



# **Film Production and Process Study**

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Prepared for  
**Municipality of Kawartha Lakes**  
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Delivered by

*SKH Consulting*

*Strategic Government & Stakeholder Relations Solutions*

# Kawartha Lakes Film Production and Process Study

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## Executive Summary

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.

Film Friendliness is a two way street.

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

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 \$9.32 Billion at last count, with over half of that work from foreign production partners.<sup>1</sup>

Pre-covid, Ontario’s volumes had grown significantly year over year.<sup>2</sup> Despite covid, by Fall 2020, Ontario Creates reported record volumes of production, with continued growth anticipated as delayed productions along with scheduled productions entered the production pipeline to meet demand.

On its face, the film + television industry is an excellent fit for the economic development plans for Kawartha Lakes, internally and externally. This Study is tasked with investigating the Kawartha Lakes film and television capacity and appetite, offering recommendations for delivering Film Friendliness for all-scale domestic and international productions.

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<sup>1</sup> CMPA Profile 2019: Economic Report on the Screen-based Media Production Industry in Canada. P 5

<sup>2</sup> Ontario Creates 2020/21 report

[https://ontariocreates.ca/assets/images/research/Statistics/Eng/Ontario\\_Creates\\_Prod\\_Stats\\_Combo\\_Sheet\\_2021-04-14.pdf](https://ontariocreates.ca/assets/images/research/Statistics/Eng/Ontario_Creates_Prod_Stats_Combo_Sheet_2021-04-14.pdf)

Accountability and transparency are crucial, in order to build predictability and trust. For Kawartha Lakes to become a successful production jurisdiction, firm leadership by Council is required.

First step is a package of Policy tools, implemented together, to ensure formal inclusion of film + television production activity in the scope of work across all departments, agencies, boards and Commissions; the establishment of a Kawartha Lakes Film and Television Office, delivering 24/7 concierge service via a Film Manager and robust website; and the establishment of an Industry Advisory Board to assist with workforce development and community engagement.

Municipality revenues, with production parking and perhaps also rental fees diverted to the Film Office, would go towards overhead investments.

Working closely with the Ontario Film Commission, the Film Manager can tap into their weekly industry calls, LA marketing efforts, and Locations Database to ramp up the Kawartha Lakes offerings, including available lands for lease, range of buildings and streetscapes, as well as the many wonderful farms and park lands.

All of this will work together to enable Kawartha Lakes to begin to attract production volumes, and over the next 2-3 years should be able to attract at least one series production to make Kawartha Lakes their 'hero' location.

Once a series makes Kawartha Lakes their home, the Industry Advisory Board workforce development ramps up and addresses the need to deliver youth training and employment, and jobs for a wide range of residents. Give-back community programs enhance and enrich Kawartha Lakes community offerings for its citizens. Land lease and development opportunities attract private sector capital driving more property tax revenues.

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

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## Introduction

Based on various Kawartha Lakes Strategic Planning done to date, the municipality is exploring additional Economic Development streams, including the attraction of film + television production.

The film + television production industry, referred to as the Film Industry, is currently one of Ontario's lead economic development drivers – the new manufacturing – delivering employment and workforce development, private sector capital, and increased global market share. Why? Because it is one of the most predictable and stable jurisdictions for film + television production in the world.

This industry touches the four Kawartha Lakes Strategic Priorities, and over time could deliver both short and long term growth opportunities in direct and indirect revenues, employment and workforce development, the attraction of private sector capital investment, and assistance with achieving community enhancement goals.

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

Transforming into a Film Friendly jurisdiction first begins with an assessment of appetite and capacity to meet the needs of industry while protecting the quality of life and municipal services in Kawartha Lakes.

## Study Mandate

This Feasibility Study is tasked with assessing the capacity and appetite of Kawartha Lakes and offering recommendations for delivering “Film Friendliness” for all-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 with integrity, transparency, accountability, and predictability, in a quick turnaround (48-72 hours) 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 Kawartha Lakes Strategic and Master Plans, one-on-one interviews with over 40 department and municipal services leads, DGC Locations Caucus, Ontario Film Commissioner, comprehensive driving of /through the municipality, and benchmarking with neighbouring communities.

A detailed Methodology is in Appendix A.

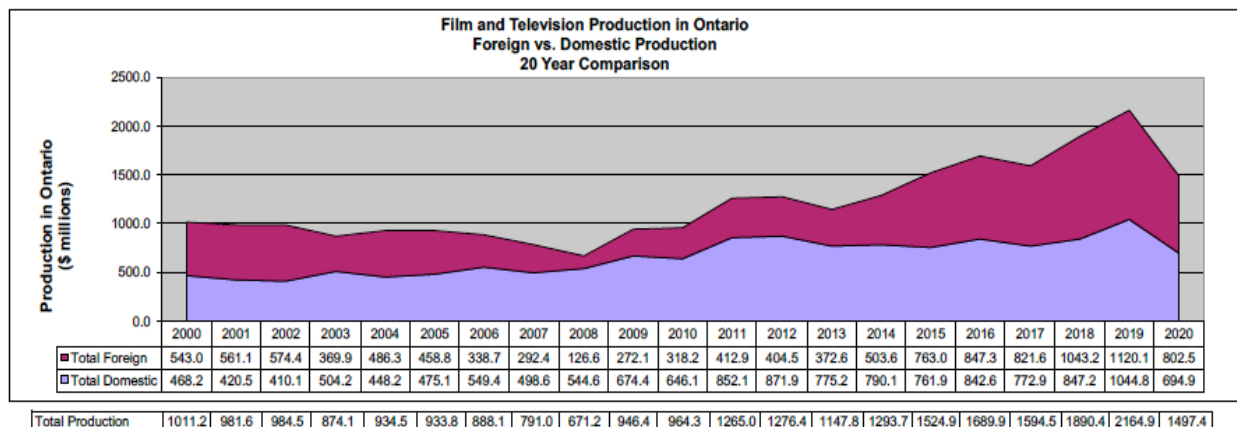
## The Current Industry Picture

### Pre-Covid

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.<sup>3</sup> The total volumes of film and television production in Canada increased to an all-time high of \$9.32 Billion in 2018/19. Foreign investment and location production rose to \$5.69 Billion in 2018/19.<sup>4</sup>

### During Covid

Ontario offers a total package of talent, infrastructure, and incentives to attract production, along with Section 21 Health + Safety protocols – strengthened due to covid.<sup>5</sup> This meant that during covid, despite a drop in early 2020, Ontario Creates reported that Fall saw record production volumes for film and television alone.<sup>6</sup>



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

“Film and television production is active throughout the province, creating jobs and economic impact for local suppliers, vendors and talent. Many productions are filmed in more than one place in Ontario, including Toronto and other cities or towns. Examples include: RESIDENT EVIL: REBOOT (shot in Sudbury and surrounding northern communities, and Hamilton), FATMAN (Ottawa), LOCKE AND KEY

<sup>3</sup> CMPA Profile 2019: Economic Report on the Screen-based Media Production Industry in Canada. P 5

<sup>4</sup> Ibid, p 5

<sup>5</sup> Ontario Section 21 Health + Safety for the film + television industry  
<https://www.filmsafety.ca>

<sup>6</sup> 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.



(Kingston/Hamilton), NIGHTMARE ALLEY (Durham Region), HARDY BOYS (Cambridge); ALL MY PUNY SORROWS (North Bay). <sup>7</sup>

## **Explosion of online TV services**

The incredible growth of online TV services – ramped up further due to the pandemic - and appetite for original screen entertainment content, is driving up international production volumes and quality at a significant rate.

There are currently over 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. <sup>8</sup>

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

This includes significant work by the Ontario Film Commission to educate and coach regional municipal governments to actively expand the location selection and eventual studio development.

## **Economic Development Opportunity for Kawartha Lakes**

With this tremendous industry appetite for fresh, Film Friendly location jurisdictions, close to airports, and the immediate need for land for film backlot and staging purposes, attracting this new manufacturing to Kawartha Lakes is becoming possible.

Without requiring investment in costly marketing, Kawartha Lakes could work closely with the Ontario Film Commission, and choose to take the internal steps critically necessary in order to become identified as a Film Friendly jurisdiction, delivering 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 Kawartha Lakes.

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<sup>7</sup> Ontario Creates, 2021 Update

<sup>8</sup> PWC Entertainment and Media outlook, 2019 - 2023

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## **Current Competitive Advantages and Obstacles for Kawartha Lakes**

Kawartha Lakes has some distinct advantages over neighbouring jurisdictions, including:

- Single tier municipal government
- Airport in Lindsay
- Proximity to Peterborough airport, and key transportation arteries
- Positive reactions from most Senior staff regarding the opportunity for increased film activity volumes, if by-laws approved by Council, and understanding that the point person in each department must be Senior, with up-to-date information on their asset uses.
- Positive reactions from key external agencies, including, Kawartha Lakes Police, Fire, and OPP, all keen to see expanded film + television production volumes.
- Any ETF needs could be met through Borden or Orillia.
- The decision to establish a Film Office, led by a Film Manager, to deliver consolidated permitting to clients for all City services and locations, and handle communications internally and externally.
- Establishment of stable and reasonable fees for City owned property rentals
- No permit fees, and a revenue-neutral approach for City services on productions
- 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
- 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
- Some warehouses and buildings going offline for repurposed studio development consideration
- Diverse range of architecture, landscapes, various downtowns and vast and numerous public spaces
- Available office space on the main floor at City Hall to house a Kawartha Lakes Film and Television Office (KLFTO) and staff.

Current obstacles include:

- A few staff uncertainty about handling the speed of turnaround for permit requests, and staff workload, even if Council passes film by-laws.
- School buildings not available for the length of a typical shoot day.
- Road occupancy permits currently require 5 days turnaround, which is too long for most productions to accommodate.
- Road occupation permits currently require 15 days turnaround, which is 5 days longer than industry practice.
- Lack of full coverage high speed broadband, which is still under development.<sup>9</sup>
- Due to the distance from Toronto, lack of overnight rental accommodations to handle film crews (can range from 25-800<sup>10</sup>), will eventually need to be addressed, through development. Currently, crews would need to overnight in Peterborough.

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<sup>9</sup> The Province has plans for Province-wide coverage by 2025.

<https://news.ontario.ca/en/release/1000538/historic-investment-plan-ensures-access-to-high-speed-internet-for-all>

<sup>10</sup> Series such as SEE or UMBRELLA ACADEMY have prep and shooting crews floating between 300-800 per day.

**Comparative Matrix of other production jurisdictions on process  
aspects of Film Friendliness**

	Toronto	Cobourg	Kingston	Peterborough	Kawartha Lakes
Film By-law	yes	no	no	no	no
One-Stop Shop	yes	yes	yes	yes/no	no
Permit Processing time	48 hours for standard permit	5-10 days depending on permit type	not specified	14 days	unknown**
Film Permit Fees	no	\$500/day	no	\$525	unknown**
Comprehensive web site	yes	yes	yes	no	no

All jurisdictions operate on a municipal cost recovery for services basis

\*\* “unknown” was used here as there is no film presence on the Kawartha Lakes web page at all. When searching for services on the “applications, licenses and permits” page of the web site, entering the word “film” generates a number of services or applications beginning with the letter “F”, filming is not among them.

## **Transforming into a Film Friendly Jurisdiction**

### **How?**

#### **Customer Service that delivers Trust, Accountability, Transparency, Predictability**

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

#### **The customer is both the local community, and the industry.**

Film Friendliness is a two way street, respecting the needs of both the industry, and the community hosting the production activity.

Trust, accountability and transparency are crucial to the integrity of a production jurisdiction. Any perception of ‘side deals’, or that going around the Film Manager to persuade a Department head, Chamber of Commerce, BIA or Councillor is a path forward, will ‘burn’ the jurisdiction. 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.

#### **All of this requires firm leadership from Council.<sup>11</sup>**

Policy tools such as by-laws and Guidelines, revenue and resource adjustments, staffing adjustments, and physical office positioning, will work together to enable Kawartha Lakes to scale up its locations offerings, market Kawartha Lakes to the industry, and service production volumes to deliver revenues, direct and indirect spending, and over time, employment, job training, and private sector capital investment.<sup>12</sup>

No municipal financial incentives are required to attract production.

<sup>11</sup> Toronto Mayor Miller initiated a strong process:

<https://www.toronto.ca/legdocs/2004/agendas/committees/pof/pof041123/it061.pdf>

<sup>12</sup> Samples from City of Toronto Council decisions, p 39-45:

<https://www.toronto.ca/legdocs/2005/minutes/council/cc050504.pdf>

## 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, with supporting by-laws and guidelines.

We recommend that the following policy items be implemented as a package including a film by-law.

- a) Establish film and television industry as lead Economic Development file for Kawartha Lakes, 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 potential economic and cultural impact for Kawartha Lakes, (this also serves to protect the Film Office and staff as a separate and distinct service), with the expectation to add/include film activity service in their scope of work. Nothing shall be read to thwart, hinder, prohibit or prevent film production activity, on condition of meeting the Guidelines.<sup>13</sup>
- b) Ensure that provisions of by-laws such as zoning shall not be interpreted to exclude or prevent locations filming or production activity.
- c) Council establish a Kawartha Lakes Film + Television Office, led by a dedicated staff Film Manager.
- d) All film production activity on all municipally owned public lands, parks, facilities, and public highways require a municipally approved film permit, supported by Guidelines. A permit shall be issued when the Guidelines are satisfied. Any violation of the permit conditions or by-law requirements is also a violation under the Provincial Offenses Act.<sup>14</sup>
- e) The Film Manager is to work with the CAO and all departments, agencies, boards and Commissions to develop filming Guidelines for permit issuance, community communications and enforcement for Kawartha Lakes.<sup>15</sup>

<sup>13</sup> Some Dept leads expressed concern about already being short staffed, and worry that 48 hour turnaround goals and production volumes would result in the need for more staff. This could be reviewed in a year or two as production volumes increase.

<sup>14</sup> Here is a sample by-law: [https://www.toronto.ca/legdocs/municode/1184\\_459.pdf](https://www.toronto.ca/legdocs/municode/1184_459.pdf)

<sup>15</sup> This is not as daunting as one might think. Ontario Film Commission staff will assist with Guidelines development and ensure Directors Guild Locations Manager Caucus input. There are also excellent references available on the City of Toronto Film Office website:

- f) Redirect production permit and municipal location fees, including parking rental fees from film production to the Kawartha Lakes Film and Television Office to help offset overhead and operations.<sup>16</sup>
- g) Establish a Kawartha Lakes Film and Television Industry Advisory Board.
- h) 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 Manager, and Advisory Board items.

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<https://www.toronto.ca/business-economy/industry-sector-support/film/> and on the Kingston Film Office website: <https://www.visitkingston.ca/media/film-office/>

<sup>16</sup> You may prefer to divert only permit and parking fees. Some department leads have expressed a desire to retain additional fees, but will abide by Council's directive.

## 2. Kawartha Lakes Film + Television Office (KLFTO)

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 48-72 hours, and direct 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 +/- community concerns related to location filming promptly is essential, with the Film Office serving as an advocate for both clients and residents.

**In order to deliver trust, transparency, accountability, and predictability, the Kawartha Lakes Film + Television Office requires the support of film by-laws, and some additional tools.**

### **KLFTO Film + Television Guidelines**

Once the by-laws have been approved by Council <sup>17</sup>, the Guidelines would be developed by the new Film Manager with assistance from the Ontario Film Commission, and input from Kawartha Lakes department leads under the direction of the CAO.

Although there are industry standard guidelines that the Ontario Film Commission can assist you with developing, each jurisdiction refines their guidelines according to their community values and needs; we will not be overly prescriptive here.

Guidelines include various expectations (such as traffic and use plans), and restrictions specific to access, production prep and wrap, locations, neighbourhoods, roads, the boundary to be included for retailers 'impacted' by nearby activity, etc., and various types of mandated communication with the impacted residents and businesses.

**We do recommend that all location permits are conditional on the assignment of a pay duty officer, either from the Kawartha Lakes police, or OPP.** This will serve to protect the work environment, including any parking or traffic concerns, ensure adherence to permit permissions and restrictions, and offer the community a point of direct contact on site, should it be required.

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<sup>17</sup> Here is an example; note that it is broad enough to enable enforcement, and cites Guideline observance. [https://www.toronto.ca/legdocs/municode/1184\\_459.pdf](https://www.toronto.ca/legdocs/municode/1184_459.pdf)



### **KLFTO Virtual Presence**

The KLFTO website will generally be the first stop for information about filming in Kawartha Lakes – for industry and for the community - so it should have a dedicated, easily searchable website.

All film by-laws and supporting Guidelines and relevant links, including Codes of Conduct for Council and Staff, and for Cast and Crew, should be posted clearly on the KLFTO website, delivering transparency to both the community and the industry. The Guidelines must be adhered to without exception, in order to deliver trust, accountability, and predictability.

Additional important links include:

- Appropriate links to additional guidelines specific to outside agencies such as pay duty, fire support, school board, library, Trent-Severn, etc.
- Permit application portal (for access to Production info sheet) for accessing permits, including listing any location fees
- 24/7 cell and email for the Film Manager, address of Film Office
- Covid production health + safety protocols
- Sample letters of notification for locations
- Ontario Creates digital locations library, Kawartha Lakes link<sup>18</sup>
- Ontario Green Screen
- Kawartha Lakes vendors, who wish to service film + television productions
- Kawartha Lakes hotel/motel accommodation offerings
- Link to what to expect if a production wishes to rent your property
- Link to what to expect when a production comes to your street
- Link to information on how to have your property listed with Ontario Creates digital location library for location rental
- Link to information on informal plebiscites and their role in ensuring no area of the community is overburdened with production activity.

Take a look at the City of Toronto or Kingston sites and links, for ideas to suit Kawartha Lakes.

<https://www.toronto.ca/business-economy/industry-sector-support/film/plan-your-shoot/>  
<https://www.visitkingston.ca/media/film-office/>

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. Often productions will authorize production stills for marketing use for the municipality. A link to this site should be included on all marketing materials and appropriate Kawartha Lakes and industry sites, such as Ontario Film Commission and Kawartha Lakes Economic Development.

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<sup>18</sup> Please note that the Ontario Digital Locations Library does not list private residences in their public facing database, for privacy reasons. Location Managers know to reach out to the Ontario Film Commission directly to see properties not on the public facing site.

### **KLFTO Physical Presence**

#### **Kawartha Lakes City Hall**

An easily accessible space on the Main floor of City Hall is optimal for servicing production, 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, PR stills, continuous show reels, etc

### **KLFTO Permit Fees**

In keeping with best practices in other lead jurisdictions, and in recognition of the significant economic impact of the production industry, we recommend that Kawartha Lakes maintain a no permit fee approach, and continue to provide other services to the industry on a revenue-neutral basis. Student projects still require a permit, and meeting the Guidelines.

### **KLFTO Function**

A Film Friendly jurisdiction must deliver one-stop-shop, concierge service, and a point of contact available 24/7. Permit timeline goals are 48-72 hours.

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.<sup>19</sup>

In response to an industry permit request, the Film Office would check the appropriate schedules and then if it appears available, would inquire by phone or text with the relevant department/agency Senior point person directly. In the absence of any conflict with the use of the facility or location, the Film Manager would be able to confirm with the department/agency that a film was expected to be shooting there, and the schedule would be populated accordingly (a ‘hold’ and then a booking once the permit is approved.)

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

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<sup>19</sup> In each of our meetings, departments were very willing to allow this, if Council passes the film by-laws

While current software systems do not allow for a quick shift to a one-permit, one-invoice process, until the film by-laws are passed enabling the film office to issue permits, there is the capacity to have all permits go to the Film Office, where they would be consolidated onto one ‘master’ permit, with pertinent guidelines and conditions, traffic and parking plans and copies of all community notifications attached.

**Each pay duty officer assigned would be briefed in advance of the shoot, and would have a copy of this ‘master’ permit, as well.**

The Film Office would send out as-it-happens City-wide email bulletins regarding location shoot activity, for their inclusion in their planning.<sup>20</sup>

### **3. Film Commissioner/Manager - The Face of a Film Friendly Jurisdiction**

The Film Office is the point of contact for all industry inquiries, scouting, and permit co-ordination and assignment, for all Kawartha Lakes locations, including access to and use of City owned buildings, parks, recreation centres, roads, 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, troubleshooting on behalf of the industry, and responding to questions/problems from City Councillors.

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 Kawartha Lakes, often referred to as Film Commissioner<sup>21</sup>. Arranging for the Mayor to visit Kawartha Lakes filming locations, for example, is important for building a Film Friendly reputation.

Traditionally, the Film Commissioner 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 department leads, 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.

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<sup>20</sup> Ibid

<sup>21</sup> 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’.

Working with Ontario Creates and the Ontario Film Commissioner, and the Locations Caucus of the DGC, through to clients is essential; The Film Manager should participate in the weekly Town Hall sessions, led by Ontario's Film Commissioner, for regional film office staff. These crucial meetings enable sharing of best practices, opportunities, and build consistency and trust for attracting productions to Ontario.

Promoting Kawartha Lakes as a Film Friendly jurisdiction should be ongoing. Often a production will authorize use of production stills, or pics with the Mayor for local use. This includes but is not limited to: conceive and produce messages (social media or otherwise) and materials to promote Kawartha Lakes as Film Friendly, including working closely with the Ontario Film Commission marketing team, and their LA office, attending appropriate locations trade shows, developing FamTours (familiarity tours) for the Locations Scouts and Managers, and business meetings to carry the message.

Additionally, productions can be encouraged to include "Filmed on location in the City of Kawartha Lakes" and City logo, in their credits.

Advocacy work on behalf of the Kawartha Lakes film jurisdiction could include working with the Ontario Eastern Economic Development Commission, and the South Eastern Ontario Production Accelerator Fund, to encourage investment for expanding the industry employment cluster.

## **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 Kawartha Lakes, provided by the production with their permit application <sup>22</sup>The Film Manager also conducts Exit Polls for each production in order to gain key feedback insight in order to continue to improve service and production experiences.

Annual reports for Ec Dev and Council are prepared by the Film Manager, and include context for the data gathered.<sup>23</sup>

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<sup>22</sup> Here is a sample from Toronto's film office:

<https://secure.toronto.ca/FilmPal/Production.jsp>

<sup>23</sup> Samples: <https://www.toronto.ca/wp-content/uploads/2021/02/9655-SCREENINDUSTRYTORONTO2019.pdf>

<http://www.toronto.ca/legdocs/mmis/2018/ed/bgrd/backgroundfile-114023.pdf>

City departments use a range of software programs 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 programs or supports.<sup>24</sup> Finance has recommended that permit invoicing remain as is, at present, but has indicated that each production will be treated as a separate Vendor, listing each expense item, with department indicated.

There is the larger question of where the revenues are allocated. In our film by-law bundle, we recommend that at least the parking revenues be diverted to help offset the film office overhead. However, you may prefer to divert all film location fees from across the departments. Some department leads have expressed a desire to retain additional fees, but will abide by Council's directive.

#### **4. Kawartha Lakes Film + Television Industry Advisory Board**

Another key step in driving economic development for this sector is the establishment of the Kawartha Lakes Film + Television Industry Advisory Board, comprised of 10-12 relevant/active film + television industry business leaders, Co-Chaired by the Mayor (or a Councillor designate), 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 Kawartha Lakes, and develop marketing, community outreach programs and infrastructure and workforce development.<sup>25</sup>

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

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

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<sup>24</sup> 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.

<sup>25</sup> The scope could be expanded to include digital media, but for the purposes of this study, the focus remains film + television production.

An ideal Advisory Board would comprise industry leads from:

- Production and Labour (ie one from each industry Union and Guild<sup>26</sup>, Producers domestic and service<sup>27</sup>, and Location Manager<sup>28</sup>);
- A domestic Producer
- A service Producer
- Support Services specific to the industry (ie equipment, studio owner/operator, legal, financial)
- Post secondary partners such as Fleming College

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.

## Strategic Action Plan

Once the Advisory Board is assembled, the First project would be to develop a Strategic Action Plan establishing development goals for customer service operations, marketing, community outreach, workforce and infrastructure, along with inter-government advocacy as needed, and steps to achieve those goals.

## 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.

Industry leaders are often able to assist with post secondary curriculum development for micro certifications and training suitable for employment in the production industry.

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

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<sup>26</sup> ACTRA, IA783, Nabet 700, DGC

<sup>27</sup> from CMPA

<sup>28</sup> from DGC Location Caucus

## **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 could 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.

## **Advocacy Support**

The Advisory Board can also assist with Advocacy work with the various Provincial and Federal policies that impact the film + television industry in Kawartha Lakes.

## **Community outreach programmes**

The Advisory Board assists with the design and implementation of community outreach programmes, such as a webinar for property owners who are interested in learning about renting to productions, “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 Kawartha Lakes 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 Manager will be able to tackle this work with assistance from Ontario Film Commission, to ramp up opportunities for Kawartha Lakes.

### **1. Working more closely with Ontario Creates**

The Province’s creative industry development agency, Ontario Creates, is home to the Ontario Film Commission, which is the first point of contact for domestic and international production inquiries. Their team works with production leads to source locations, studio space, and to assist with all aspects of permits and other requirements. The Kawartha Lakes’ Film Manager can develop a strong rapport with the Ontario Film Commissioner, speaking weekly, to ensure that Kawartha Lakes is top of mind.<sup>29</sup>

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<sup>29</sup> Over the course of our research, we facilitated a formal meeting for key Ec Dev staff, to meet with the Ontario Film Commissioner and reviewed Kawartha Lakes’ current competitive advantages to ignite a new relationship.

## **2. Ontario Locations Database**

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

Kawartha Lakes currently has a few locations posted in this database. 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) of unit moves. The Ontario Film Commission will arrange to send a professional photographer to record in-demand locations/buildings, and potential ‘star’ housing locations, to upload to the locations database. As well, they will arrange for training for the Film Manager so that they can continue updating/adding images.

Further, they can assist with developing webinars for the Chambers of Commerce and private property owners, cottage associations, ratepayer associations, and others, interested in renting to productions.

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

They will now include Kawartha Lakes’ Film Manager in all communications and production searches, to improve production opportunities.

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

## **3. Ontario LA Development Office**

Ontario Creates will also ensure that Kawartha Lakes’ Film Manager has an opportunity to connect directly and regularly with their LA development office, and marketing activities, to enable a proactive approach to attracting production.

## **4. FamTours**

FamTours (familiarity tours) have become an industry standard practice. The Ontario Film Commission will assist Kawartha Lakes’ Film Manager in developing FamTours for Ontario Location and Production Managers, and include Kawartha Lakes where appropriate for the annual LA Producer FamTours. This is a wonderful opportunity to showcase local restaurants, too.

## **5. Working with Kawartha Lakes’ Realty Department**

Keeping the Film Office up to speed (which would, in turn, keep Ontario’s Film Commissioner up to speed), on available lands is a wonderful opportunity to add significant advantage to Kawartha Lakes’ locations stock, and infrastructure development potential, as well as leasing revenues.



## **Economic Impact of Film + Television Industry in Kawartha Lakes**

Kawartha Lakes has developed several Master Plans, to guide its future and manage growth and sustainability.<sup>30</sup>

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 Kawartha Lakes 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 Kawartha Lakes 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.<sup>31</sup>

The goal for a modest sized Film Friendly jurisdiction is to actively pursue one or two television series to Kawartha Lakes, 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, Kawartha Lakes must strive to maintain City services on a revenue neutral basis, and maintain current location use rates for the foreseeable future.

<sup>30</sup> See Appendix A.2 for a list of Kawartha Lakes studies and reports reviewed

<sup>31</sup> Currently, there is no Kawartha Lakes 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.

**A Note about Economic Impact calculations**

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

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

## Conclusion

Film + Television is a good fit for the economic development plans for the City of Kawartha Lakes, internally and externally.

With leadership from Council, once Kawartha Lakes has established a Film Office and comprehensive website, led by a dedicated Film Manager, and strategic policy tools (by-laws and guidelines), the City has the capacity to attract production volumes quickly.

Done well, in a year or two a series could be landed, leading to exponential growth. 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.

Leadership from Council to implement bylaws and appropriate guidelines would enable Kawartha Lakes to scale up its locations offerings, market Kawartha Lakes 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 Kawartha Lakes Plans, and a thorough drive-through of Kawartha Lakes and key locations, we consulted with over 40 department/service leads, local Chambers of Commerce, BIA and community leads, 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 Kawartha Lakes, in order to calculate Full-Time Employment equivalents or GDP. As noted earlier, this could be tackled with the Kawartha Lakes 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.

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**

### **Ec Dec Manager**

Rebecca Mustard

### **Ec Dev Officer, Arts + Culture**

Donna Goodwin

### **Ec Dev Officer, Downtown and Community**

Carlie Arbour

### **Ec Dev Officer, Heritage**

Emily Turner

### **Ec Dev Officer, Tourism**

Laurie McCarthy

### **Superintendent of Business for KL School Board**

Tim Ellis

### **District Manager of Corporate Communications**

Catherine Shedden

### **Public Relations + Communications Officer, Trent Severn Waterway**

Karen Feeley

### **OPP Detachment Commander**

Timothy Tatchell

### **Executive Director, Lindsay BIA**

Melissa McFarland

### **(Acting) Manager of Policy Planning**

Leah Barnie

### **City Solicitor**

Robyn Carlson

### **Manager Building + Property**

Jorg Petersen

Will Hoddinott – Locations, DGC

Luis Mendoza – Locations, DGC

Catherine Crawford – Locations, DGC

Matt Greaver – Locations, DGC

Glenn Carter – Locations, DGC

*SKH Consulting*

*Strategic Government & Stakeholder Relations Solutions*

**Manager of Info Technology**

Kari Kleven

**Applications Supervisor, Information Technology**

Chris Moncrief

**ESRI – internal tech and supplier**

Nicole Ferguson

Rob Grob

Mark Patrick

**Director of Development Services**

Richard Holy

**Director of Community Services**

Craig Shanks

**Director of Engineering and Corporate Assets**

Juan Rojas

**Manager Communications + Marketing**

Cheri Davidson

**Kawartha Lakes Chief of Police**

Mark Mitchell

**Parks + Rec, Supervisor Programs + Partnerships**

Shelley Cooper

**Parks + Rec, Community Coordinator**

Nadine Bloomfield

**Chamber of Commerce, Bobcaygeon**

Denise Benning-Reid

**Chamber of Commerce, Coboconk**

Hayley Phoenix-Winterburn

**Chamber of Commerce, Fenlon Falls**

Marylee Boston

**Chamber of Commerce, Lindsay**

Colleen Collins

Charlene Shirk

**Director of Public Works**

Bryan Robinson

**Treasurer, Kawartha Lakes**

Carolyn Daynes

**CAO**

Ron Taylor

**CEO, Kawartha Lakes Library**

Jamie Anderson

**Parks, Recreation and Culture Manager**

Jean Johnson

**City Clerk**

Cathie Ritchie

**Realty Services, Manager**

Sharri Dyer

**Municipal Law Enforcement + Licensing, Manager**

Aaron Sloan

**Deputy Fire Chief, Kawartha Lakes**

Cameron Smith

**Ontario Ministry of Infrastructure, Director of Communications**

Wallace Pidgeon

**Ontario Creates, Ontario Film Commissioner**

Justin Cutler

**A.3 Kawartha Lakes reports**

City of Kawartha Lakes Strategic Plan 2020-2023

Economic Development Strategy 2017-2019

City of Kawartha Lakes Cultural Master Plan 2020-2030

## **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