under 20 feet

FIN