



**GREATER
TORONTO**

MARKETING ALLIANCE



Greater Toronto Area Value Proposition for European ICT & Digital Media Businesses

Your ideal destination for international expansion

A Wealth of Local Talent

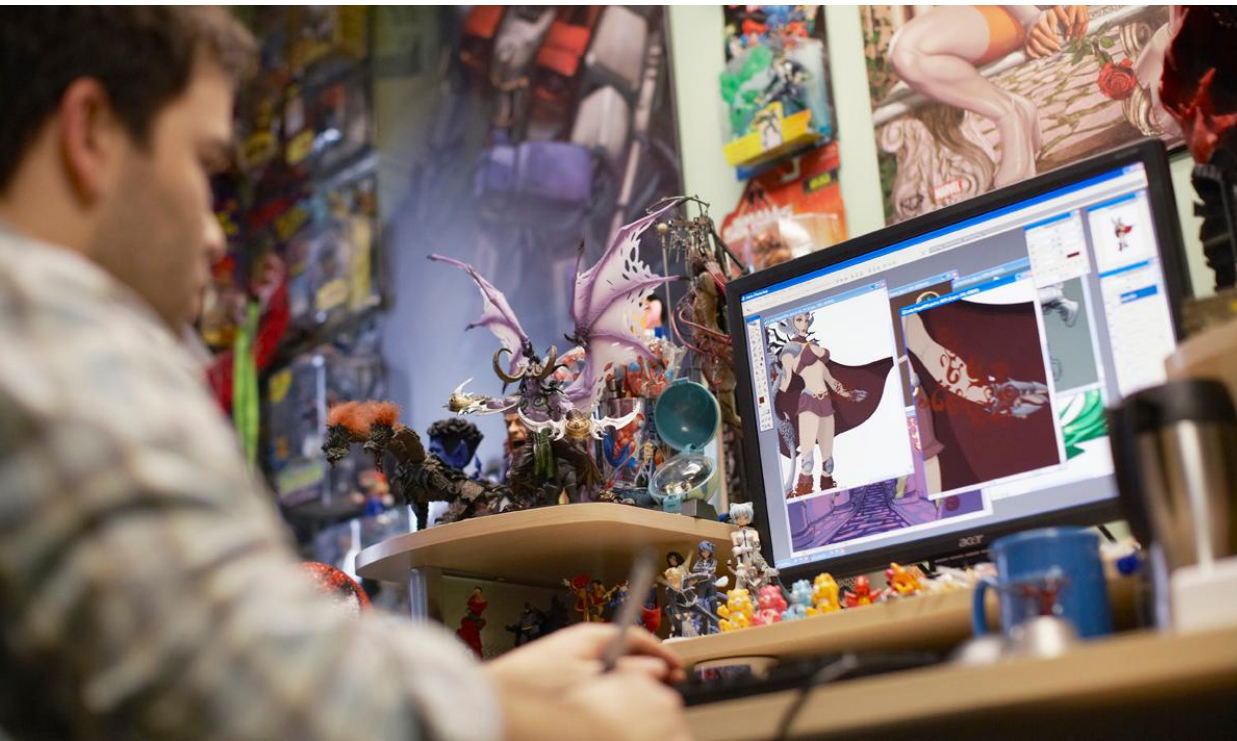
- Digital Media Industry Profile

Toronto is in the **top five cities for creative industries FDI**, after Los Angeles and New York.

Ontario's interactive digital media industry generates revenues in excess of \$1 billion annually, with over 1,000 companies and 16,000 employees.

The Toronto Area is the centre of this industry in Ontario.

Toronto is in the top five cities for creative industries FDI, after Los Angeles and New York. The city's creative eco-system and vibrant artistic culture is showcased yearly through the Toronto International Film Festival showcases.



Growing Interactive Digital Cluster

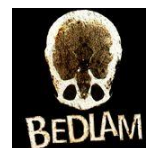
- Digital Media Industry Profile

Ontario **gaming industry** has grown at a **rate of 20%** and is forecasted to continue to grow at this rate.

Toronto is internationally renowned for its world class artists, designers, animators and programmers.

Toronto has attracted global giants such as Ubisoft, Gameloft and Rockstar.

96 entertainment software companies in Ontario, majority are in the GTA (2011).



Concentration of Entertainment Firms in the GTA

- Digital Media Industry Profile

Gaming, Animation and VFX companies in the and around the GTA.



- GO Transit Lakeshore East Line
- GO Transit Lakeshore West Line
- Go Transit Milton Line
- GO Transit Barrie Line
- GO Transit Kitchener Line
- GO Transit Stouffville Line
- GO Transit Richmond Hill Line
- Union Station Rail
- Toronto Pearson International Airport
www.gttaa.org
- Billy Bishop Airport
- Gaming Studios
- Animation/VFX studios

Special Effects, 3-D Animation & Post Production

- Digital Media Industry Profile



ARC PRODUCTIONS

- Canada's leading high-quality digital animation studio.
- Make world-class computer-animated content.



AUTODESK MAYA

- High end 3-D software developer.
- Academy Award Winner for Technical Achievement.



SIDE EFFECTS SOFTWARE

- Creator of Houdini 3-D animation tools.
- Their innovations have been production proven on more than 5,000 shots in over 200 feature films.



DELUXE LABORATORIES

- Leading worldwide provider of services to the entertainment industry in film, video and digital media.

GTA Film Industry

- Digital Media Industry Profile

The GTA is the **3rd largest city region in film production** in North America.



CREATIVE POST INC.

- One of Canada's premier post-production facilities.



SDI MEDIA

- World's leading provider of dubbing and subtitling translations.



CINESPACE FILM STUDIOS

- Operates over one million sq. ft. of production space.
- Credits include the award-winning film "Chicago".



PINEWOOD STUDIOS

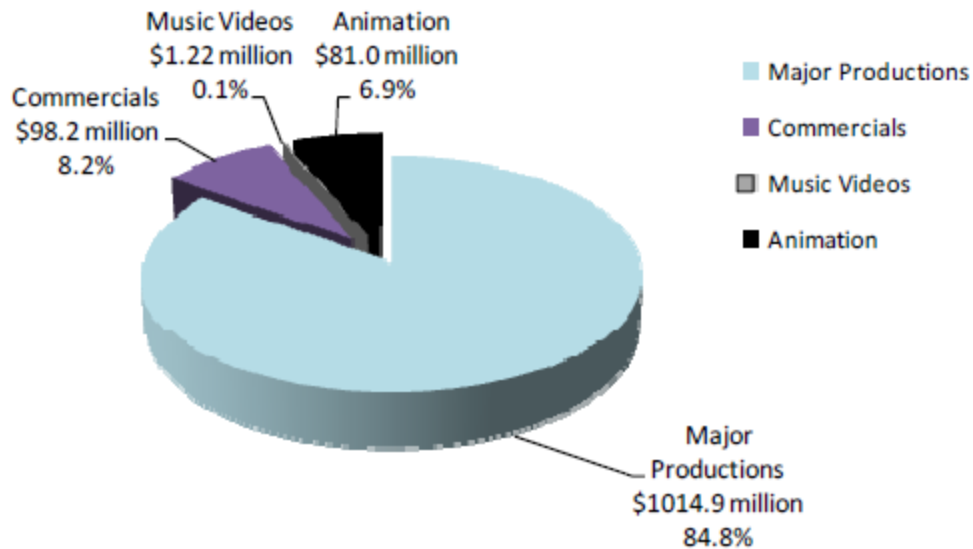
- More than 250,000 sq. ft. including North America's largest soundstage.
- Used for the upcoming \$200 million dollar re-make of the film "Total Recall".

GTA Film Industry

- Film & Television Industry Profile

The city is on track to have **\$1.2 Billion in production value in 2012**, a record.

Total Production Spending in the City of Toronto 2012



The Thing (2011)



Total Recall (2012)



Pacific Rim (2013)

Television & Film Studios in the GTA

● Digital Media Industry Profile

11 Television Canada Inc.	Avamar Entertainment	Kleinburg
169 Eastern Avenue	Basentana Productions Inc.	MPSL Group
249 Evans Avenue Studios	Believertown Productions Inc.	Munition Factory
4 Square Entertainment Ltd	Big Coat Productions	New Toronto Studios Inc.
58 Lake Productions Inc.	Big Sky Film Production Inc.	Pharmacy Studio
8 Lake Productions Inc.	CBC Toronto Production Centre	Pie in the Sky Studios
9 Story Entertainment Inc.	Cinespace Film Studios	Pinewood Toronto Studios
90th Parallel Productions Ltd	Dome Productions	Post City Sound
A71 Productions Inc.	Downsview Park	Pyman Media Group
Accent Entertainment Corp.	Drum Artz/ Primrose Studio	Showline Harbourside Studios
Air Farce Productions Inc.	Dufferin Gate	Showline Limited
Aircraft Pictures Ltd.	Eastern	Studio 65
Amaze Film + Television	Epitome Pictures	Studio City Toronto
Antica Productions	Farewell Studios	Studio Works
Appulse Films	Fast Motion Studios	Sullivan Studios
Architect Films Inc.	Film Greens Studio	Sunnyside Up Studio Ltd.
Artist's Design Group	Filmport Studios	Tattersall Sound & Picture
Astral Media	Keep It In the Family Productions	Toronto Film Studios
Automatic Pictures Api Inc	Kimono Surf Studios	Trinity Studios
Automatic Pictures Api Inc	Kipling	Wallace Film Studios

Ontario Digital Media Incentives

Digital Media Industry Profile

SUPPORT PROGRAMS/ INCENTIVES	CRITERIA	HOW MUCH
Ontario Computer Animation & Special Effects Tax Credit	Computer animation and special effects activities in film or TV production	20% refundable tax credit for eligible labour expenditures
Ontario Interactive Digital Media Tax Credit	Labour, marketing and distribution expenditures for the creation of interactive digital media products	40% of eligible labour, marketing and distribution expenditures
OMDC Interactive Digital Media Fund	Labour expenditures and eligible marketing and distribution expenses claimed with respect to interactive digital media products	A non-refundable contribution of up to \$150,000 to a maximum of 50% of the project budget to create a market-ready interactive digital media content product
OMDC Ontario Sound Recording Tax Credit	Eligible production and marketing costs incurred by a qualifying corporation with respect to an eligible Canadian sound recording	20% refundable tax credit for eligible sound recording company for production and marketing costs with respect to an eligible Canadian sound recording

Testimonial - Ubisoft

- Digital Media Industry Profile

Ontario combines **world-class technical schools** and training with **strong film industry expertise.**



“Toronto’s unique pool of experienced video game industry and film industry talent will allow us to develop a team with exceptional ability to help us realize our goals for creating brands with universal appeal that extend beyond the world of video games.”

Yannis Mallat, CEO of Ubisoft, Toronto

Testimonial – Arc Productions

- Digital Media Industry Profile

Arc Productions Toronto produces theatre-ready **feature films for as little as half the rate** of our Hollywood counterparts.

“Thanks to Canadian tax credits, ahead-of-the-curve technology and an extraordinarily talented team of animation experts, Arc Productions Toronto produces theatre-ready feature films for as little as half the rate of our Hollywood counterparts.

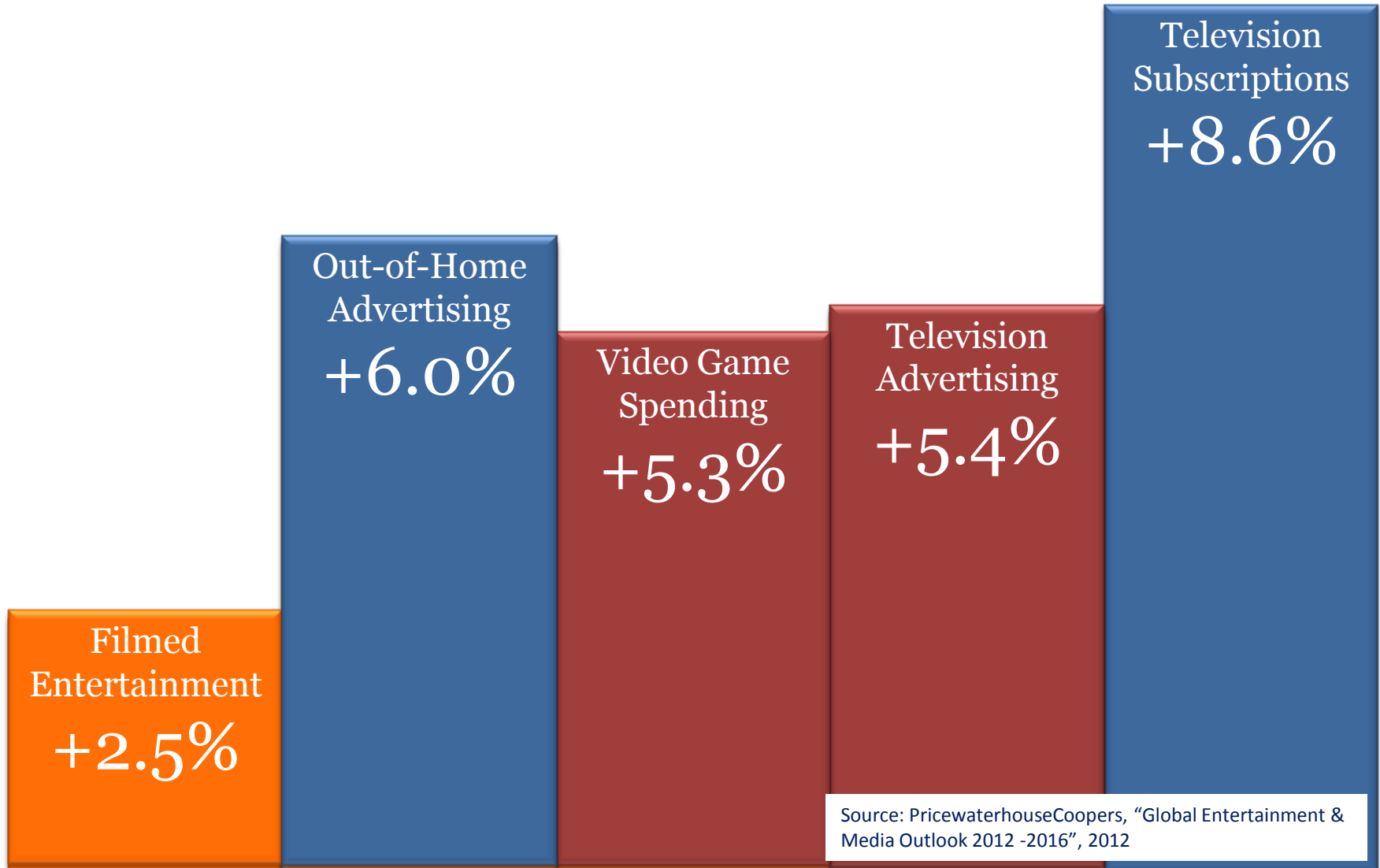
With target budgets of \$20 million or less for full-length CG features, which historically average \$142 million at the North American box office, we offer investors an attractive risk-return ratio.”

Arc Productions, Toronto



Opportunities & Trends: The Fastest Growing Segments

PwC: forecasted annual growth in the following segments
from 2012 to 2016.



Source: PricewaterhouseCoopers, "Global Entertainment & Media Outlook 2012 -2016", 2012

Opportunities & Trends: Money Makers - Consumer Segments

PwC: forecasted annual growth in the following consumer segments from 2012 to 2016.



Mobile TV +38%



Over-the-top Streaming +18%



eBooks +46%



Satellite Radio +12%



Recorded Digital Music +12.8%

Multi-National ICT Firms in the GTA

- ICT Industry Profile

Location of choice for foreign ICT companies.

Rank (2012)	Company
1	IBM
2	HP
3	Cisco
4	Microsoft
5	Oracle
6	Xerox
7	Honeywell
8	Wipro
9	SAP

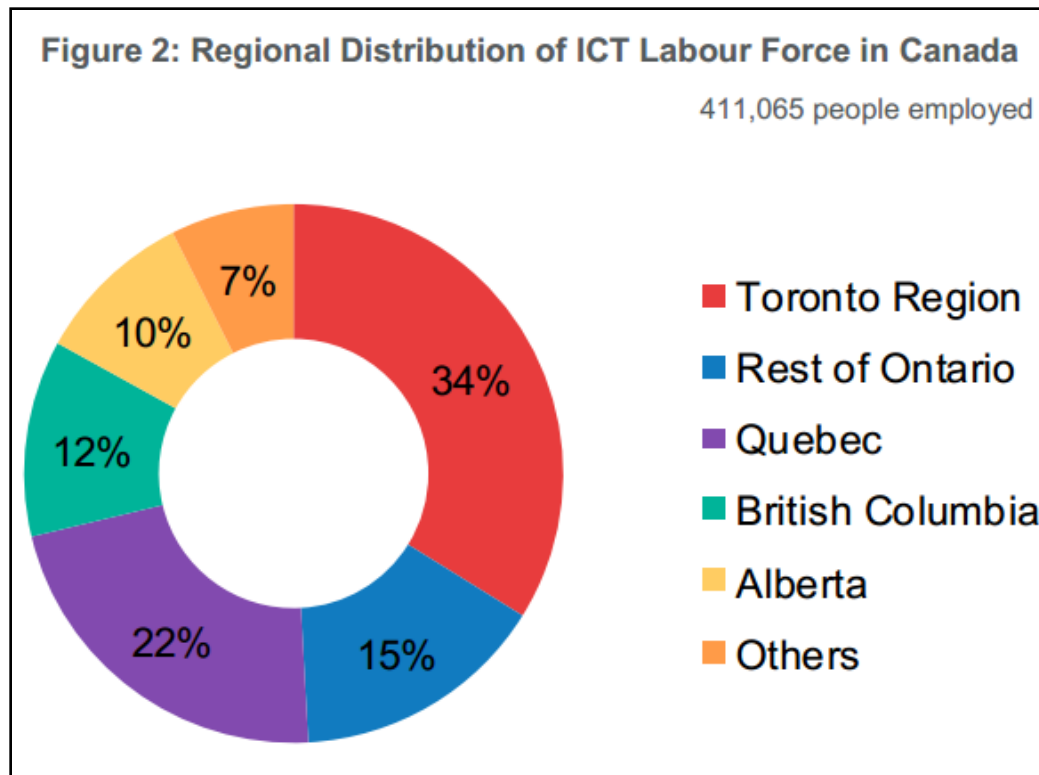
Top 25 Canadian ICT Multi-National Companies

- All of the top 9 Canadian ICT Multi-National's are based in the GTA.
- 19 of the top 25 ICT Multi-National's operating in Canada are located in the GTA.

IT Centre of Canada

- ICT Industry Profile

The GTA employs around **one-third** of Canada's ICT labour force.



Located in the region are two of the best schools for engineering and ICT-related studies in the world, the University of Toronto (UofT), ranked 14th and the University of Waterloo (UW) ranked 39th.

They attract some of the brightest students from Canada and around the world.

Testimonial - IBM

- ICT Industry Profile



IBM, GTA

- IBM Canada increased its R&D expenditure from \$397 million in 2008 to \$569 million in 2009.
- Its micro-electronics branch, which operates entirely in the GTA, generates almost \$2 billion annually in export revenue.

"We're very fortunate to be headquartered in Markham. We've been around for a long time, and have seen a lot of growth in Canada – the GTA in particular. The GTA has all the ingredients for why you would invest somewhere – great diversity base, great access to skills and innovation – it's the hub of commerce here in Canada."

Pat Horgan, VP of Manufacturing, Development & Operations, IBM, Canada

Testimonial - AMD

- ICT Industry Profile



AMD, MARKHAM, GTA

- AMD is headquartered in California, but its deep roots in Markham come courtesy of ATI, which was based there and acquired by AMD in 2006.
- AMD now has 10,000 employees worldwide, and 1,700 of them are based in Markham, AMD's largest R&D facility outside the US.

"Markham is, by far, bigger than our operations in China and India, and it's all based on very high skills, and very deep knowledge of graphics technology, software technology and silicon design. Of course, AMD has similar R&D sites elsewhere. But, the level of expertise and experience that we have here in Markham is really second to none anywhere at AMD."

Ben Bar-Haim, Corporate VP, Worldwide Software, AMD

Testimonial - CISCO

- ICT Industry Profile

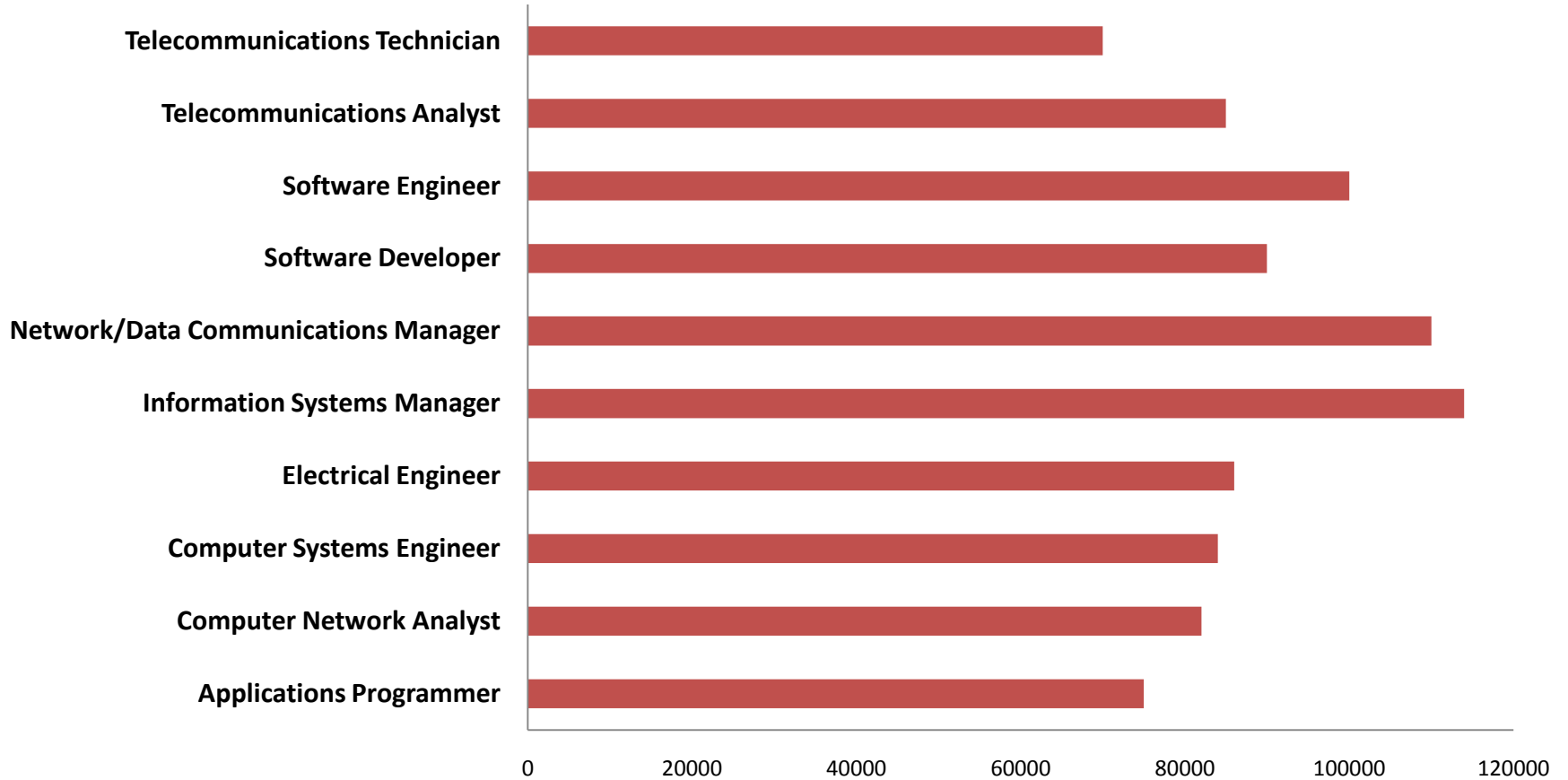


CISCO, GTA

- The Government of Ontario & CISCO Systems Inc. signed a memorandum on August 2011 announcing a combined investment of almost a half-billion dollars in R&D facilities.
- Investment will create 300 jobs in Ottawa and Toronto.
- CEO John Chambers called Ontario, “An amazing location in the world in terms of IT workforce.”
- The R&D investment will focus on core routing, collaboration, data centre virtualization, cloud computing and video. Projects will be in areas of health, energy, smart communities, education and economic development.

Ontario ICT Industry: Labour Force

Salaries in Ontario for Selected Roles



Source: ERI salary assessor

Labour Force: Average Salary for Various **Managerial** Level Jobs in the GTA for Large and Mid-Size ICT Companies

Senior Managerial Levels		
Title	Large Firms	Mid-Size Firms
Average Salary	\$70,641	\$ 64,229
VP - Chief Information Officer (CIO)	\$ 92,642	\$ 84,608
VP - Security (CSO)	\$ 74,419	\$ 60,320
VP - Administration	\$ 61,677	\$ 47,626
VP - Consulting Services	\$ 55,897	\$ 73,660
VP - Information Services	\$ 68,539	\$ 64,357
VP - Technical Services	\$ 77,182	\$ 69,942
Director - IT Planning	\$ 64,890	\$ 51,823
Director - Production/Data Center	\$ 66,120	\$ 58,419
Director - Systems & Programming	\$ 74,404	\$ 67,308

Managerial Levels		
Title	Large Firms	Mid-Size Firms
Average Salary	\$45,736	\$41,271
Manager - Computer Operations	\$50,423	\$ 44,858
Manager - Customer Service	\$44,085	\$ 38,022
Manager - Data Communications	\$42,095	\$ 34,800
Manager - Database	\$52,046	\$ 44,606
Manager - Internet Systems	\$44,227	\$ 41,909
Manager - Application Development	\$43,085	\$ 36,757
Manager - Operating Sys. Production	\$47,520	\$ 43,578
Manager - Network Services	\$46,709	\$ 44,316
Manager - Production Services	\$42,224	\$ 42,679
Manager - Production Support	\$41,744	\$ 42,226
Manager - Quality Control	\$40,872	\$ 33,862
Manager - Security and Workstations	\$46,895	\$ 42,048
Manager - Systems and Programming	\$51,852	\$ 49,748
Manager - Technical Services	\$52,423	\$ 43,222
Manager - Training & Documentation	\$37,080	\$ 31,727
Manager - Voice and Data Comm's	\$48,495	\$ 45,980

Source: Ian Martin Limited, "IT Salary Survey", February 2013

Labour Force: Average Salary for Various **Supervisory** and **Entry/Mid** Level Jobs in the GTA for Large and Mid-Size Firms

Supervisory Levels		
Title	Large Firms	Mid-Size Firms
Average Salary	\$37,078	\$35,696
Computer Operations - Shift Manager	\$34,026	\$ 35,087
Computer Operations - Shift Supervisor	\$24,764	\$ 25,227
Data Entry Supervisor	\$26,496	\$ 23,523
Production Control Specialist	\$29,356	\$ 28,642
Production Services Supervisor	\$28,928	\$ 35,256
Project Manager - Applications	\$54,878	\$ 45,697
Project Manager - Distributed Systems	\$51,395	\$ 44,726
Project Manager - Network Tech. Services	\$49,841	\$ 36,210
Project Manager - Systems	\$48,534	\$ 44,503
Supervisor - Hardware Installations	\$26,533	\$ 28,439
Senior Network Specialist	\$41,959	\$ 42,733
Software Engineer	\$43,625	\$ 45,072
Capacity Planning Supervisor	\$29,829	\$ 26,494
Change Control Supervisor	\$32,701	\$ 36,963
Supervisor - Network Services	\$30,801	\$ 34,876
Voice/Wireless Communications Manager	\$39,583	\$ 37,687

Entry and Mid-Levels		
Title	Large Firms	Mid-Size Firms
Average Salary	\$33,682	\$31,335
Webmaster	\$31,138	\$31,447
Change Control Analyst	\$31,298	\$28,294
Computer Operator	\$22,565	\$22,498
Data Center Facility Administrator	\$26,610	\$33,993
Data Entry Clerk	\$16,702	\$19,825
Data Security Administrator	\$43,919	\$33,994
Database Specialist	\$44,622	\$40,168
Disaster Recovery Coordinator	\$47,464	\$37,356
e-Commerce Specialist	\$40,930	\$30,985
Forms and Graphics Designer	\$22,033	\$27,626
Object Visual Programmer	\$38,393	\$38,635
Hardware Installations Coordinator	\$24,758	\$23,943
Internet Developer	\$37,974	\$37,455
IT Planning Analyst	\$39,807	\$33,405
LAN Applications Support Analyst	\$32,360	\$28,832
Network Control Analyst	\$39,024	\$32,568
Network Services Administrator	\$34,882	\$32,952
Network Technician	\$29,581	\$29,574
Operations Analyst	\$32,071	\$33,283
Personal Computer Specialist	\$28,107	\$26,316
Production Control Analyst	\$32,035	\$31,626
Programmer/Analyst	\$41,075	\$38,741
Systems Analyst	\$39,289	\$37,860
Systems Programmer	\$41,579	\$36,117
Systems Support Specialist	\$31,174	\$30,007
Librarian	\$23,975	\$24,957
Technical Services Specialist	\$32,262	\$30,551
Technical Specialist	\$35,705	\$28,725
Voice/Wireless Comm's Coordinator	\$37,091	\$29,504
Web Analyst	\$32,026	\$28,804

Source: Ian Martin Limited, "IT Salary Survey", February 2013

Let us help you succeed in the Greater Toronto Area!



Is the **single point of contact** for the GTA

Provides economic, sectoral & community profile information

Presents the competitive business case for investing in the GTA

Provides introductions to public sector officials and private companies

Coordinates meeting itineraries and visitation programs

Free & confidential advisory services in: corporate legal / accounting & taxation / immigration matters / staffing & recruitment / financial services / real estate

visit us at:
www.greatertoronto.org



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