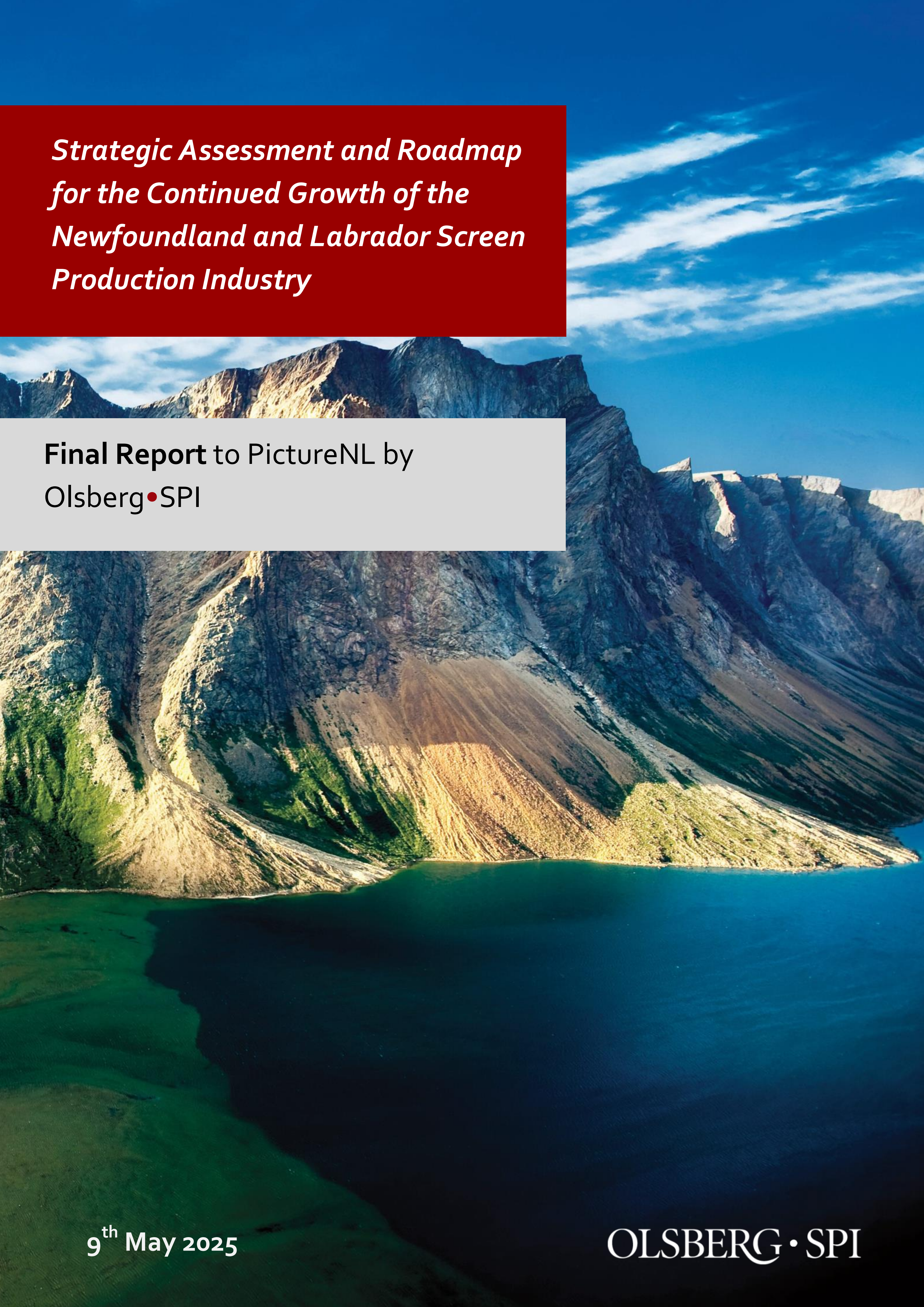

# *Strategic Assessment and Roadmap for the Continued Growth of the Newfoundland and Labrador Screen Production Industry*

**Final Report** to PictureNL by Olsberg•SPI

9th May 2025

OLSBERG • SPI

## CONTENTS

# 1. EXECUTIVE SUMMARY

## 1.1. About the Study

The Newfoundland and Labrador Film Development Corporation ("**PictureNL**") has commissioned global screen industry consultancy Olsberg•SPI ("**SPI**") to deliver a detailed strategic assessment and roadmap (the "**Study**") that will serve to drive development in the film and television ("**Screen**") production industry in Newfoundland and Labrador ("**NL**").

This Study represents the second phase of work for PictureNL to produce roadmaps for the province's Screen production industry; SPI submitted the first Study in 2022. Expanding on this initial project, this Study addresses several components that are key to the screen production industry's continued growth, including:

- Studios and infrastructure
- Workforce development
- Provincial incentives
- Sustainability and green production
- Regional sectoral development.

## 1.2. Context

In recent years, NL's screen production industry has shown significant and consistent growth, with the province firmly emerging as an attractive and film-friendly location. While historically a smaller market compared to other Canadian provinces, its reputation as an all-around film-friendly location has expanded, with successful productions driven by homegrown producers such as *Saint-Pierre* [1](2025- ), *Son of a Critch* (2022- ), *Hudson & Rex* (2019- ) and the Ontario co-production *King Tide* (2023), among others.

In addition, the province's role in accommodating parts or episodes of high-profile service productions such as Disney's *Peter Pan & Wendy* (2023), Apple TV's *Severance* (2022- ), Prime Video's *Reacher* (2022- ), and DC Studio's *Aquaman* (2018) has heightened awareness of its value among international studios.

There have also been positive developments in the enabling ecosystem that underpins the industry, such as the introduction of the All Spend Film and Video Production Tax Credit in 2022 and the subsequent 2025 increase from CA$10 million to CA$20 million for eligible productions within a tax year.

Federal investment, including support from the Atlantic Canada Opportunities Agency (ACOA), is helping to upgrade local production facilities such as those managed by the Newfoundland Independent Filmmakers Co-operative (NIFCO). Producers have also continued to maximize the use of re-purposed buildings for sets, while increasing opportunities for the province's stunning natural locations outside of St. John's to be seen on screens; for example, the Bonavista Peninsula has hosted principal photography for some high-profile productions, including Apple TV's *Severance* (2022 - ) and Disney's *Peter Pan & Wendy* (2023).

In terms of production workforce, there are approximately 2.5 professional and capable crews (and growing), based mostly around St. John's. Many below-the-line (BTL) workers have trained on set and built their skills and experience over the years on homegrown productions like *Republic of Doyle* (2010-2014) and *Hudson & Rex* (2019-), positioning them to work on bigger-budget service productions when those opportunities came around. Filming in Bonavista Peninsula of *King Tide*, *Severance*, *Peter Pan & Wendy* and others has also served to increase the numbers of crew members in that area, potentially reducing the number of crew

[1] The television series *Saint-Pierre* is a joint production of Hawco Productions and the CBC, filmed in Newfoundland as well as the French collective territory of Saint-Pierre and Miquelin.

members brought in (and therefore potentially reducing labour costs) and expanding employment opportunities.

In terms of training, the findings of the previous Study showed that there wasn't enough formally structured and consistent training in the province to effectively convert participants to professionals. Since then, the College of the North Atlantic (CNA) has expanded its professional courses in film and television production from its original Stephenville campus to a new campus in St. John's, connecting it to the heart of the province's screen production industry; launched in 2022, the now-named Paul L. Pope Centre for TV and Film features a practical program that is tightly connected to the industry's needs, creating a strong pathway into the industry and greatly strengthening the province's future workforce potential.

There are some risks to the industry's current growth trajectory that are highlighted here:

- An overall declining population in NL could affect the workforce numbers likely to enter the Screen production industry
- The province's harsh weather conditions during the winter have generally limited the types of production that takes place during that time, making the industry more seasonal (and exacerbated by the absence of a fit-for-purpose studio to provide cover for productions who may want to take advantage of winter conditions)
- The remoteness of locations beyond a three-hour drive from the industry base in St. John's also poses some challenges for not only navigation, but also for engaging potential above and below-the-line talent here.

These and other risks have been examined in this report, and recommendations have been offered where relevant.

In the current context, there are several strategic opportunities for PictureNL, the provincial government and its partners to consider in order to strengthen the foundation of the industry and continue to build on the current swell of interest from incoming producers. Continued consistent investment in the Screen production industry in NL also strengthens its attractiveness to local producers, directors and crew members as a place to live and work year-round, as well as to international students who come to train at the film school, potentially addressing the declining population issue in the long term.

### 1.3. Summary of Key Findings and Recommendations

As mentioned above, SPI's research for this Study covered five key areas that PictureNL has identified for further development. This section presents an overall summary SWOT analysis, while SWOTs for each area are explored in more detail in **Section 4.2.**

***Table 1 – Overall SWOT Summary***

| Strengths | Weaknesses |
|---|---|
| • Producers have been **resourceful** in adapting existing infrastructure and responding to opportunities<br>• **Well-regarded production workforce**, with good capacity of below-the-line (BTL) crew (about 2.5 crews)<br>• Positive interest in and view of **PictureNL's financial incentives programs** | • There is **limited capacity** at retrofitted production spaces, and a lack of purpose-built studios, which could limit growth if NL cannot meet demand<br>• **Retrofitted production facilities have structural limits**, which limit indoor winter production options<br>• Low levels of **mid to high-level crew**<br>• Limited **funding options** in the province<br>• Co-operatives are **over-subscribed** due to high demand for their services |

| Strengths | Weaknesses |
|---|---|
| • NL's **co-operatives** play a key role in supporting emerging and independent filmmakers<br>• **PictureNL's international marketing strategy is reaping benefits**, boosting business for producers and crew<br>• Producers are open to adopting **sustainable practices,** including using the new clean energy generators in St. John's<br>• NL offers high levels of **creative talent, diverse locations** and a range of **community-based cultures** and history | • Once filming outside St. John's, **long-haul transport is a requirement**, potentially affecting sustainability goals<br>• Difficult for retrofitted studios and infrastructure to **meet sustainability standards**<br>• For regional development, **limited access** is a key barrier for talent and locations. |
| **Opportunities** | **Threats** |
| • Introduction of the All-Spend Film and Video Production Tax Credit has increased NL's competitiveness for **international projects with higher budgets**<br>• **Increased interest** from incoming producers and bigger projects requiring infrastructure and production capacity<br>• Increasing support for a **fit-for-purpose studio** in the province to meet growing demand; could also extend production and employment into winter<br>• **Equipment suppliers could be incentivized** to set up in NL (possibly in or near new studio) to meet growing demand<br>• Domestic production provides opportunities for job progress<br>• Increased training and upskilling of crew through the launch of **Paul L. Pope Centre for TV and Film** in St. John's<br>• Recently introduced **immigration legislation** could help with pathways for international film school graduates into the workforce<br>• NL's **natural locations** encourage a **commitment to protection** through sustainability standards<br>• For regional development, there are wider efforts ongoing to **connect with indigenous communities**. Targeted location promotion of NL's varied landscapes could lead to economic and cultural impacts. | • **Current geopolitical events**, including the impact of recent US import tariffs on Canada and potential impacts on the financing and movement of projects, talent, crew and equipment across borders<br>• **Locations competition** for NL from other Atlantic provinces and elsewhere<br>• **Infrastructure limitations** are impacting skills development and work opportunities<br>• **Production incentives from other provinces** that enable crew working in other jurisdictions to still qualify<br>• **Geographical and logistical planning for filming in more remote areas is** challenging and costly, affecting sustainability standards<br>• For regional sectoral development, political complexities across indigenous communities may hinder progress, while there are clear **geographical limitations**. Outreach to indigenous communities also requires high levels of resources, especially people and time. |

### *1.3.1. Studios and Infrastructure*

NL's Screen production industry has an adaptive and intuitive working culture, which has been key to its workforce finding ways to service demand. To date, this has resulted in the retrofitting of buildings for filming such as warehouses and aero-hangers. In some cases, those retrofitted spaces have been used across multiple productions over several years.

**However, there is no purpose-built studio, and demand now outstrips supply for retrofitted facilities, predominantly in the production hub of St. John's.** This limits NL's ability to service productions that require studios, and to service productions (and generate employment) year-round. This is because structural limitations of such spaces mean they are often not well insulated or ventilated.

Given the industry's current growth trajectory and increasing interest from incoming producers, **there is now an opportunity for NL to facilitate the introduction of a purpose-built studio, following a careful feasibility study that considers both business and geopolitical realities**. Such a facility should have the capacity to be a full production base, hosting production offices, a set-up stage and large equipment rig storage, for example. In this way, the facility could service the industry in an expanded way throughout the pre-production and principal photography phases.

**There is strong potential for a bespoke, multi-purpose studio facility to have a positive impact on advancing the industry's maturity and expand current seasonal production into the winter months.**

In NL, co-operatives play a vital role in supporting emerging and independent filmmakers by providing access to production and post-production equipment, training and creative resources. However, the co-operatives are over-subscribed and under pressure to provide international-standard gear and services, which may be beyond their remit or capacity. A **bespoke studio offer could also be leveraged to attract well-established equipment suppliers to base in or near the facility**, strengthening the province's attractiveness and creating new forms of employment.

### *1.3.2. Workforce Development*

As the number of both homegrown and service productions in NL has increased, the province's workforce has also commensurately expanded in the last few years, with a current reported capacity of around 2.5 crews.

There is also reasonable capacity of entry-to-mid-level crew, with strong skills across both creative and technical BTL crew. There has also been a steady career progression from new entrants through to mid-level expertise, largely attributed to the stability of one to two recurring productions taking place in the province alongside a churn of mid-level television series.

However, **while both the creative and technical crew base has grown, the demand for certain roles has surpassed the skillset available and/or the capacity of the local workforce.** A third simultaneous production in the province would need to be partly crewed domestically and supplemented with external crew from other provinces or international jurisdictions. As a result, external crew members are predominantly filling senior and Head of Department (HoD) level roles. This results in many technical crew members reaching mid-level roles through a single recurring production or a series of various productions but find that they are unable to progress to or gain experience in senior roles.

Due to limited capacity and high workload, production staff, mid- to senior-level producers and some production roles are facing burn-out. There is also low-to-no provision for location management and/or fixers across the province, potentially exacerbating pressure on local line producers.

On workforce, **identifying skills gaps, highlighting roles that are under pressure or lacking, and understanding pain points in crewing productions are key to developing a strategy for continued industry growth and attractiveness to all producers.** PictureNL is playing an important role in building a cohesive industry network, which is critical to advancing the province's competitiveness. Deepening such alliances could continue to open up skills and funding opportunities for technical, digital and creative professionals.

A diverse and expanding churn of production activity in the form of both domestic or homegrown projects and incoming service productions would also provide more opportunities for crew members to progress through role expertise on different scales of productions.

On training, following the previous roadmap and SPI's evaluation of recent developments in training provision**, it is important to ensure there are clear pathways into the workforce so there is ready availability of trained and experienced crew.** With a second round of graduates and new entrants due out of CNA, this appears to be the start of a more consistent and predictable flow of new entrants into the industry's workforce.

In the long term, the launch of a purpose-built studio would extend seasonal production into the winter months and expand employment opportunities for crew to work year-round, which would help to stabilize the freelance cohort in the province, reducing the need for crew to work across multiple industries and jobs and, instead, make a full-time living from working in the NL Screen production industry.

Recently introduced immigration legislation, which allows NL-employed international persons to apply for residency, could also strongly impact workforce growth.

Finally, other provinces that offer production incentives where crew working in other jurisdictions still qualify are extremely competitive and could be a threat to the NL industry. This is the case with Ontario's labour incentive, for example, and means that such larger markets with more opportunity for skills development and higher-grade credits have crew members who can come into locations like NL, potentially limiting opportunities for local crews on bigger productions.

### *1.3.3. Provincial Incentives*

**The introduction of the All-Spend Film and Video Production Tax Credit (All-Spend) in 2022 has positively increased the value proposition of the province as a filming location** and has significantly boosted its competitiveness in the wider context of the Canadian, North American and international incentive landscape. Featuring strongly in PictureNL's promotional messaging to prospective clients, this addition has made the province more attractive to major international and larger budget productions and underlines the support from the provincial government for effectively facilitating service production. One further weakness is the lack of funding options in the province beyond the incentives.

Going forward, **there are opportunities to improve the overall incentive offering to further grow service production activity and continue to generate employment.**

In process improvement terms, the pending transfer the processing of the All-Spend from the Department of Finance to the Canada Revenue Authority (CRA) would ensure a more efficient processing of applications. While this is in train, this shift would work to further the functionality of the All-Spend. The All-Spend per project cap is also relatively low, with the maximum credit set at CA$20 million per project annually.

### *1.3.4. Sustainability and Green Production*

Considering the growing industry move towards environmentally sustainable inclusions for productions, **NL has an opportunity to lean into and expand existing efforts to encourage or mandate such practices for both domestic and service productions**.

The industry currently sits at a pivotal moment in balancing sustainability guidelines or requirements with the demands of production, and the province has made efforts to integrate sustainable practices into production; two clean energy generators have been on site in St. John's for production, signalling the potential for positive change.

There is also a growing industry-wide commitment to integrating sustainable practices across both domestic and service productions, and NL's natural landscapes encourage conservation efforts and make sustainability an inherent and attractive part of its identity. By introducing clear and practical industry-wide sustainable standards, NL could enhance its competitive edge, while the recently introduced Sustainable Production Day has the potential to serve as a long-term driver of change and to accelerate decarbonization in the industry.

At the same time, key challenges remain in infrastructure, logistics and prioritization. NL's geography poses inherent transportation challenges, with long-haul travel often unavoidable due to the remote nature of many filming locations. Sustainable travel alternatives are not yet a viable option for most productions, particularly in more isolated areas with limited charging infrastructure.

Additionally, while existing studios and production spaces have been retrofitted to support the growing industry, they were not initially designed with sustainability in mind. And while there is an awareness of sustainability within the domestic industry, it has yet to become a top priority.

#### *1.3.5. Regional Sectoral Development*

NL's Screen production industry is deeply rooted in the province's rich cultural heritage, diverse landscapes and strong community-driven storytelling traditions. **The province's unique environment, from rugged coastlines to remote inland communities, provides a unique visual appeal for filmmakers looking to create compelling and authentic narratives.**

Cultural events such as the St. John's International Women's Film Festival (SJIWFF) further highlight the strength of the homegrown industry, giving women and gender-diverse filmmakers a high-profile platform to showcase their work. Additionally, both provincial and national funding initiatives, including programs aimed at Indigenous filmmakers and creators from underrepresented backgrounds, serve to strengthen local storytelling by providing essential financial and developmental support.

However, access remains a challenge for professionals and new entrants to the industry. Many emerging talents and those looking to progress their careers, particularly those outside St. John's, have limited exposure to the various stages in the Screen production value chain. Without formalized pathways into the industry located in more hubs outside St. John's, a large portion of NL's potential creative workforce remains untapped.

Additionally, while the province offers breathtaking and distinctive locations, the practical challenges of filming in remote areas, especially for smaller or low-budget productions, can be significant.

Across Canada, there is an increasing emphasis on Indigenous outreach and access in the creative industries, aligning with global focus on local or Indigenous representation, both on-screen and behind the scenes. Leveraging NL's diverse locations through targeted promotional efforts could yield both economic and cultural benefits.

Political complexities within Indigenous communities could hinder progress and may present challenges for a unified and central working group dedicated to improving industry access and engagement. The province's geographical complexity to navigate continues to present logistical and financial limitations that require significant investment to overcome, further affecting opportunities for the widest group possible to smoothly join the industry. Moreover, meaningful and long-term sustainable Indigenous outreach and access initiatives demand substantial resources, both in terms of personnel and time.

#### 1.3.6. Summary Recommendations

Following SPI's comprehensive assessment and analysis, here is a high-level summary of the recommendations for the continued growth of the NL Screen production industry. See more details in **Section 5**.

- **Immediate Priorities (1-2 Years):** The recommendations for **Immediate Priorities** are focused on maintaining the industry's current growth trajectory, which would be further driven by attracting more service productions and increasing inward investment – a core strategic objective for PictureNL. At the same time, preemptive action must be taken to ensure an increase in production activity is not negatively impacted by a lack of capacity. The key considerations for this objective are to ensure there is a **robust provincial crew base**, to **increase infrastructure capacity** and to **improve industry engagement** with the All-Spend Film and Video Production Tax Credit. Addressing these considerations through both direct and indirect strategies in the short term is critical to maintaining growth. Also, in the short term, it is important to make **concrete steps toward longer-term goals for sustainability and regional development**.
- **Medium-Term Considerations (3-5 years):** The focus for the **Medium Term** is on supporting further growth. Once the current capacity gaps are addressed, this period focuses on **refining existing programs and initiatives**. In addition, efforts should be made to **create and implement strategies for new priority areas**. Collectively, the primary objective should be to **establish economic and crew measurement baselines** to support data-driven lobbying for and communication about the industry's value and success, driving forward the next stage of developments.
- **Long-Term Considerations (6-10 years):** The **Long-Term** recommendations focus on **evaluating the overall progress of NL's industry** and **scoping out forward-looking strategies.** This would be through detailed **evaluations of all initiatives and interventions having taken place up to that point**, particularly across the five key research areas outlined in this report. Unlike the recommendations for the previous periods, the following details a holistic approach. This will work to inform any final stages of implementation and guide PictureNL in reflecting on the industry at that stage, while looking to the next areas of expansion and development.

# Section 2 –

# Current State of Canada's Screen Production Industry


BTS still from *Hudson & Rex (2019- )*
Photo credit: Derm Carberry.
Photo courtesy: PictureNL

# 2. CURRENT STATE OF CANADA'S SCREEN PRODUCTION INDUSTRY

## 2.1. Overview

Before examining the current state of the Screen production industry in NL, it is important to update the federal context within which it operates.

The Screen production industry (comprising Canadian and international film and television production) is a critical driver of the Canadian economy and generated CA$11.04 billion in GDP in 2023-2024. Reports show that, in 2023-2024, total production volume declined 18.5% to CA$9.58 billion from the previous year's growth. This data reflects a downturn in economic activity across domestic and international production, which was driven by the 2023 SAG-AFTRA and WGA strikes in the US, and a slowdown in the commissioning of Canadian content.

The extent of that impact was concentrated in certain segments of the Screen production industry, as the volume of Canadian television production decreased by 12.7% to CA$3.25 billion, and foreign location and services production decreased by 26.1% to CA$4.73 billion. [2]

Despite the US labour strikes, the Canadian Media Producers Association (CMPA) noted that foreign location and service production in 2023-2024 was still 80% higher than in 2014-2015, and while Canadian production has also increased, it has grown at a slower rate over that same period.

English-language content comprised 70% of the CA$3.69 billion spent on Canadian productions, while French-language content accounted for the rest. [3]

In addition, the Canadian Radio-Television Communications Commission (CRTC) continues to work through a multi-phase review of the regulatory framework for the Canadian broadcasting system. Bill C-11, known as the Online Streaming Act, was introduced to support Canada's domestic content creation by extending regulatory oversight to online streaming services. In June 2024, the Commission announced that foreign streaming services with annual revenues exceeding CA$25 million are now required to allocate 5% of these revenues to support Canadian content. This initiative took effect in September 2024 and is projected to generate approximately CA$200 million annually for Canadian content development. [4]

The financial contributions from streaming services are expected to boost the Canadian Screen production industry, with an expectation that Bill C-11 could also lead to enhanced global competitiveness of Canadian productions. [5] For example, provinces such as Quebec may experience a surge in content that reflects their linguistic heritage. Similarly, Indigenous communities across Canadian provinces could see increased representation and storytelling opportunities.

## 2.2. Provincial and Arctic Context

### *2.2.1. Overview*

While the Canadian Screen production industry has not been immune to economic pressures, including inflation, rising interest rates, increasing production costs and the potential

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[2] *Profile 2024: Economic Report on the Screen-Based Media Production Industry in Canada*. Canadian Media Producers Association, 2024. Accessible at: https://cmpa.ca/wp-content/uploads/2025/02/Profile-2024-ENG-Final.pdf

[3] *Ibid.*

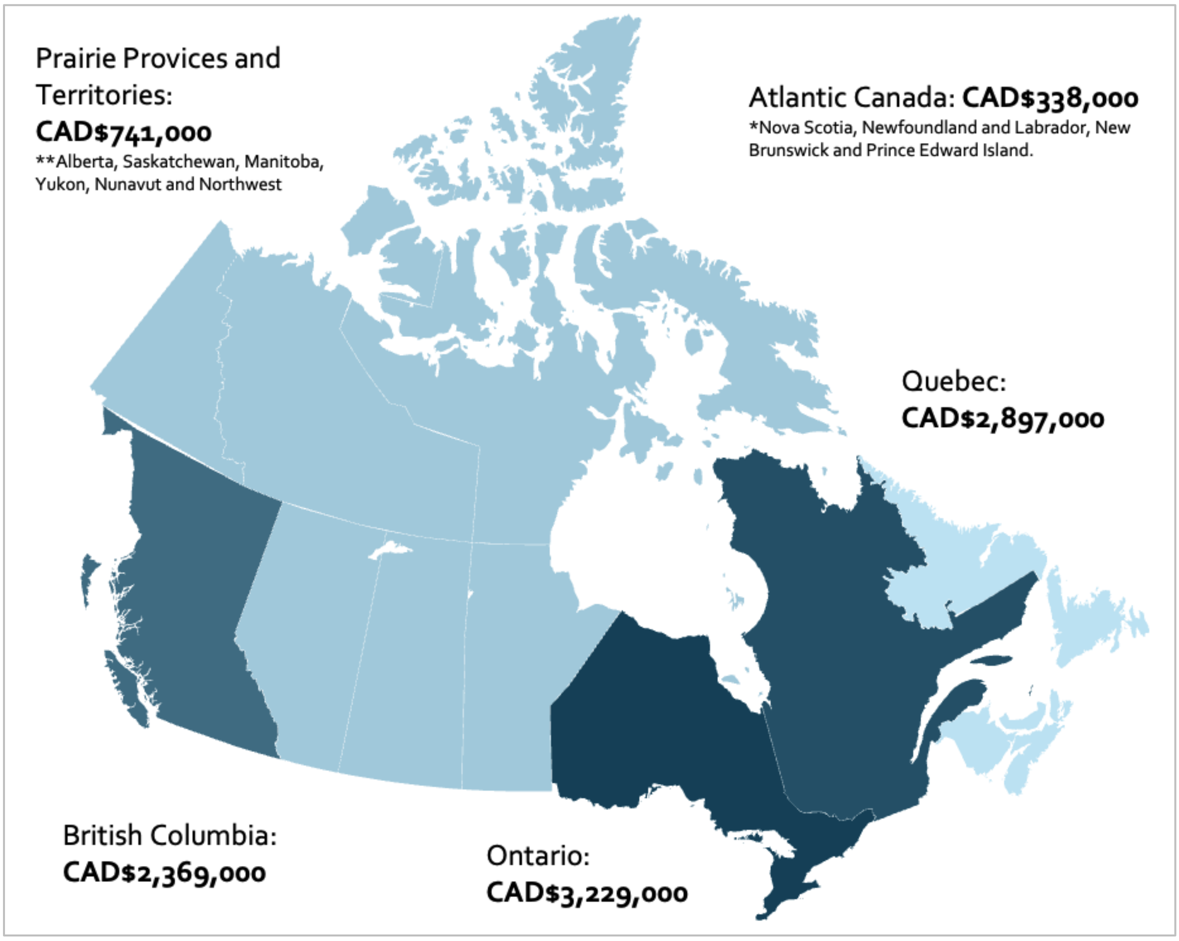
[4] *CRTC Requires Online Streaming Services to Contribute to Canada's Broadcasting System*. Government of Canada, 4th June 2024. Accessible at: https://www.canada.ca/en/radio-television-telecommunications/news/2024/06/crtc-requires-online-streaming-services-to-contribute-to-canadas-broadcasting-system.html

[5] *Streaming Giants Ordered by Canadian Regulator to Pay for More Local Movie and TV Content.* The Hollywood Reporter, 4th June 2024. Accessible at: https://www.hollywoodreporter.com/business/business-news/u-s-streamers-canadian-revenues-1235914777/

ramifications of the US government's recent tariff threats,[6] provincial governments have continued to refine their automatic production incentive programs to remain competitive against international markets, with Toronto, Quebec, and Vancouver serving as pivotal centres of production activity.

The following sub-sections provide brief updates on sectoral developments in most of the provinces and also on indigenous production in Canada.

***Figure 1 – Total Volume of Film and Television Production in Canada 2023/2024***




Source: Profile 2024, CMPA

### *2.2.2. Developments in Ontario*

The Ontario Film & Television Tax Credit (OFTTC) was extended in 2023 to include productions made for alternative distribution platforms. Applicable to principal photography commencing on or after 1st November 2022, eligible productions now benefit from tax credits even if they are distributed online or via video-on-demand services.[7]

In 2022, Toronto's film, television and digital media industry reached CA$2.6 billion in direct spending, employing over 35,000 individuals,[8] a surge that can be attributed to a combination of domestic productions and an influx of international projects. Although home to a robust

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[6] *After Trump Vows Tariffs on Foreign Movies, the Canadian Film Industry Says He's Lost the Plot*. CBC, 6th May 2025. Accessible at: https://www.cbc.ca/news/business/trump-us-film-industry-tariffs-1.7526419
[7] Ontario Film & Television Tax Credit (OFTTC). Ontario Creates, 2023. Accessible at: https://www.ontariocreates.ca/tax-incentives/ofttc?
[8] *Film and Television Facts*. ACTRA Toronto, 2022. Accessible at: https://actratoronto.com/film-and-television-facts

studio infrastructure and a skilled workforce, Toronto saw a 20% decline in production levels from the global industry downturn in 2024.[9] Despite this, recent reports indicate that production levels in this key global production hub are strong for 2025.

### 2.2.3. Developments in British Columbia

British Columbia (largely due to activity in Vancouver) continues to be a hub for visual effects, animation and post-production work; these industries are expected to see growth alongside traditional film and television production. In late 2024, the government of British Columbia announced it would increase incentives for the film and television production industry to attract and encourage more productions in the province.[10]

### 2.2.4. Developments in Quebec

In 2024, Quebec also increased its all-spend refundable tax credit for eligible service productions (CSPC) from 20% to 25% in the government's 2024-25 budget.[11] The adjustment included measures for computer-aided animation and special effects, including scenes shot in front of a chroma key; the 16% bonus applies to eligible labour expenditures capped at 65% of an animation or VFX service contract.

### 2.2.5. Developments in Alberta

In 2023, Alberta significantly expanded its Film and Television Tax Credit, increasing its cap to CA$225 million over three years to attract larger-scale productions.[12] This move has already drawn major Hollywood and independent productions to the province, boosting employment opportunities and leading to investments in new studio facilities in Calgary and Edmonton. Global hit HBO series *The Last of Us* (2023-) generated CA$182 million for the province and supported 1,490 FTE jobs across Alberta from season one alone.[13]

### 2.2.6. Developments in Nova Scotia

Nova Scotia reinstated and expanded its film tax credit in 2023 and has witnessed a resulting surge in production activity, leading to the development of new studio spaces[14] and an increase in film funds and training programs for local crews.[15]

The province also introduced the Distant Location Incentive, a two-tiered initiative based on the location of eligible productions. Any projects filmed more than 100 km from Halifax City Hall could receive an incentive of up to 7% of eligible Nova Scotia costs; the incentive is increased to up to 10% for productions more than 150 km from Halifax City Hall.[16] The added

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[9] *The State of the Industry: 2024 in Review and Outlook for 2025*. Entertainment Partners, December 2024. Accessible at: https://productionlot.ep.com/discussion/429/the-state-of-the-industry-2024-in-review-and-outlook-for-2025

[10] *Hollywood North: British Columbia's Struggling Film Production Industry Gets Big Boost with New Tax Incentives.* DailyHive, 30th December 2024. Accessible at: https://dailyhive.com/vancouver/british-columbia-bc-vancouver-film-television-production-industry-tax-credits

[11] Refundable Tax Credit for Film or Television Production Services. SODEC. Accessible at: https://sodec.gouv.qc.ca/english/credit-film-production-services/

[12] Film and Television Tax Credit. Alberta. Accessible at: https://www.alberta.ca/film-television-tax-credit#:~:text=photography%20in%20Alberta.-,Overview,or%2030%25%20tax%20credit%20rate

[13] *Economic Impacts of The Last of Us Season One in Alberta*, MPA Canada, November 2023. Accessible at: https://www.mpa-canada.org/wp-content/uploads/2023/11/OE-MPA_TheLastOfUsS1_FINAL.pdf

[14] *Screen Nova Scotia Acquiring Land for New NS Soundstage.* Screen Nova Scotia, 11th August 2023. Accessible at: https://screennovascotia.com/screen-nova-scotia-acquiring-land-for-new-ns-soundstage/

[15] *Nova Scotia Enhances Film Fund to Support Creative Industry, Propel Local Economy*. Nova Scotia, 19th December 2024. Accessible at: https://news.novascotia.ca/en/2024/12/19/nova-scotia-enhances-film-fund-support-creative-industry-propel-local-economy

[16] *More Funding for Film, Television Productions in Rural Nova Scotia*. Nova Scotia press release, 2nd July 2024. Accessible at: https://news.novascotia.ca/en/2024/07/02/more-funding-film-television-productions-rural-nova-scotia

incentive was created to address higher costs of production in rural areas and to encourage more filming outside of the Halifax region.

### *2.2.7. Developments in Manitoba*

Manitoba has also seen significant production activity as a stand-in for US cities such as Pennsylvania and Ohio. The Manitoban film incentive budget was recently increased, allowing for expanded workforce training programs to ensure a sustainable talent pipeline for the growing number of productions filming in the province.[17]

### *2.2.8. Developments in Saskatchewan*

Since April 2023, approximately CA$12 million has been committed to 21 productions through the Creative Saskatchewan Feature Film and Television Production Grant. These productions are estimated to produce a Saskatchewan spend of over CA$30 million, generating an approximate economic output of CA$50 million and more than 500 jobs.[18] When the film tax credit was eliminated in 2012, local crew members had to look for work elsewhere. Although funding has returned, the labour and skills shortage could present future challenges for productions.[19]

### *2.2.9. Developments in the Production of Film and Television by and about Indigenous People*

Production of film and television by and about Indigenous people has seen substantial growth, accounting for 6.9% of total Canadian film and television production in the 2021/22 fiscal year. This surge generated approximately CA$290.6 million, supporting over 4,120 full-time equivalent jobs and contributing CA$339.8 million to the Gross Domestic Product (GDP).[20]

At the same time, producers from these communities still face significant barriers such as limited access to funding, distribution and leadership roles, which hinders growth. Geographical constraints also make production costly and logistically challenging for many members of Indigenous communities who want to work in the Screen production industry.

The growing Arctic Indigenous audiovisual industry also has a shortage of crew members for key roles. There is a need for professional development programs that are tailored to Indigenous talent and acknowledge their cultural norms around storytelling. Permanent, high-quality training provisions are crucial, as well as developing ways of working across national borders within the Arctic region.

[17] *Manitoba Film and Video Production Tax Credit.* Government of Canada. Accessible at: https://www.canada.ca/en/revenue-agency/services/tax/businesses/topics/corporations/provincial-territorial-corporation-tax/manitoba-provincial-corporation-tax/manitoba-film-video-production-tax-credit.html

[18] *Saskatchewan's Film Sector Flourishing Two Years Post Funding Increase*. Saskatchewan, 23rd May 2024. Accessible at: https://www.saskatchewan.ca/government/news-and-media/2024/may/23/saskatchewans-film-sector-flourishing-two-years-post-funding-increase

[19] *'And … action!': With new funding Saskatchewan's film industry is scrambling to find crew.* CBC News, 4th October 2024. Accessible at: https://www.cbc.ca/news/canada/saskatchewan/not-enough-crew-as-sask-film-industry-recovers-1.7340118

[20] *Indigenous Audiovisual Sector Economic Impact Assessment.* Government of Canada, March 2023. Accessible at: https://www.canada.ca/en/canadian-heritage/services/film-video-publications/indigenous-audiovisual-economic-impact-assessment.html

# Section 3 –
# **Status of Recommendations from 2022 Roadmap**

Downtown St. John's
Photo credit: Barrett and McKay
Photo courtesy: PictureNL

## 3. STATUS OF RECOMMENDATIONS FROM 2022 ROADMAP

Before examining the current state of and growth potential for the Screen production industry in **Section 4**, the following summarizes the recommendations from SPI's previous report for PictureNL and provides notes on what has been implemented.

This is intended to highlight where already existing recommendations could be revisited or incorporated into the next phase of PictureNL's strategy, while serving as an indicator of both the corporation's and the industry's clear progress in the last few years.

***Table 2 – Status of Recommendations from 2022 Roadmap***

| Recommendations in 2022 Report | Status and Notes |
|---|---|
| **Incentives – Domestic Productions** | |
| Proactively **review and modernize the application and processing of the Equity Fund** to ensure that it meets the needs of domestic producers | The program remains unchanged and continues to provide valuable funding to domestic producers. |
| **Continue the Sponsorship Program in its current format;** consideration should be given to expanding this program in year four (2025/2026) as producer needs evolve | The program continues to provide valuable opportunities for applicants to attend film festivals and markets to advance their projects and network with the industry outside the province. According to the recommendations, the program should be reviewed in the next fiscal year for effectiveness. |
| While the tax credit has been applicable to both domestic and inward productions, **consider assigning the tax credit to domestic producers for use with co-productions, and introducing a new all-spend tax credit targeted to inward productions** | There have been no substantive changes to the Film and Video Industry Tax Credit since the first report; overall it continues to be effective<br><br>The All-Spend Film and Video Production Tax Credit has been introduced; it is still in the early stages and there is an opportunity to clarify the audiences for each incentive through marketing and through the Manager of Program's interventions. |
| **Update and streamline the tax credit processing system in accordance with national standards**, including engaging the Canada Revenue Agency (CRA) to process the applications | As of the time of writing, the Film and Video Industry Tax Credit is still being processed by the province's Department of Finance; there is a recognition that transferring responsibility for processing the tax credit to the CRA would increase efficiency, and this transfer is currently in train. |
| **Increase tax credit values for production and labour elements** | The values have not been increased; such changes require multi-level reviews and approval for regulation change at the government level. This can be reviewed for PictureNL to propose such legislative changes in the future. |

| Recommendations in 2022 Report | Status and Notes |
|---|---|
| **Introduce two uplifts**: 2% for shooting outside St. John's; 1% for diversity plans | Uplifts have not been introduced; such changes require multi-level reviews and approval for regulation change at the government level. This can be reviewed for PictureNL to propose such legislative changes in the future. |
| **Introduce a formal three-year apprenticeship program linked to accessing the labour tax credit** for direct pathway for CNA graduates and others into working in the industry | While a formal apprenticeship program has not been introduced, the recent launch of the CNA film school in St. John's, the practical focus of the program and the tight connections to the provincial industry have increased the potential for students to access internships and work experience while studying, to find jobs on sets after graduating, and to add value from early in their careers due to the film school's set-ready approach to the curriculum. |
| **Review the deeming provision** with aim of improving the terms and processing. | The deeming provision has since been removed. |
| **Incentives – Service Productions** | |
| Introduce an **all-spend tax credit program** at a competitive **30% headline rate**, specifically for **service productions** | The All-Spend Film and Video Production Tax Credit was introduced in 2022 at a competitive headline rate of 40%.<br><br>While it is being promoted to international producers, it is not immediately clear from the published marketing material that this incentive is specifically for service productions. |
| Consider complementary **uplifts** to this all-spend program for **regional sectoral development and diversity; 2% and 1%** respectively | No uplifts have been introduced; considering the relatively recent launch of the All-Spend in 2022, and that there is still some work to do around its marketing (as discussed elsewhere), focus should continue on refining the current program and consider complementary uplifts in the future when there is more usage data. |
| Once the industry has reached the target of CA$100 million of annual production spend, **the all-spend tax credit and uplifts should be reviewed for effectiveness** | The All-Spend Film and Video Production Tax Credit has been reviewed as part of this Study. |
| Attach a **formal three-year apprenticeship program to the all-spend tax credit,** to create a pathway for early-stage workforce to gain | An apprenticeship program tied to the all-spend tax credit has not been introduced, but the launch of the film school in St. John's has created more valuable internship and apprenticeship |

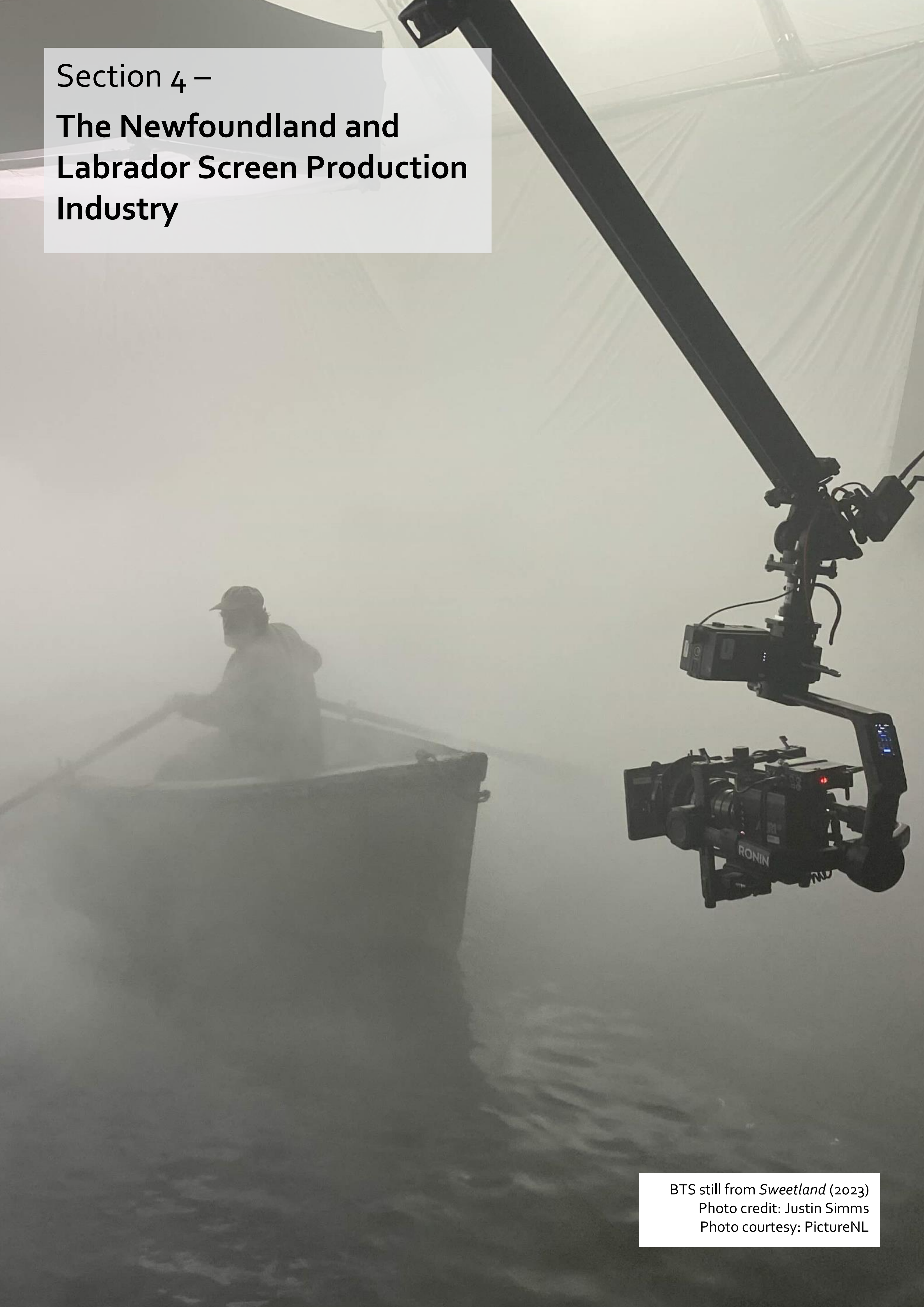
| Recommendations in 2022 Report | Status and Notes |
|---|---|
| experience on domestic and service productions | opportunities for students and graduates; it is proposed that PictureNL focus on refining the program in the short-to-medium term, and revisit this in the future when there is more usage data as well as more statistics on the performance of the film school. |
| **Processing of the All-Spend tax credit should be undertaken by the CRA** in accordance with national standards. | The processing of the All Spend Film and Video Production Tax Credit remains with the province's Department of Finance; both the Department and PictureNL have a watching brief on the uptake and performance of the All-Spend as a new program, before considering a transfer to the CRA. |
| **Workforce Capacity** | |
| Prioritize the creation of **a robust training plan for NL, created and overseen by an PictureNL-led provincial skills committee**, comprised of relevant government agencies, training professionals and providers, key producers and heads of department. The focus should be on year-round provision at all relevant levels – from entry-level to continuing professional development for those already working in the industry | While such a plan has not been introduced, the 2022 launch of the College of the North Atlantic's film and television school in St. John's is a significant step forward to training the next generation of production professionals; critically, it provides a clear pathway into working in the industry by connecting tightly to producers with domestic, inter-provincial and service productions filming in NL. |
| Formalize the professionalization and consistency of skills provision through creating **accredited above-the-line (ATL) and below-the-line (BTL) training programs** | The launch of the CNA's film and television school in St. John's provides accredited training in several key areas, with potential for future expansion: there is one two-year program in Television ad Film Creation that focuses on ATL roles, plus three one-year BTL stream.<br><br>Contributing to further opportunities for professionalization, PictureNL has also introduced the Writer's Room Program (credited) and the Producer Accelerator Program. |
| Consider **retraining and pivoting workers with relevant skills from declining traditional resource-based industries** | Research shows that the CNA is currently developing micro-credentials programs that cross over with its non-film programs, including production accounting, catering, hair, costume/wardrobe, make-up and set dressing. |

| Recommendations in 2022 Report | Status and Notes |
|---|---|
| Consider adding **a labour uplift to the all-spend tax credit** will support the regular hiring and training of new labour. | The "matching" element of the All-Spend is intended to increase the hiring and training of new roles. |
| **Development of Newfoundland and Labrador's Talent and Content** | |
| Develop and implement a robust producer succession program to provide targeted and lasting mentorship for and promising early- or mid-career producers by leading local practitioners | Pending at this time. |
| Deliver targeted business and entrepreneurship skills as part of a mentoring program, addressing capacity to build and manage sustainable business, as well as to produce successful content | Pending at this time. |
| Continue to invest in producers and talent from the province in engaging with the international industry | These interventions continue through the Sponsorship Program that funds market trips and training opportunities, as well as PictureNL's own investment into partnerships that benefit producer education and talent development, such as with the St. John's International Women's Film Festival. |
| Adopt international best practice and include clearly stated diversity and inclusion standards for projects and programs in which the NLFDC invests, prioritizing Indigenous talent and stories from the province with a focus on the Labrador region | The Empowerment Production Fund was launched in fiscal year 2022/2023 to support citizens who identify with traditionally under-represented group with getting their projects made.<br>Diversity requirements for incoming productions are pending at this time. |
| Direct funding for the domestic industry outside of the peak inward summer production season. | PictureNL aims to attract and currently funds domestic production year-round. |
| **Physical Infrastructure** | |
| At this point in the industry's life cycle, development of crew and the regional funding offer should be prioritized over a studio. On the basis that industries can expand rapidly, keep a close watching brief on this area for future development | This Study investigated the state and future potential of physical infrastructure in the province and provides an assessment and recommendations in later sections. |

| Recommendations in 2022 Report | Status and Notes |
|---|---|
| Continue to encourage or incentivize the use of empty or under-utilized industrial spaces for productions, perhaps developing an inventory of such spaces to provide to new clients | Use of empty or under-utilized industrial spaces for productions; the development of a space inventory is currently in progress. |
| In the meantime, intelligence on the evolving trends of studio production in line with the global deluge should be tracked, including the rise of virtual production expansions or new builds. | Infrastructure has been reviewed as part of this Study. |
| **Film-Friendly Environment** | |
| Formalize the film friendly network to ensure that as production budgets and expectations increase, PictureNL is fully equipped to meet any production-related request | Pending at this time; however, PictureNL continues to maintain strong and healthy relationships with provincial and federal partners, as well as ACOA. |
| Increase the awareness and appreciation of the local community and business for the value of Screen production through consistent engagement programs, social media platforms, and stories in local media, and through regularly publishing economic impact statistics. | The promotion and marketing of the industry has markedly increased since the last report, and PictureNL is currently developing a wider communications strategy. |

# Section 4 –

# The Newfoundland and Labrador Screen Production Industry




BTS still from *Sweetland* (2023)
Photo credit: Justin Simms
Photo courtesy: PictureNL

# 4. THE NEWFOUNDLAND AND LABRADOR SCREEN PRODUCTION INDUSTRY

## 4.1. Overview

**In the last several years, NL has emerged as an attractive and film-friendly location in Canada's valuable Screen production industry**. While historically a smaller market compared to other provinces, its reputation as an all-round film-friendly location has expanded with successful homegrown productions such as *Hudson & Rex* (2019-), *Son of a Critch* (2022- ) and the Ontario co-production *King Tide* (2023), among others.

In addition, the province's role in facilitating parts of high-profile service productions such as Disney's *Peter Pan & Wendy* (2023), Apple TV's *Severance* (2022- ), Prime Video's *Reacher* (2022- ) and DC Studio's *Aquaman* (2018) has heightened awareness in the market and broadened its appeal to the larger studios.

Producers of all sizes are choosing NL for its distinctive cultural and creative appeal in its unique landscapes, versatile locations, incentive programs and skilled local crews; at the same time, domestic or homegrown producers remain committed to growing the industry so that they can have more stable careers closer to home without needing to move to bigger production hubs to work.

Since the release of SPI's first assessment and roadmap Study in 2022, NL's Screen production industry has experienced significant growth, driven in part by post-pandemic recovery and the introduction of a new All-Spend Film and Video Production Tax Credit; this incentive offers a 40% refundable tax credit on eligible production costs, capped at CA$20 million per project per tax year.

The Equity Investment Program continues to play a vital role in domestic industry growth, supporting 39 productions in 2023/2024, including two major television series, seven feature films, 22 lower-budget TV projects, two documentaries and six short films.[21]

The provincial government has also demonstrated its strong commitment to developing and promoting the industry through the following actions:

- **Increased investment in NLFDC/PictureNL –** The Newfoundland and Labrador Film Development Corporation (NLFDC) launched the marketing brand PictureNL and expanded the film office's team and industry support services to the current complement of six; a full-time Industry Development Manager now oversees training initiatives, job placements and workshops, while a full-time Manager of Programs facilitates a range of funding instruments for domestic creators.

  The expanded team and budget allow PictureNL to more effectively manage the growing industry and the needs of both domestic and incoming stakeholders; at the same time, the rebranded name aligns with international film commission standards and expectations and has strengthened its ability to more effectively promote the province as an attractive and competitive location abroad.

  PictureNL's operational budget also increased by CA$400,000, and funding from the Atlantic Canada Opportunities Agency (ACOA) continues to support its projects to connect domestic producers to international networks, training and resources.

- **Public commitment from and promotion by the Minister of Tourism Culture, Arts and Recreation (TCAR) –** In 2023-2024, Minister of TCAR Steve Crocker and Deputy Minister of TCAR Jamie O'Dea joined the PictureNL team at several international industry markets and meetings to promote the province's offer, including at the Berlin

[21] PictureNL Annual Report 2023-24. PictureNL. Accessible at: https://www.gov.nl.ca/tcar/files/PictureNLAnnualReport-2023-2024.pdf

International Film Festival,[22] the Cannes Film Festival and others, instilling confidence in potential new or returning producers about the quality of their filming experience in the province and the commitment of the government. This demonstration of public support for the industry from such a high office declares that NL intends to be competitive and film-friendly in these important spaces where film and television industry professionals gather and conduct business.

- **Facilitating a new film school in the main production hub –** The provincial government has been instrumental in facilitating the relatively fast establishment of the College of the North Atlantic's Paul L. Pope Centre for TV and Film[23] in St. John's, which is set up to train the next generations of the province's film and television workforce in practical skills, ensuring they are set-ready upon graduation. This has been a critical step in feeding the needed expansion of the crew and talent base for the industry.
- **Introducing an industry-friendly immigration policy** – Minister Crocker recently announced the launch of the Provincial Nominee Program, which "...acknowledges the cyclical nature of film and television productions."[24] This new immigration policy allows persons from outside the province who have full-time employment in the Screen production industry to apply for permanent residency. This visionary step has the potential to boost the crew and talent base in the province since students from all over the world have been enrolling in the new St. John's-based film school since inception; this is an excellent way to incentivize talent to stay and grow the industry.
- **Premier Andrew Furey's** consistently vocal support for the industry over the last several years.

PictureNL has also launched initiatives to promote diversity and inclusion, including its Empowerment Production Fund in fiscal year 2022/2023.[25] Additionally, partnerships with national and regional organizations, including IATSE 709, DGC-NL and the CNA, are fostering sustainable production practices and promoting gender equality in the industry.

Despite ongoing global economic pressures and the far-reaching impacts of the 2023 US labour strikes, NL's Screen production industry maintained steady growth in 2024; PictureNL's 2023/2024 annual report highlighted CA$73.4 million in economic activity and the creation of approximately 1,264 full-time jobs.[26]

PictureNL is in the process of developing a locations database to provide industry-standard location packages that would further leverage its unique landscapes as an even more focused aspect of its international marketing strategy. These and other efforts align with its broader goal of positioning the province as a premier destination for film and television production by

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[22] *Tourism Minister Steve Crocker is Off to a Film Production Mission in Germany*. BAY FM, 16th February 2024. Accessible at: https://www.bayfm.ca/news/local-news/tourism-minister-steve-crocker-is-off-to-a-film-production-mission-in-germany/

[23] *Before His Death, Paul Pope Fought for a Film Training Centre. Now Open, It's Named After Him*. CBC News, 20th September 2024. Accessible at: https://www.cbc.ca/news/canada/newfoundland-labrador/cna-film-school-1.7329389

[24] *New Immigration Policy Supports Film and Television Workforce.* Newfoundland and Labrador press release, 10th January 2025. Accessible at: https://www.gov.nl.ca/releases/2025/ipgs/0110n02/#:~:text=%E2%80%9CWe%20have%20been%20dedicated%20to,in%20film%20and%20television%20studies.%E2%80%9D

[25] NLFDC 2022-23 Annual Report. PictureNL. Accessible at: https://www.assembly.nl.ca/business/electronicdocuments/NLFDC2022-23AnnualReport-RevisedVersionCentralEdits.pdf

[26] PictureNL Annual Report 2023-24. PictureNL. Accessible at: https://www.gov.nl.ca/tcar/files/PictureNLAnnualReport-2023-2024.pdf

31st March 2026, and indicate the renewed commitment to the success of the industry for all its stakeholders.

This context for the industry's growth naturally leads into the value of taking the time to assess how it is currently positioned, and to address some specific areas of focus, as covered in the following sub-sections.

## 4.2. Research Approach and SWOT Analysis

**While NL is considered an emerging market, its Screen production industry has shown clear growth over recent years**; examples include the recent homegrown production *Saint-Pierre* (2025-), which had its first season launch in early 2025, while *Hudson & Rex* (2019-) is in its seventh season. High-profile service productions are also choosing the province, including Disney's *Peter Pan & Wendy* (2023), Apple TV's *Severance* (2022- ), Prime Video's *Reacher* (2022- ), and DC Studio's *Aquaman* (2018).

**As a result of this trajectory, the industry is approaching and, in some areas, has surpassed its current capacity for efficient and optimal servicing of domestic and service productions.**

For this Study, SPI reviewed the work done in the previous study and updated the key areas of research necessary to understand the current capacity and operational efficiency of the Screen production industry in NL. The five areas of focus are:

1. Studios and infrastructure
2. Workforce development
3. Provincial incentives
4. Sustainability and green production
5. Regional sectoral development.

To evaluate the industry and provide appropriate recommendations for successful and sustained growth, SPI sought to map the industry's successes, gaps, opportunities and challenges through the lens of the five identified key research areas, outlined in the following SWOT analysis.

### 4.2.1. Studios and Infrastructure

**The growing stability and success of NL's Screen production industry has increased demand on existing infrastructure and production services facilitation in the province, predominantly in the production hub of St. John's.**

The primary focus here was to understand the current capacity of the existing infrastructure, and how those spaces have historically serviced production activity in the province up to this point. SPI then evaluated the feasibility of the introduction of a fit-for-purpose facility, analyzing the opportunities and challenges and considering the industry's feedback.

In addition, SPI sought to evaluate production services in the province and the capacity to efficiently service the industry, projecting that the current pattern of growth continues. More details follow the summary table below.

***Table 3 – SWOT Summary: Studios and Infrastructure***

| Strengths | Weaknesses |
|---|---|
| • As an emerging industry, it has responded to the increase in demand by sourcing and adapting existing infrastructure for specific projects | • The industry has developed, so the increase in current production activity and potential interest means there is limited capacity of existing spaces and an over-subscription of existing services. |

| Strengths | Weaknesses |
| --- | --- |
| • A co-operative system has served as the foundational structure for servicing (mainly) the domestic industry. | |
| **Opportunities** | **Threats** |
| • There is increasing industry support for a fit-for-purpose studio at this current stage in the industry's development<br>• Increasing interest from incoming producers and larger budget projects requiring infrastructure. | • A holistic approach is needed to ensure any fit-for-purpose studio has the supportive structure to secure and maintain occupancy. |

#### 4.2.1.1. Strengths

A key contributing factor to the dynamism and development of the Screen production industry in NL is the **adaptive and intuitive working culture, which has resulted in the industry being responsive to interest and finding ways to service the demand.** This is particularly relevant when considering the existing culture of retrofitting spaces for filming. Historically, there have been no fit-for-purpose production studios in the province; instead, personnel have found existing spaces such as warehouses, aero-hangers, building complexes, and so on, and adapted them to suit the specificity of the production.

In some cases, those retrofitted spaces have been used beyond the single production for which it was modified, or have been used over continuous projects, such as the retrofitted studio space constructed for *Hudson & Rex*. This highlights the responsiveness and flexibility of the industry's professionals, which have been key drivers of its rapid growth.

**Co-operatives play a vital role in supporting emerging and independent filmmakers** by providing access to production and post-production equipment, training and creative resources. The Atlantic Studios Co-operative (ASCO) and NIFCO have long supported the industry's technicians by supplying equipment and gear as well as post-production technology suites and training, respectively. Both have been instrumental in workforce development and expansion by providing filmmakers in the province with resources and skills development opportunities.

#### 4.2.1.2. Weaknesses

While the approach of **adapting existing spaces** to meet demand has significantly expanded the province's ability to service multiple productions, it has become a standard of practice that is **now a barrier to the industry's readiness to further diversify and expand the infrastructure offering.**

**As the studio spaces are retrofitted structures, there are structural limitations, which mean the spaces are often not well insulated or ventilated**. Due to the severe weather conditions in the colder months, this leaves few to no indoor production base options; while the province does facilitate production during this period, these limitations do suggest that the industry is more seasonal. For the warmer months, stakeholders have reported difficult working conditions in these spaces, as there is often no air-conditioning and limited ventilation for the heat generated from the equipment to be pulled out of the space.

**With the co-operatives being the main entities servicing the industry in the province, they are over-subscribed.** In the case of post-production infrastructure and services, NIFCO is under significant pressure to provide international standard editing, recording and post-production services (in the form of hardware, programs and advisory services) to the entire industry, beyond their remit of servicing and training emerging and independent filmmakers.

Equally, ASCO is under significant pressure to provide and service gear for all production levels; it does not have the capacity for this, resulting in some local productions sourcing equipment from other provinces.

#### *4.2.1.3. Opportunities*

With the current growth trajectory of the domestic industry and increasing interest from service productions, there is a **need for capacity and an opportunity to create that capacity of space in a way that will improve the province's offering –** attracting larger-budget projects requiring international-standard studio space as well as providing domestic industry players with the opportunity to level-up their content output.

SPI noted through consultations that there is **increasing stakeholder support for a fit-for-purpose studio at this current stage in the industry's development**. Such a studio structure should have the capacity to be a full production base, hosting production offices, a set-up stage and large equipment rig storage, for example. In this way, the facility could service the industry in an expanded way throughout the pre-production and principal photography phases.

An element of a **studio's multi-functionality could include attracting an equipment supplier to the province.** The development of a facility would provide the structure and security for sustained equipment usage and management, supporting investment in the establishment of a satellite equipment house, for example.

There is strong potential for a bespoke, multi-purpose studio facility to have a positive impact on maturing the industry – in particular, with the **opportunity to formally extend seasonal production into winter months** (as production is currently facilitated during that period, but with limitations). From an inward production perspective, there has been interest in filming in the province over winter to capture the unique landscape during that season; however, many productions looking to travel to NL would require a high-grade production base and space to film interiors or construct sets to make filming in the province for an extended period worthwhile. This would **expand employment opportunities year-round**, which would reinforce the workforce and contribute to developing and maintaining a reasonable crew capacity with high expertise in the province for the long term.

#### *4.2.1.4. Threats*

A significant factor affecting industry development is linked to **the province's geographical considerations**:

- A fit-for-purpose space would need to be within reasonable proximity to the production hub of St. John's. If this was built outside St. John's, significant work would need to be done to ensure access
- A fit-for-purpose studio would require significant investment to ensure it can both withstand severe weather conditions and observe sustainable practices in keeping with green production requirements (see **Section 4.2.4** regarding the necessity of adopting sustainable practices to remain competitive in the international marketplace)
- Transporting resources like crew and production equipment to NL can be costly and intensive. Reframed as an opportunity, it would further support the necessity of a facility to accommodate a notable portion of a production's filming to make a choice

in location viable. That said, the cost of travel (both from other Canadian provinces and internationally) could be a barrier to entry for small to mid-budget productions.

There are various individual interests from local industry stakeholders, national and international industry stakeholders as well as from wider public and private representatives; this has resulted in the vocalizing of polarizing perspectives, which has perpetuated complexity around the potential value as well as the potential hindrance of a fit-for-purpose facility. For any facility to be successful and sustained, industry buy-in is imperative. In this case, significant work would need to be done to ensure this level of change is embraced effectively.

SPI's engagement with local industry stakeholders indicated concerns with the management of any potential facility. Reports in recent years have detailed international studios being block-booked for established streamers and legacy studios, limiting the opportunity for local, small to mid-budget productions to access those spaces. These concerns highlight the potential complexities that extend beyond the decision to build the facility and must be considered in terms of maintaining any effective and efficient studio space in the long term.

### 4.2.2. Workforce Development

**As the industry has developed, so too has the workforce. While both the creative and technical crew base has grown, demand for certain roles has surpassed the skillset available and/or the capacity of the local workforce.**

On workforce, identifying skills gaps, highlighting roles that are under pressure or lacking, and understanding pain points in crewing productions in the province are key to developing a strategy for industry growth and attractiveness to all producers.

On training, following the previous roadmap and SPI's evaluation of recent developments in training provisions, it is important to ensure there are clear pathways into the workforce so there is ready availability of trained and experienced crew. More details follow the summary table below.

***Table 4 – SWOT Summary: Workforce Development***

| Strengths | Weaknesses |
|---|---|
| • The province's workforce is well regarded; good capacity of BTL crew<br>• There is a reported capacity of around 2.5 crews in the province. | • Low levels of mid to high-level crew across key departments are potentially inhibiting growth in production servicing. |
| **Opportunities** | **Threats** |
| • Continued domestic production provides opportunities for crew members to progress up the ranks<br>• Medium to long-term potential for training and upskilling crew in the province through the launch of film school in the St. John's production hub<br>• The recently introduced immigration legislation allowing employed foreigners to apply for residency could positively impact workforce growth. | • The offerings from other provinces and regions, particularly in terms of expertise in Head of Department roles as well as incentivized workforce opportunities<br>• Infrastructure limitations impacting skills development and work opportunities. |

#### *4.2.2.1. Strengths*

SPI's research identified that there is a **reported capacity of around 2.5 crews in NL**, suggesting that there are enough skilled individuals to fill each crew role level across each department for two full standard mid-to-large-scale budget productions, and around half the necessary skilled individuals to crew a third production.

There is reasonable capacity of entry-to-mid-level crew, with strong skills across BTL crew (creative and technical), in particular.

In general, **crew members demonstrate a strong sense of community and willingness to engage with the wider industry**, such as through renting personal equipment stock or participating in training and mentorship programs.

There is a **stable base for cast and crew unions, which are key support structures for the workforce**. In addition, events such as the SJIWFF and the Nickel Independent Film Festival not only showcase local talent but also provide inclusive platforms for career development and growth.

There is also a wider sense of support and advocacy for the creative industries, especially showcased during the Year of the Arts in 2024.[27] This has been and can be further capitalized on through fostering and supporting members of the promising creative crew base (including writers and directors) in the province.

There is a steady career progression from new entrants through to mid-level expertise largely attributed to the stability of one to two recurring productions taking place in the province, including the series *Hudson & Rex* (2019- ) running alongside a churn of mid-level television series, such as *Son of a Critch* (2022- ) and, more recently, *Saint-Pierre* (2025).

In many notable film and television markets, such as New Zealand and Australia, the **consistent flow of recurring formats** (e.g., serials, soap operas, non-scripted broadcast segments, television series, etc.) is often acknowledged as **key training grounds for crew members, while providing a secure pipeline of work for local industry**. Training programs and apprenticeships are being developed and implemented to address the current industry demand. Since SPI's previous report, and as has been mentioned earlier in this report, the CNA launched the St. John's-based film school campus with programs to meet the growing demand for skilled ATL talent and BTL set-ready crew in the province.[28]

#### *4.2.2.2. Weaknesses*

Considering that there is a reported 2.5 crew capacity in NL, research suggests that a third production would be partly crewed domestically and supplemented with external crew from other provinces and/or jurisdictions. As a result, **external crew members are predominantly filling senior and Head of Department (HoD) level roles.** This results in many technical crew members reaching mid-level roles through a single recurring production or a series of various productions but are unable to progress to or gain experience in a senior role.

**Production staff, mid- to senior-level producers and production roles are facing burn-out**. The high workload due to the limited capacity of the expertise in the province is a significant driver of this. In addition, the industry-standard practice of **fee deferrals is inequitably impacting producers** in the province since the smaller scale of the industry as well as limited

[27] *Year of Arts Will Celebrate Newfoundland and Labrador's Unique Artistic Identity*. Newfoundland and Labrador, 5th January 2024. Accessible at: https://www.gov.nl.ca/releases/2024/tcar/0105n01/
[28] *N.L. Bets Big on Film Industry with New $10M CNA Campus*. CBC, 13th April 2022. Accessible at: https://www.cbc.ca/news/canada/newfoundland-labrador/cna-film-school-1.6418768

funding options or lengthy return times of financing are collectively contributing to producers being put under intense financial pressure.

**There is low-to-no provision for location management and/or fixers across the province**. This exacerbates the pressure on the local line producers as they must take on that responsibility. This also places further reliance on PictureNL to not only advocate and broker international production agreements to film in the province, but also requires them to get into the nuanced work of scouting and managing certain locations, which is the responsibility of a production services company, led by a location manager in many international markets.

Location fixers are also fundamental for guiding domestic and service productions through filming in specific locations, ensuring that they pay attention to necessary cultural or community requirements, permitting logistics, travel restrictions and more.

Many crew members used on domestic productions (particularly low-to-mid level budgets) are non-union members because they are unable to make the hours locally to qualify or only work in the industry part-time due to the seasonality and availability of roles throughout the year.

In addition, should there be an incoming international production, demand for mid-to-high-level crew would exceed capacity. If there are local, independent productions looking to take place at the same time, options for crew become limited.

#### *4.2.2.3. Opportunities*

Since the rebrand to PictureNL, the film commission's role in building an industry network continues to be critical for creating a cohesive whole that grows together, as well as an opportunity to advance the province's competitiveness as a production location in the wider Canadian context.

**PictureNL continues to build relationships with key industry stakeholders**, unions, institutions as well as wider provincial and national organizations. This includes SJIWFF, Nickel, IATSE, Directors Guild of Canada (DGC), Alliance of Canadian Cinema, Television and Radio Artists (ACTRA), CNA, the Canadian Media Producers Association (CMPA), Telefilm and the Canada Media Fund (CMF). Deepening alliances with these entities could continue to **open up skills and funding opportunities for technical, digital and creative professionals**.

Having diverse and concurrent churn of production activity (both domestic and service productions) provides **opportunities for crew to progress through role expertise on different scales of productions,** garner experience and skills as well as earn the necessary hours to secure the respective union membership.

With the second round of graduates and new entrants due out of can at the time of writing, this appears to be the start of a more consistent and predictable **flow of new entrants into the industry's workforce.** Building on and maintaining the relationship between the CNA and the industry is imperative to ensure that graduates are meeting the requirements necessary as well as looking to address gaps in skills and department roles early on.

**In the longer term, private investment in a studio facility will extend seasonal production into the winter months and thus expand employment opportunities for crew to year-round**, which would stabilize the freelance cohort in the province, reducing the need for crew to work across multiple industries and jobs and instead, make a full-time living from working in the province's Screen production industry.

Attracting private entities to invest in the provincial industry, such as a branch of a globally established equipment rental house, would allow spin-off opportunities for training and apprenticeships, and diversify employment options for new entrants to the industry.

The recently introduced **immigration legislation allowing employed foreigners to apply for residency could strongly impact workforce growth**. The Provincial Nominee Program, which

"…acknowledges the cyclical nature of film and television productions,"[29] is a new immigration policy that allows persons from outside the province who have full-time employment in the Screen production industry to apply for permanent residency. This visionary action has the potential to boost the crew and talent base in the province since students from all over the world have been enrolling in the new St. John's-based film school since inception; this is an excellent way to incentivize talent to stay and grow the industry.

#### *4.2.2.4. Threats*

**Provinces that offer production incentives where crew working in other jurisdictions still qualify can be extremely competitive;** this is the case with Ontario's labour incentive. While co-productions are a necessity for many productions to ensure financing, the larger markets with more opportunity for skills development and higher-grade credits (like Ontario) will send most of the high and mid-level crew to NL; this can potentially limit opportunities for local crews on bigger productions.

An increase in production has and will continue to expand demand for a robust, skilled and available local workforce, which will increase **pressure on the capacity and the quality of skills development to meet international standards**.

While capacity demand increases, the limitations of existing infrastructure will impact specific skills development and work opportunities. This is particularly relevant in the case of post-production. For example, as NIFCO are already over-subscribed, there is limited opportunity for freelance editors to use international standard technology for their work as well as limited to no spaces for voice-over artists to record.

### 4.2.3. Provincial Incentives

**Considering the introduction of the All-Spend Film and Video Production Tax Credit in 2022, which has been well-received by the industry, there remain opportunities to improve the overall incentive offering to further support domestic production and to grow international production activity.**

SPI found that the **All-Spend Film and Video Production Tax Credit is regarded well by industry as a way to increase service productions in the province, which would have positive consequential impacts**, including the development and growth of local workforce and infrastructure**.** That said, there are currently few examples of productions that have used the All-Spend, as the province's capacity to service these productions is low and is one of the key barriers to increasing.

SPI's approach was to focus on establishing a baseline for usage and efficiency and identify key points to encourage the industry to engage with production servicing opportunities, and thus tap increase applications to the All-Spend.

**The Equity Investment Program and Labor Tax Credit are highly operational and notable support systems for the domestic industry**. In light of that, SPI elected to focus primarily on the All-Spend Tax Credit and use the Equity Investment Program and Labor Tax Credit as examples of the domestic industry's level of literacy regarding incentive usage. More details follow the summary table below.

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[29] *New Immigration Policy Supports Film and Television Workforce.* Newfoundland and Labrador press release, 10th January 2025. Accessible at: https://www.gov.nl.ca/releases/2025/ipgs/0110n02/#:~:text=%E2%80%9CWe%20have%20been%20dedicated%20to,in%20film%20and%20television%20studies.%E2%80%9D

***Table 5 – SWOT Summary: Provincial Incentives***

| Strengths | Weaknesses |
|---|---|
| • The industry is avidly in favor of the Equity Investment Program, and the All-Spend Film and Video Production Tax Credit is viewed positively. | • Wider funding options in the province are limited<br>• There is limited industry knowledge and local experience with the All-Spend Film and Video Production Tax Credit. |
| **Opportunities** | **Threats** |
| • The All-Spend Film and Video Production Tax Credit opens up the industry to more national and service productions with higher budgets, which has a direct correlation to further developing the industry, in terms of workforce and infrastructure in particular<br>• While the Equity Investment Program and Labour Tax Credit service the domestic industry, there are opportunities for local production companies and producers to diversify and service international productions as facilitated by the All-Spend Tax Credit. | • If the incentive offering does not remain competitive, geographical limitations and access could inhibit further industry growth<br>• While the domestic industry remains dependent on the Equity Investment Program and the Labor Tax Credit, the province's workforce remain dependent on domestic productions, and producers will have little to no opportunity to engage with service productions, which would limit the growth potential of the province's industry. |

#### 4.2.3.1. Strengths

**The industry is avidly in favour of the Equity Investment Program** (EIP), especially in its support of recurring productions and series, as they have experience with the program and favour the creative ownership element.

The **introduction of the All-Spend Film and Video Production Tax Credit in 2022 was viewed positively and continues to be perceived by local industry as of benefit to the wider industry.** According to SPI's research, the All-Spend has also been well-received by international industry stakeholders. While offering the incentive itself has increased the value proposition of the province as a filming location, it has significantly boosted Newfoundland and Labrador's presence and level of competitiveness in the wider context of the Canadian and North American as well as UK and European incentive landscape. The introduction of the All-Spend is also evidenced support of the provincial government for film and television as well as for the wider creative industries, which contributes to the province's film-friendliness.

#### 4.2.3.2. Weaknesses

**Funding for the province from federal budgets is limited and is equally a challenge for some other Atlantic regions**. While there are some efforts to address this, such as a strategy proposal from Telefilm through Telefilm Canada's Atlantic Strategy for 2024-2027,[30] there remain significant gaps in financing options, which particularly impacts independent and indigenous filmmakers.

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[30] *Telefilm Canada unveils its 2024-2027 Atlantic Strategy for the region's cinema industry.* Telefilm. 2024. Accessible at: https://telefilm.ca/en/telefilm-canada-unveils-its-2024-2027-atlantic-strategy-for-the-regions-cinema-industry

There is **limited industry knowledge and local expertise regarding using the All-Spend. While the domestic industry is rightly serviced by the Equity Investment Program and the Labor Tax Credit, as a result the province's workforce remain dependent on domestic productions and producers have little to no opportunity to engage with service productions, which will limit the growth potential of the province's industry.** SPI's research revealed some cases of co-productions and/or inter-provincial/Canadian productions, in which the All-Spend could be used for mid- to larger-budget productions.

This would have been an opportunity to increase literacy in the All-Spend Tax Credit as well as manage the demand on the Equity Investment Program. While the Equity Investment Program has a high functionality, significant increases in applications could impact the processing and payment time schedule, so managing that through utilising the All-Spend for appropriate service productions, which could be certain co-productions, would be recommended. These issues are also largely exacerbated by the low capacity of production servicing expertise and the lack of production crew with mid-to-high expertise and experience.

#### *4.2.3.3. Opportunities*

**The All-Spend opens NL up to service productions as well as larger budget projects**, which have been seen in other markets to have a direct correlation to boosting an industry and sustaining significant growth, in terms of upskilling a workforce, driving investment in the industry and increasing infrastructure development.

**Transferring the processing of the All-Spend from the Department of Finance to the Canada Revenue Authority (CRA) would ensure a more efficient processing of applications.** While this is in train, this shift would work to further the functionality of the All-Spend. In the long term, this structuring would allow for further levers to be added to the incentive system that could contribute to other key aspects of consideration for industry growth.

**For example, the addition of an uplift could be a mid-to-long-term strategic move** to catalyse the industry's adoption of sustainable practices, as done in Austria with the Green Filming Bonus,[31] and/or induce a regional incentive system that would advance regional development across the province. It could also increase competitiveness, as has happened in British Columbia; per Budget 2025, it has been proposed to restore the regional and distant location tax credits for animation productions (subject to the approval of the legislature).[32] Similarly, in Ontario, there is an uplift of 10% for filming outside the Greater Toronto Area.[33]

#### *4.2.3.4. Threats*

Changes in government could result in a shifting of priorities and threaten the support of the incentive and wider support of the province's industry. This is particularly relevant considering pressures from wider political impacts and changes.

Ensuring that PictureNL is not only promoting the All-Spend but that the industry has the necessary structures and processes in place to efficiently support all subsequent productions is vital. Negative experiences for service productions, due to lack of resources or access, for example, as well as a misalignment or lack of clarity on application processes and securing the incentive can have significant repercussions.

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[31] *Industry Report: Green Industry Initiatives and Sustainability*. Cineuropa. 2025. Accessible at: https://cineuropa.org/en/dossiernewsdetail/2025/427603/

[32] Film and Television Tax Credit. British Columbia. 2025. Accessible at: https://www2.gov.bc.ca/gov/content/taxes/income-taxes/corporate/credits/film-tv#regional

[33] *Ontario Regional Opportunities Investment Tax Credit*. Government of Canada. 2024. Accessible at: https://www.canada.ca/en/revenue-agency/services/tax/businesses/topics/corporations/provincial-territorial-corporation-tax/ontario-provincial-corporation-tax/ontario-regional-opportunities-investment-tax-credit-en.html

The All-Spend Film and Video Production Tax Credit per project cap, meaning the maximum credit available is set at CA$20 million per project annually. This is relatively low, considering global standards and, especially, considering British Columbia, Ontario and Alberta have no maximum limits. With any uptick in international as well as larger-budget productions, this cap could inhibit the competitiveness of the program. If the All-Spend incentive does not remain competitive, geographical limitations, access and cost could hinder industry growth.

#### 4.2.4. Sustainability and Green Production

**Considering the wider industry push towards environmentally sustainable inclusions for productions, the province has an opportunity to lean into and expand existing efforts to encourage or mandate such practices for both domestic and incoming productions.**

The primary objective was to evaluate existing global industry initiatives as well as those taking place in other Canadian provinces. This would inform a foundational strategy for a range of clear sustainability options to future-proof the industry in the province, as well as to cater to the increasing demand from service productions to meet certain sustainability goals. More details follow the summary table below.

***Table 6 – SWOT Summary: Sustainability and Green Production***

| Strengths | Weaknesses |
|---|---|
| • Two clean energy generators have been on site in St. John's for production<br>• There is an industry willingness to include and adopt sustainable practices. | • The geographical limitation of the province means transport, often long-haul, is inevitable<br>• Retrofitted studios and infrastructure do not lend themselves to meeting sustainability standards. |
| **Opportunities** | **Threats** |
| • The coastal locations and natural landscapes encourage a commitment to conserve and protect<br>• There are provincial efforts that would align with and support sustainable production practices, most importantly linked to most of the electricity being generated from renewable resources<br>• The screen industry could introduce clear and practical sustainable standards of practice<br>• PictureNL's Sustainable Production Day could become a consistent and significant point of training<br>• The province to align with wider Canadian sustainable objectives to become a key province for sustainable filmmaking. | • Although the domestic industry is conscious of the issue, sustainability is not yet a priority<br>• The geographical and logistical planning needed to work across the province mean sourcing and transporting sustainable equipment are challenging and costly. |

#### *4.2.4.1. Strengths*

NL's Screen production industry is at a pivotal moment in balancing sustainability with production, while the province has taken strides in integrating sustainable practices into production, key challenges remain in infrastructure, logistics, and prioritization.[34] **Two clean energy generators have been on site in St. John's for production** (temporary installations to trail usage across productions). This initiative not only contributes to cleaner air and reduced greenhouse gas emissions but also signals its potential as a leader in sustainable filmmaking.

**A transition to clean electricity in film production could create economic opportunities**, attract environmentally conscious investors, and generate skilled jobs in green energy solutions. Moreover, there is a growing industry-wide commitment to integrating sustainable practices across both local productions and visiting productions that use NL as a filming location.

#### *4.2.4.2. Weaknesses*

**The province's geography poses inherent transportation challenges, with long-haul travel often unavoidable due to the remote nature of many filming locations**. Sustainable travel alternatives, such as electric or hybrid production vehicles, are not yet a viable option for most productions, particularly in more isolated areas with limited charging infrastructure.

Additionally, while existing studios and production spaces have been retrofitted to support the growing industry, they were not initially designed with sustainability in mind. As a result, meeting high sustainability standards such as energy-efficient lighting, advanced waste management systems, and green building certifications can be difficult within the current infrastructure.

#### *4.2.4.3. Opportunities*

The natural landscape, coastal locations and vast wilderness encourage conservation efforts, making sustainability an inherent part of its identity. This is further enforced by the province's efforts, with over 98% of their electricity being generated from renewable resources, as of 2022. This provincial infrastructure can be tied into NL's offering as a prime location for sustainable filming.

**By introducing clear and practical industry-wide sustainable standards, NL could enhance its competitive edge.** Establishing formal sustainability guidelines covering everything from energy use to waste reduction could attract productions seeking to align with environmentally responsible practices.

Moreover, **PictureNL's Sustainable Production Day has the potential to serve as a long-term driver of change and to accelerate decarbonization in the Screen production industry.** If developed into a recurring training and education initiative, it could equip both ATL and BTL workers with access to tools and knowledge to implement sustainable solutions effectively. Aligning with Canada's broader push for green solutions would further position the province as a key player in sustainable filmmaking, reinforcing the province's reputation within the national and international industry.

#### *4.2.4.4. Threats*

**While there is an awareness of sustainability within the domestic industry, it has yet to become a top priority**. Limited financial and logistical resources mean that sustainability

[34] Newfoundland and Labrador: Clean Electricity Snapshot 2022-2024. Government of Canada, 13th February 2025. Accessible at: https://www.canada.ca/en/services/environment/weather/climatechange/climate-plan/clean-electricity/overview-newfoundland-labrador.html

efforts are often secondary to more immediate production needs. In practice, many projects lack the budget and support to integrate greener alternatives.

Additionally, the logistical demands of working across the province make sourcing and transporting sustainable equipment particularly challenging. Alternative fuel sources and charging stations for electric-powered production vehicles are under development but not widely distributed across the province, making sustainable transportation expensive and complex.

#### 4.2.5. Regional Sectoral Development

**There is a high level of creative skill and artistic output across the province, including the history of creative storytelling and the use of film for social and cultural development in Labrador.**

The province has a vast and widespread geography that can be a challenge to navigate, in terms of access to certain locations as well as access for the communities in those locations to wider opportunities in the creative industries, for example. There is an opportunity to develop a strategy that lays the groundwork to leverage this potential for the Screen production industry to create a larger pool of talent as well as encourage necessary diversity. More details follow the summary table below.

***Table 7 – SWOT Summary: Regional Sectoral Development***

| Strengths | Weaknesses |
|---|---|
| • Offers high levels of local creative talent, diverse locations as well as a range of community-based cultures and history<br>• Events can support and showcase the existing base of filmmakers already telling local stories<br>• There are provincial and national initiatives, programs, grants and organizations geared to independent filmmakers looking to tell localized stories and/or from indigenous communities. | • Limited access is a key barrier for both talent and locations<br>• The geographical spread of communities versus the centralized production hub of St. John's further exacerbates the disconnect of Labrador from the industry<br>• Limited exposure of local content and/or local stories outside of St. John's. |
| **Opportunities** | **Threats** |
| • Wider creative industry efforts ongoing to connect with indigenous communities<br>• Wider global industry shifts to prioritize indigenous outreach and access in film<br>• Targeted location promotion of its varied landscapes could lead to economic and cultural impacts<br>• More film-friendly and accessible location options will contribute to the province's capacity for long-term industry growth. | • Politics across indigenous communities could inhibit the creation of a central working group<br>• Geographical limitations<br>• Outreach to indigenous communities requires high levels of resources, especially people and time. |

#### *4.2.5.1. Strengths*

**The Screen production industry is deeply rooted in the province's rich cultural heritage, diverse landscapes and strong community-driven storytelling traditions.** The province's diverse environment, from rugged coastlines to remote inland communities, provides a unique visual appeal for filmmakers looking to create compelling and authentic narratives.

Local cultural events such as the SJIWFF further highlight the strength of the domestic industry, giving women and gender-diverse filmmakers a platform to showcase their work. Additionally, both provincial and national funding initiatives, including programs aimed at Indigenous filmmakers and creators from underrepresented backgrounds, serve to strengthen local storytelling by providing essential financial and developmental support.

#### *4.2.5.2. Weaknesses*

**Access to the industry remains a challenge for professionals and new entrants to the Screen production industry.** Many emerging talents and those looking to progress their careers, particularly those outside St. John's, have limited exposure to the industry. Without formalized pathways into the industry, a large portion of NL's potential creative workforce remains untapped. Additionally, while the province offers breathtaking and distinctive locations, the practical challenges of filming in remote areas, especially smaller or low-budget productions, can be significant.

**The province's vast geographical spread means that Labrador (in particular) remains largely disconnected from the industry hub in St. John's**, limiting opportunities for regional talent and stories from the area to be integrated into the broader industry ecosystem. The limited distribution channels for local films outside of the capital city further constrain the reach of its creative output, making it difficult for local stories to gain visibility beyond the province.

#### *4.2.5.3. Opportunities*

**Across Canada, there is an increasing emphasis on Indigenous outreach and access in the creative industries**, aligning with global tendencies to focus on local or Indigenous representation both on-screen and behind the scenes.[35] In NL, this presents a valuable opportunity to establish stronger connections with Indigenous communities, ensuring that their voices and perspectives are included in the province's evolving film landscape.

Additionally, **leveraging the province's diverse locations through targeted promotional efforts could yield both economic and cultural benefits.** By positioning NL as a prime destination for productions seeking distinctive landscapes, the province could increase its attractiveness to both domestic and international filmmakers. Developing more film-friendly and accessible locations, including improved transportation links and infrastructure investments, would not only make it more competitive but also create long-term benefits for the industry.

#### *4.2.5.4. Threats*

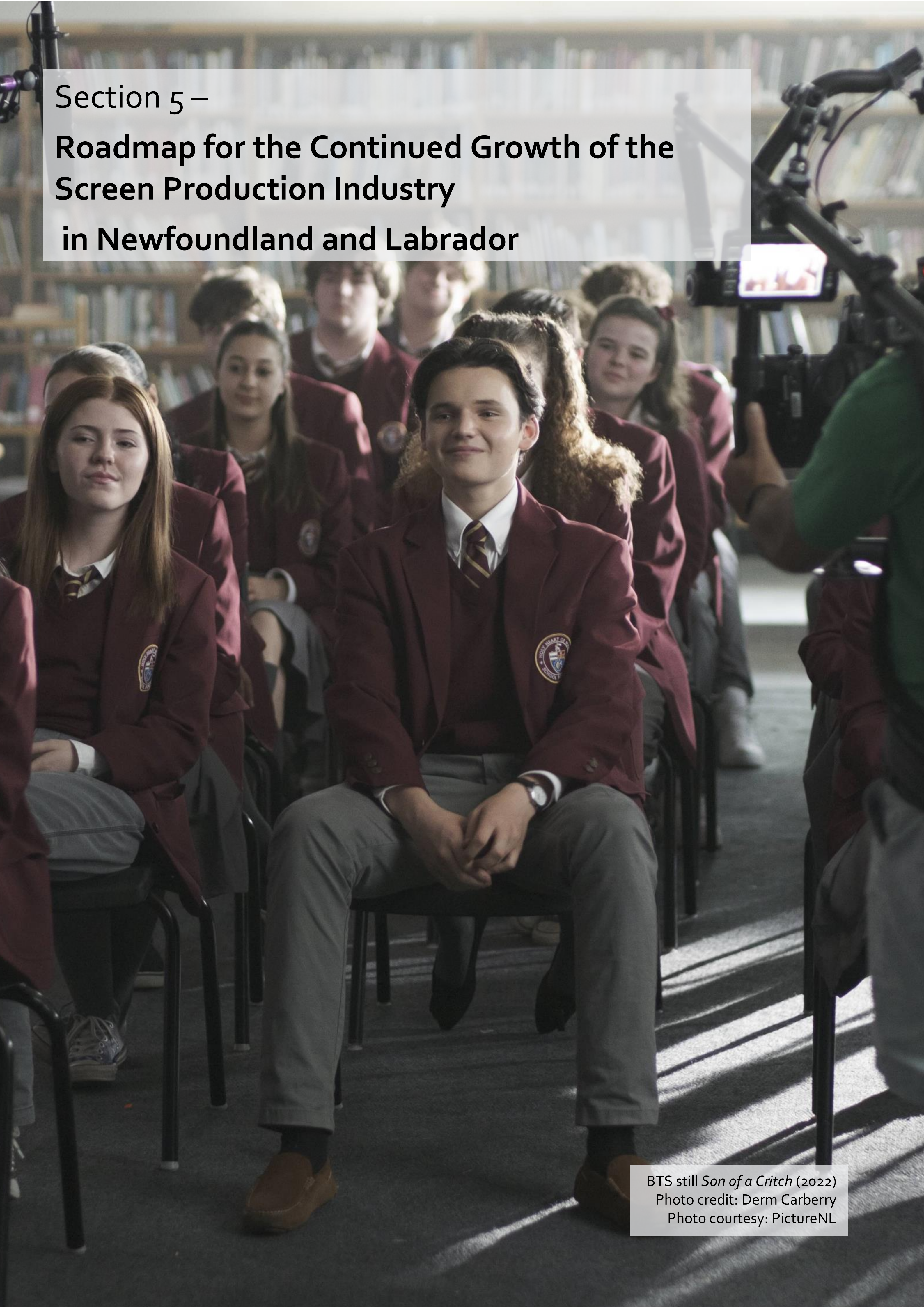
**Political complexities within Indigenous communities could hinder progress** and may present challenges for a unified and central working group dedicated to improving access and industry engagement. The province's geographical limitations continue to create logistical and financial burdens that require significant investment to overcome, making access to the industry less attainable.

[35] Indigenous Audiovisual Sector Economic Impact Assessment. Government of Canada, March 2023. Accessible at: https://www.canada.ca/en/canadian-heritage/services/film-video-publications/indigenous-audiovisual-economic-impact-assessment.html

Moreover, **meaningful and long-term sustainable Indigenous outreach and access initiatives demand substantial resources, both in terms of personnel and time.** Without sustained commitment from industry stakeholders and government bodies, these efforts risk being underfunded or underdeveloped, limiting their impact.

Section 5 –

# Roadmap for the Continued Growth of the Screen Production Industry in Newfoundland and Labrador



BTS still *Son of a Critch* (2022)
Photo credit: Derm Carberry
Photo courtesy: PictureNL

# 5. ROADMAP FOR THE CONTINUED GROWTH OF THE SCREEN PRODUCTION INDUSTRY IN NEWFOUNDLAND AND LABRADOR

## 5.1. Overview

In the 2022 Report, SPI outlined a strategic roadmap for the then-NLFDC that identified and detailed the five key areas critical to developing and expanding a healthy Screen industry and to meet its overall goal of doubling production activity to $100 million.

These five areas were:

- Incentives
- Workforce Capacity
- Developing provincial talent and content
- Physical infrastructure
- Film-friendly environment.

For this report, SPI reviewed and identified updated research areas that aligned with the five previously outlined. The updated key research areas are relevant to the province's industry at its current stage of growth and considered what was needed to sustain and support that trajectory.

The five key research areas for this Report included:

- Studios and infrastructure
- Workforce development
- Provincial incentives
- Sustainability and green production
- Regional sectoral development.

SPI conducted a SWOT analysis of each key research area, and the resulting the assessment and analysis of those findings led to a two-, five- and ten-year strategic roadmap formulated through targeted recommendations for PictureNL to help maintain and build on the current production activity and subsequent wider impacts of the already-healthy industry within the province.

## 5.2. Recommendations

### 5.2.1. Immediate Priorities (1-2 years)

The following recommendations for **Immediate Priorities** are focused on maintaining the industry's current growth trajectory, which would be further driven by attracting more service productions and increasing inward investment – a core strategic objective for PictureNL. At the same time, preemptive action must be taken to ensure an increase in production activity is not negatively impacted by a lack of capacity. The key considerations for this objective are to ensure there is a **robust provincial crew base**, to **increase infrastructure capacity** and to **improve industry engagement** with the All-Spend Film and Video Production Tax Credit. Addressing these considerations through both direct and indirect strategies in the short term is critical to maintaining growth. Also, in the short term, it is important to make **concrete steps toward longer-term goals for sustainability and regional development**.

#### *5.2.1.1. Build Infrastructure Capacity*

**Through SPI's research and consultations with key industry stakeholders, there is a need for significant expansion of infrastructure capacity in the province through the introduction of a fit-for-purpose studio.** Considering various factors, including the climate and the limitation of existing retrofitted spaces, alongside PictureNL's objective to increase inward production streams, a fit-for-purpose studio would positively serve the industry at this stage of its development.

Direct engagement in this kind of development is not in PictureNL's mandate, and there are a range of considerations and complexities involved in managing a studio (as detailed in the SWOT analysis in **Section 4.2.1**).

**The recommendation for this would be for PictureNL to act in a guiding role, aiding in the facilitation of private investment in the building of at least one fit-for-purpose and multi-functional studio.** This facilitation would include the packaging and offer of available construction and business incentives and concessions and working with the appropriate government agencies to advance strong applications.

In line with longer-term sustainability objectives, **PictureNL could advise on inclusions and considerations that would align with the wider advancement of the industry** – particularly in terms of workforce development and building towards green production goals. This would be through the negotiation of a requirement for internships and apprenticeships at the studio to create diverse pathway opportunities into the industry. This would not only appeal to film school students, which could evolve into a partnership with CNA, but would also appeal to skilled workers from other industries with transferable skills.

Sustainability has become one of the highest priorities for studios globally, as studios, streamers and production companies are looking to facilities that offer built-in green production processes to contribute to their own productions' sustainability targets. For example, the UK's Sky Studios have set a benchmark for the international industry, which has boosted their presence as a global leader.[36]

**Using sustainable resources and processes to construct and operate a green production studio would set a precedent for local industry**, through opportunities to engage with and learn from international standards of practice for green productions. It would also demonstrate that the province aims to be part of the global conversation and action.

#### *5.2.1.2. Build Workforce Capacity*

PictureNL has an established relationship with institutions, provincial and national organizations and industry professionals that are willing and able to provide training and mentorship opportunities. These relationships are key levers for addressing skills gaps in the province's existing crew base and securing a pipeline of capable new entrants.

**PictureNL should continue to engage with points of entry for the industry, such as CNA.** Working directly with the film school will solidify their direct connection to the industry, which would result in graduates being set-ready, which would be of high value to busy productions.

The gap in mid-to-high-level production crew is of immediate concern as the skills gaps along with limited capacity will impact the industry's readiness for an increase in inward productions. **PictureNL has mentorship programs in place to address this, however, these efforts should be significantly advanced**. This can be addressed through partnerships with other provinces for knowledge-sharing opportunities or crew-exchange initiatives (for which entry to mid-level production crew could be placed on productions elsewhere).

**PictureNL should work to educate and encourage local producers to adapt and take on production servicing**; this can also be furthered through the offering of concessions and/or incentives for establishing production servicing businesses in province.

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[36] *Sky Studios Elstree Named as the World's Most Sustainable Film and TV Studio*. Sky Studios Elstree, 8th May 2024. Accessible at: https://skystudioselstree.com/article/sky-studios-elstree-named-as-the-world-s-most-sustainable-film-and-tv-studio

**PictureNL's development of a locations database is of significant value and will be a notable addition to the perceived film-friendliness of the province**. While there is limited capacity of both production servicing and location management, PictureNL must have the necessary resources available to staff and support all the functionalities of an operational locations database, including receiving and processing locations requests as well as guiding and supporting inward productions in navigating, setting up and filming on site, and more.

#### *5.2.1.3. Refine Incentive Engagement*

As identified in the SWOT analysis (**Section 4.2.3**), while the All-Spend Film and Video Production Tax Credit has been well received, local industry has not fully engaged with the processes of using it and have not fully embraced it as an opportunity to attract service productions and, thus, diversify the province's industry – which would create more job opportunities, bring in external expertise, advance infrastructure and work to attract private investment in the province. This could limit the All-Spend's functionality and continue to put pressure on the EIP.

**The recommendation for this would be to streamline PictureNL's internal policies to target relevant industry stakeholders for each incentive program.** This can be achieved through clear and consistent communication to producers through the website and other engagement platforms (such as festival events or targeted industry workshops) at which PictureNL presents case examples and reviews the criteria, requirements and benefits of each incentive program, to ensure that producers are well-informed as to which projects may benefit from the All-Spend rather than the EIP.

This is a key foundation-building action; in the long term, as applications across all programs increase, there is a healthy spread of interest and overall understanding across the incentive programs to service domestic (EIP), inter-provincial (Film and Video Industry Tax Credit) and larger budget as well as international production (All-Spend).

In a further effort to ensure high functionality of the incentive programs, **SPI supports PictureNL's pending process to transfer the processing of the Film and Video Industry Tax Credit to the Canada Revenue Authority.** This would improve the operating efficiency of the incentive programs and align with two of the country's largest provincial screen industries, Ontario and Quebec.

**Further, SPI also recommends that the same be done with the All-Spend Film and Video Production Tax Credit at the appropriate time, following the current review and refining of the program.**

#### *5.2.1.4. Formalize Sustainable Practices for the Industry*

Considering the inaugural event in 2024, **SPI recommends that PictureNL establish and promote the Sustainable Production Day as an annual event.** This would be a foundational move to direct the local and wider Canadian industry's attention to the province's progression into the global conversation around green production. This platform can engage local industry in developing sustainable production practices that are feasible and efficient for the province.

The consistency of this event would present an opportunity to build, formalize, launch and monitor industry requirements, provincial KPIs and new sustainable infrastructure as well as production processes, building on collective actions for long-term success.

#### *5.2.1.5. Educate the Wider Community*

SPI noted that many industry stakeholders highlighted a lack of understanding or awareness of the industry in the province. This can create various barriers for an industry, including community frustrations with outdoor and/or location filming, lack of awareness of job opportunities, misrepresentation of the feasibility of a career in the industry or limited audiences for local content.

**The recommended approach for this would be for PictureNL to plan and execute a comprehensive campaign to educate the provincial community about the value of the film industry.** This could include short, visual economic reports on the value of individual high-profile productions, screenings of locally filmed content, or campaigns across the province's schools and institutions. These activities would help to demystify the industry and build an informed support base for its growth in the long term.

### 5.2.2. Medium Term Considerations (3-5 years)

The following recommendations for the **Medium Term** relate to supporting further growth. Once the current capacity gaps are addressed, this period focuses on **refining existing programs and initiatives**. In addition, efforts should be made to **create and implement strategies for new priority areas**. Collectively, the primary objective should be to establish economic and crew measurement baselines to support data-driven lobbying for and communication about the industry's value and success, driving forward the next stage of developments.

#### *5.2.2.1. Maintain Infrastructure and Workforce Capacity*

The recommendations outlined in the previous period are geared towards building the capacity necessary to better address current skills gap and preparing for the forecasted increase of production activity. With that work under way, it would be important at this stage to build out the structures and resource provisions necessary to support a high-functioning production ecosystem and, in the process, advocating for private investment in the industry.

**The recommendation would be for PictureNL to engage with national as well as international vendors and suppliers** – particularly of equipment, production transportation and unit supplies (including temporary, prefabricated production offices and cast and crew accommodation, and others). The objective would be to advocate for the expansion of these critical vendor services into the province. This could be through partnerships and inclusions of the use of certain suppliers in the All-Spend requirements (specifically pertaining to suppliers out of province that would still be eligible). This would be particularly relevant for existing suppliers across the Atlantic region.

**Addressing the significant gap in location management provisions would, at this stage, be critical**. PictureNL could engage existing and new partnerships to develop and support training and apprenticeship opportunities, most importantly on the set of established, local productions and larger, service productions across various regional locations. There would also be an opportunity for emerging location scouts and managers to work alongside PictureNL directly, with the pending introduction of their location database.

Finally, **ensuring there is a diverse offering of location scouts, managers and fixers is of significant value to the overall industry** as well as being an opportunity to engage members of the wider community across the province (this recommendation is further detailed in **Section 5.2.2.4**).

#### *5.2.2.2. Review the Incentive Offering*

By this stage, this iteration of the province's incentive program, in its entirety, would have been operating for about a decade. In alignment with global best practice, **SPI would recommend that PictureNL conduct a detailed review of the operations and efficiency of the main incentive programs: the Equity Investment Program, the Labour Tax Credit and All-Spend Tax Credit.** The objective of this exercise would be to ensure all programs are efficiently serving the industry.

This review would be an opportunity to propose adjustments, where needed, to ensure that NL remains competitive. This would include proposing an increase to the All-Spend per project cap in particular, as it is currently lower than competitors (as detailed in the SWOT analysis in **Section 4.2.3**).

In addition, **this would be the opportunity to scope out the potential impact of introducing regional uplifts,** connected to the longer-term objective of regional development outside of the production hub of St. John's. Uplifts could target the use of local crew, advancing local creative talent and generating economic impact in specific regions of the province.

**At this matured stage of the industry's life cycle, SPI would recommend PictureNL commission and/or conduct a comprehensive economic impact assessment alongside a detailed crew mapping exercise**. This would not only feed into the education of the community on the impacts of the industry (**Section 5.2.1.5**) but would provide valuable data to support the financial value of the industry to the provincial government, national partners and to federal agencies.

#### *5.2.2.3. Implement Sustainability Practices*

**Following the foundation-building recommendations in the previous period, green production would be established as a core industry objective**. In alignment with the incentive program review mentioned above, this would be an opportune time to introduce an uplift, specifically attached to the All-Spend. This will target larger budget productions, utilizing their resources to deepen commitment through education and, potentially, leave behind sustainable practices, structures and tools for the local industry. This could promote the advancement of green production in the province as well as make sustainable processes and resources more accessible.

#### *5.2.2.4. Engage with Regional Communities*

Nationally and globally, there are proposed strategies and active initiatives that are working to ensure production industries are inclusive and representative of their local, indigenous communities, in terms of their workforces and the content produced; examples include Telefilm Canada's Atlantic Strategy for 2024-2027[37] and the Artic Indigenous Film Fund (AIFF).[38]

Provincially, similar work is being conducted by cultural and creative organizations such as ArtsNL.[39] While PictureNL has an existing relationship with ArtsNL, this is an opportunity to further leverage this through coordinated community engagement and regional talent development. **While any outreach initiative would require significant resource and time, partnerships with agencies like ArtsNL would provide PictureNL with a base of knowledge of various community engagements with the wider creative industries.**

**PictureNL could also establish a recurring quarter or bi-annual collective to develop an approach that builds on their community education initiatives from the previous period and expands into specific, regional communities across the province**. This collective would be representational of the province's current production industry as well as gradually bring in representatives of creative talent from across the various communities.

As suggested in **Section 5.2.2.1**, **addressing the limited availability of location scouts, managers and fixers is critical.** This is motivated in part by the province's value proposition as

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[37] *Telefilm Canada Unveils its 2024-2027 Atlantic Strategy for the Region's Cinema Industry.* Telefilm, 12th September 2024. Accessible at: https://telefilm.ca/en/telefilm-canada-unveils-its-2024-2027-atlantic-strategy-for-the-regions-cinema-industry

[38] *Our Impact.* Artic Indigenous Film Fund. Website. Accessible at: https://www.aiff.no/our-impact/

[39] Year of the Arts 2024. ArtsNL. 2024. Accessible at: https://www.artsnl2024.ca/

a filming location being its range of diverse and unique landscapes. By not having location scouts who are intricately familiar with the various viable locations across the province, the industry is limiting its potential to be a destination of choice for service productions, as well as restricting the benefits of the local industry to St. John's.

In addition, the role of a location fixer can be picked up by an individual with transferrable skills that are not specific to the production industry, or even to the wider creative industries.

As part of the coordinated outreach initiative outlined above, additional program, scouting and training can be targeted to members of various communities who have the potential to absorb and practice the responsibilities of a location fixer, location scout or manager. This is an opportunity to engage regional communities in a way that is inclusive and considerate to local cultural practices.

#### *5.2.3. Long-Term Considerations (6-10 years)*

The following **Long-Term** recommendations are focused on evaluating the overall progress of Newfoundland and Labrador's industry and scoping out forward-looking strategies. This would be through **detailed evaluations of all initiatives and interventions** having taken place up to that point, particularly across the five key research areas outlined in this report. Unlike the recommendations for the previous periods, the following details a holistic approach. This will work to inform any final stages of implementation and guide PictureNL in reflecting on the industry at that stage, while looking to the next areas of expansion and development.

**A key element of this period is to review performance metrics of the overall industry growth and development.** To efficiently structure such a review, it is recommended that PictureNL, guided by this strategic roadmap and the key research areas, outline KPIs and highlight necessary metrics to adequately contextualize the performance of the industry over the previous periods.

The general framework of these KPIs would include the following essential areas:

- **Economic Impact**, including:
    - Metrics of progression across production spend
    - Job creation
    - Additionality of the incentive program – including for the local productions (EIP), inter-provincial productions (Labour Tax Credit), and larger budget as well as service productions (All-Spend)
    - Impact of the incentive program – including metrics of performance on any changes made to the All-Spend per project cap and/or any additional uplifts introduced (including but not limited to regional and sustainable uplifts).

- **Production Activity** (considering domestic and service productions), including:
    - Number of productions
    - Type of productions – in terms of budget levels, format and genre
    - Number of days filming in the province.

- **Capacity Offering** (considering infrastructure, workforce, services and vendors), including:
    - Functionality of retrofitted spaces in use
    - Functionality of fit-for-purpose studio space, if/when relevant – including users, number of productions, production budgets
    - Crew capacity – following the 2.5 crew reported in this Report
    - Existing and forecasted skills gaps

  - Metrics of performance for graduates from CNA – including union memberships, career progressions and notable credits
  - Capacity of services and vendors (public and private) – evaluating any/all co-operatives and their ability to serve the industry, tracking private investment in the province through the establishment of any equipment, post-production and transport vendors (for example).

- **Environmental Impact:**
  - Metrics of carbon footprint and waste outputs across recurring and keystone productions that have taken place over the period
  - Reviewing The Sustainable Production Day through relevant performance metrics (including but not limited to attendance, industry engagement through sessions, discussions and workshops, proposed interventions and executed interventions)
  - Map out existing sustainable practices and implementations across the provincial industry through key stakeholder consultations and case studies to understand functionality and efficacy of current interventions against carbon footprint and waste metrics.

- **Community Impact**:
  - Metrics of performance across regional and indigenous talent entering the industry's workforce,
  - Number regional and indigenous talent participating in PictureNL led training, upskilling and mentoring programs,
  - Number of productions led by regional and indigenous talent as well as number of regional and indigenous crew members placed on key domestic and service productions; and
  - Map out areas of community engagement and existing programs across the province through key stakeholder consultations and case studies to understand efficacy of current interventions against performance and capacity metrics.

- **Market Competitiveness**:
  - Identify key national market competitors (in the context of the Atlantic regions and in the case of Canada overall) and identify key international market competitors
  - Comparative metrics of performance for the above competitors – including incentive offerings, location offerings, film-friendliness, crew capacity and skills and infrastructure and vendors.

**This would be a future-looking exercise, scoping out the next strategic roadmap.** Following the review and evaluation of the KPIs, PictureNL would be able to identify the next selection of key areas to maintain existing growth potential and look to level-up the province's industry in the national and international context.

# Section 6 – **Appendices**


BTS still *Saint-Pierre* (2025)
Photo credit: Derm Carberry
Photo courtesy: PictureNL

# 6. APPENDIX 1 – THE CURRENT STATE OF THE GLOBAL SCREEN PRODUCTION INDUSTRY

## 6.1. The Current State of Global Screen Production

Since SPI produced its first film strategy for PictureNL in 2022, the global Screen production industry has continued to evolve and be affected by various headwinds. This section provides an updated overview of the global context since 2022 and is included in this Appendix for general reference.

Over the last decade, there has been unprecedented growth in the value and volume of Screen production globally. Production studios Netflix and Prime Video were joined by new over-the-top ("**OTT**") services from Apple, Disney, Paramount, HBO and others. Efforts to demarcate services from competitors led to increased spend on original content.

The global COVID-19 pandemic in 2020 saw almost all jurisdictions pause production as governments introduced national lockdowns and sought to control the rise and spread of COVID-19. The production shutdown impacted the Screen production industry significantly. A 2020 survey of film commissions conducted by SPI found that 60% of the 65 film commissions surveyed had seen a reduction of at least 75% of their expected production volume for the year.[40] This is reflected in the annual reports for almost all jurisdictions globally, where a dip in content spend and the number of production titles produced is evident in 2020.

However, once lockdown measures were lifted, the Screen production industry quickly bounced back as jurisdictions reopened for production in mid-2020. A backlog of productions, as well as increased consumer demand for content, resulted in a new surge in production activity. Jurisdictions that were perceived as 'COVID safe' such as Australia, New Zealand, Ireland, and Iceland, saw particularly significant increases in the number of productions shooting in their jurisdiction.

Since the initial post-COVID Screen production boom, there has been a general relative cooling of production activity globally, with the projected annual growths remaining positive but at lower levels. This is due to multiple compounding factors. These factors include economic headwinds, such as cost inflation (in part induced by increasing oil prices) and a contraction of spending by some content investors. Furthermore, in 2023 the US actors' union (SAG-AFTRA) and the Writers Guild of America (WGA) went on strike. Both strikes were resolved after almost six months, but this was the first time since 1960 that both unions were simultaneously on strike. The industrial action resulted in all major US studio-backed productions coming to a standstill worldwide, impacting global supply chains.

Overall, global content spend is predicted to increase by just 0.4% year-on-year to reach US$248bn in 2025, according to recent estimates.[41] This follows a 2% growth in content investment in 2024, that was driven by increased ad spend on the US Presidential Election, the Summer Olympics, and the resolution of the 2023 Hollywood strikes.

In 2025, it's also predicted that spending by SVoD services will surpass commercial broadcasters for the first time – set to increase by 6% to US$95bn. Streamers' successful subscriber growth in 2024, in-part due to password-sharing restrictions and newly-acquired rights to key sporting events, has positioned them to invest heavily in content.

[40] *Global Screen Production – The Impact of Film and Television Production on Economic Recovery From COVID-19*. Olsberg•SPI, 25th June 2020. Accessible at: https://www.o-spi.com/projects/economic-impact-studies-research-and-evaluation-ly9lh?rq=COVID-19

[41] *Streamers to spend $95bn on content in 2025, surpassing commercial broadcasters*. Ampere Analysis, 4th February 2025. Accessible at: https://www.ampereanalysis.com/insight/streamers-to-spend-95bn-on-content-in-2025-surpassing-commercial-broadcasters

Ad-based finance has also become increasingly prevalent. Ad-funded and subscription-based services is now estimated to account for 39% of total global spend in 2025.

## 6.2. Anticipated Trends in the Global Screen Production Landscape

### *6.2.1. Growing Interest in Emerging Markets*

While there remains uncertainty about the Screen production industry and whether there can be a return to the levels of growth witnessed between 2015 and 2022, consumer demand for content remains strong, and investor confidence in the market continues to be buoyant.

There is also growing interest in developing markets and international collaboration. As cost-conscious investors seek competitive incentives and lower production costs, content spending is expected to increase in emerging regions such as Central and South America, Central and Eastern Europe and Sub-Saharan Africa, while spending in North America and Western Europe is projected to stagnate or decline. Advances in technology, infrastructure and internet provision have also fueled growth in these regions, providing new opportunities for streaming platforms and studios to reach untapped audiences.

### *6.2.2. Broadening Opportunities for Genres and Formats*

Genres like factual, lifestyle, game shows and reality programming are becoming increasingly attractive due to lower production costs and shorter turnaround times. For example, in Japan, 70% of primetime linear programming is unscripted, and three-quarters of Netflix subscribers in APAC watched unscripted content in 2022.[42] Streaming platforms are investing more in this genre, with SVoD providers estimated to have spent US$4.9 billion globally on unscripted content in 2023, reflecting a 22% year-on-year growth.[43] Governments are increasingly recognizing this opportunity, with some jurisdictions expanding their production incentives to include unscripted formats, such as Illinois in the US and Ireland, which is exploring a tax credit for unscripted content.[44]

### *6.2.3. Geo-Political Developments*

In early February 2025, it was widely reported that the US would apply 25% tariffs to Canadian exports;[45] while this measure and rate is currently under negotiation (at the time of writing), this announcement has had widespread political, cultural and social effects in Canada, including a renewed enthusiasm for supporting local creative content.[46]

While such tariffs could further devalue the Canadian dollar and potentially deepen the country's long-held position as an attractive location for Hollywood productions, this is balanced against the financial and resourcing challenges it creates for vendors such as caterers, who are seeking alternatives to US-made goods for the services they provide to Screen productions. A weaker Canadian dollar could also strain local resources, increasing competition

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[42] *Breaking Barriers: How Audiences are Embracing Asian Unscripted Shows*. Netflix, 5th September 2023. Accessible at: https://about.netflix.com/en/news/unscripted-shows-asia-subtitling-dubbing
[43] *Streaming Platforms to Invest $42 Billion In Original and Acquired Content In 2023: Ampere Analysis.* Broadcast Pro, 8th October 2024. Accessible at: https://www.broadcastprome.com/news/streaming-platforms-to-invest-42bn-in-original-and-acquired-content-in-2023-ampere-analysis/#:~:text=The%20major%20global%20streaming%20platforms,latest%20report%20from%20Ampere%20Analysis.
[44] *Statement by Minister Donohoe on Budget 2023.* Department of Finance, 27th September 2022. Accessible at: https://www.gov.ie/en/speech/oed8e-statement-by-minister-donohoe-on-budget-2023/
[45] *Film Industry in Canada Closes Ranks Amid Trump Tariffs Threat: "It's a Moment.* The Hollywood Reporter, 4th February 2025. Accessible at: https://www.hollywoodreporter.com/business/business-news/canadian-leaders-trump-tariffs-threat-1236127181/
[46] *Amid Trump's Tariffs, Support for Local Canadian Content Builds: "It's Become Imperative".* The Hollywood Reporter, 12th March 2025. Accessible at: https://www.hollywoodreporter.com/news/politics-news/canada-local-content-trump-tariffs-1236154675/

for soundstages, equipment and skilled labour, and increasing access challenges for independent Canadian filmmakers.

There is concern that tariffs may extend to Canadian content licensing, potentially limiting access to the US market and pushing Canadian producers to seek alternative international partners. Despite these uncertainties, Canada's stable tax incentives, skilled workforce, and established industry relationships provide some resilience. The visual effects and post-production areas may benefit, though reliance on US software and hardware could drive up costs. Canadian officials and industry leaders are emphasizing cross-border cooperation and exploring measures to support domestic production.[47] As National Canadian Film Day approaches on 16th April 2025, Canada is demonstrating its awareness of the wider issues and a renewed enthusiasm for consuming homegrown Canadian content.[48]

While new tariffs would pose risks, they also highlight Canada's continued importance in global Screen production, and value in particular to US studios. The industry's adaptability and the federal government's response will be key in navigating these complex circumstances.

#### *6.2.4. Technological Developments*

Developments in technology have long had a direct and indirect impact on the global Screen production industry. Technology developments effect the equipment used, the ways of working adopted, as well as the skills and knowledge required by those working in the industry.

Virtual production (VP) is a relatively recent technological development, which transforms filmmaking by integrating real-time computer-generated imagery (CGI) with traditional production techniques. While often associated with large LED screens, as seen in *The Mandalorian* (2019–), VP also includes green screens and AI-assisted tools that streamline production. By shifting more work to pre-production and minimizing the need for location shoots, VP helps lower costs and improve efficiency. Major film hubs like the US, UK, and Germany have been investing heavily in VP, with new studio developments enhancing global production capabilities.

That said, there has been a relatively cooling of investment levels in recent years, as some of the prevailing barriers to entry for mass adoption of VP become increasingly apparent. These barriers include prohibitively high rental costs for smaller productions, specialist skills and knowledge requirements, as well as limited applicability to a wide range of content types.

Beyond virtual production, AI-driven tools have (and will continue) to revolutionize workflows, from pre-visualization software to automated editing and CGI enhancements. Major studios such as Amazon MGM, Lionsgate, and Warner Bros. are increasingly integrating AI into their production pipelines.

AI-assisted innovations, like real-time motion capture and generative AI, are making high-quality visual effects more accessible, but are also raising significant concerns about labour impacts and industry ethics. As AI becomes a more integral part of Screen production, regulatory frameworks are emerging to address its ethical and economic implications. The EU AI Act, for example, marks a significant step in regulating AI's role in media production. While AI and automation offer new opportunities for efficiency and cost savings, concerns remain about transparency, data privacy, and fair compensation for creative professionals. Moving forward, balancing technological advancements with industry sustainability will be crucial in shaping the future of Screen production.

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[47] *Canada Film Day Celebrates Homegrown Movies and Offers a Symbolic "Elbows Up" to America*. The Hollywood Reporter, 27th March 2025. Accessible at: https://www.hollywoodreporter.com/movies/movie-news/donald-trump-tariff-annexation-threats-1236173235/
[48] National Canadian Film Day website. Accessible at: https://canfilmday.ca/

# 7. APPENDIX 2 – THE PRODUCTION LOCATION DECISION

## 7.1. Overview

Since the 2022 Study, SPI's work on the Production Location Decision has been updated and is included in this Appendix for PictureNL's reference. This section provides some context for the primary and secondary factors that producers consider when deciding where to base their productions; to inform the development of a sound strategy and to thoroughly understand the range of producer needs, it is important to model the process by which productions come to select a specific jurisdiction.

In general, location decisions are informed by a balance between:

1. The **creative characteristics** that are best suited to the story (often driven by the director's preferences)
2. The more **practical considerations**, such as the availability of high-quality infrastructure, experienced crew and attractive incentives (largely, the producer's concerns).

## 7.2. Defining the Production Location Decision

The selection process, described here as the Production Location Decision, is related to several critical factors; these factors apply whether a production shoots primarily on location, primarily on a soundstage or in a studio, or both.

SPI has analyzed these factors to update this Producer Location Decision sequence of considerations. While the importance of any given factor can vary depending on the specific circumstances of the production, the below factors generally represent the order of importance by which producers decide among locations.

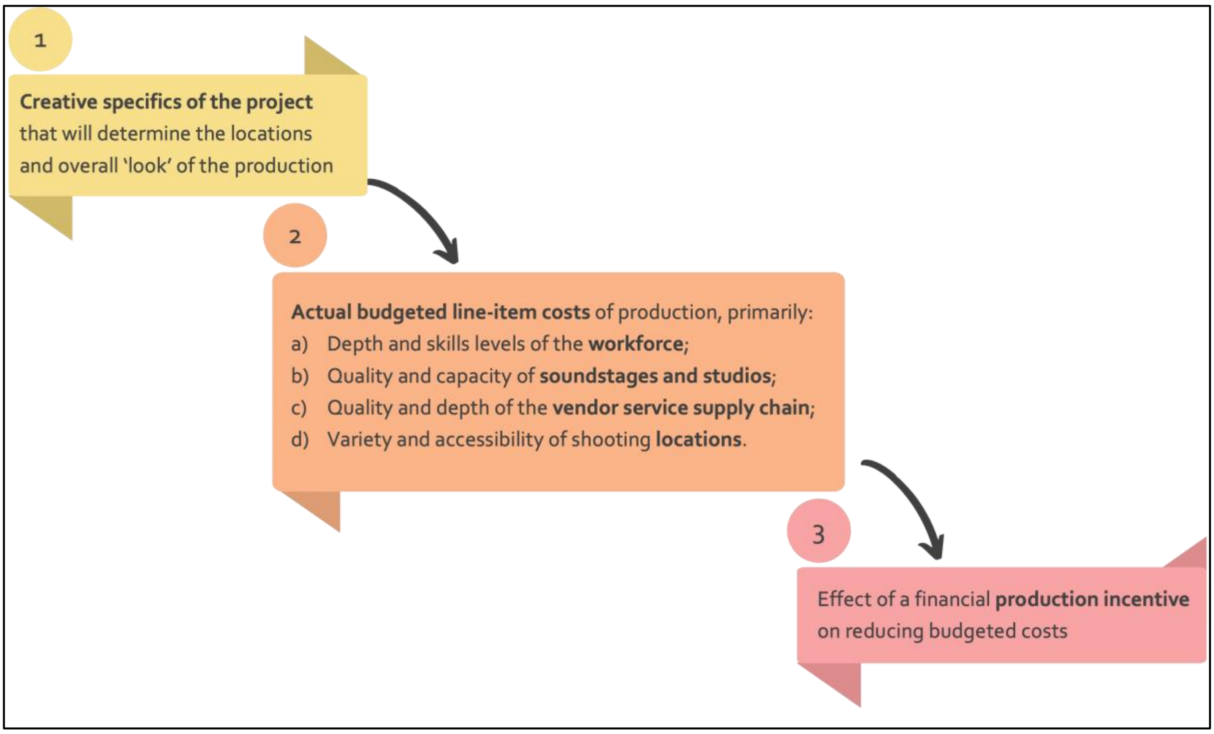
Note that the following information is intended to be used as a theoretical guide; within this list of both Primary and Secondary Considerations, the final order would be determined by a range of factors that are specific to each production, including:

- Whether it is a film or series production
- Whether a few locations are needed, or a wide range
- The degree of reliance on a production incentive; for productions that require an incentive to make the budget, the lack of one may be a dealbreaker, even if the locations are creatively ideal.

## 7.3. The Production Location Decision – Primary Considerations

The following section describes the main hierarchy of factors that are first considered when researching locations.

***Figure 2 – Primary Considerations Flowchart***




Source: Olsberg•SPI

### *7.3.1. Creative Specifics*

Typically, the above three factors are pivotal in determining where productions decide to locate. First, the creative specifics that are best suited to the story must be feasible in any potential location. This is often driven by the director's preferences and typically relates to whether the location matches the desired overall 'look' of the production, such as containing the appropriate natural landscapes, architecture, ethnicity of the actors and extras and climate conditions. Meeting the creative specifics of a production is, therefore, a necessary condition rather than an ideal one.

### *7.3.2. Budgeted Costs*

Following the creative specifics, the cost of production would be considered. The first aspect of this, actual budgeted line-item costs, is assessed from two different angles: The price levels of required budgeted line items in the given jurisdiction, and the number of budgeted resources that a production would need to import from another location. Typically, where the chosen location is not able to sufficiently service key production needs, rather than compromising industry or company standards, productions would often source much of their production requirements from other jurisdictions to fill in any gaps.

Overall costs can be significantly impacted in such cases and negate cost savings from locations that may initially present as budget-friendly. Two major examples pertain to workforce requirements and vendor equipment; if the crew is brought in from other jurisdictions, they will need to have their flight costs paid for and be housed and paid per diems for the duration of the production. Similarly, if production equipment and supplies are brought in from abroad, the cost of transporting this equipment, including customs duties and potential related delays, would be reflected in the budget's bottom line.

### *7.3.3. Production Incentives*

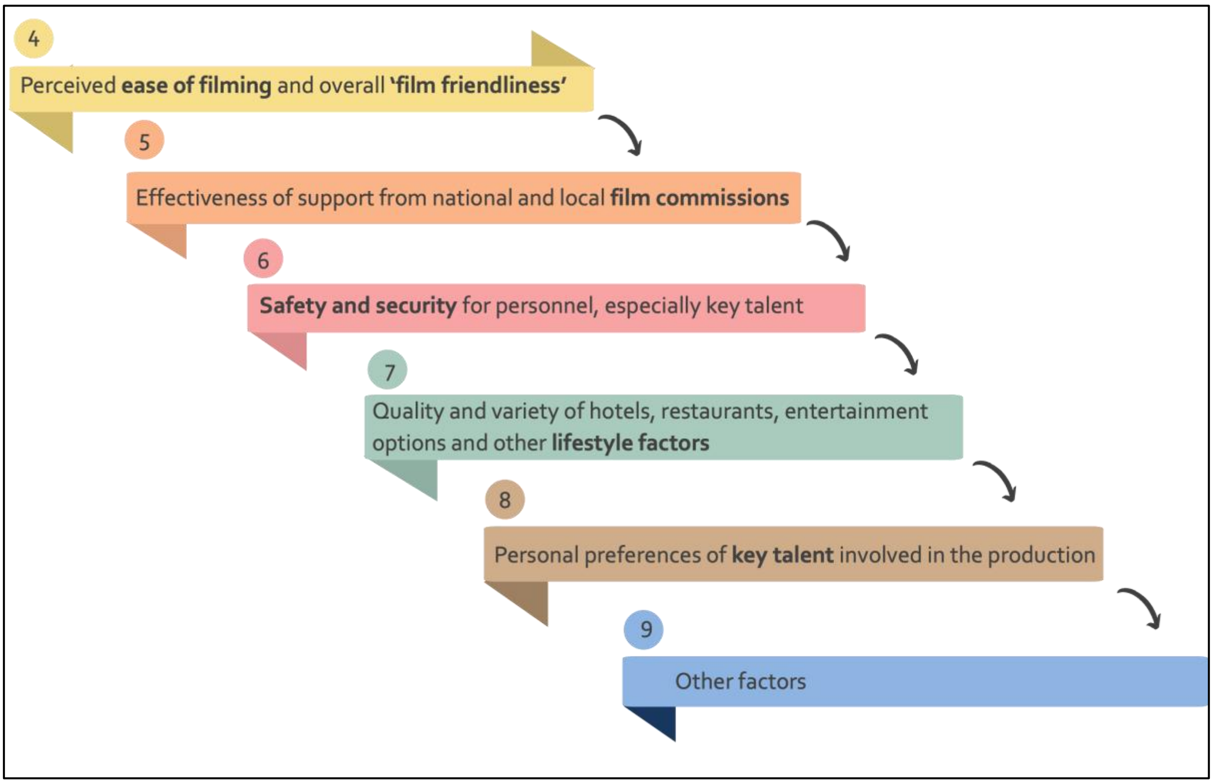
Due to the significant impact of line-item costs, production incentives have become an important tool to attract productions to a jurisdiction because they offset some of the costs of budgeted line items. With headline incentive rates generally around 25%-30% of eligible expenditure,[49] incentives can provide producers with the cornerstone of a financial plan and play a decisive role in where productions are eventually located. Incentive systems are highly detailed with a range of stipulations related to elements such as the incentive rate, eligibility of projects and applicants and spending requirements.

In jurisdictions with no formal production incentive system, ad hoc concessions are sometimes offered to attract productions. These can take a variety of forms, such as one-off production incentives negotiated with individual productions, discounted hospitality fees and reduced rates on flight costs. It should be noted that such ad hoc concessions do not usually function as an effective alternative to automatic production incentives. Producers often first consider jurisdictions with valuable and appropriate formal incentive systems because they can more effectively project the eventual production costs.

## 7.4. The Production Location Decision – Secondary Considerations

Once the above primary considerations have been addressed, the factors described below are generally considered next; by this stage, a much narrower pool of markets can compete.

***Figure 3 – Secondary Considerations Flowchart***




Source: Olsberg•SPI

### *7.4.1. Film Friendliness*

Following the primary considerations, the perceived ease of filming and film-friendliness is often the most important Production Location Decision Factor. This is usually determined by

[49] Global Incentives Index. Olsberg•SPI, November 2024. Accessible at: https://www.o-spi.com/news/incentive-index-november-2024

a jurisdiction's ability to deal quickly and effectively with permits, the importing of crew and equipment as well as other key production requirements and the ease of dealing with regulatory obstacles in the jurisdiction. This, in turn, is often based on a jurisdiction's understanding of the economic value of hosting international productions, stimulating a desire to be an attractive location when compared to the competition.

Additionally, in most jurisdictions, local authorities in the form of a film commission or film office play an important role in helping producers to navigate potentially complex local community dynamics. In such cases, cultural and social awareness and respectful negotiation periods can be critical in mitigating potential disruption and maintaining a smooth production process. These dynamics can differ greatly between countries, and even between jurisdictions within the same country.

#### *7.4.2. Film Commissions*

While some of these issues are overseen by a film commission or film office, there are additional functions that determine the effectiveness of support from national and local film commissions or film offices, which is another factor of great importance to producers. These agencies often support productions by connecting them with local service providers, assisting with location scouting and ultimately providing producers with confidence that their production needs are being addressed. Other functions involve problem-solving once productions are in-market, and marketing the location to the international producer community, often leveraging past productions through formal or informal endorsements, credits and footage to use in promotional videos.

It should be emphasized that while there are many good examples, there is no one set model for film commissions and film offices; the structure, organization, responsibilities and size are due to several factors, including: the importance the jurisdiction's government places on the industry's value; the budget assigned to its operations; the availability of other entities to share the industry work (such as a film institute) or whether it is responsible for all of the Screen production industry; the government department or agency to which it is aligned (such as economy, tourism, arts or culture); and more. Instead, based on best practice, a film commission should be established to meet the government's goals for the industry.

#### *7.4.3. Safety and Security*

Additionally, safety and security for personnel is a key factor and one that is becoming more important following instability generated by the COVID-19 pandemic and current general political instability, both perceived and real; these issues have increased wariness around unfamiliar locations. This is especially the case when there is prominent talent (and their management) involved in the project. Areas of concern in this regard can be mitigated by a police presence, road closures and safety and security guidance from local authorities. It should be noted that the perceived level of safety and security abroad is often more important than the actual level of safety and security.

#### *7.4.4. Lifestyle Factors*

The quality and variety of hotels, restaurants and other lifestyle factors on offer can also be influential, given that cast and crew would likely be relocated for weeks or months at a time throughout the production. A jurisdiction's ability to ensure high standards of living for cast and crew would provide it with an advantage in location decisions. Given the intense working conditions of film and television production, the cast and crew would likely need to be housed within reasonable proximity to the production set, further restricting the hospitality options available.

### *7.4.5. Key Talent*

Similarly, the personal preferences of key talent involved in the production, especially the director and lead actors, are factored into decision-making. Certain features of a jurisdiction can deter key talent and thereby reduce the attractiveness of a jurisdiction. Such features include the geographical distance of relocation required (often from Los Angeles), objections to social or political values present in the considered location, as well as the availability of English-speaking locals.

### *7.4.6. Other Factors*

Fluctuations in and stability of the exchange rate can impact the true net cost of production. Along with production-specific infrastructure, general infrastructure plays a role in the Production Location Decision, such as the variety and availability of transportation options, the quality of the digital infrastructure (including access to reliable and fast Internet), the quality of the communications infrastructure (both in-location and international), the ease of moving around the jurisdiction and the proximity to international airports.

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