WIFT WOMEN IN FILM & TELEVISION TORONTO

Frame Work II: Canada's Screen-Based Workforce

January 2012

FOUNDATION FOR WIFT WOMEN IN FILM & TELEVISION TORONTO | Ontario Media Development Corporation / Société de développement de l'industrie des médias de l'Ontario | QUEBECOR Fund | CMPA Canadian Media Production Association | DGC DIRECTORS GUILD OF CANADA ONTARIO | TELEFILM CANADA | Nordicity | ENVIRONICS RESEARCH GROUP

PRESENTING PARTNERS — SUPPORTING PARTNERS — RESEARCH PARTNERS

WIFT WOMEN IN FILM & TELEVISION TORONTO

Table of Contents

List of Figures 4

List of Tables 4

Acknowledgements and Disclaimers 5

Executive Summary 7

1. Introduction 15

1.1 Project mandate 15

1.2 Research approach and methodology 16

1.3 Report structure 18

2. Background 19

2.1 The screen-based industries 19

2.1.1 Film and television production 19

2.1.2 Film and television distribution 20

2.1.3 Broadcasting 20

2.1.4 Digital media 21

2.2 Changes in the workplace since 2004 22

3. Economic profiles of designated groups 24

3.1 Basic profiles of designated groups by employment 24

3.2 Comparison of average annual earnings in Canada 29

3.3 Pay equity and average pay in the screen-based industries 30

3.4 Employment by occupation category 35

3.5 Age of employment 42

3.6 Regional concentration 43

3.7 Type of employment 45

3.8 Profile summary 48

4. Employment and the workplace 50

4.1 Recruitment 50

4.1.1 Recruitment: employer-side challenges 50

4.1.2 Recruitment: worker-side challenges for designated groups 56

4.1.3 Recruitment: the market as a driver for change 58

4.2 In-Career training 59

4.3 Career path progression 62
4.3.1 Career path progression: networking challenges 65
4.3.2 Career path progression: attitudinal barriers 66
4.3.3 Career path progression: "the leaky pipeline" 67
4.4 Workplace issues 68
4.4.1 Workplace issues: work-life balance 70
4.4.2 Workplace issues: overcoming perceptions 72
4.4.3 Workplace issues: unwelcoming work environments 73
5. Impact of new technology 75
6. Conclusions 78
6.1 Overall progress 78
Appendices 82

List of Figures

Figure 1 Change in representation of designated groups between 2001 and 2006: total workforce, communications sector as reported by federally regulated private sector employers and motion picture and video industries 27
Figure 2 Average earnings, NAICS 5121 motion picture and video industries and NAICS 515 broadcasting (except Internet), worked full-time, full-year 2006 32
Figure 3 Average earnings, NAICS 5121 motion picture and video industries and NAICS 515 broadcasting (except Internet), worked part-year, part-time, 2006 32
Figure 4 Key creative positions by job description, by designated group, film and television production industry 36
Figure 5 Percentage of designated groups employed per job description, broadcasting 38
Figure 6 Broadcasting employment by job occupation, Aboriginal people 39
Figure 7 Broadcasting employment by job occupation, visible minorities 40
Figure 8 Broadcasting employment by job occupation, persons with disabilities 40
Figure 9 Women and visible minorities employed per job description, distribution (%) 41
Figure 10 Labour force by age group and sex, NAICS code 5121 - motion picture and video industries, 2006 43
Figure 11 Labour force regional distribution, motion picture and video industries and broadcasting (except Internet), Canada, 2006 44
Figure 12 Film and television worker regional representation (all survey respondents) 44
Figure 13 Equity groups by province (film and television production) 45
Figure 14 Full-time versus part-time workforce, motion picture and video industry, 2006 46
Figure 15 Type of employment, women in film and television production, 2011 46
Figure 16 Film and television distribution employment, by employment type and by designated group 47
Figure 17 Broadcasting employment by employment type and by designated group 47
Figure 18 Full-time versus part-time workforce, broadcast (except internet), 2006 48
Figure 19 Recruitment issues by point score (film and television production) 51
Figure 20 Recruitment issues by point score (film and television distribution) 51
Figure 21 Recruitment issues by point score (broadcasting) 52
Figure 22 Recruitment issues by point score (digital media) 53
Figure 23 Workplace issues by designated group (film and television production) 69
Figure 24 Workplace issues by designated group (broadcasting) 69
Figure 25 Workplace issues by designated group (digital media) 70

List of Tables

Table 1 Direct film and television production employment, Canada, 2005 to 2010 19
Table 2 Total number of film and television distribution establishments in Canada, 2006 to 2008 20
Table 3 Employment profile of the film and video distribution industry, Canada, 2006 to 2009 20
Table 4 Average weekly number of employees by type of broadcaster, Canada, 2006 to 2010 21
Table 5 Digital media employment, Canada, 2008 21
Table 6 Total workforce population by employment equity group, Canada, 2001 and 2006 24
Table 7 Canadian labour force by NAICS code 5121 – motion picture and video industries, 2001, 2006 25
Table 8 Canadian broadcasting labour force comparison by NAICS code 515, HRSDC and company-level survey results 27
Table 9 Representation of designated groups as reported by federally regulated private sector employers 27
Table 10 CBC hiring and promotion rates for designated groups, 2000 to 2009 28
Table 11 Average employment income, total workforce and all occupations, full-year, full-time employment, in Canada, 2001, 2006 29
Table 12 Average employment income, total workforce and all occupations, some work activity in the reference year, in Canada, 2001, 2006 ($) 30
Table 13 Game play characteristics of casual and hard-core enthusiasts 58
Table 14 Senior level representation of women and visible minorities in the screen-based industries, 2011 63
Table 15 Full-time employment by occupation unit NAICS 5121 - motion picture and video industries, 2001, 2006 64
Table 16 Full-time employment by occupation unit NAICS 515 – broadcasting (except Internet) 2006 64
Table 17 Average earnings, NAICS 5121 motion picture and video industries and NAICS 515 broadcasting (except Internet), 2006 82
Table 18 Workforce by employment equity occupational group: Senior Managers, Canada, 2001 and 2006 82
Table 19 Workforce by employment equity occupational group: Middle and Other Managers, Canada, 2001 and 2006 82
Table 20 Broadcasting job occupations by proportion of designated group representation, company-level survey 83

Acknowledgements and Disclaimers

Frame Work II was commissioned by Women in Film & Television – Toronto (WIFT-T). With thanks to the Advisory Committee, chaired by Susan Ross.

***Frame Work II* Advisory Committee:**

Susan Annis, Executive Director, Cultural Human Resources Council of Canada
Susanne Bell, CEO & Film Commissioner, SaskFilm
Jennifer Brown, Research Consultant, Ontario Media Development Corporation
Hans Fraikin, Film Commissioner, Quebec Film & Television Council
Kim Haladay, Development Manager, WIFT-T
Gail Harvey, Director, Directors Guild of Canada
Katie Jeffs, Director, Membership Development & Outreach, Canadian Media Production Association
Ian Kelso, CEO, Canadian Interactive Alliance
Derek Luis, Principal Analyst, Quebecor Fund
Cynthia Lynch, Manager, Research & Strategic Planning, Ontario Media Development Corporation
Robert Maxwell, Analyst, Research and Strategy, Telefilm Canada
Muriel Solomon, Senior Director of Marketing, Specialty, Shaw Media
Susan Ross, Partner, ISM Access; *Frame Work II* Chair
Peggy Thompson, Executive Producer and Writer, Rave Film; Board Director, WIFT Vancouver
Heather Webb, Executive Director, WIFT-T
Diane Williamson, President, Digital Wizards
Akhaji Zakiya

***Frame Work II* Coordinator:**

Consuelo Solar

WIFT-T and Nordicity would like to acknowledge that funding for this study was provided by:

Presenting Partners:

FOUNDATION FOR WIFT WOMEN IN FILM & TELEVISION TORONTO

Ontario
Ontario Media Development Corporation
Société de développement de l'industrie des médias de l'Ontario

QUEBECOR Fund

Supporting Partners:

CMPA Canadian Media Production Association Screen-based entrepreneurs

DGC DIRECTORS GUILD OF CANADA ONTARIO

TELEFILM CANADA

WIFT WOMEN IN FILM & TELEVISION TORONTO

Research Partners:

Frame Work II was prepared by Nordicity Group Ltd.

Peter Lyman, Project Director
Julie Whelan, Project Manager
Kristian Roberts, Survey Design and Analysis
Mila Dechef-Tweddle, Research and Analysis

The *Frame Work II* surveys were deployed by Environics Canada under the supervision of Donna Dasko and Derek Leebosh.

WIFT-T and Nordicity would also like to extend a heartfelt thanks to the individuals and organizations who took the time to participate in the surveys and interviews for this study.

Any opinions, findings, conclusions or recommendations expressed in this material are those of the authors and do not necessarily reflect the views of the supporting departments, agencies and other partners.

The Government of Ontario and its agencies are in no way bound by the recommendations contained in this document.

Women in Film & Television – Toronto
110 Eglinton Avenue East, Suite 601
Toronto, Ontario M4P 2Y1
t: 416.322.3430
f: 416.322.3703
e: wift@wift.com
w: www.wift.com

Executive Summary

Background and mandate

Women in Film & Television – Toronto (WIFT-T), with support from the Foundation for Women in Film & Television – Toronto, the Ontario Media Development Corporation, Quebecor Fund, Telefilm Canada, the Canadian Media Production Association and the Directors Guild of Canada – Ontario, engaged Nordicity and Environics to update the pivotal 2004 study, Frame Work: Employment in Canadian Screen-Based Media — A National Profile (Frame Work). This update, Frame Work II: Canada's Screen-based Workforce (Frame Work II), provides a snapshot of the employment of equity groups in Canada's screen-based industries in the context of today's business and technological developments.

As for the 2004 *Frame Work, Frame Work II*'s mandate is to provide insight on employment trends in Canada's screen-based industries with a particular focus on the participation of women, Aboriginal people, visible minorities and persons with disabilities.

The screen-based industries and designated groups

In the context of this report the screen-based industries are composed of four, at times overlapping, industries: i) film and television production, ii) film and television distribution, iii) broadcasting, and iv) digital media.[1] Together, these four industries employ some 85,000 full-time equivalent workers in Canada.

This report addresses employment diversity and equity in the screen-based industries, drawing on the definitions of designated groups[2] put forward in Canada's *Employment Equity Act*: i) Women, ii) Aboriginal peoples,[3] iii) Persons with disabilities,[4] and iv) Members of visible minorities.[5]

Rationale and objectives for this study

WIFT-T views the active support and promotion of designated groups' participation at all levels of employment in the screen-based industries as more than an issue of equal representation. WIFT-T's assumption is that the more diverse the screen-based industries are in Canada, the more creative, innovative, competitive and successful they stand to become.

WIFT-T's intent for *Frame Work II* is that its study's findings i) enlighten key industry decision-makers by providing them with a snapshot of the current workforce, including the challenges and opportunities it faces and ii) drive policy and promote educational programs on national and provincial levels.

---

[1] "Digital media includes several types of interactive content available through a variety of digital platforms. This includes but is not limited to games, news, stories, comedy, videos and audio. This content can be delivered via a variety of devices including computers, game consoles and mobile devices." *Interactive Digital Media Industry Profile*, OMDC, March 1, 2011. http://www.omdc.on.ca/AssetFactory.aspx?did=6564

[2] Note that an individual worker may at any time identify with none, one or several of these groups.

[3] "persons who are Indians, Inuit or Métis" *Employment Equity Act.*

[4] "persons who have a long-term or recurring physical, mental, sensory, psychiatric or learning impairment and who (a) consider themselves to be disadvantaged in employment by reason of that impairment or (b) believe that a employer or potential employer is likely to consider them to be disadvantaged in employment by reason of that impairment, and includes persons whose functional limitations owing to their impairment have been accommodated in their current job or workplace." *Employment Equity Act.*

[5] "persons, other than aboriginal peoples, who are non-Caucasian in race or non-white in colour." *Employment Equity Act.*

Frame Work II key findings

Findings are drawn from an analysis of primary and secondary research. Primary research consisted of (i) surveys of workers and companies across the screen-based industries and (ii) 25 key informant interviews with individuals actively engaged in senior positions in the screen-based industries or others with relevant experience. Secondary research included reviews of census data and other relevant studies that were publicly available.

While survey participation was strong in the film and television production, distribution and broadcasting industries, the digital media industry proved more difficult to access. As a result, additional interviews with digital media experts were conducted to bolster the portrait of employment diversity in that industry. *Frame Work II*'s nine key findings are presented below, divided into five themes: (i) Workforce participation and recruitment, (ii) Earnings, (iii) Training, (iv) Career path progression, and (v) Workplace issues.

Workforce participation and recruitment

1. While there is some progress in the representation of most designated groups in the screen-based sectors, such progress is not always consistent or smooth, nor does it keep pace with the employment of designated groups in Canada's overall workforce.

- Drawing on Human Resources and Skills Development Canada ("HRSDC") Employment Equity data for the broadcasting industry,[6] we are able to contrast the participation of all designated groups with their participation in the overall workforce.[7] Census data for the motion picture and video industries[8] allows us to compare the participation of women and visible minorities to their participation in the overall workforce.
- Although women increased their participation in the overall workforce by 10% between 2001 and 2006, they did not increase their participation in the motion picture and video and broadcasting industries:
  - In fact it declined slightly; by 0.8% in motion picture and video, and by 1.7% in broadcasting.
  - Progress for women in broadcasting has been relatively flat since 1987, although between 1987 and 2001 women experienced minor gains (from 39.6% to 41.3%) compared to the minor decline in broadcasting since 2001.[9]
  - Interviewees in film and television production indicated that women tend to receive fewer contracts in a year (for work both in-front of and behind the camera), and also tend to work in greater numbers on smaller, lower-budget contracts where there are fewer hours of work overall.
- The participation of visible minorities in the total workforce increased more than did their participation in either the motion picture and video industries or in broadcasting:

---

[6] *HRSDC Employment Equity Act Annual Report*, 2008, 2009.
[7] *Employment Equity Data Report* 2001, 2006.
[8] NAICS 5121: motion picture and video industries "comprises establishments primarily engaged in producing and/or distributing motion pictures, videos, television programs or commercials; exhibiting motion pictures or providing post-production and related services." Source: Statistics Canada Industry Classifications, NAICS 2007.
[9] *HRSDC Employment Equity Act Annual Report*, 2008, 2009.

  - Visible minorities' participation in the total workforce rose 31% between 2001 and 2006 and by 26% in the motion picture and video industries.
  - Between 2001 and 2006 the proportion of visible minorities working in broadcasting increased 28%. Gains also continued through 2007 and 2008.
- Aboriginal people in the total workforce increased their participation by 30.2% between 2001 and 2006 to reach 3.1% of the total workforce:[10]
  - In broadcasting the proportion of Aboriginal people in the workforce grew 12.2% between 2001 and 2006, to reach 1.5% of the total broadcasting workforce.[11]
- Persons with disabilities accounted for 4.7% of the total workforce in 2006, and experienced growth of 1.0% between 2001 and 2006. Their participation in the broadcasting industry grew by 13.8% in the same period to reach 2.5% of that industry.[12]
- In the broadcasting industry, growth in representation of all designated groups was stronger between 1987 and 2001 than between 2001 and 2008.

2. There remains a relationship between gender and job description in the screen-based industries. Women have made progress in decision-making and creative positions in film and television production and broadcasting, but remain under-represented in technical roles across all screen-based industries.

- The screen-based worker survey was completed by a higher proportion of women than men (3:1 ratio); however, we are still able to extract insights applicable to the industry as a whole. 82% of survey respondents who were in key creative positions (Director, Producer, Director of Photography and Screenwriter) were women.[13] This high proportion will relate, in part, to the high number of women respondents overall and is therefore unlikely to reflect the landscape. A recent US study, for example, observes that women comprise 25% of individuals working as Creators, Directors, Writers, Producers, Executive Producers, Editors and Directors of Photography on broadcast television.[14]
- Conversely, 1% or less of women survey respondents working in the film and television production industry held more technical occupations such as Sound Engineer, Camera Operator, Special Effects, Post-production Supervisor, Director of Photography or Visual Effects artist.
- In broadcasting, according to the company-level survey, women outnumber men in occupation categories such as: Clerical and Administrative (79.8%); Human Resources (77.7%); Communication, Promotion and Marketing (68.9%); Business Affairs, Legal, Finance and Accounting (67.2%); Advertising Sales (61.7%); Program Sales (61.6%) as well as Rights and Program Acquisition (59.6%).
- Conversely, women were significantly under-represented in occupation categories such as Broadcast Engineering and other Technical (13.2%) and IT (25.4%) and *somewhat* under-

---

[10] 2006 Census, Statistics Canada.
[11] *HRSDC Employment Equity Act: Annual Report 2009.*
[12] *HRSDC Employment Equity Act: Annual Report 2009.*
[13] Of the survey respondents, the participation of designated groups in the key creative positions was: Aboriginal people (1.8%), visible minorities (7.9%) and persons with disabilities (1.2%).
[14] *Boxed In: Employment of Behind-the-Scenes and On-Screen Women in the 2010-11 Prime-time Television Season*, Center for the Study of Women in Television & Film, 2011.

represented as Interactive and Digital Media Producers (41.8%), Original Production and Development (45.1%) and On-air Talent (48.6%).

3. The screen-based industries' supply pool of graduates appears (anecdotally) to be more diverse than in past generations but the level of diversity is inconsistent by industry and designated group. Further, a diverse cohort of graduates is not a sufficient condition for increasing diversity in the screen-based industries' workforce.

- Interviewees perceived strong growth in the diversity of graduates of formal-training institutions, except in digital media programs where progress (for women in particular) is perceived to be far slower.
- As it can take years for graduates to enter the workforce and move up the ranks successfully, it will be years before a more diverse supply of entrants alone will be able to have a tangible impact on diversity in the overall workforce, especially in higher level positions.
- The participation rates of designated groups among students in education and training programs does not always transfer to the workforce. There appears to be a disconnect between the education and training supply pool and the screen-based industries' workforce.
- Interviewees questioned whether designated groups might not be attracted to the screen-based industries (and to their associated training programs) in the first place, because they do not see themselves represented or portrayed sufficiently in either the content it produces or in the workforce behind the camera.

4. The market is an effective driver of change when a compelling business case can be made about the connection between a more diverse workforce (and more diverse content) and an increase in sales and enhanced competitiveness.

- While women have long been a coveted target market segment in television, only recently have they been perceived as a lucrative market segment in digital media, particularly in casual gaming for example. Similarly, diversity is beginning to be embraced more readily in the content of games and digital media projects; for example, visible minority protagonists are beginning to feature more often in mass-market games.
- Demonstrating how women and other designated groups are both important consumers of screen-based content and buyers of screen-based technology begins to build a business case for business owners about the importance of appealing to these previously overlooked market segments.
- Business owners, decision-makers and industry leaders may then be increasingly compelled to enhance the diversity of their teams in development, production and distribution of screen-based content.
- "Real-time" digital metrics such as Google Analytics are central to understanding and appreciating the diverse nature of the marketplace. As the screen-based industries grow increasingly sophisticated at engaging audiences online and traditional audience measurement tools improve, it should become easier for firms to measure their audience profile.

Earnings

5. Gender-based disparities in average earnings persist across the screen-based industries, which may be the result of a greater proportion of women in lower paid positions and occupations.

- Based on the 2006 Census, the average earnings for women working full-time in broadcasting are $53,005 per year, as compared to $67,825 for men. In this case, men earn 109.5% of the average salary of the total workforce and women earn 85.6% of the average salary of the total workforce.[15]
- Again, based on the 2006 Census, the average earnings for women working full-time in motion picture and video industries (film and television production) are $50,719 per year, as compared to $56,994 for men.[16] In this case, men earn 104.1% of the average salary of the total workforce and women earn 92.6% of the total workforce average.[17]
- In film and television distribution, women accounted for 48% of specialized managers captured by the company-level survey while they only accounted for 32% of senior managers.
- The worker-level survey results show that, on average, women working in film and television production tend to earn 6.8% less than the overall average with the most significant gender-based pay difference occurring for the position of Director, in which women reported earning 16.5% less than the overall average.
- As highlighted above, women in broadcasting outnumber men in typically lower-paid occupation categories, for example in Clerical and Administrative and Human Resource roles, while 50% of surveyed broadcasters indicated that they have no representation of women at all at the Board or ownership level (typically higher-earning categories).
- At 4.9, the average number of annual engagements for female contract workers in film and television production is slightly lower than the overall sample average of 5.2 engagements.
- Notably, according to interviewees, the greater the level of transparency in an industry or organization, the greater the chance of pay equity amongst all employees.

Training

6. Training is not a panacea for hiring or for progressing further in one's career in the relationship- and project experience-driven screen-based industries. Further, interviewees expressed that proactive career management is often a challenge for members of designated groups, even though it is often more important for members of designated groups to possess these skills than for the rest of the workforce.

- While often difficult to obtain, on-the-job or on-project experience (outside of the classroom) is important for new entrants and graduates wishing to succeed in the screen-based industries. Indeed, this experience is vital for all workers but can be particularly difficult for designated groups to access due to a lack of established networks, visible role models and the presence of other systemic barriers.

---

[15] Census 2006, Statistics Canada.
[16] Census 2006, Statistics Canada.
[17] Census 2006, Statistics Canada.

- Reports suggest that business skills are generally lacking in cultural industries. Notably, survey results showed that just 17% of women in film and television production who accessed training in the past year accessed business skills training.
- Among digital media firms that participated in the company-level survey, the most pressing recruitment issue was that "graduates don't have the appropriate skills" followed by "lack of new entrants"—highlighting the need for more, and more highly-skilled graduates.
- In general, lack of access to training was not identified as a major issue for designated groups in the screen-based industries. However, in some cases the structural barriers that all workers face in accessing training (lack of funds, time constraints) may be heightened or amplified for certain designated groups.

Career path progression

7. The "old boys' club" still commands authority, particularly in the film and television production, film and television distribution and broadcasting industries. Some interviewees stated that while networking barriers were breaking down, the location of the barrier has simply shifted. The "glass ceiling" continues to exist for women, but it has moved up a level of seniority.

- The 2006 Census data shows that in the broadcasting and motion picture and video industries, the representation of women and visible minorities declined as each group advanced to more senior roles. For example, women accounted for 52% of specialized managers in the motion picture and video industries, but just 25% of senior managers.[18]
- In broadcasting, 50% of surveyed firms indicated that they have no representation of women at the board or ownership level. Similarly, 90% of firms had neither Aboriginal people nor persons with disabilities at the board/ownership level. None of the broadcasters surveyed have visible minority representation at the board or ownership level.
- Interviewees perceived that women have made good progress up the career ladder since 2004 but continue to have trouble penetrating the highest echelons of the screen-based industries. Interviewees believed that other designated groups have not enjoyed the same degree of progress as women in this area.
- Across the screen-based industries, interviewees cited the time that women sacrifice for maternity leave as a major barrier to career progression. This situation has worsened in the face of rapid technological and business process changes in the industry, meaning that absences from the workforce require more of a catch-up. As well, competition is keener, so leaving the workforce, even for a short time, is a bigger disadvantage than it was in the past when changes in the industry happened more gradually and at a slower pace than they do today.

[18] *Full-time employment by occupation unit NAICS 5121 - motion picture and video industries*, Census 2006, Statistics Canada.

Workplace Issues

8. "Work-life balance" is the workplace issue identified as the most significant in terms of its impact on recruitment and career progression across the screen-based industries. Some interviewees claim that this issue is still basically not considered a problem for which appropriate measures should be taken by employers in these industries.

- 41% of all worker-level survey respondents (men and women) identified work-life balance as a "significant" or "severe" issue.
- Multiple interviewees described the screen-based industries, with particular emphasis on film and television production, as challenging for working mothers and "unfriendly" for workers with families.

9. Members of designated groups still face great challenges in overcoming negative perceptions about their abilities in the workplace.

- Some interviewees indicated that discrimination based on persistent but hidden perceptions such as (i) social stereotypes, (ii) negative attitudes, and (iii) general misperceptions still occurs and can affect hiring and promotion decisions regarding members of designated groups.
- 16% of Aboriginal people who responded to the worker-level survey identified "overt discrimination" as having a "severe" or "significant" impact on their workplace.
- A major challenge for members of employment equity groups in the screen-based industries is coping with workplace environments that are unwelcoming or unaccommodating to their unique needs and/or sensibilities. Persons with disabilities, for example, face intense attitudinal and architectural barriers (such as building access) across the screen-based industries.

Conclusions

While forming recommendations is outside the scope of this report, Nordicity has identified three "pressure points for positive change" through a synthesis of interviews, secondary research and survey results. These pressure points are as follows:

Demonstrate the market's buying power to influence change
Early on, certain organizations may have instituted diversity policies for employment because they were required to do so; now many are beginning to recognize the tangible business rewards of encouraging a more diverse culture. Demonstrating how women and other designated groups are both important buyers of smart phones, apps and casual games, as well as vital team-members in the production and distribution of content, is a compelling business case for decision-makers, business owners and industry leaders. As they recognize the growing diversity of their audience, these leaders may, in turn, be more likely to actively promote change in their organizations. This message is particularly relevant in an era where vertical integration means there is management interested in a wider view of communications, not just the silos of broadcasting, distribution and production.

Change requires leadership, not just more training

CRTC and regulatory interventions have only limited impact and ability to spur actual change in the representation of designated groups in the screen-based industries. Similarly, increased training for designated groups is, alone, unlikely to create measurable change.
One road to measurable change requires industry and business leaders to shift from simply being "open" to a more diverse workforce, to demonstrating an active determination to change the status quo. Evidence of this shift could come, for example, in the form of hiring, nurturing and promoting strong candidates from designated groups and commitment to increasing on-screen diversity. Whether a leadership shift comes in response to the business case for stronger representation or in reaction to public pressure, diversity in the workplace stands a stronger chance if it is a priority vocalized and acted on at the apex of organizations.

Public momentum may influence change

One interviewee described the struggles of "outsider groups" such as visible minorities, Aboriginal people and persons with disabilities today as very similar to what she experienced as a woman in the industry years ago. To her the vital difference was that her struggle occurred in the midst of the women's liberation movement, among myriad regulations, laws, growing public support and political pressure to help women cut a path into the workplace. In this time, associations such as Canadian Women in Communications and WIFT-T received funding and became powerful allies for women to find their way and gain a strong foothold in the industry.
Today, however, there is no organization serving "outsider groups" that has quite the same level of support. In addition, only those organizations that are in the business of representing that single designated group's issues will be knowledgeable enough of their unique needs. Still, as long as all of these smaller groups continue to work in isolation toward similar goals, it will continue to be difficult to drive broader-reaching change and increase the inclusion of all designated groups in the screen-based workforce.

Overall, in the 2011 snapshot of the representation of designated groups in the screen-based industries we find that:

1) Certain factors, such as diversity among university graduates, the advancement of women to more senior roles as well as more visible designated group representation in potential role models for younger generations, have led to some progress in the screen-based industries. As firms face increasing pressure and workplaces become more competitive, however, issues such as lack of work-life balance and hidden, negative perceptions become a greater challenge and barrier to the advancement of designated groups;

2) While training for the digital transition continues to be a high priority across all the screen-based industries, designated groups in the main centres of screen-based activity are not disadvantaged more than the total workforce in terms of access to training; and

3) The more the consumer market becomes diverse, the more pressure there is to make the workforce diverse in a competitive environment.

This report shows how important it is to keep tracking the progress of designated groups in the screen-based industries, but also demonstrates the challenge of accessing the necessary data in such a varied workforce. In an effort to continue such tracking, this report presents a range of issues for discussion at future conferences among key stakeholders on what strategies might be proposed for effective future success in this arena.

1. Introduction

This short introductory section reviews *Frame Work II's* 1) Project mandate, 2) Research approach and methodology, and 3) Report structure.

1.1 Project mandate

Women in Film & Television – Toronto (WIFT-T),[19] with support from the Foundation for Women in Film & Television – Toronto, the Ontario Media Development Corporation, Quebecor Fund, Telefilm Canada, the Canadian Media Production Association and the Directors Guild of Canada – Ontario, engaged Nordicity and Environics to update the pivotal 2004 study, *Frame Work: Employment in Canadian Screen-Based Media — A National Profile* (Frame Work). This update, *Frame Work II: Canada's Screen-based Workforce* (Frame Work II), provides a snapshot of the employment of equity groups in Canada's screen-based industries in the context of today's business and technological developments.

Frame Work II's mandate is to provide insight on employment trends in Canada's screen-based industries with a particular focus on the participation of women, people from culturally diverse backgrounds and persons with disabilities.

In the context of this report the screen-based industries are composed of four, at times overlapping, industries: i) film and television production, ii) film and television distribution, iii) broadcasting, and iv) digital media.[20]

In addition, the report discusses employment diversity and equity in the screen-based industries, drawing on the definitions of designated groups put forward in Canada's *Employment Equity Act*:

1) Women;
2) Aboriginal peoples - persons who are Indians, Inuit or Métis;
3) Persons with disabilities - persons who have a long-term or recurring physical, mental, sensory, psychiatric or learning impairment, and who (a) consider themselves to be disadvantaged in employment by reason of that impairment or (b) believe that a employer or potential employer is likely to consider them to be disadvantaged in employment by reason of that impairment, and includes persons whose functional limitations owing to their impairment have been accommodated in their current job or workplace; and
4) Members of visible minorities - persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour.[21]

---

[19] Founded in 1984, Women in Film & Television – Toronto (WIFT-T) is a not-for-profit professional organization that supports women in screen-based media—film, television and digital media—to build, advance and sustain their careers nationally and internationally. WIFT-T's mission is to enhance the skills of its members so they can become significant decision-makers at all levels of the industry. This goal is achieved by providing access to high quality programming, mentoring, networking and industry events that recognize the talents and potential of women.

[20] "Digital media includes several types of interactive content available through a variety of digital platforms. This includes but is not limited to games, news, stories, comedy, videos and audio. This content can be delivered via a variety of devices including computers, game consoles and mobile devices." *Interactive Digital Media Industry Profile*, OMDC, March 1, 2011. http://www.omdc.on.ca/AssetFactory.aspx?did=6564

[21] *Employment Equity Act*, pp. 1-2.

It should be noted that an individual worker may at any time identify with none, one or more than one of these groups.

WIFT-T's intent for *Frame Work II* is that its study's findings i) enlighten key industry decision-makers by providing them with a snapshot of the current workforce, including the challenges and opportunities it faces and ii) drive policy and promote educational programs on national and provincial levels.

As part of the creative business sector, one of the screen-based industries' most important and valuable resources is its people. Canada's increasingly diverse population is a source of enormous creative and economic potential and a key factor in the screen-based industries' global competitive advantage. In WIFT-T's view, actively supporting and promoting the participation of designated groups at all levels of employment in the screen-based industries is more than an issue of equal representation; it also makes good business sense. The more diverse the screen-based industries in Canada are the more creative, innovative, competitive and successful they stand to become.

1.2 Research approach and methodology

To conduct this study Nordicity employed three mutually supportive research tools: online surveys, targeted interviews and secondary research. Each tool has particular strengths and drawbacks. Surveys can yield great amounts of data, but are prone to issues of representivity in that a sample of respondents will not always be statistically representative of a wider segment of the population. Survey responses can also be subject to biases if certain segments have higher response rates than others. Interviews generate a wealth of qualitative data, but do not necessarily always represent the experiences of designated groups, rather they will more likely yield general observations about the screen-based industries overall. Secondary research provides a broader statistical base, but the data may be dated, may not represent the designated groups, and therefore may not be comparable. By combining these approaches we balance the drawbacks of each.

For the survey component, two parallel surveys were conducted. First, we employed a worker-level survey[22] to capture the perspective of those screen-based industry workers who are not employed by a firm on a full-time basis, such as the majority of the film and television production industry. We also conducted a company-level survey[23] to address those screen-based industries where full-time employment is the norm (viz. broadcasting), and where key producing companies (viz. production companies and digital media development companies) employ a critical mass of full-time staff.

For the **worker-level survey**, we received 611 total responses:

- Of these responses the overwhelming preponderance were English-speaking (578), women (470) and were located in Ontario (354). Similarly, the majority of responses were film and television workers (543); of these, 394 were women in the film/TV production industry. As a result, the sample size is large enough to perform several analyses on women working in the film and television production industry in Ontario.

[22] WIFT-T Worker-level survey, conducted by Nordicity and Environics, 2011.
[23] WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011.

- Conversely, samples of men, French language respondents, other designated groups and other screen-based industries are too small to be representative of their particular group—but can form part of the overall worker sample.
- For the most part, the survey was distributed through industry associations (e.g., the Directors Guild of Canada), whose membership is not oriented to a particular designated group. However, the survey was also distributed to the WIFT-T membership, which is mainly composed of women. This group accounted for the largest group of respondents to the worker-level survey. As such, it is logical to assume that women's perspectives are over-represented in the survey results.

For the **company-level survey**, we received 58 total responses:

- Of these responses, 10 were from broadcasters representing more than 27,000 full-time employees and 1,900 part-time employees—a significant portion of Canada's broadcasting industry. While the majority (70%) of these firms are located in Ontario, it should be pointed out that they are (in almost all cases) national broadcasters and are responding on behalf of employees located across Canada.
- At the same time, responses were received from five film and television distribution companies representing over 400 employees. Again, this response rate was deemed to be sufficient to represent a significant portion of the film and television distribution industry. However, it should be noted that two of Canada's largest film and television distribution firms (Maple Pictures and Alliance Films) were in the process of executing a corporate merger over the course of the study period and therefore were not able to contribute to the study.
- Response rates from film and television production (26 firms representing 420 employees) and digital media (17 firms representing 272 employees) companies were not sufficient to be deemed representative of their respective screen-based industries. Accordingly, the study draws upon data from the worker-level survey for the film and television production industry and upon interview and secondary research data for the digital media industry.

Interviews provided additional context, which was particularly important for areas where data was lacking: e.g., for digital media worker and company perspectives, and for any other non-production parts of the industrial ecosystem that were not statistically significant enough to be accurately profiled from the data. Nordicity conducted a total of 25 interviews with key stakeholders from the screen-based industries in order to gather experienced perspectives on diversity and equity issues and gain a deeper understanding of the mechanisms behind these issues. Nordicity and WIFT-T selected the interviewees using a series of eligibility criteria in order to ensure that as many perspectives were captured as possible, such as 1) Designated group representation, 2) Representation across the four screen-based industries, 3) Regional perspectives from across Canada, 4) Human resources experts (e.g., from employment/recruitment and training/career development organizations as well as unions and guilds), and 5) Industry experts (e.g., recruited from industry organizations, associations and funding agencies).

Nordicity used **secondary research** in a number of ways in order to lend context to the study; where relevant, secondary research was used to contextualize, support or enrich study findings.

- First, Nordicity conducted a scan of recently published research on the topic of diversity and equity in the screen-based industries. While Nordicity did review a number of publications from international jurisdictions (e.g., U.S., UK, and Australia), *Frame Work II*'s focus is on the status of employment in the screen-based industries in Canada. Thus, there is no international

comparison or benchmarking discussed in the analysis of this study. *Frame Work II* draws primarily on the few existing studies that originate in Canada, in order to give context and enrich the findings presented throughout.

- Nordicity also drew upon existing industry studies and economic profiles of the four screen-based industries (as defined within the context of this study), which were used in order to provide background about the structure of the industries as well as context about the overall workforce of each industry.
- Finally, Nordicity drew on secondary data sources such as Census data, the Statistics Canada Employment Survey and data collected by Human Resources and Skills Development Canada (HRDC) in order to contextualize the results of this study in the broader national employment picture.

1.3 Report structure

After presenting brief profiles of each screen-based industry, the report is structured as far as possible around the trajectory of a full career.

First, we review basic employment for each screen-based industry and designated group. Then, we move on to discuss representation in terms of hiring and recruitment, skills and training and, finally, career progression. Next, we discuss workplace issues identified in the surveys and their impact on employment and career progression. We close with a summary of overall progress and the study's findings. While recommendations are outside the scope of this report, we also provide a snapshot of what we describe as "pressure points for change". In other words, we make a few broad observations about potential areas for interventions based on an integration of the evidence presented to the study team.

Throughout the report we employ anecdotes and vignettes to add a human dimension to statistics and figures cited in the report and, where possible, refer to highlights from other significant studies in order to clarify or amplify this study's findings.

It should be noted that there has been a lack of research conducted in the area of diversity in Canada's screen-based industries since the 2004 *Framework* study (the majority of studies conducted since 2004 originate in Québec). Similarly, there is very little current research on equity issues relating to Aboriginal people, visible minorities or persons with disabilities in the screen-based industries. Existing research tends to focus on film and television production and broadcasting based on the CRTC's *Diversity Reports*. Current data on the digital media industry is also extremely limited, research into diversity or employment in that industry even more so.

2. Background

In this background section, we outline the four screen-based industries covered in this report, provide a basic snapshot of employment in these industries and identify changes that have impacted the workplace in the screen-based industries since 2004.

2.1 The screen-based industries

In the context of this report, the screen-based industries are composed of the four industries identified in section 1.1, above. In this report, the screen-based industries are primarily those industries that create and distribute cultural and entertainment content. The following sub-section will include both quantitative and qualitative details about each of the screen-based industries such as size (measured by the number of companies) and top-line employment levels.

2.1.1 Film and television production

The film and television production industry in Canada is a major source of economic activity and jobs for Canadians. Of the three key sectors that comprise the film and television production industry,[24] Canadian television and theatrical production, made up for the most part of independent production companies, is the largest in production value and employment.[25]

Similarly, independent film and television production (as measured by full-time equivalent employment) is the largest of the four screen-based industries covered in this report. Canadian film and television production industry employment declined overall between 2006 and 2009, but stayed relatively flat between 2009 and 2010. The compound annual growth rate (CAGR), between 2005 and 2010 was -0.8%.

Table 1 Direct film and television production employment, Canada, 2005 to 2010

	2005	2006	2007	2008	2009	2010	CAGR* 2005-2010
Full-time equivalents	48,700	51,400	51,100	51,300	46,800	46,100	-1.1%
[Less broadcaster in-house production]	11,700	10,400	11,600	11,200	11,200	10,500	--
Independent Production Total	**37,000**	**41,000**	**39,500**	**40,100**	**35,600**	**35,600**	-0.8%

Source: Profile 2010: An Economic Report on the Canadian Screen-based Production Industry
*CAGR: Compound Annual Growth Rate

The Canadian Media Production Association (CMPA) 09/10 Industry Guide lists 908 production companies across Canada. Many of these firms are micro-enterprises with between one and four employees, with select small-to-medium enterprises (SME), employing between five and 499 workers. Individual productions employ far larger numbers for roles in-front of and behind the camera, but always for limited periods of time during the shooting part of the production process.

---

[24] 1) Canadian Production, 2) Foreign Location and Service Production, and 3) Broadcaster In-House Production.
[25] *Profile 2010: An Economic Report on the Canadian Screen-based Production Industry*, CMPA, 2011, p. 4.

2.1.2 Film and television distribution

Film and television distributors typically acquire the rights to feature film, television and interactive content in order to distribute that content in domestic and/or foreign markets and on conventional and new platforms. The distributor, however, is not usually itself the physical distributor of content to customers, in the way that broadcasters, online streaming sites such as Netflix and theatrical exhibitors are.

Recently, Canada's film and television distribution industry has been dominated by two or three larger entities and a high number of micro and small establishments. Although the total number of enterprises grew between 2006 and 2008 (Table 2), mergers and bankruptcies have altered the number of Canadian-controlled distributors over the past decade and the number of workers employed in the industry (Table 3). Over the course of this study, for example, Alliance Films announced its acquisition of Maple Pictures, joining the largest and third-largest Canadian-controlled distributors.

The foreign-controlled distributors that are based in Canada employ very few workers in their Canadian offices, sometimes as few as three or four in total. In Table 3 we see a decline in the number of full-time workers between 2006 and 2009 (with the sharpest drop between 2007 and 2008) and a shift to part-time and contract-based employment which experienced compound annual growth of 26.5% over the same period.

Table 2 Total number of film and television distribution establishments in Canada, 2006 to 2008

	2006	2007	2008
Total	66	80	88

Source: Statistics Canada, Special Tabulation

Table 3 Employment profile of the film and video distribution industry, Canada, 2006 to 2009

	2006	2007	2008	2009	CAGR* 2006-2009
Full-time	953	941	820	797	-8.0%
Part-time and contract workers	110	105	109	168	26.5%
Total	x	x	x	**965**	--

Source: Statistics Canada
*CAGR: Compound Annual Growth Rate

2.1.3 Broadcasting

Broadcasting in Canada is a federally regulated industry composed of public broadcasters such as the CBC (Canada's national public broadcaster), conventional for-profit television broadcasters and pay and specialty television services.

Overall employment levels in the broadcasting industry have remained relatively flat between 2006 and 2010, exhibiting a compound annual growth rate of -1.6%. Within the industry, private conventional television broadcasters have seen the largest workforce declines with a compound annual growth rate of -4.6%. At 10.3%, pay television's compound annual growth rate outperforms the other types of broadcasters but the growth is from a very small base. As measured by full-time employment, broadcasting is the third largest of the screen-based industries covered in this report.

Table 4 Average weekly number of employees by type of broadcaster, Canada, 2006 to 2010

	2006	2007	2008	2009	2010	CAGR* 2006-2010
Private conventional television	8,202	8,307	7,972	7,436	6,801	-4.6%
Public and non-commercial television	9,140	9,328	9,164	9,163	8,802	-0.9%
Specialty television†	4,624	4,972	5,120	5,082	4,871	1.3%
Pay television†	294	327	382	432	435	10.3%
Total	**22,259**	**22,934**	**22,637**	**22,113**	**20,909**	**-1.6%**

Source: Statistics Canada
*CAGR: Compound Annual Growth Rate
† The CRTC licensed Canadian pay, pay-per-view, video-on-demand and specialty services starting in the early 1980s. Canadian content requirements vary and are set by conditions of license.

2.1.4 Digital media

The *Canadian Interactive Industry Profile 2008* (CIIP) tells us that the majority of digital media companies (85%) are 100% Canadian owned and, excluding micro-organizations, companies generated $1.1 million in gross average annual revenue in their past reporting year. Further, employees in digital media earn wages on par with the national averages for workers in the information and cultural industries.[26]

Canada faces an enormous challenge when it comes to measuring and monitoring the size and growth of its digital media industry. Presently, Statistics Canada includes the digital media workforce in NAICS code 51 for Information and cultural industries[27] but does not isolate it from telecommunications or broadcasting within that industry classification category, for example. This practice presents a challenge to researchers, industry leaders and others who require consistent and reliable data on the industry and its key performance indicators. The Profile 2010[28] and the CIIP are our primary sources of reliable employment data on this industry.

Table 5 Digital media employment, Canada, 2008

	2008
Full-time equivalent workers	27,000
Digital media "creators" (firms)	1,300

Source: Profile 2010.
*Estimates based on Nordicity survey for CIAIC.

---

[26] *Canadian Interactive Industry Profile*, Nordicity, 2008, p. 6.
[27] NAICS code 51 - Information and Cultural Industries comprises "establishments primarily engaged in producing and distributing (except by wholesale and retail methods) information and cultural products. Establishments providing the means to transmit or distribute these products or providing access to equipment and expertise for processing data are also included. Source: Statistics Canada, North American Industry Classification (NAICS) 2007.
[28] *Profile 2010: An Economic Report on the Screen-Based Production Industry in Canada*, CMPA, 2011, p. 91. *These estimates are based on data from a Nordicity survey conducted for the CIAIC in 2008.

According to Profile 2010, there are approximately 27,000 full-time equivalent workers at approximately 1,300 digital "creator" companies across the country (Table 5). While, at 52,489, the total digital media industry workforce (including all the so-called "enabling" company employees) is almost double this number,[29] the portion of the workforce employed by "creator" companies (27,000) is the most relevant to this study.[30]

The CIIP tells us that while almost 15% of Canada's digital media companies were founded between 2006 and 2008, the majority of firms had been in business for an average of almost nine years in 2008, meaning that most have "experienced the rigours of multiple business, technological and consumer cycles."[31] Viewed in this way, one can no longer think of Canada's digital media industry as being in its infancy. In fact, it has grown into at least the second largest employer of the four industries covered in this report.

2.2 Changes in the workplace since 2004

Since the publication of *Frame Work* in 2004, numerous technological and business developments have had an impact on the screen-based industries' workplace and workforce. We characterize a selection of such changes below:

- The screen-based industries have experienced audience fragmentation due to viewers spreading across multiple channels, the rise of vertically integrated media companies, increasing globalization and trans-media production. These scenarios create everything from profitability threats to new skills challenges.
- The advent of new platforms and growth of online streaming to new devices has had an enormous impact on audience behaviour. Audience consumption patterns and content demands have transformed into a "watch what I want, where I want and when I want" attitude. As a result, companies all along the value chain in all screen-based industries have had to adapt their business models to meet (and sometimes challenge) the demands of existing and emerging audiences.
- The digital transformation and continuous pace of technological change are altering workflow patterns, requiring a significant investment in ongoing on-the-job training and skills upgrading (often in more technical areas) among workers at all career levels.[32]
- Convergence and trans-media production are changing workflows and work processes throughout the value chain, which is requiring the acquisition of new skills and a shift in the way workers think about screen-based productions.
- Today, the Canada Media Fund (CMF) requires projects to provide content on more than one platform in order to be eligible for funding in its convergent stream. This criterion has changed the workplace and increased the partnering between TV producers and digital media producers. Furthermore, broadcasters now have web and mobile divisions as well as relationships with independent digital content producers.

---

[29] *Canadian Interactive Industry Profile*, Nordicity, 2008, p. 26.
[30] "Creators" refers to the entities creating the end-user experience, while "Enablers" relates to the entities offering products and services that enable the creation or distribution of content and environments to end-users. Source: *Canadian Interactive Industry Profile*, Nordicity, 2008, p. 6.
[31] *Canadian Interactive Industry Profile*, Nordicity, 2008, p. 6.
[32] *Cultural HR Study: HR Trends and Issues Report*, Conference Board of Canada, 2010.

- Where today 3G and 4G mobile technology allows near-constant connectivity and access to social networks, in 2004 such openness was still to come (consider that Facebook was founded in 2004). Indeed, a recent study commissioned by the Canadian Wireless Telecommunications Association indicates that one third of mobile phone users in Canada have a smartphone. The study also found that 58% of smartphone users had downloaded apps to their phones and had downloaded, on average, a total of 12 apps.[33]
- In video games, audience appetites have grown across the board—from blockbuster standalone releases like the *Call of Duty* franchise to massive multi-player games such as *World of Warcraft* as well as addictive casual games such as Angry Birds and Farmville. As a consequence, the traditional 'video game audience' has recently expanded to become far more inclusive.

This list provides just a small sample of some of the developments the screen-based industry has experienced since 2004. In a period of exciting advances but also high levels of uncertainty, some companies act reactively rather than proactively. The screen-based industries' workforce must be prepared for new challenges and armed with salient skills such as the capacity to innovate.

[33] *2011 Cell Phone Consumer Attitudes Study*, Quorus Consulting Group Ltd., 2011, p. 5.

3. Economic profiles of designated groups

This section draws on the survey data, secondary research and interviews to profile the designated groups in terms of their employment in the screen-based industries, their age, average earnings, occupational type and regional concentration. This section also explores the issue of pay equity and compensation gaps across the designated groups.

Throughout this section we first examine the existing data and then, where possible, relate the survey data to it, comparing and contrasting between the various sources.

3.1 Basic profiles of designated groups by employment

To begin, we review the participation of designated groups in Canada's workforce.[34] Table 6 presents the participation of women, Aboriginal people, visible minorities and persons with disabilities in Canada's workforce population as a whole.

Between 2001 and 2006, national workforce participation increased for almost every designated group, most notably for visible minorities and Aboriginal people. Women, the largest designated group, also experienced gains in workforce participation and form a larger base than the other groups. The participation rate of persons with disabilities in the workforce experienced growth of 1% between 2001 and 2006. In the 2006 *Employment Equity Data Report*, HRSDC attributes this increase to Canada's aging population as well as a more general increase in the willingness of Canadians to self-identify as persons with disabilities.[35]

Table 6 Total workforce population by employment equity group, Canada, 2001 and 2006

	2001	2006	% of 2006 total	% change since 2001
Total Workforce*	**16,961,080**	**18,418,100**	**100.0**	8.6
Women	8,019,030	8,818,855	47.9	10.0
Visible Minorities	2,144,325	2,811,390	15.3	31.1
Aboriginal People	436,490	568,195	3.1	30.2
Persons with Disabilities†	865,670	874,700	4.7	1.0

Source: Employment Equity Data Report 2001, 2006
*Totals may not equal the sum of components due to rounding and suppression
†Persons with Disabilities (Employment Equity defined) figure include those aged 15 to 64 who worked any time and exclude the Yukon, Northwest Territories and Nunavut and may be overstated

Statistics Canada provides selected employment data according to the North American Industry Classification System (NAICS). The best available proxy for employment statistics on the screen-based industries is the "motion picture and video industries" NAICS code 5121[36]

---

[34] When we use the terms "Canada's workforce" or the "Canadian workforce" or the "national workforce" in this report we are referring to the Human Resources and Skills Development Canada's Employment Equity Act definition of the Canadian workforce: "all persons in Canada of working age who are willing and able to work." This includes all persons over the age of 15 across all occupations and industries.
[35] "Data Highlights" 2006 *Employment Equity Data Report,* Human Resources and Skills Development Canada.
[36] NAICS Code 5121 - motion picture and video industries - comprises establishments primarily engaged in producing and/or distributing motion pictures, videos, television programs or commercials; exhibiting motion pictures or providing post-production and related services. Source: Statistics Canada, *North American Industry Classification* (NAICS) 2007.

as presented in Table 7 in combination with the "broadcasting (except Internet)"[37] NAICS code 515 figures (also presented in Table 7) and the "communication sector" highlights of the *Employment Equity Act: Annual Report 2009*, which are based on the diversity filings of broadcasters to the Canadian Radio-television and Telecommunications Commission (CRTC).

While it is possible to isolate the employment of both women and visible minorities for both NAICS codes 5121 and 515, and for all designated groups in the "communication sector" highlights, the data have several deficiencies, primarily the following:

- None captures the digital media workforce;
- The "broadcasting (except Internet)" data set has no comparable figures set for 2001;
- "Broadcasting (except Internet)" includes employment in non-screen-based industries such as radio;
- "Communication sector" data from HRSDC includes employment in non-screen-based industries such as telecommunications and radio; and
- "Motion picture and video industries" data (NAICS 5121) do not disaggregate results regarding the employment of Aboriginal peoples or persons with disabilities.

Employment in film and television production

Table 7 shows the employment profile for NAICS code 5121 – motion picture and video industries, and the highlights are as follows:

- Between 2001 and 2006, the motion picture and video industries workforce grew by 3.7%, much less than the 8.6% growth demonstrated by the Canadian workforce in total (see Table 6);
- There was also a slight decline (0.8%) in the participation of women in this industry, in stark contrast to their 10% gain in the total national workforce (see Table 6);
- The gains enjoyed by visible minorities in the overall national workforce (31% growth between 2001 and 2006, as shown in Table 6), are echoed in the motion picture and video industries where the participation of visible minorities grew 26% from 2001-2006, as shown in Table 7; and
- As mentioned previously, worker-level survey respondents in film and television production were overwhelmingly women (72.6%), a proportion that does not reflect the actual employment profile of the industry, in which, according to the 2006 Census, 40.6% of the industry workforce are women (see Table 7).

Table 7 Canadian labour force by NAICS code 5121 – motion picture and video industries, 2001, 2006

	2001	2006	% of 2006 total	% change since 2001
Total Workforce*	**59,480**	**61,775**	**100.0**	3.7
Women	25,320	25,105	40.6	-0.8
Visible Minorities	7,090	8,935	14.5	26.0

Source: 2001, 2006 Census

[37] NAICS Code 515 - broadcasting (except Internet) - comprises establishments primarily engaged in operating radio and television broadcasting studios and facilities. Source: Statistics Canada, *North American Industry Classification* (NAICS) 2007.

Employment in TV broadcasting

The representation of designated groups is somewhat different for the broadcasting industry. Table 8 compares the most current data available, while Table 9 presents the change in representation between 2001 and 2006. The highlights of labour force participation in broadcasting are as follows:

- Though the actual number of women employed in the broadcasting industry is smaller than in the motion picture and video industry (and again, the broadcasting figures from the 2006 Census include radio), at 43.4% the proportion of women working in the broadcasting industry is slightly ahead of their participation in the motion picture and video industry, which is 40.6%.
- As demonstrated in Table 9, we see that women represented 43.4% of the workforce in the broadcasting industry in 2006 and 40.2% in 2008. However, this participation rate is still slightly below representation levels in the total Canadian workforce where women account for 48% of the workforce (see Table 6).
- Progress for women in broadcasting has been relatively flat over the past 20-25 years and with a slight decline since 2001as presented in Table 9.
- Two sources show different participation rates for visible minorities in the broadcasting workforce. According to the 2006 Census, visible minorities represent 11.1% of the broadcasting workforce, which is below their participation in either the total workforce (15.3%, see Table 6) or the motion picture and video industries (14.5%, see Table 7) in the same year. In contrast, the HRSDC reported a participation rate of 15.3% in 2008, which is equal to the proportion of visible minorities participating in the total workforce (see Table 6, Table 9).
- Based on the diversity filings to the CRTC, visible minorities have seen the highest growth since 1987, from just 4% to 15.3% of the workforce. The largest gains were made in the period between 1987 and 2001 followed by the period between 2001 and 2006, as shown in Table 9.
- The company-level survey results for the broadcasting industry echo the existing data, as shown in Table 8. The survey results depict designated group representation in the broadcasting industry as: 43% women, 7% visible minorities and 1% each for Aboriginal people and persons with disabilities. These figures are based on a sample that represents roughly 27,000 workers. Remember, the survey sample is specific to the screen-based segment of the broadcasting industry (where the NAICS code and HRSDC data includes non-screen-based workers), and may provide a truer representation of that portion of the industry's workforce profile.
- Though the proportion of Aboriginal people and persons with disabilities in the broadcasting workforce population remains low, technically they have exhibited strong growth since 1987, albeit from a very small base, with the largest relative gains observed in the period between 1987 and 2001 (see Table 9).
- In 2004, the *Frame Work* report recorded that the participation of persons with disabilities ranged from between 1.6% to 3.3% of the film and television production and broadcasting industries. Today, interviews with key stakeholders suggest that there has been no measurable progress in this area, with one stakeholder explaining that it is impossible to measure "what is not there."[38] Indeed, results in Table 9 show no growth between 2007 and 2008.

[38] Key informant interview, industry expert, August 2011.

Table 8 Canadian broadcasting labour force comparison by NAICS code 515, HRSDC and company-level survey results

	2006 NAICS 515	% of 2006 total	Communication sector 2008 %	Company-level survey 2011 %
Total Workforce	**44,235**	**100.0**	**100.0**	**100.0**
Women	19,215	43.4	40.2	43.0
Visible minorities	4,890	11.1	15.3	7.0
Aboriginal people	--	--	1.6	1.0
Persons with disabilities	--	--	2.5	1.0

Source: 2006 Census, HRSDC, and the WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011

Figure 1 Change in representation of designated groups between 2001 and 2006: total workforce, communications sector as reported by federally regulated private sector employers and motion picture and video industries

Source: HRSDC Employment Equity Act: Annual Report 2008, Census 2001,2006

Table 9 Representation of designated groups as reported by federally regulated private sector employers

	1987 (%)	2001 (%)	2006 (%)	2007 (%)	2008 (%)
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Women	39.6	41.3	40.6	40.4	40.2
Visible minorities	4.0	10.8	13.2	14.5	15.3
Aboriginal people	0.6	1.4	1.5	1.6	1.6
Persons with disabilities	1.4	2.3	2.5	2.5	2.5

Source: HRSDC Employment Equity Act: Annual Report 2009

In Table 10 we delve deeper into one of Canada's major broadcasting employers and find that the proportion of designated groups employed by the CBC closely mirrors the proportions reported in the company-level survey. In its annual report to the HRSDC, the CBC relates increases in the representation of designated groups between 2000 and 2009 to its hiring and promotion rates.[39] The broadcaster notes that in all cases, the hiring and

[39] CBC/ Radio-Canada, Annual Employment Equity Report to HRSDC – 2009.

promotion rates are above or equal to representation rates, except for the hiring of Aboriginal people and persons with disabilities as presented in Table 10:

Table 10 CBC hiring and promotion rates for designated groups, 2000 to 2009

	Hiring Rate (since 2000)	Promotion Rate (since 2000)	Representation Rate
Total Workforce	--	--	**100.0%**
Women	51.0%	53.0%	45.0%
Visible minorities	10.8%	8.3%	6.5%
Aboriginal people	0.6%	1.5%	1.5%
Persons with disabilities	0.6%	1.8%	1.8%

Source: CBC

Employment in film and television distribution

Turning now to the film and television distribution industry, Statistics Canada does not provide specific employment data by employment equity group in the 2006 Census data for film and television distribution, as separate from the motion picture and video industries (NAICS 5121). Our company-level survey results for the film and television distribution industry, however, portrayed the representation of designated groups in the full-time workforce as: 55% women and 17% visible minorities. It should be noted that of the 401 workers reported by respondents to the company-level survey, not one was identified as an Aboriginal person or a person with a disability.

While it is promising to see that women represent more than half of the full-time workforce in film and television distribution, interviews suggested this industry is one that has struggled to embrace diversity in the highest echelons, such as at the board and ownership level and in the executive suite. Interviewees generally could not name more than one corporate executive or owner that was a woman and/or a visible minority, either in their own company or another. We will consider this issue in greater depth in section 4.3 on the theme of career progression.

Employment in digital media

As noted earlier, the surveys captured a smaller portion of the digital media industry and the industry is not subject to measurement through specific NAICS codes. However, there are several existing studies that report on workforce diversity in the game development sphere. Highlights from these studies follow below, although these will not represent digital media industry fields such as: simulations and interactive training; advertising and promotional content; software design and development; content management systems; and web design and development.

Interviews confirm the under-representation of designated groups in interactive media and the video game development workforce. However, they could also point to many notable exceptions (whether strong individuals or highly diverse Canadian firms) that stood out in their minds. We will discuss the once endemic under-representation of women in video game development in section 4.1, on the theme of recruitment.

3.2 Comparison of average annual earnings in Canada

In this sub-section we review the average earnings of designated groups in Canada in order to establish a benchmark for future discussions on pay equity and employment by job description in the screen-based industries.

In the total full-year, full-time Canadian workforce (presented in Table 11 below) we note that between 2001 and 2006, income levels have grown more quickly than the index (5.5%) for all groups except visible minorities who experienced a 3.3% growth in average income. Other 2006 income data highlights include:

- At $41,332, women's average employment income remains well behind the total national workforce and just 70% of men's average income;
- Though they experienced the least growth since 2001, visible minorities continue to earn more than women and Aboriginal peoples, on average; and
- At a growth rate of 6.6%, Aboriginal peoples experienced the highest income gain between 2001 and 2006 but continue to earn just 78% of what the total Canadian workforce earns, on average.

Table 11 Average employment income, total workforce and all occupations, full-year, full-time employment, in Canada, 2001, 2006

	2001 ($)	2006 ($)	% of 2006 total	% change since 2001
Total Workforce	**48,563**	**51,221**	**100.0**	**5.5**
Men	55,212	58,539	114.3	6.0
Women	39,136	41,332	80.7	5.6
Aboriginal people	37,496	39,980	78.1	6.6
Visible minorities	42,573	43,979	85.9	3.3
Persons with disabilities	-	-	-	-

Source: 2001 and 2006 Census, 2010 Federal Disability Report, The Government of Canada's Annual Report on Disability Issues

We know that jobs in the screen-based industries, perhaps most notably in the film and television production industry, do not always offer steady, full-time employment. These industries are often project-driven, and workers tend to go from one shoot to another rather than being employed full-time. Table 12 below presents the average earnings for the total workforce with some work activity in the reference year. The highlights are as follows:

- There are similar patterns of earnings disparities between equity groups as with full-year, full-time workers income; women's average employment income remains well behind the total workforce and approximately three-fifths of men's average income.
- At 8.1% each, Aboriginal people and persons with disabilities experienced the strongest growth rates but from relatively small bases. Furthermore, In *Advancing the Inclusion of People with Disabilities 2009*, the HRSDC reports that people with disabilities continue to experience a "sizeable gender gap" within their designated group. Women with disabilities earn, on average, approximately $11,000 less per year than men with disabilities.[40]

[40] *Advancing the Inclusion of People with Disabilities*, HRSDC, 2009, www.hrsdc.gc.ca/eng/disability_issues/reports/fdr/2009/page00.shtml.

- Visible minorities registered zero growth (or a very slight decline) but are still out-earning the other designated groups.

Table 12 Average employment income, total workforce and all occupations, some work activity in the reference year, in Canada, 2001, 2006 ($)

	2001	2006	% of 2006 total	% change since 2001
Total Workforce	**35,620**	**36,303**	**100.0**	**1.9**
Men	43,012	43,872	120.8	2.0
Women	27,357	28,074	77.3	2.6
Aboriginal people	24,046	25,991	71.6	8.1
Visible minorities	30,451	30,385	83.7	-0.2
Persons with disabilities[41]	23,900	25,840	71.2	8.1

Source: 2001, 2006 Census, HRSDC

In the next section we delve further into the issue of pay equity in the screen-based industries.

3.3 Pay equity and average pay in the screen-based industries

In this sub-section, we provide data that shows the average pay for each of the designated groups, and address the issue of pay equity for men and women in the screen-based industries. By pay equity, we are referring directly to the concept of equal pay for equal work of equal value for men and women. Pay equity is a fundamental human right in the *Canadian Human Rights Act*.

Not surprisingly, no survey respondent or interviewee in a hiring position suggested that they or their companies knowingly participated in gender, or designated group-based wage discrimination.[42] The majority of interviewees reported that while pay equity is still a concern and must continue to be monitored closely, women have made good progress on this front overall. The majority of interviewees across all of the screen-based industries believed that the deep-seated or institutionalized discrimination that once existed in this domain has been, for the most part, eliminated.

Despite perceptions of progress, however, disparities in average income by gender still exist as evidenced in this study's survey responses and in Statistics Canada data for both the motion picture and video industries and the broadcasting industry.

It should be noted that while the data show that there is a disparity in average earnings between genders, it does not necessarily follow that there is a pay equity issue. However, qualitative data gathered through the worker-level survey (and select interviews) do suggest that there may be a pay equity issue for certain occupational categories.

---

[41] "Total income encompasses all sources of income, including employment income and government transfers… Total income also varies by severity of disability. Working-age adults with severe to very severe disabilities have two thirds the average total income of those with mild to moderate disabilities." *Advancing the Inclusion of People with Disabilities,* HRSDC, 2009.

[42] In fact, 24% of employers asked to supply salary data were unable to do so because that HR information was not organized by gender.

The worker-level survey for this study was generally consistent in documenting that there is a gender imbalance in average earnings across the board. For example:

- The worker-level survey results show that, on average, women working in film and television production tend to earn 6.8% less than the overall average (the worker-level survey reported an average salary of $53,656 for workers in the film and television production industry, a number consistent with the 2006 census data for the motion picture and video industries, which identifies the average salary at $54,757); and
- Among the broadcasters that responded to the company-level survey and that supplied salary data by gender, results show that women earn between 10% and 15% less than the overall average in a cross-section of roles including Senior Management, On-air Talent, Broadcast Engineering and Business Affairs and Finance positions.

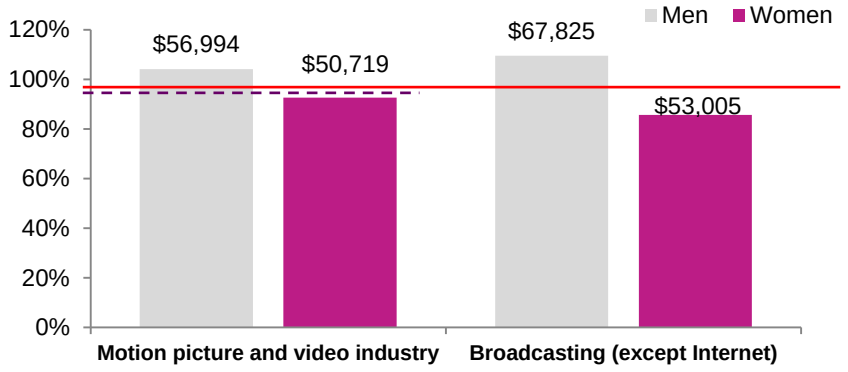
A recent study by the International Game Developer Association shows a similar story in the game development industry.[43] The study identified an average gap of $9,000 between the average total earnings of men and women across all occupations in the industry, where women earned an average of 15.5% less than men.[44]

Full-time, full-year workers

According to the 2006 census, women constitute 35.6% of the full-time motion picture and video industries workforce and 39.8% of the full-time broadcasting (except Internet) workforce. In Figure 2 below, we see that in 2006, on average, women working full-time in both the motion picture and video industries and the broadcasting industry continue to earn an average yearly income below that of their male counterparts.

[43] Note: The scope of the IGDA study includes the US, the UK and Australia, as well as, Canada.
[44] *Game Developer Demographics: An Exploration of Workforce Diversity*, IGDA, 2005, p. 13.

Figure 2 Average earnings, NAICS 5121 motion picture and video industries and NAICS 515 broadcasting (except Internet), worked full-time, full-year 2006

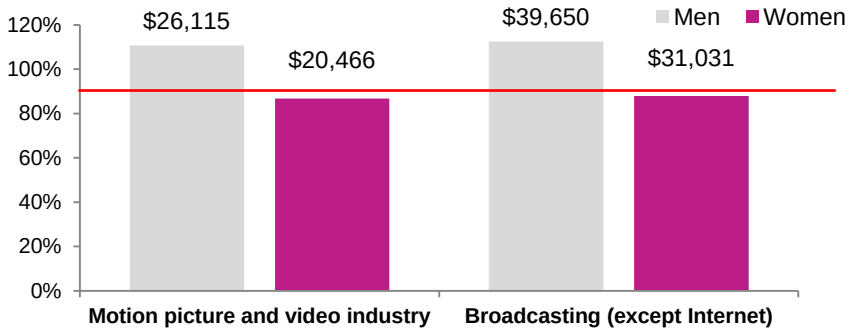


Red line = index of average earnings, full-time, full-year, total workforce.
Dashed line = average earnings as reported by the worker-level survey.
Source: 2006 Census[45]

Part-time, part-year workers

According to 2006 Census data, disparities in average earnings are once again evident for part-time and part-year earners. Part-time, part-year workers form a significant component of the motion picture and video industry[46] and within that group women represent 44.5% of workers. Women part-time workers in the motion picture and video industries earn on average 86.7% of the average earnings of the total workforce and 22% less than what men earn. Similarly, in broadcasting (except Internet), women —who represent just over 50% of the part-time workforce— earn on average 88% of the average earnings of the total workforce and again earn 22% less than men, on average.

Figure 3 Average earnings, NAICS 5121 motion picture and video industries and NAICS 515 broadcasting (except Internet), worked part-year, part-time, 2006



Red line = index of average earnings, full-time, full-year, total workforce.
Source: 2006 Census[47]

[45] Source data for this table can be found in the Appendix.
[46] At 40,710 there are more than double the number of part-time workers in motion picture and video than in broadcasting (except Internet) where there are just 13,360, Census 2006.
[47] Source data for this table can be found in the Appendix.

As mentioned above, these results do not provide much statistical evidence that there is a pay equity issue; however, they do indicate that women tend to fill positions within the screen-based industries that pay less relative to the positions occupied by men. (We discuss employment by occupation category in more detail in section 3.4).

Interviewees also identified a number of other factors that can contribute to gender-based earning disparities, such as a higher proportion of women employed in part-time positions versus the proportion of women employed in full-time positions or (for contract and freelance workers) the tendency for women to have, on average, fewer engagements or hours worked in a year than men. For example, regarding the on-screen workforce, interviews with key informants indicated that, while the on-screen workforce is generally unionized and therefore subject to standardized rates, this does not ensure that men and women have the same average yearly income. In fact, interviewees suggested anecdotally that there are generally fewer roles or on-screen positions for women than for men, and that those roles available to women tend to be smaller roles that require fewer hours of work than the roles available to men. As a result, women on-screen workers tend to work fewer hours in a year than their male counterparts, which results in lower average earnings per year despite the fact that they are being paid equal rates.[48]

Other key informants from the film and television production industry indicated that similar patterns exist for many behind the camera positions (such as camera operation or creative positions) where women tend to either receive fewer contracts in a year or work on smaller, lower-budget contracts where they receive fewer hours of work. The result once again is lower average yearly earnings for women, compared to men, despite their both being subject to standardized base rates through union agreements. (We discuss employment by type of employment in more detail in section 3.7).

Lack of concrete evidence of pay inequity

While we have indicated that there is a lack of clear statistical evidence to indicate the presence of gender-based pay equity issues, the worker-level survey results provide more insight into the earnings landscape for the screen-based industries; these do indicate some pay equity issues, for both genders.

For example:

- In film and television production, the most significant gender-based pay differences occurred for the Director role, in which women reported earning 16.5% less than the overall average; and
- Conversely, women *exceeded* the overall average salary in program acquisition and clerical/administrative roles in the broadcasting industry.

Interviewees described certain dynamics which they believe impact earnings both positively towards pay equality and those that can cause subtle and sometimes overt gender-based wage gaps.

---

[48] Key informant interviews, August, 2011.

While there is only isolated statistical evidence of pay inequity, it was a subject that aroused substantial interest, and thus deserves more comment.

Factors for pay equity – transparency

Frame Work II interviewees revealed that the greater the level of transparency in an industry or organization, the greater the chance of pay equity amongst all employees. In other words, pay equity across the screen-based industries tends to vary directly with the level of budgetary transparency in a team, an organization or, indeed, an industry. Such transparency may be derived from a number of sources, including the impact of collective bargaining on behalf of unions and/or regulators working to deter pay inequity through, for example, pay bands, rate cards and reporting requirements. The prominence of small teams working collaboratively across the screen-based industries, including digital media, also supports a culture of openness around compensation.

In addition, interviewees explained that many occupations in broadcasting and film and television production are unionized, which serves to equalize pay; although some interviewees conceded that there are still opportunities to negotiate for additional rates or compensation outside of the required base rates agreed through collective agreements with the unions and guilds. Similarly, the HRSDC links collective agreements and union contracts to better wages for people with disabilities, and particularly for women with disabilities who report average earnings of $35,677 with agreements and just $21,983 without.

Factors for pay inequity – opaque culture, weak negotiation skills and looking beyond the bottom line

In contrast with the generally more transparent nature of micro and SME production and digital media companies, senior level workers in larger media, distribution and production companies are perhaps less likely or willing to share details of benefits packages or salary compensation with their peers and networks. At these larger organizations, the majority of women interviewed believe wage gaps between men and women doing equal work still exist. In fact, one senior distribution executive with international experience described the persistent suspicion, on the part of her and her female cohort, that when the second-in-command to a male president is a woman, she will earn less than a second-in-command who is a man. Today, however, as one respondent in broadcasting put it (and as corroborated by industry association representatives and industry leaders), "I truly believe that when you get the top job, you are more likely to get the top salary too."[49]

Interviewees agree that strong, even aggressive, negotiators will earn more than those who do not ask for higher salaries up-front. Furthermore, many interviewees agreed that men traditionally tend to be more likely to negotiate for better pay not only at the point of being hired but also more frequently throughout their careers. Indeed, a recent study by a professor at Carnegie Mellon University in Pittsburgh found that men initiate negotiations

[49] Key informant interview, senior-executive, July-August 2011.

three or four times more often than women, on average.[50] As a result, what may begin as only a marginal salary disparity between two workers in the same role can thus grow much wider over an entire career, particularly as women may also "lose time" due to maternity leave, and miss out on that year's pay increase or bonus. (We discuss the impact of maternity leave on career progression in more detail in section 4.3, below).

This factor in pay inequity was seen as particularly frustrating for women because it relates more to learned behaviour and gender norms and, with the right tools and confidence, should be within a woman's power to overcome. One interviewee in the video game development workforce believed that this circumstance is slowly improving—not because of anything the industry is doing, rather as part of the general societal shift towards women being more career focused and thus better at negotiating on their own behalf.

Another facet of compensation raised by one of our film and television executive interviewees is that women are more likely to look at an entire benefits package, not just the bottom line of compensation.[51] If a woman prioritizes flexible work hours, additional holidays and/or the ability to work from home over pay, her salary will appear lower than her male counterpart on paper, though she derives non-monetary value from other clauses of her employment agreement. Of course, these privileges are not necessarily compatible with the film and television production industry; however, they may be attainable for workers in the digital media, broadcasting and distribution industries.

Frame Work II's survey results showed that employee benefits vary a great deal across the screen-based industries. According to the company-level survey, all broadcasters surveyed offer a benefits package of some nature to their employees, while only 27% of film and television production companies surveyed do so. Of these packages, nearly all (97%) include extended healthcare, a majority offer optical care (59%), and many offer pension contributions (45%) or maternity/paternity benefits (45%). We will revisit the issue of work-life balance in more detail in section 4.4.

For persons with disabilities, pay equity issues are rooted in misperception (discussed further in section 4.4: *Workplace issues*). While earnings for persons with disabilities in the screen-based industries are not available, interviewees described the failure of the creative sector to appreciate or recognize the potential value and talent of this designated group. One symptom of this perception is the sense in general society that people with disabilities have nothing to contribute and therefore "why don't we just let them volunteer?" Such an attitude denies the creative potential of members of this designated group and contributes negatively to their earnings.

3.4 Employment by occupation category

This sub-section covers the representation of equity groups by specific occupation categories in the screen-based industries. The analysis relies on survey results, secondary research and interviews. Based on these inputs, it seems there remains a correlation

---

[50] Babcock, Linda and Laschever, Sara, *Women Don't Ask: Negotiation and the Gender Divide*, Princeton University Press, 2003, p. 3.
[51] Key informant interview, film and television executive, August 2011.

between job description and designated groups, particularly along gender lines in the screen-based industries.[52] At this stage, *Frame Work II* is less concerned with seniority or career progression (though certain job descriptions are also clear indicators of rank), and is more focused on investigating the current state of the often stubborn gender associations that arise with certain occupational categories.

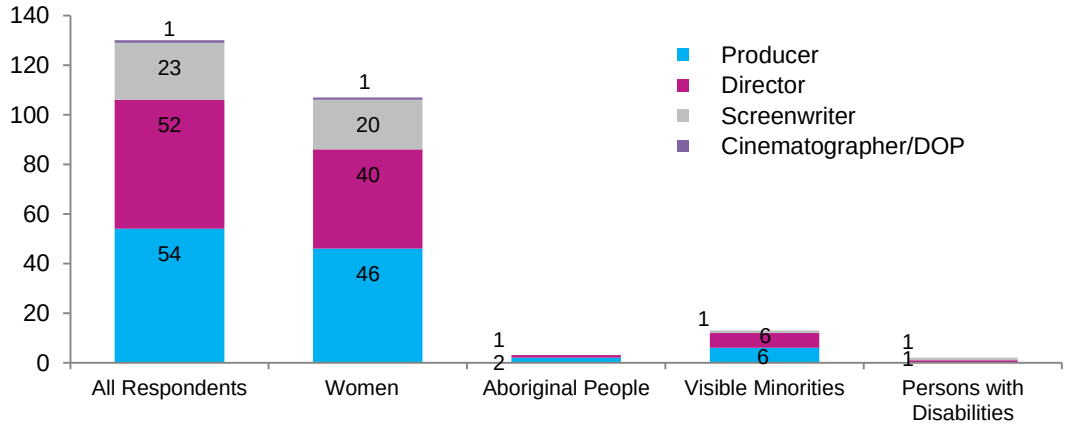
Both the company-level and worker-level surveys requested information on representation by occupation category and the highlights below relate to the film and television production, broadcasting and distribution industries.

Film and television production

In film and television production the first focus is on the roles defined as "key creative", in other words: Producer, Director, Screenwriter and Cinematographer or Director of Photography. The survey results showed the following:

- As the following chart depicts, a significant portion of respondents in key creative positions were women (82%). This high proportion will relate, in part, to the high number of women respondents overall, as described in the Methodology section in the introduction to this report and is therefore unlikely to reflect the landscape. A recent US study, for example, observes that women comprise 25% of individuals working as Creators, Directors, Writers, Producers, Executive Producers, Editors and Directors of Photography on broadcast television.[53]
- Of all survey respondents, the participation of designated groups in key creative positions is: Aboriginal people (1.8%), visible minorities (7.9%) and persons with disabilities (1.2%) (see Figure 4).

Figure 4 Key creative positions by job description, by designated group, film and television production industry



Source: WIFT-T Worker-level survey, conducted by Nordicity and Environics, 2011

N = 545

[52] *Women's Labour Issues in the Film and Television industry in British Columbia*, BCIFP, 2005, pp. i, 37.
[53] *Boxed In: Employment of Behind-the-Scenes and On-Screen Women in the 2010-11 Prime-time Television Season*, Center for the Study of Women in Television & Film, 2011.

As noted earlier, Statistics Canada data shows that the overall participation of women in the motion picture and video industries has declined by 0.8% since 2001. Similarly, research shows that women are still under-represented in many areas of the industry,[54] particularly in roles that have been traditionally male-dominated and in higher-level, decision-making roles.[55] Based on the worker-level survey, the most common occupational categories among women working in film and television production are:

- Production Support Services (15%);
- Producer (11%);
- Director (10%); and
- Editor (9%).

Again, the women who responded to the worker-level survey demonstrate good representation (as depicted in Figure 4 above) among key creative positions. Conversely, very few women (1% and less) working in the film and television production industry did so as:

- Sound Engineer;
- Camera Operator;
- Special Effects Technician;
- Post-production Supervisor;
- Director of Photography; or
- Visual Effects artist.

Notably, the above job descriptions all relate to technical positions in some respect, suggesting that making inroads into these core technical positions remains a considerable challenge for women.

Similarly, a 2005 study[56] by the BC Institute of Film Professionals shows that women are still very highly represented in "traditional" female roles, such as:

- Wardrobe (where women account for 89% of the workforce in BC);
- Makeup (where women accounted for 82% of the province's workforce); and
- Publicity (where women accounted for 94% of the workforce).

The same study found that women were highly under-represented in a number of typically male-dominated roles in the industry in BC (echoing the survey results and interviewee perceptions), for example:

- Special effects (4%);
- Lighting (3%); and
- Grip (4%).

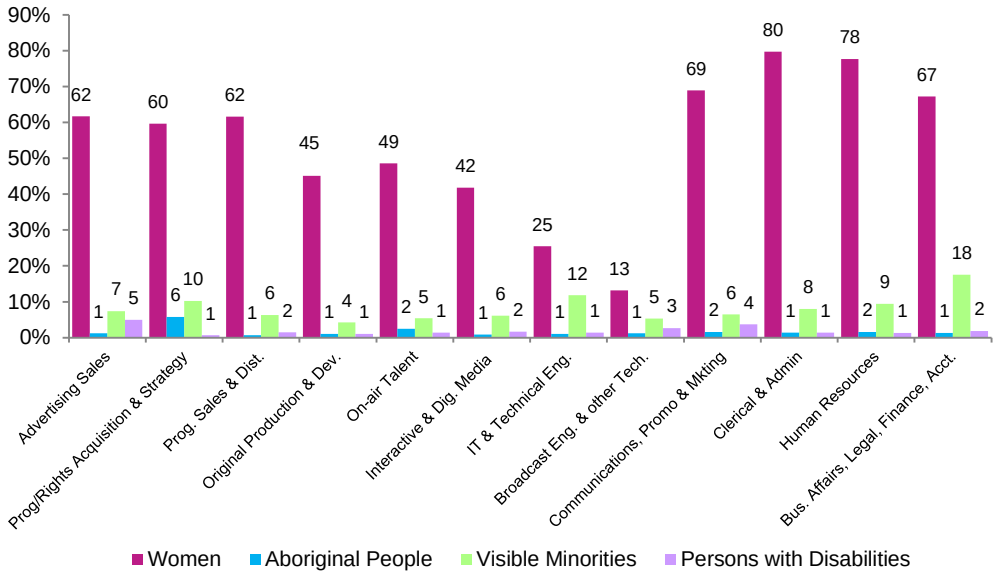
---

[54] *Fast Forward: Recommendations for a National Training Strategy for the Film and Television Industry*, Lowenbe Holdings Inc., 2006.
[55] *Women's Labour Issues in the Film and Television industry in British Columbia*, BCIFP, 2005.
[56] *Women's Labour Issues in the Film and Television industry in British Columbia*, BCIFP, 2005, p. 11.

Broadcasting

The strong company-level survey responses for the broadcasting industry allow us to examine employment by occupation category within each of the designated groups, as well as comparing across designated groups as in Figure 5, below.

Figure 5 Percentage of designated groups employed per job description, broadcasting



Source: WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011

Our survey results show that women outnumber their male counterparts in the following broadcasting job descriptions (see Figure 5, above):

- Clerical and Administrative (79.8%);
- Human Resources (77.7%);
- Communication, Promotion and Marketing (68.9%);
- Business Affairs, Legal, Finance and Accounting (67.2%);
- Advertising Sales (61.7%);
- Program Sales (61.6%); and
- Rights and Program Acquisition (59.6%).

Conversely, women were significantly under-represented in:

- Broadcast Engineering and Other Technical (13.2%); and
- IT (25.4%).

Women were somewhat under-represented in:

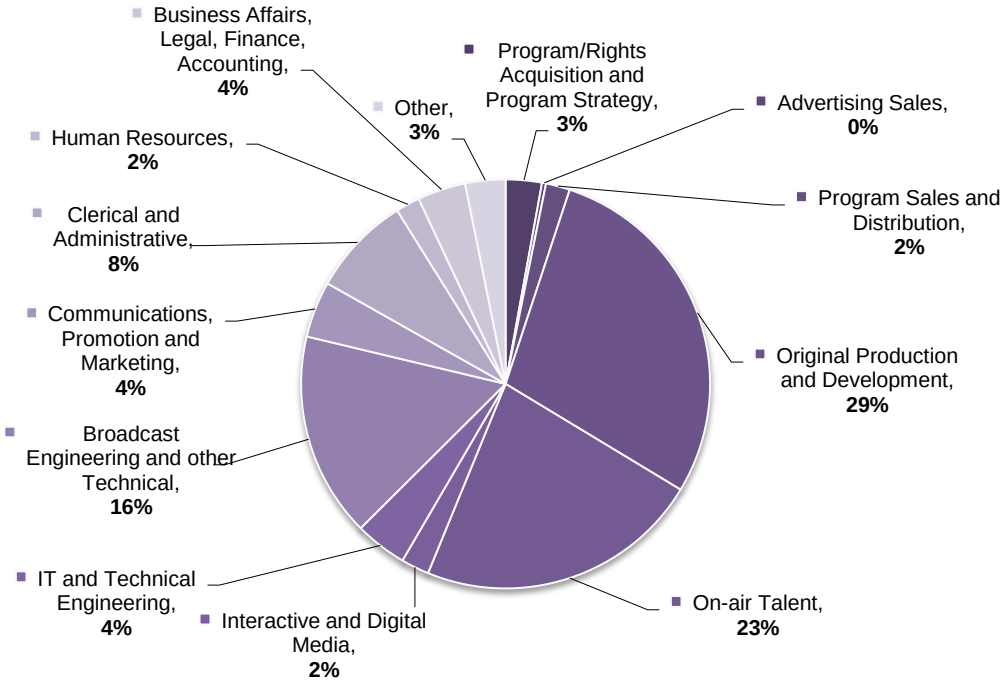
- Interactive and Digital Media Production (41.8%);
- Original Production and Development (45.1%); and
- On-air Talent (48.6%).

Similarly, *Frame Work II* interviewees from the broadcasting industry indicated that women tend to be the most under-represented in technical roles, including IT, which have been traditionally male-dominated as well as in Affiliate Relations (dealing with broadcasting distribution undertakings).[57] Interviewees also suggested that women are under-represented in certain genres of programming —for example, in sports.

The pie-charts below show the employment of Aboriginal people (Figure 6), visible minorities (Figure 7) and persons with disabilities (Figure 8) across broadcasting job occupations. The highlight observations are as follows and more detail can be found in Table 20 in Appendix A1:

- Company-level survey results indicate that while Aboriginal people were not significantly represented in any job description, they did fare slightly better as On-air Talent, where they comprised 2.5% of the reported workforce (see Figure 6);
- Visible minorities reported working in Business Affairs, Legal, Finance and Accounting (17.5%), IT and Technical Engineering (11.8%), and Rights Acquisition and Program Strategy (10.3%) more than in other job occupations (see Figure 7); and
- Persons with disabilities, like Aboriginal people, were not widely represented among the reported workforce, although they did show slightly higher represented in Advertising Sales (4.9%) and Communications and in Promotion and Marketing (3.7%) than in other job categories (see Figure 8).

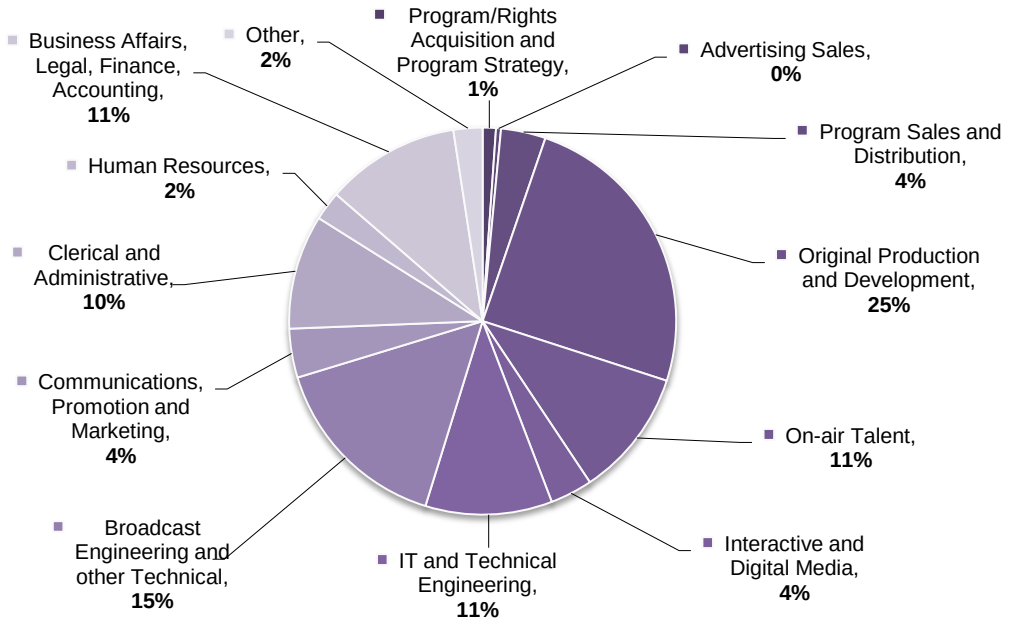
Figure 6 Broadcasting employment by job occupation, Aboriginal people



Source: WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011

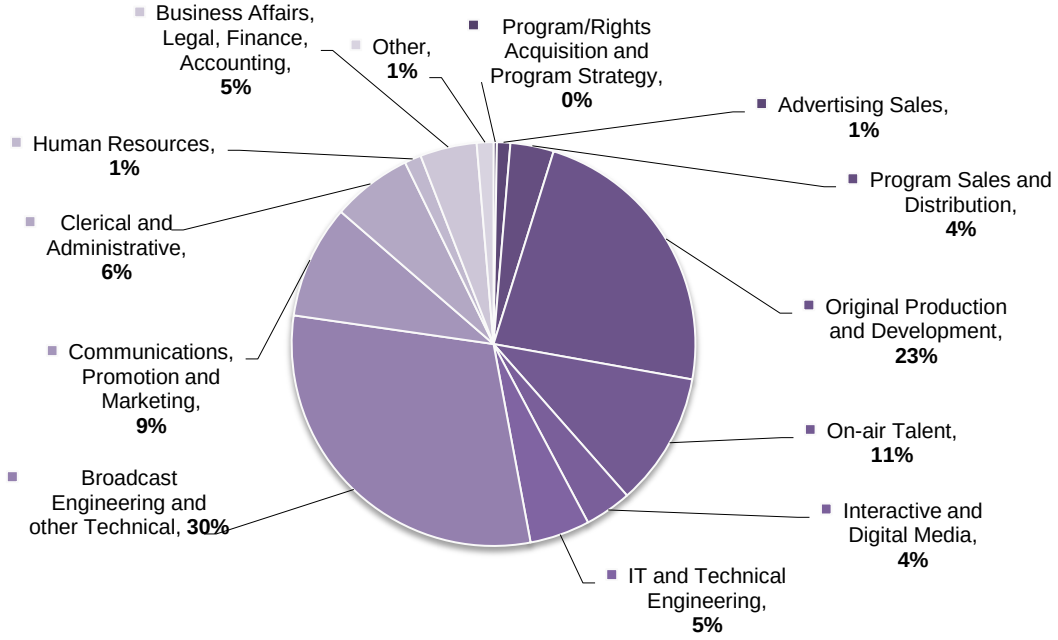
[57] Interviews with HR representatives and executives in the broadcasting industry, July-August 2011.

Figure 7 Broadcasting employment by job occupation, visible minorities



Source: WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011

Figure 8 Broadcasting employment by job occupation, persons with disabilities



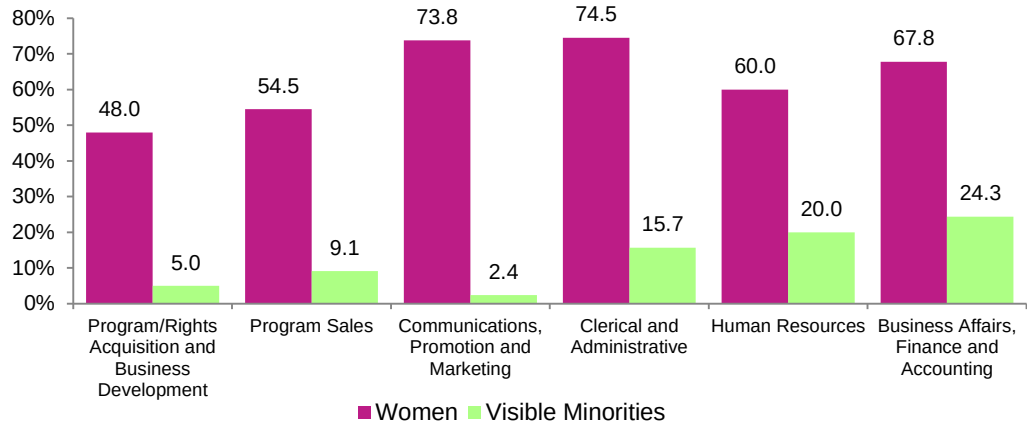
Source: WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011

Film and television distribution

No film and television distributor reported employing an Aboriginal person or person with a disability in the *Frame Work II* company-level survey. Highlights of the job description information obtained from the company-level survey are presented in the bullets and in Figure 9, below:

- Women working in distribution account for a higher proportion of workers in Clerical and Administrative (74.5%); Communications, Promotion and Marketing (73.8%); Business Affairs, Legal, Finance, and Accounting (67.8%); and Human Resources (60%) positions.
- Little disparity exists in terms of Program/Rights Acquisition (48%) and Program Sales (54.5%) staff.
- Visible minorities, though representing a limited portion of any job categories, did account for a higher proportion of Business Affairs, Legal, Finance and Accounting (24.3%) and Human Resources (20%) departments.

Figure 9 Women and visible minorities employed per job description, distribution (%)



Source: WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011

Interviewees observed anecdotally that women in their industry are more highly represented in HR, Marketing and content-buying roles, whereas they tend to be under-represented in sales divisions.

Digital media

Interviewees from the digital media industry estimated that approximately 20% of the workforce is female but clarified that this figure varies widely by country, genre, and the size of studio. In addition, as mentioned in section 3.1 above, a recent study by the IGDA determined that women represented only 11.5% of the game development workforce in Canada, the US, the UK and Australia in 2005.[58]

Interviewees also indicated that the majority of the female portion of the workforce was found in administrative, HR and marketing occupational categories, while they are under-represented in engineering, management and design roles. One interviewee suggested that the women in marketing, production, administrative and HR roles in digital media are

[58] *Game Developer Demographics: An Exploration of Workforce Diversity*, IGDA, 2005, p. 12.

actually propping up the overall representation levels (estimated at 20%), while numbers drop to 10% or below for pivotal technical roles in engineering and design, as well as senior management roles. The IGDA study also identifies the occupation categories where women are more and less highly represented:

- Women represent 47% of workers in Operations, IT and Human Resources occupations;
- Women account for 30% of workers in Writing and 25% of workers in Marketing, PR and Sales;
- Women represent only 10% of workers in Audio and Design roles; and
- Only 5% of workers in Programming positions are women.[59]

3.5 Age of employment

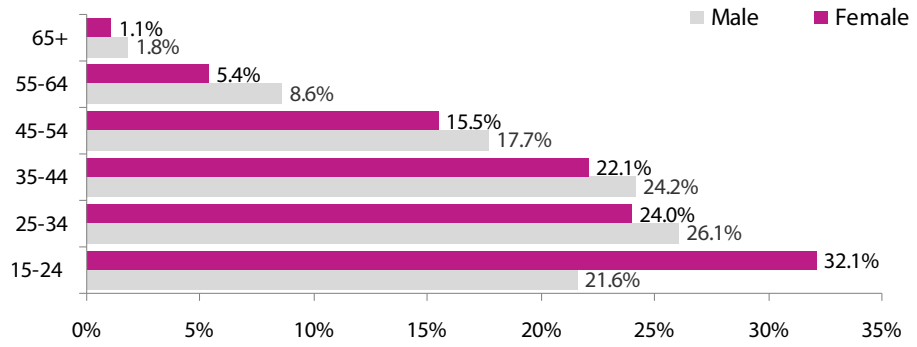
The screen-based industries' age profile provides useful context to discussions of recruitment and career progression. The wave of Canadian professionals to retire in the near future will have an impact on all sectors but is particularly challenging for knowledge-based industries as they must grapple to transfer years of accumulated experience through strong succession plans. All eyes are on the next generation of workers, in part, to see if new entrant hires and promotions will lead to stronger distribution of designated groups across the screen-based industries.

The distribution across age categories as measured by Statistics Canada in 2006 for the motion picture and video industries is presented in Figure 10, where we observe the following:

- The motion picture and video industries' workforce is concentrated between the ages of 25 and 44 for males and between 15 and 34 for women, suggesting that the supply of women as new entrants and graduates is high. The supply declines steeply, however, after the age of 24 and drops again after age 44 indicating perhaps that the supply of women at the senior levels (if one accepts a loose correlation between age and years of professional experience) may be less strong; and
- The proportion of women only exceeds that of men between the ages of 15 and 24. In every other age category, men are participating in proportionately higher numbers than women.

[59] *Game Developer Demographics: An Exploration of Workforce Diversity*, IGDA, 2005, p. 13.

Figure 10 Labour force by age group and sex, NAICS code 5121 - motion picture and video industries, 2006



Source: 2006 Census

On the other hand, according to the worker-level survey responses overall, the average age of workers in the screen-based industries (and of women) is 45 years. This pool of female survey respondents is thus slightly older than the one presented in Figure 10, which is based on data from 2006. The majority of those women respondents working in the film and television production industry (71%) have worked in the industry for 10 years or more.

With regard to other designated groups, according to the worker-level survey:

- Visible minorities in the screen-based industries tend to be younger than the total average (and average for women) of 45. The visible minority workers who responded to the survey had an average age of 39 years.[60]

The higher representation of women and visible minorities in younger age brackets could indicate the potential for increased participation rates at both new entrant and more senior level positions, particularly as the two designated groups accumulate years of experience in the screen-based industries.

3.6 Regional concentration

In this sub-section we provide a brief comparison of different regions of activity for the screen-based industries and, for the film and television production industry, regional employment by designated group.

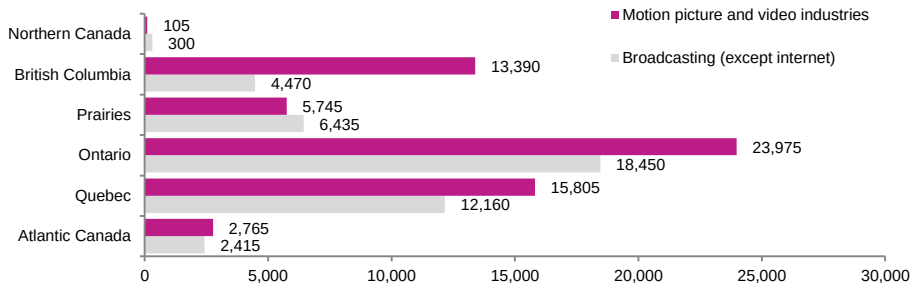
Typically, Statistics Canada data has shown that employment (and production) in film and television production is concentrated in Ontario, with Québec and British Columbia (BC) vying for the position of second largest employer by province. Competitive tax credits, highly-skilled labour and existing relationships and networks are major attractions for company-owners and producers looking to place a new production or entity.

Figure 11 presents the labour force's regional distribution based on the NAICS code 5121-motion picture and video industries and NAICS code 515 - broadcasting (except Internet); the highlights are as follows:

[60] Worker-level survey, conducted by Nordicity and Environics, 2011.

- Ontario leads in both industries as measured by employment, commanding 38.8% of the motion picture and video industries' workforce and 41.7% of broadcasting (except Internet).
- As a whole, Western Canada employs more workers in the motion picture and video industries than Québec, but if we restrict the comparison to BC and Québec, BC falls to third place, with 13,390 workers or 21.7% of the workforce.

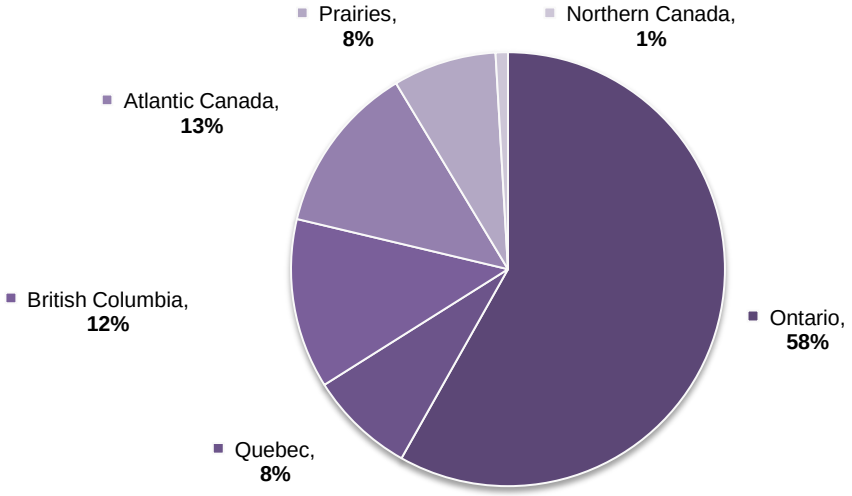
Figure 11 Labour force regional distribution, motion picture and video industries and broadcasting (except Internet), Canada, 2006



Source: 2006 Census

- As with the Statistics Canada data, *Profile 2010* shows that film and television production in Canada is highly concentrated in Ontario and Québec. For example, 82% of all Canadian production volume in 2009-10 took place in Ontario and Québec. The next largest province was British Columbia, with 7% of the production volume in that year (though it represented a larger portion in previous years). As the film and television production industry is project-based, one can expect employment to (roughly) map to production levels.
- The worker-level survey results for film and television production map roughly to the *Profile 2010* results and, if anything, over-represent the workers based outside of Ontario and Québec as only 64% of respondents were from Ontario and Québec. The chart below depicts the overall response of film and television production workers by region (see Figure 12).

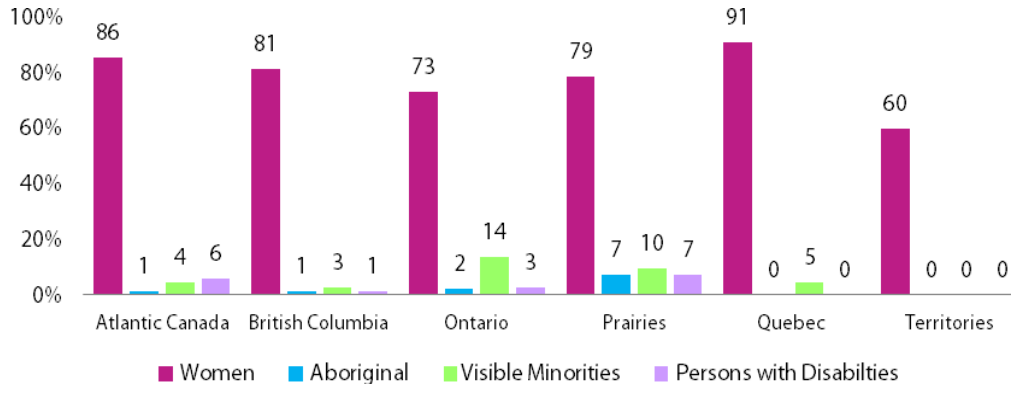
Figure 12 Film and television worker regional representation (all survey respondents)



Source: WIFT-T Worker-level survey, conducted by Nordicity and Environics, 2011
N = 545

Looking into regional representation in film and television production by designated group, the survey results seem to indicate a higher proportion of visible minority participation in Ontario (14%) and the Prairies (10%), and a higher rate of participation by persons with disabilities in the Prairies (7%) and Atlantic Canada (6%).

Figure 13 Equity groups by province (film and television production)



Source: WIFT-T Worker-level survey, conducted by Nordicity and Environics, 2011
N = 545

The total screen-based industries company-level survey results reflected a high proportion of firms based in Ontario (70%) and Québec. In part, this reflects the tendency of major media companies (e.g., broadcasters) and film and television distributors to be based in either Toronto or Montréal (or both). It should be pointed out that they are (in almost all cases) national broadcasters and responded to the survey on behalf of employees located across Canada.

3.7 Type of employment

In this section we outline the distribution of the workforce across the six types of employment[61] for the broadcasting, film and television production, and film and television distribution industries.

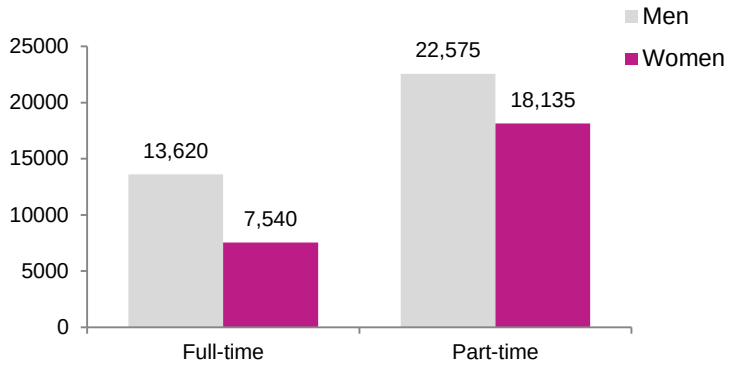
Film and television production

In section 3.3 we discussed the nature of work in the film and television production industry; particularly that it is often unpredictable, project-oriented, concentrated into short periods of time and does not accommodate itself easily to a nine-to-five schedule.

Looking first at the total workforce in the film and television industry (as represented by NAICS 5121 –motion picture and video industries, which includes distribution), we see that the part-time workforce is larger than the full-time workforce (see Figure 14).

[61] Note: the six types of employment are separated into two categories: (i) currently employed: full-time, part-time, contract, and (ii) currently not employed: freelance, between contracts, unemployed.

Figure 14 Full-time versus part-time workforce, motion picture and video industry, 2006

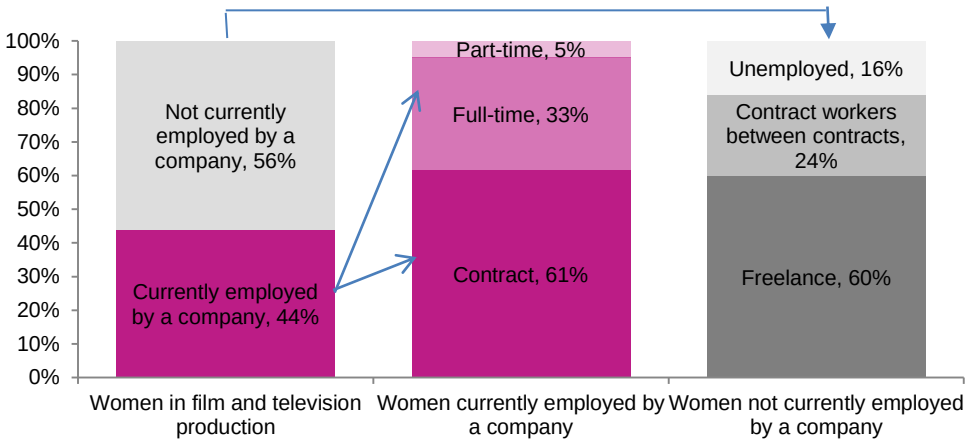


Source: Census 2006

In addition, Figure 15 presents results from the worker-level survey and shows the distribution of women respondents in the film and television production industry across the six employment types. Highlights from the survey results are as follows:

- Overall, 44% of women workers in the film and television production industry reported that they are currently employed by a company. Of these, most (61%) are employed on a contract basis, while 33% are full-time employees of their firms. Interestingly, only 5% are employed on a part-time basis. There does not appear to be any difference between women and the overall sample with respect to types of employment.
- Of the 56% of female film and television workers surveyed that are not employed on a full-time basis, most (60%) are freelance workers, while only 16% are unemployed. The remaining 24% are contract workers between contracts.
- For all female contract workers in film and television production, the average number of annual engagements is 4.9 as compared to 5.2 in the overall sample. As we discussed in section 3.3, this gender-based disparity in average number of engagements could be a factor in gender-based disparities found in average earnings.

Figure 15 Type of employment, women in film and television production, 2011

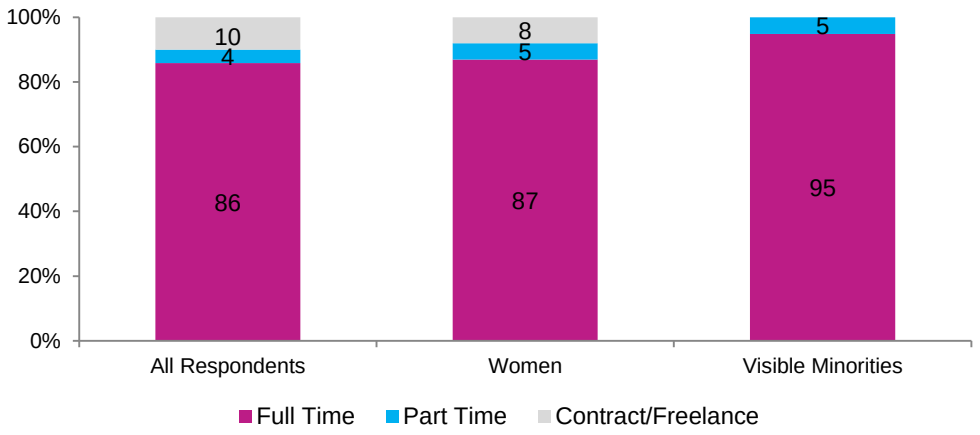


Source: WIFT-T Worker-level survey, conducted by Nordicity and Environics, 2011

Film and television distribution

By contrast, according to results from the company-level survey shown in Figure 16 below, the vast majority of employment in the film and television distribution industry is full-time. With that said, visible minorities are slightly less likely to maintain non-full-time employment.

Figure 16 Film and television distribution employment, by employment type and by designated group

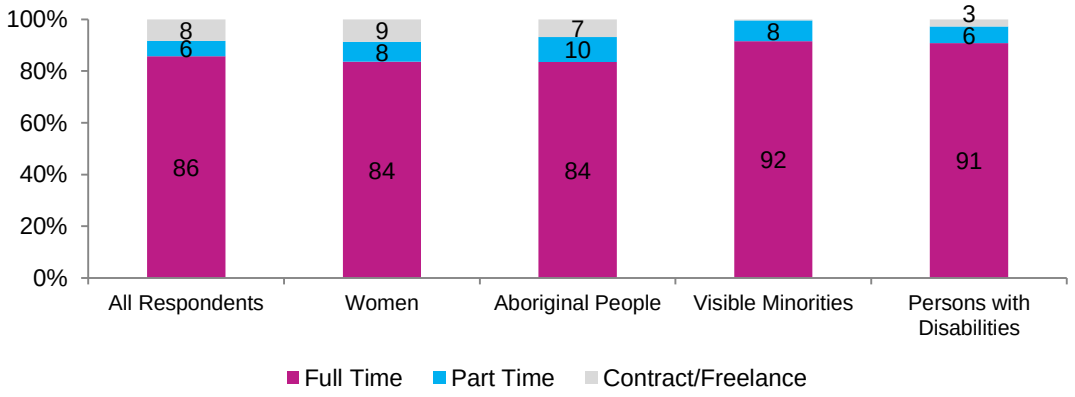


Source: WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011

Broadcasting

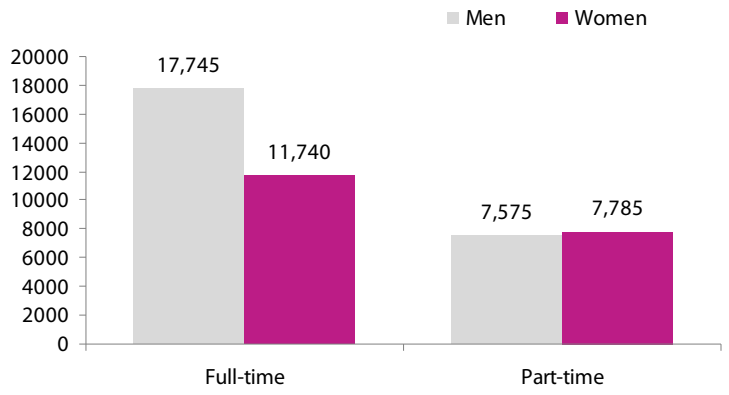
Similarly, as shown in Figure 17 below, the bulk of employment in the broadcasting industry is full-time. However, survey results also indicated that women and Aboriginal people are slightly more likely to maintain part-time employment or contract/freelance work. Indeed, according to data from the 2006 Census, the number of women working part-time in the broadcasting (except Internet) industry exceeds the number of men in the part-time workforce (as shown in Figure 18, below). Again, the higher likelihood of women working in a part-time or contract/freelance capacity could help explain some of the disparity in average earnings that we discussed in section 3.3.

Figure 17 Broadcasting employment by employment type and by designated group



Source: WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011

Figure 18 Full-time versus part-time workforce, broadcast (except internet), 2006



Source: Census 2006

3.8 Profile summary

The summary of the findings from section 3: *Economic profiles of designated groups* are outlined below.

- There has been little growth and some decline in the total workforce employment levels in film and television production, broadcasting and the film and television distribution industries in recent years.
- The digital media industry is the second largest employer covered by this report, as measured by full-time employment.
- Growth in the representation of women in broadcasting (since 2001) and the motion picture and video industry (since 2001) has been relatively flat. Women experienced the greatest gains in representation in the broadcasting industry between 1987 and 2001.
- Visible minorities experienced the greatest gains in both broadcasting and film and television production. In broadcasting the most pronounced progress occurred between 1987 and 2001.
- There has been little progress in the representation of Aboriginal people and persons with disabilities. In broadcasting, these two groups also experienced their strongest gains between 1987 and 2001. Today's participation rate for Aboriginal people in the broadcasting sector (1.6%) is becoming gradually closer to, though is still behind, the participation of Aboriginal people in the total workforce (3.1%).
- Based on average earnings by gender, one cannot conclude decisively that women are being paid less for the same work. The disparity between average earnings of men and women in film and television production and broadcasting suggests that women continue to occupy lower-seniority and lower-experience job occupations on average than men. In other words, women are either not getting the higher paying jobs in certain occupational categories, or are tending to gravitate to categories of jobs that pay less well. Anecdotal evidence also suggests that the disparity could be the result of differences in the total number of hours worked in a year either as a result of women working fewer engagements (contracts) in a year or women being more highly represented in part-time positions.
- There remains a relationship between gender and job description in the screen-based industries. Women have made inroads in "key creative" positions in film and television

production but remain under-represented in technical roles across the screen-based industries. Women continue to be over-represented in administrative, clerical and HR roles in broadcasting and distribution.

- Women in the film and television industry workforce and visible minorities across the screen-based industries are slightly younger than the average worker, suggesting the potential for future growth in representation of both designated groups.

In section 4 we go on to review themes of employment and the workplace in the screen-based industries.

4. Employment and the workplace

This section is focused on elaborating key employment and workplace trends and is organized (broadly) around the trajectory of a full career, beginning with recruitment, followed by professional development and closing with career path progression. These sub-sections draw primarily on survey results and interviews and are complemented with secondary research. Each sub-section highlights industry-specific stories as related by interviewees or otherwise reported on in secondary research analysis.

4.1 Recruitment

This sub-section focuses on recruitment and hiring in the screen-based industries, with a view to addressing challenges related to diversity in recruitment. While employers hire at all levels, and "recruitment" is not limited to new entrants or early-career workers, in this section we focus on entry-level or early-career workers as these are likely to be the stages where hiring occurs in the greatest volume. In addition, we discuss senior levels of employment as part of section 4.3: *Career path progression*, below.

This section is organized around two core recruitment dynamics: 1) The experience of companies (employers) and the challenges they face in recruiting talent that meets their needs; and 2) The experience of new entrants and the challenges they face as they attempt to enter the industry.

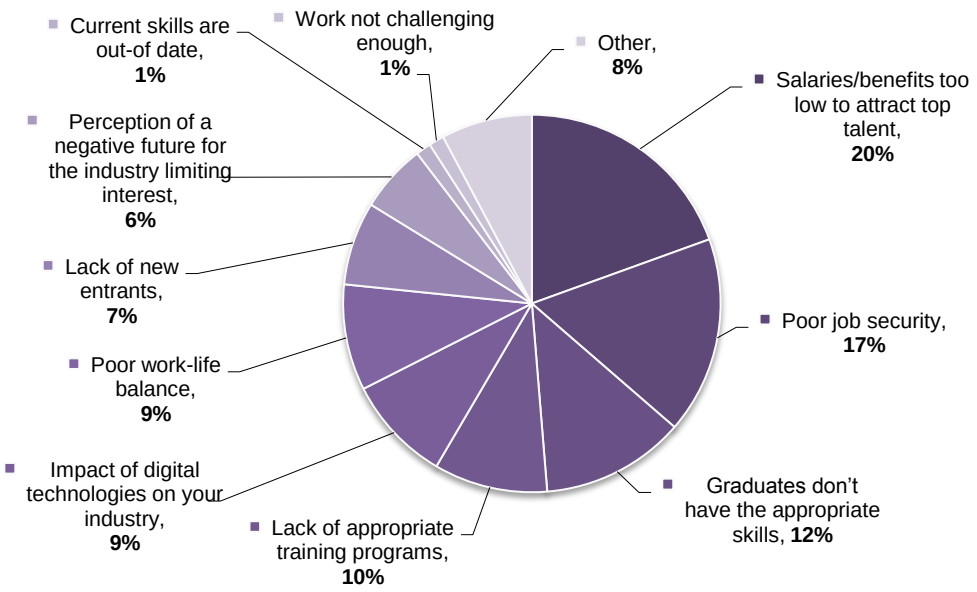
4.1.1 Recruitment: employer-side challenges

Below we discuss the results of the company-level survey with respect to the most significant recruitment issues identified by companies. The survey employed a point system to prioritize recruitment issues—three points for issues deemed to be the "Most Important" by a respondent, two points for the "Second Most Important" issue and finally one point was allocated to the "Third Most Important" issue. Points were tallied to identify the most important issue in each screen-based industry.

Film and television production

As shown in Figure 19 below, "Salaries/benefits too low to attract top talent" (20% of all points) and "Poor job security" (17% of all points) scored as the most pressing recruitment issues among film and television production respondents to the company-level survey.

Figure 19 Recruitment issues by point score (film and television production)

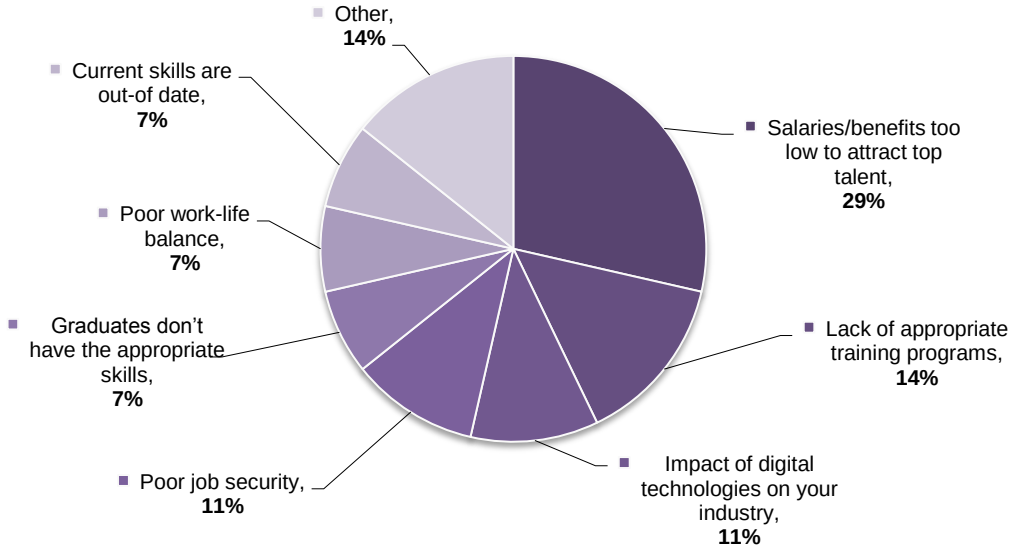


Source: WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011

Film and television distribution

As in film and television production, "Salaries/benefits too low to attract top talent" was the most pressing recruitment issue (garnering 29% of all awarded points) for company-level survey respondents in the film and television distribution industry (see Figure 20, below). "Lack of appropriate training programs" was also identified as an important recruitment issue by respondents (14% of all points).

Figure 20 Recruitment issues by point score (film and television distribution)

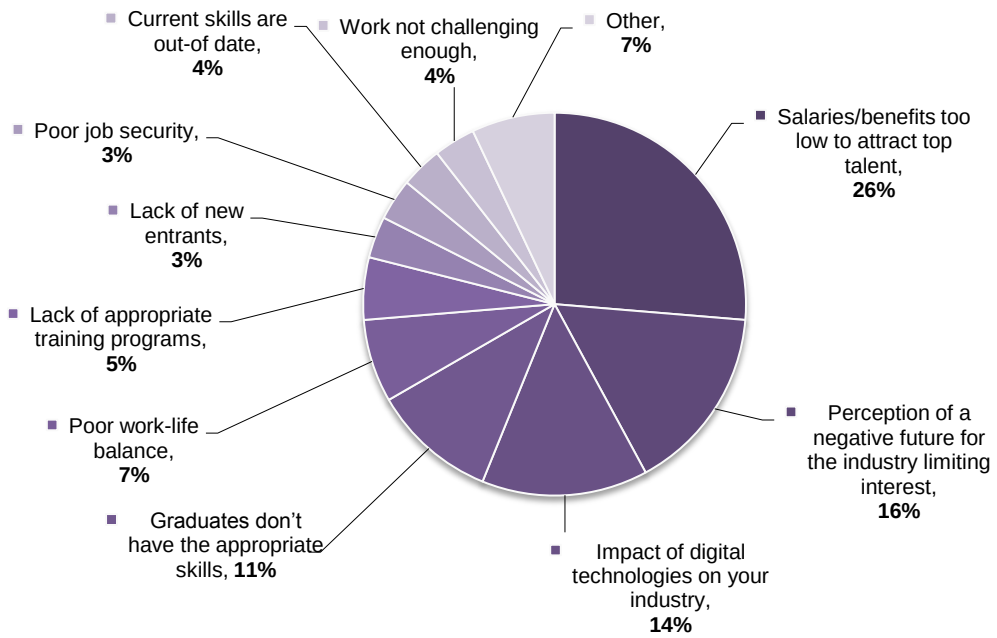


Source: WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011

Broadcasting

Once again, among broadcasting respondents, "Salaries/benefits too low to attract top talent" was deemed to be the most pressing recruitment issue, scoring 26% of all awarded points. Respondents identified "Perception of a negative future for the industry" (with a score of 16% of all awarded points) and "impact of digital technologies" (14%) as the other two most significant recruitment issues in the broadcasting industry (see Figure 21, below).

Figure 21 Recruitment issues by point score (broadcasting)

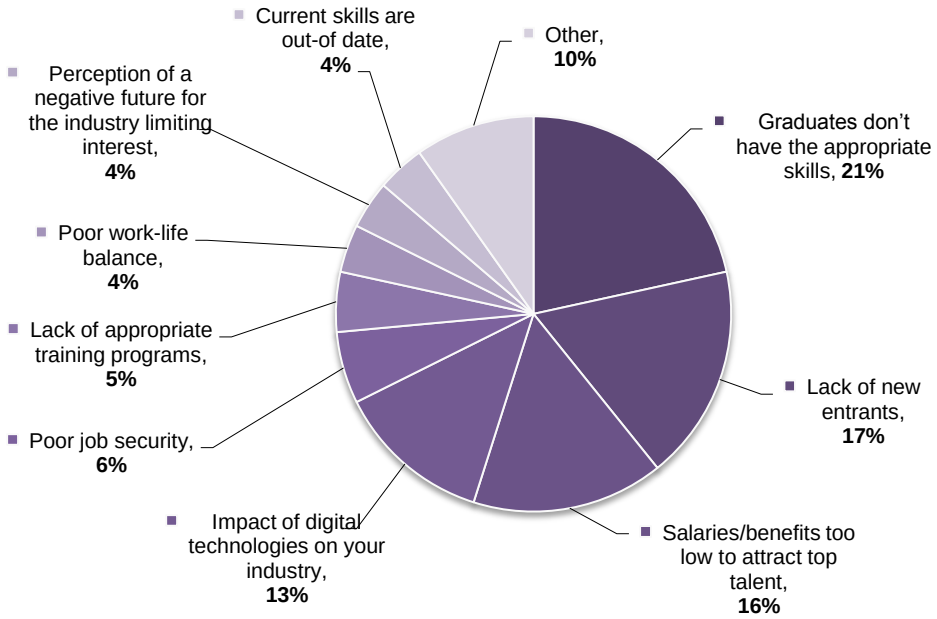


Source: WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011

Digital media

Among digital media firms that participated in the company-level survey, the most pressing recruitment issue was that "Graduates don't have the appropriate skills" which scored 21% of all points assigned, followed by "Lack of new entrants" (17%) and "Salaries/benefits too low to attract top talent" (16%) (see Figure 22, below).

Figure 22 Recruitment issues by point score (digital media)



Source: WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011

Recruiting a diverse workforce

Hiring practices such as policies or programs promoting the recruitment of a diverse workforce can be influenced by a number of factors, not the least of which is being part of a regulated industry. For example in broadcasting, which is a regulated industry, companies are required to adhere to diversity employment policies and report on them to the CRTC. In contrast, employment is unregulated in film and television production, although a large portion of the workforce is unionized, which has some influence on recruitment practices. Film and television distribution and digital media are also both unregulated. Thus, the development and composition of human resources management is quite different across the four screen-based industries, partly because of varying regulatory environments.

Nevertheless, interviewees from across all the screen-based industries identified some common challenges in recruiting a diverse workforce. The primary observation made by interviewees was that there is often a lack of diversity in the supply pool, and particularly that portion of the supply pool that comes from university, college and other formal training programs. For example, there are still faculties where women are under-represented, particularly in more technical fields such as engineering or computer science where digital media companies recruit heavily. For example, as the *Outlook for Human Resources in the ICT Labour Market, 2011–2016* describes, there has been "no increase in the share of women in university enrolments in mathematics and computer and information sciences" between

1992 and 2009.[62] In addition, one interviewee recalled that in her most recent visit to a top Canadian digital media training institution, just one or two of the thirty students in class were women.[63]

Interviews with key informants identified a number of factors that can contribute to the lack of diversity in post-secondary education program supply pools and these are explored below.

Perceptions of screen-based industries

Several interviewees suggested that members of designated groups may not perceive the screen-based industries as a viable career option because they do not see themselves represented on-screen or behind the camera, nor do they see their stories commonly reflected in the creative content (be it in a game, film or television show). Further, there may be too great a lack of strong, vocal role models from designated groups for future new entrants to look to for career inspiration. As interviewees explained, this could create the perception that the screen-based industries do not welcome these designated groups as part of their workforce—such that young women, individuals from culturally diverse backgrounds and persons with disabilities may not see the screen-based industries as a place that can provide them with solid career opportunities.

Similarly, certain industries or occupations can feel more unwelcoming than others for members of designated groups, further deterring members of those groups from wanting to enter the industry. Indeed, one interviewee described the digital media industry, in particular the video game development sphere, as palpably alienating for women until recently. She described a not-very-distant past in which she faced the challenge of wanting to hire women for her game development team but simultaneously feared exposing the firm to harassment lawsuits because of the industry's "fraternity-like" culture. Such a culture included the open display of suggestive images and sometimes offensive and sexist comments. (We discuss unwelcoming work environments in more detail in section 4.4: *Workplace issues*).

Another interviewee suggested that the Aboriginal People's Television Network (APTN) (launched in 1999) has helped encourage Aboriginal participation in the screen-based industries. However, he estimated that the number of high-profile Aboriginal people outside of APTN and its supplier production firms in the screen-based industries is still in the single digits.

Outreach to diverse communities

During interviews, several key informants indicated that members of designated groups may not consider careers in the screen-based industries simply because they are unaware of the career opportunities available to them there. Many interviewees agreed that increased outreach on the part of employers and industry associations to designated groups would eventually help improve the diversity of the supply pool in the screen-based industries. Some possibilities for such outreach are listed below:

---

[62] *Outlook for Human Resources in the ICT Labour Market, 2011–2016,* Information and Communications Technology Council, 2011, section 2: *Trends in the ICT Labour Market*.
[63] Key informant interview, July 2011.

- More exposure of high school and post-secondary students to future career opportunities in the screen-based industries is needed. One interviewee explained that in her experience high schools and post-secondary institutions lacked communication strategies for reaching young women, particularly regarding the opportunities available to them in the more technical fields of study relating to the screen-based industries. This interviewee believed this deficiency was a contributing factor to the lower representation of women in technical fields of study and consequently to their low level of representation in the more technical occupations in the screen-based industries[64] (In section 3.4, above, we discuss the representation of the various designated groups, by occupational category in more detail).
- A recent report by the Association of Canadian Broadcasters identified a lack of communication or outreach from the industry to the community of persons with disabilities about the opportunities available to them in the industry as one of the reasons that there is such a low participation rate of persons with disabilities in broadcasting.[65]

Access to post-secondary education and training programs

General access to colleges and universities remains an issue for certain designated groups because of structural barriers such as socio-economic factors or geographic remoteness from educational institutions. During interviews, access to training was identified as particularly challenging for Aboriginal people, particularly those who live in rural areas or the Northern regions (e.g., Nunavut). While there are a variety of film and television training programs targeted at developing the skills and talent of Aboriginal people, there are often very few spots available in such programs—as few as one or two in many cases. One interviewee observed that at this rate, it will be a very long time before these programs can create any momentum or significant impact on the screen-based industries as a whole. Interviewees also underscored that certain groups may be more challenged by the socio-economic barriers to accessing training, including Aboriginal people, persons with disabilities and visible minorities (particularly if they are new Canadians).

The question of supply

With the exception of company-level survey respondents in the digital media industry, where it was identified as one of the most important issues (see Figure 22), a lack of new entrants was not identified as a particularly important recruitment issue by survey respondents. Indeed, "Lack of new entrants" only received 8% of all awarded points by film and television production respondents (see Figure 19), 7% by broadcasting respondents (see Figure 21) and does not appear on the list of issues among film and television distribution respondents (see Figure 20). However, while the total supply pool may be plentiful, many interviewees indicated that the supply pool is not as diverse as it could be. Therefore, while one solution is to accelerate the rate of supply of people in designated groups, such action would have to be considered within the context of a possible total oversupply of film and media school graduates.

Furthermore, a diverse supply pool does not always translate into a diverse workforce. In the case of women in the film and television production industry, supply no longer appears to be an issue. Interviewees observe that women are relatively equally represented among

---

[64] Key informant interview, July 2011.
[65] *Presence Portrayal and Participation of Persons with Disabilities in Television Programming*, Canadian Association of Broadcasters, 2005.

students and graduates in film and television post-secondary education programs. Yet, it remains the perception of several interviewees that those proportions are not maintained once graduates are in the workforce, and there is hard evidence of that phenomenon.

According to a 2008 study by the Société de dévelopment des enterprises culturelles (SODEC) in Québec, "43% to 45% of those enrolled in the primary film and television studies programs at Québec Universities are women, however only 29% of the Association des réalisateurs et réalisatrices du Québec's (ARRQ) membership is women."[66] Similarly, a 2005 study by the BC Institute of Film Professionals showed that women accounted for about 40% of film students in the province in 2004 but only 32% of the unionized labour force in the film and television production industry.[67]

Moreover, even if we increase diversity in post-secondary education and training programs in an attempt to increase the diversity of the workforce supply pool, it can take decades to move new cohorts through the system to expand the numbers of an unrepresented group in the workplace. This long lag time is especially relevant for positions that require many years of experience, such as certain highly skilled specialist and senior management roles.

Indeed, the weakness of relying solely on increasing the supply of graduates from designated groups to improve their representation was raised in a 2007 study by McKinsey & Company.[68] In this study, McKinsey examines historic trends in numbers of women graduates and applies them to women's representation in top management positions across all industries. It then posits that "natural growth in the number of women graduates is insufficient to bring about change." While this theme is picked up again in section 4.3 on Career Path Progression, it is important to note that merely increasing the number of members of designated groups in the pool of graduates is not a sufficient strategy on its own for increasing diversity among new recruits in any given industry.

4.1.2 Recruitment: worker-side challenges for designated groups

Discrimination and other attitudinal barriers

Many interviewees indicated that discrimination—as well as lack of access to the "network" through which much of the recruiting in the screen-based industries takes place—can often be a barrier for members of designated groups. Designated groups often encounter a number of attitudinal barriers and misperceptions about their abilities, which can lead to discrimination in the hiring process. Attitudinal barriers are particularly challenging for persons with disabilities, where there may be many misperceptions compounded together, including general negativity as well as misperceptions and misinformation in the workplace about persons with disabilities and the challenges of living with a disability.[69] One industry

---

[66] *The Status of Women Directors with respect to Public Funding for Film and Television in Quebec (2002-2007)*, SODEC 2008, p. 15.
[67] *Women's Labour Issues in the Film and Television industry in British Columbia*, BCIFP, 2005, pp. i, 9, 21-22.
[68] *Women Matter: Gender Diversity, a corporate performance driver*, McKinsey & Company, 2007.
[69] *Presence Portrayal and Participation of Persons with Disabilities in Television Programming*, Canadian Association of Broadcasters, 2005.

stakeholder described a persistent belief that persons with disabilities have nothing to contribute and little capacity for creativity.[70]

One interviewee indicated that discrimination is systemic and even perceived as acceptable when it comes to on-screen talent positions because of creative license. The individual maintained that producers can make casting decisions based on anything (hair colour, skin colour, height, weight, age), and need only say that the candidate does not fit the role or the vision for the production. Such creative license is the nature of their work and is difficult to influence. In addition, marketing and sales preferences are often cited as reasons to reduce the diversity of on-screen personalities in a production (e.g., that regional audiences may not relate to a visible minority). However, one interviewee reported that increasingly, workers and the organizations who represent them (e.g., unions, guilds and professional associations) sense that these reasons are based on little actual data and perhaps a symptom of groupthink that could lead to major missed opportunities.

In section 4.4, below, we further discuss workplace issues and their impact on recruitment, employment and career progression.

Tokenism

The trap of "tokenism" was regularly cited by interviewees as an ineffective means to create sustained change, but one that is common and easy to fall into. One interviewee explained that to perceive one woman in a leadership role or one Aboriginal person on an important project team as successful evidence of progress for all women and all Aboriginal people is too simplistic. In fact, two separate interviewees, one in the digital media industry and one in film and television, referred to the number three as a possible point of inflection, in terms of moving beyond "tokenism"—three visible minorities working in a video game development micro-organization, three women sitting on a board or in the most senior levels across an organization, three persons with disabilities working behind or in-front of the camera on a production.

In the context of diversity in the workforce, the message is that tokenistic representation of designated groups is not enough to drive change, there needs to be a critical mass of representation of the various designated groups to create changes in perception and organizational culture and for their perspectives to enter the corporate and creative mind.

Barriers for persons with disabilities

As mentioned earlier, the challenges faced by persons with disabilities in the screen-based workforce (or looking to break into the screen-based industries) are both unique and seemingly daunting. Interviewees described enormous attitudinal, financial and architectural barriers compounding to result in very low levels of participation.

In addition to the various attitudinal barriers described above, architectural accessibility is an enormous challenge for persons with disabilities and many organizations seem unaware of the province of Ontario's Accessibility for Ontarians with Disabilities Act, which aims to

[70] Key informant interview, July 2011.

create a barrier-free Ontario by 2025. In particular, the broadcasting and film and television production industries still have a long way to go with regards to accommodating the workplace to the needs of persons with disabilities and increasing the accessibility of the workplace.[71]

Attitudinal, Financial and Architectural Barriers
I once went for an audition for a major Hollywood production that called for a person with a wheelchair and yet… the site of the audition was inaccessible. I arrived at the steps for the audition and felt totally defeated. For many people with disabilities, simply getting to the workplace may be a financial challenge when you consider the cost of support workers and transportation. If you have organized all the necessary support and transport to the audition or set but cannot get inside the facility, how can you work?

Actor and person with a disability, interview extract.

4.1.3 Recruitment: the market as a driver for change

Perhaps one of the most salient new developments reported by interviewees was the power and influence of market and audience diversity to drive change in the representation of designated groups. In other words, the greater the number of designated groups who are recognized to be consumers and users of the products or content offered by companies, the greater the willingness of the broadcaster, video game developer or producer to include members of the designated groups in the workforce and key management positions. This observation may seem utterly logical but in the screen-based industries, it has been slow to translate into practice.

The most recent indication of this phenomenon is related to the rapid rise of casual and social games accessible on the Internet. The Casual Games Association reports that more than 200 million people of all ages, genders and nationalities worldwide play casual games via the Internet, while "a majority of those who purchase casual games, however, are over 30 and female."[72] In its *2007 Market Report*, the Association contrasts the characteristics of casual and hard-core game enthusiasts, as shown in Table 13, below:

Table 13 Game play characteristics of casual and hard-core enthusiasts

Characteristic	Casual	Hard-Core Enthusiast
Demographic	All ages, male and female, 100% of population	18-25 year-old males, < 15% of population
Primary platform	PC, Mac, inexpensive console	Games consoles, high-end C
Game price	Free - $19.99	$29.99-$59.99
Hollywood equivalent	Sex and the City, Friends, ER	Silence of the Lambs, Reservoir Dogs, Alien

Source: Casual Games Market Report, 2007

Multiple digital media interviewees explained that many of the "hard-core" game

[71] *Presence Portrayal and Participation of Persons with Disabilities in Television Programming*, Canadian Association of Broadcasters, 2005.
[72] 2007 Casual Games Market Report at www.casualgamesassociation.org.

developers, so experienced in designing the first-person shooter games of the games console market, are not necessarily as comfortable or capable when it comes to designing and launching games for the social and casual market. As a result, the demand for female workers at all levels in game development is beginning to grow.

Some interviewees expressed hope that a broader consensus will develop which recognizes that a diversity of opinion is important to creating content that will resonate with a variety of audience segments, including new and emerging ones. As explored in the discussion on tokenism above, the logic to this thinking is that it is not enough to have a single designated group member 'consulting' or on the periphery of the team. For a stronger chance of success, diverse team members need to be integrated and to become active participants in the creative process. Of course, as one interviewee put it, in times of financial stress, there are endless reasons business owners will cite as excuses for not prioritizing diversity. Interviewees expressed the view that if one can link workforce diversity to stronger outputs and higher product demand, diversity would become more of a priority in recruitment.

Indeed, the extract below, from an article recently published on Gamasutra.com, cites an interview with BioWare's Manveer Heir where he points to some hopeful signs about future on-screen diversity in games.

> **More diversity will only make games more compelling to players, and more meaningful.**
> It's not about fairness. It's not video game affirmative action. It's about actually pushing our medium to make better games, to tell better stories in our games…To me, thinking about the sexual orientation, the gender, and the race of a character can change... Even the age of a character -- that can change the way your game is structured, what your game is about, the things a game can comment on, the mechanics of a game…I think when we don't try to do things that are out of our comfort zone, we fall back into comfortable patterns.
> I know games are not the same authorial control as a director… Games are made by teams, not individuals ... But I think we can promote our talent, not just at the top level, but at the lower levels as well. That gives more visibility to the talent, as well as it gives visibility to people from the outside, on who is making these games.
>
> *BioWare Montreal designer Manveer Heir speaking to Gamasutra.com, August 2011*

4.2 In-Career training

This section on in-career training focuses on designated groups' access to training, the types of training that are being accessed and the skills the screen-based industries will require in the future. With some exceptions, women, visible minorities and Aboriginal people have equal access to skills and training while persons with disabilities face greater and unique barriers in access to training.

In-career training is an important aspect of proactive career management, something we discuss further in the next section on career progression. Proactively assessing one's own strengths and weaknesses—including asking for feedback from peers and taking active steps to improve those weaknesses—is vital for every worker in a competitive industry. Across the screen-based industries, interviews suggested that these skills are even more crucial for members of designated groups.

Women and training – film and television production

According to the worker-level survey, approximately two-thirds (66%) of women working in film and television production have accessed in-career training over the past 12 months, which is slightly less than the overall average (69%).

For those women who did not access training, reasons were varied. The most significant barriers cited were:

- Lack of time (27%);
- Lack of awareness (30%);
- Lack of need (22%); and
- Lack of financial resources.

In many cases the cost of the training in combination with the cost of lost time ("no billable hours") to participate in training creates a sort of double barrier for freelancers and independent workers, compared to those who are employed full-time. As survey results show, film and television production training is mainly self-financed (60%):

- Only in 3% of cases were the costs of training shared between worker and employer—though this low percentage may reflect the freelance nature of the film and television production industry. Fortunately, most of that training (63%) was offered for less than $1000.

Of those women in the film and television production industry who did receive training, the most popular subject-matter areas were:

- Creative and/or artistic skills (62%); and
- Technical skills (41%).

Notably, only 17% of women in film and television production who accessed training in the past year accessed business skills training.

According to the survey, the training accessed by respondents was offered by a variety of organizations:

- 36% of women accessed their in-career training through unions, guilds or a professional association;
- 27% of women accessed training through a professional development organization; and
- 23% of women accessed training via a private training institution.

Training and the broadcasting industry

The highlights of the company-level survey results on the theme of training in the broadcasting industry are as follows:

- The majority (70%) of broadcasters offer in-career training and almost all (90%) broadcasters will facilitate in-career training.
- All of these broadcasters offer technical training, while most (90%) offer leadership, financial and/or business, marketing or creative training.

- Despite this training, half (50%) of broadcasters report that they are experiencing severe or significant difficulties in meeting their needs for technical skills. Indeed, the technical area appears to be the only area where such difficulties are being experienced in the broadcasting industry.
- To address these skills gaps, most (90%) broadcasters are (extremely or very) likely to provide more training directly to employees, whereas about half are likely to create a mentorship program and/or recruit new types of workers with different skill sets.
- Indeed, half of surveyed broadcasters indicated that web development/design was the top in-demand skill that has emerged over the past 5 years. In addition, respondents identified that over the next 5 years, writing/creative development and new/digital media skills are likely to be important.

Employers and risk tolerance

Interviews suggested that some employers can be risk averse when it comes to skills and training investment and new hires. Of course, investing in skills and training for any employee comes with a risk that the employee may move on, taking the value of the training investment with them.

In the screen-based industries, however, employers are particularly risk averse when it comes to investing in training for candidates who may move on to other more lucrative industries or to organizations in the US or overseas. From a gender perspective there is the added reality (which is not restricted to the screen-based industries, as one digital media industry representative pointed out) that an organization could be less likely to hire or invest substantially in training for a woman in her 30s on the assumption that she may be looking to start a family (we discuss maternity leave and work-life balance in more detail in sections 4.3 and 4.4, respectively).

Beyond training

Many interviewees expressed frustration with training and skills development practices in the screen-based industries, explaining that access to training exists, particularly for motivated people—but that training in itself "is not a panacea." It was suggested that training can only give people the tools to solve problems, but it cannot solve them directly. In fact, one highly-experienced executive suggested that training can even set up false expectations in some workers, who express frustration that it did not lead to immediate hiring. Similarly while mentorship is a strong factor in success and there is evidence it offers a good return on investment for all parties involved, it is not the "magic solution" it is sometimes purported to be. One business-owner with decades of experience in media and training, also suggested that in some cases, the training does not fit the skills gap. For example, "a breakfast" she explained, "is not much good for improving your financial skills."

Today digital skills permeate almost all facets of the screen-based industries. Indeed, *Frame Work 2004* published two major findings on overall skills and training needs:

1) The need for the screen-based media workforce of the future to be highly skilled in: creative business development and marketing, advanced management and finance, and have the ability to work with new technologies.

2) The need for a digitally-skilled workforce—one that is poised to exploit new and future digital technologies.

These findings continue to resonate in today's rapidly changing digital landscape. For the digital media industry, among the firms that participated in the company-level survey, the most pressing recruitment issue was that "Graduates don't have the appropriate skills," followed by "Lack of new entrants," highlighting the need for *more* highly-skilled graduates, or graduates with more relevant skills that will allow them to hit the ground running upon recruitment.[73]

While the quantity of new entrants was not raised as an issue, in film and television production, 10% of survey respondents cited "Lack of appropriate training programs" as a barrier to recruitment. In an industry where on-set/on-site/live-project training and exposure is vital for new entrants and career progression, training that is not designed or geared toward apprenticeship or "hands-on" experience may not be as successful at preparing the graduates and new entrants the industry requires.

Challenges in these arenas (graduating with the appropriate skills and/or accessing the appropriate training) arise in part from the relationship-driven nature of the screen-based industries which makes access to "hands-on" experience more difficult for new entrants. On both client projects and major film productions there is a preference for developers, producers and directors to work with people they have worked with successfully in the past. This inclination is somewhat financially motivated as the smoother everything runs, the fewer costly delays and overall days of production.

This closed shop mentality naturally inhibits the development of on-set/on-site/live-projects for new entrants and, in some cases, encourages the exclusion of members of designated groups. New entrants may rely on networks in order to obtain one of the few available positions in the studio or on-set. While we discuss the challenges designated groups face with networking in the next section, the most extreme form of this barrier is faced by persons with disabilities. In addition to problems in physically gaining access to the set or studio, a director or producer who is focused on sticking to a tight schedule, a tight budget and a seamless on-set experience may be unlikely to make the modifications required to train and hire a person with a disability, whatever creative value they may bring to the project.

4.3 Career path progression

The focus of this sub-section is on the career path leading up to senior levels of employment—be it CEO of a micro- or SME organization or a senior executive role in a larger one. Throughout this sub-section we will refer to the occupation levels of "senior manager" and "specialized manager."[74] These categories, from the National Occupational Classification

---

[73] WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011.

[74] When referring to "senior managers" and "specialized managers" we are using the National Occupational Classification (2006) definitions from Statistics Canada where "senior managers" are defined as being primarily concerned with establishing policy and carrying out the functions of management *through* middle managers, while "specialized managers" refers to the NOC category of "Specialized middle management occupations" who are defined as being "primarily concerned with carrying out the functions of management in a specialized field

for statistics, are reported on in the Census and were included in the design of the survey questionnaires for consistency.

Looking at the company-level survey results presented in Table 14 we can observe the following about the representation of women and visible minorities working in senior roles in broadcasting and film and television distribution:

- Of the portion of the broadcasting workforce captured by the survey, 50% of specialized managers were women while only 35% of senior managers and 31% of owners and board members were women.
- Similarly, 7.5% of specialized managers captured in the survey are visible minorities, while visible minorities represent less than 1% of senior managers and not one of the owners or board members captured was a member of a visible minority.
- In broadcasting, 50% of surveyed firms indicated that they have no representation of women at the board or ownership level. Similarly, 90% of firms had neither Aboriginal people nor persons with disabilities at the board/ownership level. None of the broadcasters surveyed have visible minority representation at the board level.
- In film and television distribution, women accounted for 48% of specialized managers captured by the company-level survey while they accounted for only 32% of senior managers. Visible minorities accounted for 13% of specialized managers in film and television distribution but only one senior manager was identified as a visible minority out of the 37 that were captured by the survey.

Table 14 Senior level representation of women and visible minorities in the screen-based industries, 2011

	Broadcasting (%)	Film and Television Distribution (%)
Women		
Owners and board members	31.0	14.3
Senior management	35.0	32.0
Specialist managers	50.0	48.0
Visible minorities		
Owners and board members	0.0	0.0
Senior management	1.0	3.0
Specialist managers	7.5	13.0

Source: WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011

The situation is similar in film and television production. For example, according to a 2005 study conducted by the BC Institute of Film Professionals:

- Women represented 46% of second and third Assistant Directors out of reported BC members of the Directors Guild of Canada, while they only represented 26% and 10% respectively of Assistant Directors and Directors.[75]

Indeed, the 2006 Census data supports the finding that across broadcasting, distribution and production, the representation of women and visible minorities declines as they advance to more senior roles. For example, women accounted for 52% of specialized

---

such as finance, personnel, purchasing, sales, production, engineering or facility management within an industrial, commercial, professional or institutional organization."

[75] *Women's Labour Issues in the Film and Television Industry in British Columbia*, BCIFP, 2005, pp. 9-10.

managers in the motion picture and video industries,[76] but just 25% of senior managers (see Table 15).[77] Similarly, for broadcasting (except Internet) women represented almost 48% of specialized managers and only 19% of senior managers.

Table 15 Full-time employment by occupation unit NAICS 5121 - motion picture and video industries, 2001, 2006

	2001	2006	% of 2006 total	% change since 2001
Total Senior Management	**1,000**	**1,125**	**100.0**	**12.5**
Men	735	840	74.7	14.3
Women	260	285	25.3	9.6
Total Specialist Managers	**1,185**	**1,440**	**100.0**	**21.5**
Men	585	685	47.6	17.1
Women	600	755	52.4	25.8

Source: Census 2001, 2006

Table 16 Full-time employment by occupation unit NAICS 515 – broadcasting (except Internet) 2006

	2006	% of 2006 total
Total Senior Management	**760**	**100.0**
Men	625	82.2
Women	145	19.1
Total Specialist Managers	**2,260**	**100.0**
Men	1,185	52.4
Women	1,075	47.6

Source: Census 2006

These data suggest that women and visible minorities are not moving into senior roles at the same rate as their peers. It should be noted that although these data do not show much discrepancy between the representation of women at both middle and senior management among the broadcasting, film and television distribution or overall motion picture and video industries (NAICS 5121), several interviewees indicated that the broadcasting industry has been more successful than the other screen-based industries at bringing women into these more senior roles. Furthermore, interviewees observed that the film and television distribution industry was perhaps the one with the least female representation, particularly at the CEO and ownership levels.[78]

Similar trends are also visible in the overall national workforce, where women represent 61% of the total middle and other management workforce, while they only account for 24% of the overall senior management workforce.[79] Similarly, visible minorities account for 14% of the overall national middle and other management workforce, while they only represent

---

[76] NAICS 5121- motion picture and video industries "comprises establishments primarily engaged in producing and/or distributing motion pictures, videos, television programs or commercials; exhibiting motion pictures or providing post-production and related services." Source: Statistics Canada Industry Classifications, NAICS 2007.
[77] *Full-time employment by occupation unit NAICS 5121 - motion picture and video industries,* Census 2006, Statistics Canada.
[78] Key informant interviews, July-August 2011.
[79] *Employment Equity Data Report*, HRSDC, 2006.

8.7% of senior managers in the overall workforce.[80] The trend is also mirrored outside of Canada. For example, "although women constitute almost half of the U.S. workforce and hold more than 50 percent of management and professional positions, they make up only 2 percent of Fortune 500 CEOs. The under-representation of women at the top occurs across occupations and industries, irrespective of how many women occupy management positions within the organization."[81]

There are a number of factors which could explain why members of these groups appear to have more trouble penetrating the upper ranks of the screen-based industries and these are discussed in more detail below.

4.3.1 Career path progression: networking challenges

Many interviewees indicated that networking has a large part to play in both recruitment and career advancement—whether it is networking internally within your organization or externally with the broader industry. Indeed, in a 2005 study by the BC Institute for Film Professionals, "developing a solid network of industry contacts" was the second most commonly identified career advancement tool for women respondents working in the film and television production industry in British Columbia.[82]

As we discussed in sections 4.1 and 4.2, there is a tendency for employers in the screen-based industries to recruit through existing networks, and to hire people they have previously worked with or who come to them with a recommendation from a trusted source. As such, exercising good inter-organizational networking skills is an important part of career management. In the same way, a strong *internal* network is important for individuals to advance their careers within a given organization.[83] Interviewees expressed that actively engaging in networking activities is both a way to access career advancement opportunities and a way to create a support network that will vouch for you when those opportunities arise.

However, several interviewees expressed that designated groups (women in particular) do not always exploit networking opportunities as well as they could as a means of advancing their careers. In addition, some interviewees explained that networking is a particular challenge for visible minorities who are more likely to be attempting to break into the industry from outside of the established networks. One interviewee stated that lack of a good network can be particularly challenging for a new Canadian who does not always know where to start in order to build that all-important network.[84]

The persistence of the "old boys' club"

Throughout the interview process, the subject of a persistent "old boys' club" was raised repeatedly. Indeed, many interviewees expressed the view that the old boys' club still exists,

---

[80] *Employment Equity Data Report*, HRSDC, 2006.
[81] *The Double-Bind Dilemma for Women in Leadership: Damned if You Do, Doomed if You Don't*, Catalyst Research, 2007, p. 3.
[82] *Women's Labour issues in the Film and Television Industry in British Columbia*, BCIFP, 2005, p. 32.
[83] Key informant interview, broadcasting industry, August 2011.
[84] Key informant interview, technology and digital media expert, August 2011.

although it has shifted higher up the career ladder. In recent years, the innermost circle of men in film and television production and broadcasting has moved "up a level" in seniority, to ownership positions, industry boards and upper-echelon senior executive positions. The screen-based industries are still very much a "who-you-know" industry based on networks and relationships that are difficult for outsiders to access. As one interviewee expressed, the persistence of this old boys' club certainly makes one feel like an outsider if one is a member of one or more designated groups.[85] The persistence of this club at the top decision-making levels of the industry makes it more difficult for members of designated groups to penetrate the top echelons of the screen-based industries.

The glass ceiling is not gone, it just moved up to the second floor.
The glass ceiling still exists. Although women have made a great deal of progress and have been able to climb up into middle management quite successfully, they are still struggling to move up into the senior executive and ownership positions in the screen-based industries. The progress made in terms of female representation at the management level creates an illusion that the glass ceiling has been shattered or at least cracked, but in fact it is still intact it has only shifted upwards to those higher levels of the screen-based industries.

President of a professional development association

4.3.2 Career path progression: attitudinal barriers

Proactive career management skills are necessary for all workers in a competitive industry but are vital to the success of designated groups. However, several interviewees expressed that proactive career management is often a challenge for members of designated groups. Indeed, one interviewee from the broadcasting industry expressed frustration at women in her industry who had weak career planning abilities such as: not preparing a five- or ten-year plan, failing to seize new opportunities as they arise, or plan possible exit strategies and strategic career moves, and not setting themselves sufficiently aggressive or strategic skills development targets.

One interviewee explained that women often have low confidence in their abilities or qualifications and may not pursue career advancement opportunities as aggressively as their male peers.[86] Others expressed that there is a tendency among women to trust that an employer will look after them and wait for opportunities to be presented to them, rather than proactively looking for good career advancement opportunities for themselves.[87] Similarly, another interviewee expressed that women have a tendency to interpret eligibility criteria literally; they may choose not to apply for a promotion or other career opportunity rather than risk the possibility of failure or rejection. It was suggested that men are more

[85] Key informant interview, diversity expert, August 2011.
[86] Key informant interview, technology and digital media expert, August 2011.
[87] Interview with senior level TV executive, July 2011.

likely to take the risk anyway and adopt a "what have I got to lose" attitude.[88] Interviewees attributed lack of confidence to both the way in which women are socialized and to a lack of visible role models to whom they can look for inspiration and encouragement.

Several interviewees also expressed that members of designated groups often lack role models or mentors from designated groups. One interviewee suggested that having a good mentor is important as they often act as career coaches, helping their mentees to identify and seize opportunities and make important career change decisions such as moving to a new organization at the right time. Many interviewees explained that having a mentor or career coach who can relate to and understand the unique challenges faced by designated groups is extremely important and that there is a sharp lack of such role models for members of designated groups.

Saying Yes
A growing perspective today is to question whether women really want 'it,' as in the top job, or do we want the theory of knowing it is available to us. People can read that indecision in you. Offer a man an opportunity and he'll say 'yes' right off the bat, he doesn't need to know more information or worry about whether he is qualified. Offer a woman the same exciting opportunity and she will doubt her ability to succeed. I try not to do that, but even a couple months ago I was asked to be the Chair of a Board, and I hesitated, wondering if I had the right skills. Everyone looked at me like I was crazy until I finally snapped out of it and said 'yes.'
Wouldn't it be amazing if we were taught how to say 'yes' all the way through our lives rather than told not to get our dresses dirty?

Senior Media Executive, interview extract

4.3.3 Career path progression: "the leaky pipeline"

The expression "the leaky pipeline" describes the phenomenon whereby women exit an industry's workforce at increasingly higher rates as they move up the career path to more senior positions. This dynamic is often cited as an explanation for why women are more under-represented in the most senior level positions than in entry- or mid-level positions.[89] There are a number of reasons why women might exit (or "leak" from) the workforce, including motherhood.

Interviews with key informants, particularly from film and television production (an industry where work-life balance is described as a significant challenge), indicated anecdotally that some women climb the ranks in an industry until they have their first child and may then be forced to exit under the weight of family responsibilities. In some cases, as interviewees observed, women may not leave the industry altogether after having children, but will find

[88] Interview with the president of a professional development organization for the screen-based industries, July 2011.
[89] "Research commissioned by PwC UK indicates that, in most 'first world' countries, entry level men and women in the professional services sector are hired at an equal (1:1) rate. However, evidence exists that women are lost from the pipeline through voluntary termination at a rate two or three times faster than men once they have attained the experienced, mid-career, Manager/Senior Manager level of their careers." Source: *The leaking pipeline: Where are our female leaders?,* PricewaterhouseCoopers, 2008, p. 3.

their progress up the ladder has slowed or stalled as their work-life balance becomes more difficult to manage. (We discuss more about work-life balance for working parents as a workplace issue and its impact on career path progression in section 4.4 below.)[90]

Further, interviewees suggested that the time women "lose" to maternity leave over the course of their career has a material negative impact on their rate of promotion. In some cases, the issue arose from the fact that over the same eight year period, for example, two candidates (one a man and one a woman) would actually claim different years of experience if the woman had taken two periods of maternity leave for six or twelve months. While the reality of lost time and work experience as a result of maternity leave is frustrating, perhaps the more complex and worrying employment practice to consider is that women may be overlooked for a promotion, not because of the experience they missed while on maternity leave, but out of fear of future maternity leave absences. We discuss this specific dynamic in more detail in the next section.

Another point raised by interviewees regarding "the leaky pipeline" in the screen-based industries has to do with generational shifts and retirement rates. For example, the generation of women who entered the industries 10-15 years ago has progressively climbed the ranks and has successfully populated middle and specialized management roles. However, because there are fewer positions in senior management and executive roles and because those roles are currently occupied by an older generation of men, women have reached a road block in career progress. In addition, these senior positions have very low turnover and retirement rates. As a result, women who aspire to reach those senior and executive roles are more likely to exit the industry in order to continue to advance their careers rather than stagnate at the management level.[91]

4.4 Workplace issues

In this sub-section, we aim to identify and explain the main workplace issues that pose challenges for members of the designated groups at various levels of employment across the screen-based industries. By workplace issues, we mean special circumstances or challenges that create barriers to entry or career advancement for designated groups. Workplace issues could also indicate circumstances that make the workplace unpleasant or uncomfortable and create a challenging work experience for designated groups. The issues discussed below were identified by interviewees and survey respondents as the most pressing challenges that these groups face in the screen-based industries.

It should be noted that the number of years of experience and level of training did not appear to have any impact on workplace issues among respondents to the worker-level survey.

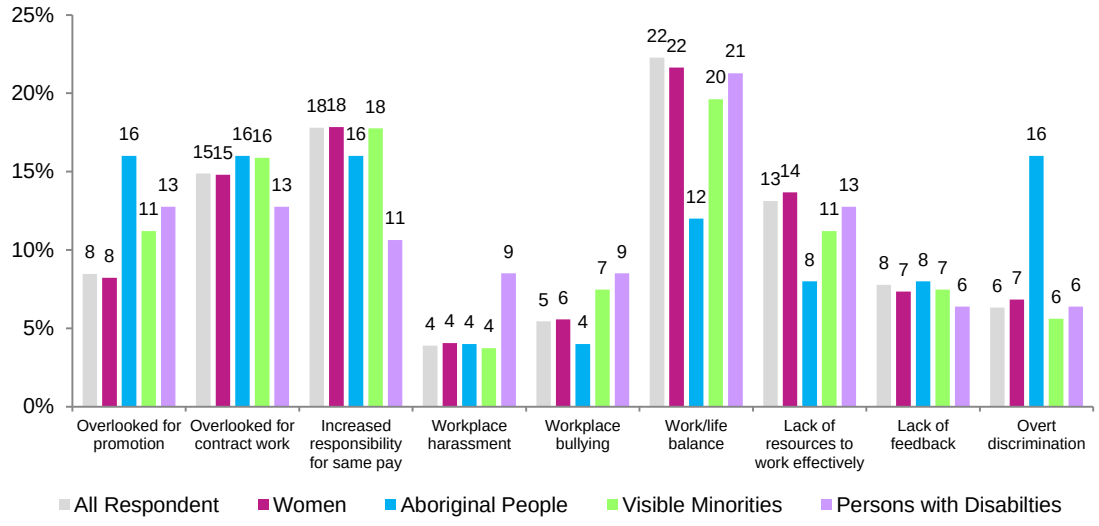
Before examining a selection of workplace issues in more detail, Figures 23 to 25 (below) show the results of the worker-level survey. Respondents were asked to rate various challenges for the level of impact they had on their workplace. Results have been presented by screen-based industry, and depict the percentage of respondents in each designated

---

[90] Key informant interviews, July-August 2011.
[91] Key informant interview, July 2011.

group who responded that these issues have had either a "severe" or "significant" impact on their careers. The following sub-section expands on the data presented below.

Figure 23 Workplace issues by designated group (film and television production)



Source: WIFT-T Worker-level survey, conducted by Nordicity and Environics, 2011

Figure 24 Workplace issues by designated group (broadcasting)

Source: WIFT-T Worker-level survey, conducted by Nordicity and Environics, 2011

Figure 25 Workplace issues by designated group (digital media)

Source: WIFT-T Worker-level survey, conducted by Nordicity and Environics, 2011

4.4.1 Workplace issues: work-life balance

Both survey respondents and interviewees identified the lack of a good work-life balance as an important workplace issue across the screen-based industries. Indeed, 41% of all worker-level survey respondents identified work-life balance as a "significant" or "severe" issue (for more detail on how these results are distributed across screen-based industries and employment equity groups refer to Figure 23, Figure 24**,** and Figure 25, above). There are many factors and components to a good work-life balance, but the present discussion will focus on work-life balance insofar as it refers to the difficulties of being a working parent in the screen-based industries (interviews with key informants in all of the screen-based industries identified this as the most significant component of work-life balance).

Interviews and previous studies indicate that the screen-based industries are particularly challenging for working parents because these industries may not always be the most forgiving or flexible when it comes to balancing home or family responsibilities with work, particularly in the film and television production industry.[92] Indeed, one interviewee explained that in the film and television production industry there is really no such thing as a weekend or statutory holiday; any day can be a working day. In addition, working days are often very long (12-14 hours) in the film and television production industry and there is no flexibility for a parent to leave early to pick children up from daycare or be home for them after school. Furthermore, working in film and television production often involves travel, which can be difficult for a working parent.[93]

---

[92] *Encore Pionnières: Parcours des réalisatrices québécoises en long métrage fiction*, Réalisatrices Équitables, 2010.
[93] Interview with the president of a film and television production industry professional association, August 2011.

While the work-life balance issue was most-commonly identified as a challenge for film and television production workers in previous studies, the worker-level survey and during interviews, interviewees from the other screen-based industries (film and television distribution, broadcasting, and digital media) also indicated that work-life balance could be a challenge. Additionally, although the survey shows that work-life balance is an issue for everyone and interviewees conceded that it would be a challenge for any working parent (as in both mothers and fathers), most interviewees also expressed that this particular workplace issue has a tendency to impact women more often than their peers because women still tend to have more home or familial responsibilities, mainly as a result of persistent societal norms.

Indeed, 41% of female film and television production workers who responded to the worker-level survey indicated that work-life balance had a severe or significant impact on their career development. Interestingly, women's perspectives on this issue did not differ from the overall response when men are included in the count (42% of all respondents in film and television production—including men and women—indicated that work-life balance had a severe or significant impact on their career development). Nevertheless, a recent study from 2005 out of British Columbia supports the interviewees' observations. In the study, balancing work and home or family responsibilities was identified as a significant constraint to workforce participation and career advancement among women employed in the film and television production industry.[94]

The impact of work-life balance on employment and career advancement for women in the screen-based industries is two-fold. First, there are the basic working conditions: long work days, inconsistent work days, lack of flexible work hours and travel, which have intrinsic implications when it comes to family responsibilities. The working conditions, particularly in film and television production, are simply not family-friendly. As a result, many women leave the workforce without returning after starting or expanding a family because they simply cannot juggle their family responsibilities with the work conditions in the industry.[95]

Indeed, in a recent study by Réalisatrices Équitables, interviews with women directors in the film and television production industry in Québec indicated that those who had children saw their careers transformed. Many had to slow down the pace of their careers by spacing out projects more, focusing on activities such as writing which were easier to balance with family responsibilities or by taking on more jobs in film categories that had more reasonable working hours, such as documentary film.[96]

As noted above, having a family can have an impact on career advancement. Many interviewees explained that women often experience pressure or discrimination from employers if they have a family, are planning to grow their family or are perceived to be

---

[94] *Women's Labour issues in the Film and Television Industry in British Columbia*, BCIFP, 2005. Women employed in the film and television production industry who participated in the study were asked to rate a number of factors (on a scale of one to five) according to the level at which they felt these factors constrained employment and career advancement opportunities. Balancing work and family responsibilities was identified as one of the most significant constraints for women in the industry, where the overall average rating among participants was 3.5, and 29% of participants rated this factor as a major constraint (5).

[95] Key informant interviews, July-August 2011.

[96] *Encore Pionnieres: Parcours des realisatrices québecoise en long metrage de fiction*, Realisatrices Equitables, 2010, p. 56.

likely to start a family in the near future. Women have reported anecdotally that they often get left out of certain projects, are overlooked for promotions or even for employment because employers perceive that they will not work as hard as someone without family responsibilities.[97]

One key informant interviewee from the digital media industry even suggested that many employers hesitate to hire women of a certain age (mid-30s) or who already have a child because they perceive it as a risk to hire someone who may want to start a family or expand their family. The perceived risk lies in the fact that the individual may demand time off for maternity leave or that the job will become a second priority and that the individual will begin to ask for time off, shorter work days, flexible hours or make other demands to accommodate their family responsibilities. The worry is that a working parent will either leave the workforce or stay but not perform as well because they are not making their job a priority, which will ultimately negatively impact any projects they are involved in.[98]

4.4.2 Workplace issues: overcoming perceptions

Worker-level survey respondents did not identify workplace bullying, harassment or overt discrimination as a particularly pressing issue (indeed, 45% of respondents suggested that workplace bullying and harassment had little or no impact on their career development), with the exception of Aboriginal respondents from the film and television production industry, 16% of whom identified overt discrimination as a having a "severe" or "significant" impact on their workplace (see Figure 23, Figure 24 and Figure 25, above). Nevertheless, many of the survey respondents and key informant interviewees suggested that members of designated groups still face great challenges in overcoming negative perceptions about their abilities in the workplace.

In fact, it is sometimes more difficult to overcome challenges of perception than overt discrimination because they are more subtle. Employers may not outwardly express their belief that women, persons with disabilities or visible minorities are less capable than their peers but may still exhibit subtle differences in behaviour towards members of designated groups based on those perceptions. If they are not saying it out loud, it is virtually impossible to do much about it.[99]

Women

A small number (8%) of female respondents to the worker-level survey indicated that "gender discrimination" is a pressing issue (although definitions of that term were quite varied). Indeed, many of the interviewees indicated that women still face many false perceptions; that they are somehow less capable, less credible or less talented than their male counterparts, even if they are more qualified and experienced. There is still a sense that men are given preference in hiring and promotion in the screen-based industries as a result of these lingering perceptions.[100] Other studies have indicated this perception as well. For example, in the 2005 study commissioned by the BC Institute of Film Professionals, "almost

---

[97] Key informant interviews, July-August 2011.
[98] Key informant interviews, July-August 2011.
[99] Key informant interviews, July-August 2011.
[100] Key informant interviews, July-August 2011.

two-thirds of the women film professionals surveyed feel that they have experienced work-related discrimination based on gender."[101] The types of gender-based discrimination identified by these women included perceptions that women were less capable, were being treated differently, were given different tasks than their peers, were being treated as less credible or were not being taken seriously.[102]

Visible minorities

Visible minorities similarly have to battle with these "hidden" perception issues, such as social stereotypes. Though none of the interviewees singled out this challenge specifically for visible minorities, a recent study by Catalyst indicates that members of visible minorities in professional occupations in Canada still encounter negative perceptions and experience negative stereotyping. Participants in the study reported encountering ethnic/racial stereotypes relating to everything from social traits to negative perceptions about their work ethic and skills or abilities. As a result, many of the respondents felt isolated or hindered in their career advancement because they felt they were subject to double standards, had to work harder to prove themselves or were overlooked in career progression opportunities.[103] Indeed, as one participant quoted in the study expressed, it can be difficult to change such perceptions once they are established: "I struggle with my…manager...He was so engrossed in his perception, his image, of me, that I don't think he really was listening to what I was saying."[104]

Persons with disabilities

Perception, or misperception, is also one of the more significant challenges for persons with disabilities. In a recent study, the Canadian Association of Broadcasters identified "negative social attitudes, misperceptions and misinformation concerning persons with disabilities and life with a disability" as a major issue or barrier to participation for persons with disabilities in the broadcasting industry.[105] Interviewees identified two major perceptions that pose significant employment challenges for persons with disabilities in the screen-based industries. On the one hand, there is still a great deal of misperception on the part of employers with regard to the talent or abilities of persons with disabilities. Indeed, as discussed in section 4.1, the perception that persons with disabilities have little of value to contribute still persists.[106] Furthermore, employers often imagine that employing persons with disabilities will be "too much of a hassle" or perceive that creating an accessible workplace, whether architecturally or in the form of personal assistance, will be too cost prohibitive.[107]

4.4.3 Workplace issues: unwelcoming work environments

A major challenge facing members of employment equity groups in the screen-based industries is workplace environments that are unwelcoming or unaccommodating to their needs and sensibilities.

---

[101] *Women's Labour issues in the Film and Television Industry in British Columbia*, BCIFP, 2005, p. 35.
[102] *Women's Labour issues in the Film and Television Industry in British Columbia*, BCIFP, 2005, p. 35.
[103] *Career Advancement in Corporate Canada: A Focus of Visible Minorities*, Catalyst Research, 2008.
[104] *Career Advancement in Corporate Canada: A Focus of Visible Minorities*, Catalyst Research, 2008, p. 24.
[105] *The presence, Portrayal and Participation of Persons with Disabilities in Television Programming*, CAB, 2005.
[106] Key informant interview, July-August 2011.
[107] Key informant interviews, July-August 2011.

For example, many of the screen-based industries have been traditionally male-dominated, in particular digital media and film and television production, and within those industries certain occupations are traditionally even more male-dominated (e.g., camera operation and visual effects in film and television production; technical roles in broadcasting). Some genres of broadcasting, notably sports, are considered very unwelcoming for women. As many interviewees indicated, women entering a work culture that is clearly male-dominated can feel unwelcome, unsupported and unaccommodated with respect to their needs and sensibilities.[108] For example, one interviewee explained that it can be very intimidating for a woman working on a film production to be the only woman on set with an all-male cast and crew, as well as all of the key creative and decision-making positions.[109] The 2005 study commissioned by the BC Institute for Film Professionals also identified feelings of isolation resulting from women working in male-dominated work cultures as a major challenge.[110]

Similarly, members of visible minorities might feel that they do not fit in because of cultural and sometimes linguistic differences that are not in line with what is often a "white Canadian" workplace culture. Indeed, the 2008 study by Catalyst Research found that most visible minorities in professional occupations in Canada struggled with feelings of not-fitting-in with the cultures at their employer organizations or not feeling accepted at their place of work.[111]

Interviewees also hinted that a large part of the cultural challenge had to do with a lack of "visible" role models for women, visible minorities or Aboriginal people in the screen-based industries or within their employing organizations. This lack of visible role models makes it harder for members of these designated groups to see a place for themselves within the culture of an industry, occupation or organization. Many interviewees felt that an increase in the number of role models and increased visibility for those few role models that do exist would help members of designated groups by giving them someone who they feel reflects and relates to them to look up to. Many felt that this would make members of designated groups feel more accepted, welcome and comfortable in workplaces that can often feel hostile to them.[112]

For persons with disabilities, the work environment challenge once again is two-fold. First, there is the basic challenge of entering a workplace that does not meet their unique needs, either architecturally or attitudinally (e.g., access to personal assistance for persons with non-physical or non-sensory disabilities such as individuals with mental, psychiatric or learning impairments).[113] Second, persons with disabilities have to deal with the added challenge of entering a workplace whose culture is ridden with misperceptions about the abilities of persons with disabilities and the realities of living with a disability, as discussed above.

---

[108] Key information interviews, July-August 2011.
[109] Interview with the president of film and television production professional association, August 2011.
[110] *Women's Labour issues in the Film and Television Industry in British Columbia*, BCIFP, 2005.
[111] *Career Advancement in Corporate Canada: A Focus of Visible Minorities*, Catalyst Research, 2008.
[112] Key informant interviews, July-August 2011.
[113] Key informant interviews, July-August 2011.

5. Impact of new technology

In this section, we will shift to a forward-looking perspective on how the representation of designated groups in the screen-based industries is affected by the impact of new technology.

As described in the background section of this report, since the publication of *Frame Work* in 2004, numerous technological and business developments have had an impact on the screen-based industries' workplace and workforce. New digital technology has influenced the workplace and the flow of work across the screen-based industries over the past five to seven years (consider that Facebook launched early in 2004). From multi-platform distribution to the rapid pace of new project development, the screen-based industries aim to become more agile in order to seize opportunities in this exciting market. This sub-section serves to highlight aspects of new technology that influence the representation of designated groups in the screen-based industries.

Digital democratization

Multiple interviewees spoke of the 'democratization' of digital technology, of 'levelling the playing field' in the screen-based industries. Low-cost, high-quality technology is more accessible and is leading creators to experiment with new forms, styles and perspectives. While such advances are more or less available to the population as a whole, as women and other designated groups take advantage of these lower barriers to develop and refine their story-telling skills, market themselves, create new products and distribute on the web, it could lead to stronger representation of designated groups in the screen-based industries.

One interviewee described, for example, how digital technology could lead to more opportunities for showcasing one's talent on a smaller scale and bypassing certain barriers in order to have content seen and played by decision-makers and content buyers (for example the few stand-out short films that gather momentum on YouTube and social networks without "official" distribution). Simultaneously, however, interviewees also referenced the digital divide, suggesting that such new opportunities are more likely to be harnessed by younger generations, and that their impact on the screen-based industries' employment would not be evident for some time. The common assertion that men are somehow stronger at working in the digital format was refuted but, as noted in the section 4.1: *Recruitment*, there are still some technical roles and study programs that men are more inclined to pursue than women.

'Democratization' is also somewhat of an overstatement in regards to people in remote areas with reduced access to broadband Internet, including many of Canada's First Nations communities.[114] Similarly, people with disabilities still face difficulties in accessing digital technology. In part, challenges for persons with disabilities arise from financial barriers but

[114] In a recent study, the Canada Council on Learning states that according to Industry Canada, only 17% of Canada's First Nations communities had access to broadband services in 2007. *The State of Aboriginal Learning in Canada: A Holistic Approach To Measuring Success*, Canada Council on Learning, 2009, p. 6.

also, depending on the nature of one's disability, mainstream digital content such as websites can also be inaccessible.

The Social Network
Though interviewees concluded that overall, there has been a demonstrated positive change in light of digital technology and social networking for people with disabilities, one interviewee described a possible area of concern with regard to online recruitment. Social media networks and sites such as Craigslist are used increasingly as a means to recruit actors and models (overall but also specifically for persons with disabilities) – rather than more formal methods such as through agents. On the one hand, this method is positive if it results in more on-screen work for an individual actor. On the other hand, some worry that the contract terms and compensation of such work is often unfavourable for persons with disabilities (low rates and no remuneration for extra transportation or assistance costs) as compared to the work obtained through more formal channels. By approaching actors in isolation, such recruitment methods may put persons with disabilities at a disadvantage and hinder their advancement in the screen-based industries as a collaborative group.

Summary extract from a key informant interview, August 2011

The analytics

This report highlights the notion that an increasingly diverse consumer marketplace has the capacity to influence change in the workplace diversity profile. One interviewee noted that enhanced, "real-time" digital metrics and analytics are key factors in achieving this "truer" understanding of the market. As the screen-based industries grow increasingly sophisticated at engaging audiences online and traditional audience measurement tools improve, it should become easier for firms to measure and update their understanding of their audience profile (such as in the rise of female casual gamers). Often, as with Google Analytics and Facebook Insights, such tools are easily accessible and free to use.

New business models

Digital technology and convergence is having a profound impact on the way that screen-based content is created, distributed and consumed, resulting in fundamental and disruptive changes to the screen-based industries' business model. While many digital developments create opportunities in the screen-based industries, they also pose threats to the business plans that underpin them. In *Navigating Convergence II: Charting Canadian Communications Change and Regulatory Implications*, the CRTC describes the competitive pressure posed by the accelerating trend in online consumption of screen-based content through "over-the-top" services such as Netflix and iTunes. These challenges have the potential to undermine broadcasters' business models and put the industry at risk of losing jobs. The CRTC highlights, for example, two major changes in the Canadian communications industry: (i) Shaw Communications' acquisition of CanWest Global Communications, and (ii) BCE's acquisition of CTVglobemedia. Both moves created large, vertically integrated

companies that "effectively combine programming, distribution and Internet services."[115] Such integration has an impact on all of the screen-based industries, even if indirectly. The report concludes that now is the time to focus on a more innovative and robust digital economy.

Indeed, in these times of uncertainty, the representation of designated groups in the screen-based industries' workforce may not appear to be a business priority. To return to a theme raised in the introduction to this study, however, one of the screen-based industries' greatest assets is its human capital. The new digital economy will require a highly-skilled workforce, able to collaborate across the screen-based industries. If Canada's increasingly diverse population can be considered a competitive advantage amid the constant pressures of the global marketplace, it would be desirable for this diversity to be reflected in the screen-based industries' employment profile.

[115] *Navigating Convergence II: Charting Canadian Communications Change and Regulatory Implications*, CRTC, August 2011.

6. Conclusions

This section provides a summary of the overall progress and conclusions of this study by highlighting select findings from *Frame Work II* alongside those of *Frame Work 2004*.

6.1 Overall progress

Though different methodologies prevent us from drawing a direct line through *Frame Work 2004*'s and *Frame Work II*'s survey results, we are able to characterize recent progress in the representation of designated groups in the screen-based industries. To that end, we review the key findings in *Frame Work 2004* and respond to each one with an update on the situation today, based on our findings from *Frame Work II*.

- **Screen-Based Media Workforce: Skilled, Increasingly Diverse and In Transition**: *Frame Work 2004* found that despite advances by women key occupations, including "senior management, top creative positions and new-media-related and technical positions" in the film and television workforce remained dominated by men. Visible minorities, Aboriginal people and persons with disabilities were largely under-represented, though *Frame Work 2004* highlighted the "inroads" made by visible minorities in small and entrepreneurial film and television companies.
  - **2011 *Frame Work II* Study Findings:**
    - Women continue to break ground in middle and specialized management positions, though not generally at the most senior management and ownership levels. It is still very much a networking business, and the "old boys' network" has moved to the highest echelons of business.
    - The situation remains challenging for other equity groups overall, and progress since 2004 has been relatively slow. Visible minorities struggle to break into senior management levels, although their participation in the workforce has increased the most rapidly (over the long term recent indications, for example in broadcasting, suggest gains have reached a plateau).
    - Digital media lags behind the other screen-based industries with regard to representation of women, though recent developments such as the popularity of social gaming signal opportunities for measurable change.
- **Screen-Based Media Work: Highly-Skilled, Entrepreneurial and Regionally Concentrated**: *Frame Work 2004* described a highly-skilled labour force, concentrated in the Greater Toronto Area (GTA), Québec and British Columbia and dominated by micro- and SME firms relying on a blend of full-time employees and freelance workers (with the exception of the television broadcasters).
  - **2011 *Frame Work II* Study Findings:**
    - The majority of activity in the screen-based industries in Canada continues to be concentrated in Ontario, Québec and British Columbia, although there are important secondary clusters in most provinces for film and television production and digital media, supported by competitive tax credits and other policies.
    - The 'democratization' of digital media is helping to 'level the playing field' in certain respects, though this simultaneously creates a new underclass as a result of the digital divide (be it an age barrier, or access barrier such as lack of financial resources).

- **Workforce Gender Diversity: Significant Gains Over 15 Years but Challenges Still Ahead**: *Frame Work 2004* observed substantial gains for women in film and television since WIFT-T's 1989 study, which measured women's participation in the screen-based industries. Notable gains occurred at the senior level in private and public broadcasting. At private broadcasters, women's share of upper-level management grew from 7% in 1988 to 28% in 2001; still well below the halfway mark but a significant leap forward. The proportion of women in the CBC's managerial workforce, similarly, increased from just 19% to 44%—much closer to equal representation. In private film and television production companies, *Frame Work 2004* recorded women's overall participation growing from 29% to 60.9% over the same period. *Frame Work 2004* attributed these gains to cross-industry efforts to increase representation by women at all levels including industry and government, working cooperatively.

  - **2011 *Frame Work II* Study Findings:**
    - While we see some continued progress in the representation of women in the screen-based industries since 2004, it is not at the same rate as the gains won between 1988 and 2004.
    - In general, maternity leave creates challenges for the pace of women's career advancement in the screen-based industries and contributes to the 'leaky pipeline' along the road to equal representation in senior executive roles.
    - The most recent period has shown that progress, particularly at the most senior levels, is not always consistent or smooth. For example, the representation of women in broadcasting has faced some very recent, high-profile setbacks. For example, following recent consolidation in the broadcasting and communications sector, some of the new executive teams do not appear to be as gender diverse as before.

- **Workforce Diversity: Visible Minorities, Aboriginal People and Persons with Disabilities – Setting Benchmarks for Progress:** According to *Frame Work 2004,* at 17%, the participation of visible minorities in the digital media workforce was strong and promising, but designated groups remained under-represented in key occupations and management positions throughout the industries. Similarly, Aboriginal people were under-represented in almost all areas of screen-based media and the participation of persons with disabilities was minimal. *Frame Work 2004* identified the potential of a diverse workforce contributing to Canada's competitive advantage in the global screen-based media marketplace.

  - **2011 *Frame Work II* Study Findings:**
    - The situation remains very challenging for Aboriginal people and persons with disabilities, whose participation in the screen-based industries continues to be minimal. For these two groups in particular, the wider social context relating to issues of self-identification and culture are highly complex, and cannot be wholly addressed in the context of the screen-based industries.
    - Though it will be a component of future solutions, relying solely on an increase in the supply of new graduates may be a slow and ineffectual strategy.

- **The Canadian Screen-Based Media Workforce of the Future: Technically Savvy, Entrepreneurial and Multi-Disciplined, with Sophisticated Business and Financial Skills**: *Frame Work 2004* identified a range of in-demand skills for the screen-based media workforce of the future, including: creative business development and marketing skills, advanced management and financial skills, technical skills and the ability to work with new technologies.

- **2011 *Frame Work II* Study Findings:**
  - All screen-based industry workers are under increasing pressure to proactively assess their weaknesses and continually build their skills arsenal. Employers emphasize the need for new entrants and senior-level workers to demonstrate a stronger grasp of business and financial skills, whether they are entrepreneurs themselves or working in large organizations.

- **Employers Report Significant Skills Shortages in Key Growth Areas Today: Are We Prepared for the Future?** *Frame Work 2004* identified the need for a highly-skilled workforce—one that is poised to exploit new and future digital technologies—as a critical challenge. Digital skills needs were followed by the need for increased business and financial skills.

- **2011 *Frame Work II* Study Findings:**
  - Digital skills continue to be in-demand and high-priority across all screen-based industries and 21% of digital media industry survey respondents identify "graduates do not have the appropriate skills" as a key barrier to recruitment.
  - There is, however, perhaps less anxiety about the future of digital media overall as many firms have now experienced more than one wave of new digital technology and are gradually improving their ability to adapt and exploit new opportunities as they arise.
  - Workers in the screen-based industries are not actively seeking out business skills training to the same degree as other types of training. Employers continue to emphasize the importance of strong business skills to the advancement of all workers, including designated groups.

While forming recommendations is outside the scope of this report, Nordicity provides a snapshot (below) of what we describe as "pressure points for change". In other words, broad observations about potential areas for interventions based on an integration of the evidence presented to the study team:

Demonstrate the market's buying power to influence change
While early on, certain organizations may have instituted diversity policies for employment because they were required to do so, many are beginning to recognize the tangible business rewards of encouraging a more diverse culture. Demonstrating how women and other equity groups are both important buyers of smart phones, apps and casual games as well as vital team members in the production and distribution of content, can make a compelling business case for decision-makers, business owners and industry leaders, who are then, in turn, more likely to actively promote change in their organizations. This message is particularly relevant in an era where vertical integration means there is management interested in a wider view of communications, not just in the silos of broadcasting, distribution and production.

Change requires leadership, not just more training

CRTC and regulatory interventions have only limited impact and ability to spur real change in the representation of designated groups in the screen-based industries. Similarly, increased training for designated groups is, alone, unlikely to create sustainably measurable change.

One road to measurable change requires industry and business leaders to shift from merely being "open" to a more diverse workforce to a determination to change the status quo. Evidence of this shift could come, for example, in the form of hiring and nurturing of strong candidates from designated groups.

Whether a leadership shift comes in response to the business case for stronger representation or in reaction to public pressure, diversity in the workplace stands a stronger chance if it is a priority vocalized and acted on at the apex of organizations.

Momentum can influence change

One interviewee described the struggles of "outsider groups" such as visible minorities, Aboriginal people and persons with disabilities today as very similar to what she experienced as a woman in the industry years ago. To her, the vital difference was that her struggle occurred in the midst of the women's liberation movement, among myriad regulations, laws, growing public support and political pressure to help women cut a path into the workplace. During this time, associations such as Canadian Women in Communications and WIFT-T received funding and became powerful allies for women to find their way and gain a foothold in the industry.

Today, however, there is no organization serving "outsider groups" that has quite the same level of support. Similarly, only those organizations that are in the business of representing that single designated group's issues will be knowledgeable enough of their unique needs. Still, as long as all of these smaller groups continue to work in isolation toward similar goals, it will be more difficult to drive broader-reaching change and increase the inclusion of all groups in the workforce.

Overall, in the 2011 snapshot of the representation of designated groups in the screen-based industries we find that:

1) Certain factors, such as diversity among university graduates, the advancement of women to more senior roles as well as more visible designated group representation in potential role models for younger generations, have led to some progress in the screen-based industries. As firms face increasing pressure and workplaces become more competitive, however, issues such as lack of work-life balance and hidden, negative perceptions become a greater challenge and barrier to the advancement of designated groups;

2) While training for the digital transition continues to be a high priority across all the screen-based industries, designated groups are not more disadvantaged than their peers in terms of gaining access to training, particularly in the main centres of screen-based activity (such as Ontario, B.C. and Québec); and

3) The more the consumer market becomes diverse, the more pressure there is to make the workforce diverse in a competitive environment.

This report shows how important it is to keep tracking the progress of designated groups in the screen-based industries, but also demonstrates the challenge of accessing the necessary data in such a varied workforce. In an effort to continue such tracking, this report presents a range of issues for discussion at future conferences among key stakeholders on what strategies might be proposed for effective future success in this arena.

Appendices

A Supporting tables

Table 17 Average earnings, NAICS 5121 motion picture and video industries and NAICS 515 broadcasting (except Internet), 2006

	NAICS 5121 Motion picture and video ($)	%	NAICS 515 Broadcasting (except Internet) ($)	%
Total Workforce	54,757	100.0%	61,925	100.0%
Men	56,994	104.1%	67,825	109.5%
Women	50,719	92.6%	53,005	85.6%

Source: Census 2006

Table 18 Workforce by employment equity occupational group: Senior Managers, Canada, 2001 and 2006

	2001	2006	%	% change since 2001
Total Senior Managers*	216,300	229,850	100.0	6.3
Women	54,325	55,545	24.2	2.2
Aboriginal People	5,500	5,475	2.4	-0.5
Visible Minorities	17,685	20,030	8.7	13.3
Persons with Disabilities†	4,200	--	--	--

Source: Employment Equity Data Report 2001, 2006
*Totals may not equal the sum of components due to rounding and suppression
†Persons with Disabilities figures include Senior, Middle and Other Managers and figures should be used with caution as "the coefficient of variation of the estimate is higher than 33.3%"

Table 19 Workforce by employment equity occupational group: Middle and Other Managers, Canada, 2001 and 2006

	2001	2006	%	% change since 2001
Total Middle and Other Managers*	1,484,410	1,487,545	100.0	0.2
Women	556,205	581,615	60.9	4.6
Aboriginal People	21,360	28,570	1.9	33.8
Visible Minorities	174,945	207,760	14.0	18.8
Persons with Disabilities†	--	--	--	--

Source: Employment Equity Data Report 2001, 2006
*Totals may not equal the sum of components due to rounding and suppression
†Persons with Disabilities figures include Senior, Middle and Other Managers and figures should be used with caution as "the coefficient of variation of the estimate is higher than 33.3%"

Table 20 Broadcasting job occupations by proportion of designated group representation, company-level survey

Job Occupation	Women	Aboriginal People	Visible Minorities	Persons with Disabilities	Non-designated Group
Advertising Sales	61.7%	1.2%	7.4%	4.9%	24.7%
Program/Rights Acquisition and Program Strategy	59.6%	5.8%	10.3%	0.6%	23.7%
Program Sales and Distribution	61.6%	0.7%	6.3%	1.5%	29.9%
Original Production and Development	45.1%	1.1%	4.2%	1.0%	48.6%
On-air Talent	48.6%	2.5%	5.4%	1.4%	42.1%
Interactive and Digital Media	41.8%	0.8%	6.1%	1.7%	49.5%
IT and Technical Engineering	25.4%	1.0%	11.8%	1.4%	60.3%
Broadcast Engineering and other Technical	13.2%	1.2%	5.3%	2.7%	77.6%
Communications, Promotion and Marketing	68.9%	1.5%	6.5%	3.7%	19.3%
Clerical and Administrative	79.8%	1.4%	8.0%	1.4%	9.5%
Human Resources	77.7%	1.6%	9.4%	1.3%	9.9%
Business Affairs, Legal, Finance, Accounting	67.2%	1.3%	17.5%	1.8%	12.1%
Other	65.5%	2.8%	9.7%	1.4%	20.7%

Source: WIFT-T Company-level survey, conducted by Nordicity and Environics, 2011

B Survey questionnaire: company-level

A. Corporate Information

A1. Please provide the following information

Company Name: _____

Contact Name: _____

Contact Email: _____

Province/Territory [drop-down menu of provinces and territories]

City/Town _____

A2. Please indicate in which of the following screen-based industries your company is most active.

Note that while your company may be active in more than one screen-based industry; please indicate the industry in which you would most like to be included.

Film and TV Production (skip to A3 – Film and TV Production)

Film and TV Distribution (skip to A3 – Film and TV Distribution)

Broadcasting (skip to B1)

Digital Media (skip to A3 – Digital Media)

A3 - Film and TV Production. Please indicate your company's primary line of business (select one)

Film Production

TV Production

Film and TV Production Services (e.g., post-production, visual effects)

Animation Production

Commercial Video Production

A4 - Film and TV Production. On what types of production does your company primarily work?

Service production = production undertaken for a non-Canadian producer or production company

Domestic production = production initiated by a Canadian-controlled production company, with at least six Canadian content points

Service Production

Domestic Production

International Co-production

A3– Film and TV Distribution. Please indicate your company's primary line of business (select one)

Film Distribution

TV Distribution

A4– Film and TV Distribution. Does your company primarily distribute Canadian or non-Canadian programming?

Canadian programming = programming created by a Canadian-controlled production company, with at least six Canadian content points

Non-Canadian programming = all other programming

Canadian programming

Non-Canadian programming

A3 – Digital Media. Please indicate your company's primary line of business (select one)

Video game development and/or publishing

Cross-media and/or transmedia content production

Serious gaming and/or educational digital media producer

Mobile application (non-games) developer

Other web development

A4 – Digital Media. On what types of production does your company primarily work?

Service production = production undertaken for a non-Canadian producer or production company

Domestic production = production initiated by a Canadian-controlled production company

Service Production

Domestic Production

B. Employment Data

B1. Please indicate the total number of individuals that your company currently employs in each of the following job categories and in each of the equity groups.

Please note that the total numbers include all employees in each category, not only those in an equity group.

Note that one individual may appear in more than one equity group (e.g., a woman who is also a member of a visible minority group). In such an event, please record that individual in each of the respective categories.

Please replace the zero numbers in the table below with the actual numbers for each category or estimate as closely as possible.

	Full-time Employees	Part-time Employees	Contract Employees	Freelance Workers (on average at any given time)
Total	0	0	0	0
Females	0	0	0	0
With a Disability	0	0	0	0
Aboriginal	0	0	0	0
Visible Minority	0	0	0	0

B2. Please indicate the total number of individuals that your company currently employs in each of the following ownership and/or senior positions and in each of the equity groups.

Please note that the total numbers include all individuals in each position, not only those in an equity group.

Note that one individual may appear in more than one equity group (e.g., a woman who is also a member of a visible minority group). In such an event, please record that individual in each of the respective categories.

Senior Management = Vice-President, Corporate Director and more senior roles.

Specialist Manager = Executive Producer, Production Manager, Business Development Manager, Sales Manager, Creative Director, Production Manager, Technical Director, etc.

Please replace the zero numbers in the table below with the actual numbers for each category or estimate as closely as possible.

	Owners and/or Board Members	Senior Management	Specialist Managers
Total	0	0	0
Females	0	0	0
With a Disability	0	0	0
Aboriginal	0	0	0
Visible Minority	0	0	0

B3. Please indicate the total number of paid employees and long-term contract workers (not freelancers) your company currently employs in each of the following job categories and in each of the equity groups.

Please note that the total numbers include all individuals in each position, not only those in an equity group.

Note that where an individual may occupy more than one position, she/he should be counted in the category that describes the majority of her/his responsibilities.

Note that one individual may appear in more than one equity group (e.g., a woman who is also a member of a visible minority group). In such an event, please record that individual in each of the respective categories.

Also note that this question is intended to reflect your core employees only. Do not include those employees and/or contract workers hired for specific productions.

Please replace the zero numbers in the table below with the actual numbers for each category or estimate as closely as possible.

[If A2 is selected as "Film and TV production"]

Job Category	**Total**	**Female**	**With a Disability**	**Aboriginal**	**Visible Minority**
Producers and Line Producers	**0**	**0**	**0**	**0**	**0**
Associate Producer	**0**	**0**	**0**	**0**	**0**
Researcher/Story Editors	**0**	**0**	**0**	**0**	**0**
Business Affairs, Finance and Accounting Staff	**0**	**0**	**0**	**0**	**0**
Communications, Promotion and Marketing Staff	**0**	**0**	**0**	**0**	**0**
Human Resources Staff	**0**	**0**	**0**	**0**	**0**
Clerical and Administrative Staff	**0**	**0**	**0**	**0**	**0**
Post-production Staff	**0**	**0**	**0**	**0**	**0**
Other (please specify)	**0**	**0**	**0**	**0**	**0**
Other (please specify)	**0**	**0**	**0**	**0**	**0**

[If A2 is selected as "Film and TV Distribution]

Job Category	**Total**	**Female**	**With a Disability**	**Aboriginal**	**Visible Minority**
Program/Rights Acquisition and Business Development Staff					
Program Sales Staff	**0**	**0**	**0**	**0**	**0**
Communications, Promotion and Marketing Staff	**0**	**0**	**0**	**0**	**0**
Clerical and Administrative Staff	**0**	**0**	**0**	**0**	**0**

Job Category	Total	Female	With a Disability	Aboriginal	Visible Minority
Human Resources Staff	0	0	0	0	0
Business Affairs, Finance and Accounting Staff	0	0	0	0	0
Other (please specify)	0	0	0	0	0
Other (please specify)	0	0	0	0	0

[If A2 is selected as "Broadcasting"]

Job Category	Total	Female	With a Disability	Aboriginal	Visible Minority
Program/Rights Acquisition and Program Strategy Staff	0	0	0	0	0
Advertising Sales Staff	0	0	0	0	0
Program Sales and Distribution Staff	0	0	0	0	0
Original Production and Development Staff (including news)	0	0	0	0	0
In-house On-air Talent (including news)	0	0	0	0	0
Interactive and Digital Media Producers and Support Staff	0	0	0	0	0
IT and Technical Engineering Staff	0	0	0	0	0
Broadcast Engineering, and other Technical Staff	0	0	0	0	0
Communications, Promotion and Marketing Staff	0	0	0	0	0
Clerical and Administrative Staff	0	0	0	0	0
Human Resources Staff	0	0	0	0	0
Business Affairs, Legal, Finance and Accounting Staff	0	0	0	0	0
Other (please specify)	0	0	0	0	0
Other (please specify)	0	0	0	0	0

[If A2 is selected as "Digital Media"]

Job Category	Total	Female	With a Disability	Aboriginal	Visible Minority
Creative Development Staff (e.g., studio artists, graphic designers)	0	0	0	0	0
Technical Development Staff (e.g., traffic	0	0	0	0	0

Job Category	Total	Female	With a Disability	Aboriginal	Visible Minority
managers, programmers,)					
Sales Staff (e.g., account managers)					**0**
Business Affairs, Finance and Accounting Staff					**0**
Communications, Promotion and Marketing Staff					**0**
Human Resources Staff					**0**
Clerical and Administrative Staff					**0**
Other (please specify)					**0**
Other (please specify)					**0**

B4a. Are you able to provide the average salary levels for your overall staff and for women in various job categories?

Yes (skip to B4b)

No (skip to B4c)

B4b. Using the following salary ranges, please estimate (to the best of your ability) the AVERAGE salary level (excluding benefits) of paid employees and long-term contract workers (not freelancers) your company employs in each of the following job categories.

Again, note that this question is intended to reflect your core employees only. Do not include those employees and/or contract workers hired for specific productions.

Also, recall that individual company information will at no time be shared with WIFT-T or any other party.

[drop down menu. 1 for employees and 1 for females]

No employees in this job category/No females in this job category

Under $20,000

$20,000 to just under $40,000

$40,000 to just under $60,000

$60,000 to just under $80,000

$80,000 to just under $100,000

$100,000 to just under $120,000

$120,000 to just under $140,000

$140,000 to just under $160,000

$160,000 and above

[if A2 is selected as "Film and TV production"]

Job Category	Overall Average	Female
Senior Management		
Producers and Line Producers		
Associate Producer		
Researcher/Story Editors		
Business Affairs, Finance and Accounting		
Communications and Marketing		
Human Resources		
Clerical and Administrative Staff		
Post-production		
Other (please specify)		
Other (please specify)		

[if A2 is selected as "Film and TV Distribution]

Job Category	Overall Average	Female
Senior Management		
Program/Rights Acquisition and Business Development Staff		
Program Sales Staff		
Communications, Promotion and Marketing Staff		
Clerical and Administrative Staff		
Human Resources Staff		
Business Affairs, Finance and Accounting Staff		
Other (please specify)		
Other (please specify)		

[if A2 is selected as "Broadcasting"]

Job Category	Overall Average	Female
Senior Management		
Program/Rights Acquisition and Business Development Staff		
Advertising Sales Staff		
Program Sales and Distribution Staff		
Original Production and Development Staff (including news)		

Job Category	Overall Average	Female
In-house On-air Talent (including news)		
Interactive and Digital Media Producers and Support Staff		
IT and Technical Engineering Staff		
Broadcast Engineering, and other Technical Staff		
Communications, Promotion and Marketing Staff		
Clerical and Administrative Staff		
Human Resources Staff		
Business Affairs, Finance and Accounting Staff		
Other (please specify)		
Other (please specify)		

[if A2 is selected as "Digital Media"]

Job Category	Overall Average	Female
Senior Management		
Specialist Managers		
Creative Development Staff (e.g., studio artists, graphic designers)		
Technical Development Staff (e.g., traffic manages, programmers,)		
Sales Staff (e.g., account managers,)		
Business Affairs, Finance and Accounting		
Communications and Marketing		
Human Resources		
Clerical and Administrative Staff		
Other (please specify)		
Other (please specify)		

B4c. Why have you opted not to provide salary data? [Only ask if B4a=No]

Salary data isn't organized by gender

Salary data isn't organized by job category

Confidentiality concerns

Too difficult to answer (e.g., to establish salary averages)

Other (please specify)

B5a. Does your company offer a benefits package to its employees?

Yes (skip to B5b)

No (skip to C1a)

B5b. Which of the following benefits does your company provide its employees?

Extended health care (excluding optical care)

Optical care

Pension contributions

Maternity/Paternity Benefits

Other (please specify)

C. Professional Development

C1a. Does your company currently offer or facilitate any in-career training?

Direct training = the company holds seminars, workshops and/or another type of training service

Facilitated training = the company allows time and/or provides funding for staff to receive training at 3rd party institutions.

Yes, we offer training directly (proceed to C1b)

Yes, we facilitate training (proceed to C1b)

No (proceed to C1c)

C1b. In what areas do you offer or facilitate training (select all that apply)

Financial and/or accounting skills (e.g., production financing, budgeting, etc.)

Marketing skills (e.g., use of social media, promotional techniques, etc.)

Creative and/or artistic skills (i.e. new uses of existing tool for new creative/artistic outputs)

Technical skills (i.e. use of new tools in the creative process, production and/or distribution)

Leadership skills (e.g., strategic skills, interpersonal skills, managerial skills, team dynamics, etc.)

Project management skills (e.g., workflow management, resource planning, etc.)

Other skills (please specify)

C1c. What is the primary reason that your company does not offer or facilitate any in-career training? (select one) [only ask if C1a=1, or 2]

No need, staff is adequately trained and/or acquires new skills on their own

Company is too small (and cannot afford the lost time)

Lack of financial resources

Fear of employees being 'poached' by competitors

Not aware of any relevant training courses

Other reason (please specify)

D. Skills and Recruitment

D1. Does your company have a diversity or equity recruitment policy?

Yes

No

D2. Please indicate the top three key recruitment issues facing your company (ranking question)

Issue	Most Important	2nd Most Important	3rd Most Important	Not Top 3
Lack of new entrants				
Graduates don't have the appropriate skills				
Lack of appropriate training programs				
Current skills are out-of date				
Salaries/benefits too low to attract top talent				
Poor job security				
Poor work-life balance				
Work not challenging enough				
Impact of digital technologies on your industry (e.g., changing business models)				
Perception of a negative future for the industry limiting interest				
Other (please specify)				

D3. Please indicate the level of difficulty that your company is currently experiencing in filling its needs in each of the following skills areas.

[If A2 is selected as "Film and TV Production"]

Skill Area	Severe Difficulty	Significant Difficulty	Some Difficulty	Almost no Difficulty	No Difficulty	Not Applicable
Production Management Skills						
Creative Skills						
Technical Skills						
Management/ Financial/ Business Skills						
Marketing/ Promotion Skills						
Digital Media Skills						
Workflow and Other Workplace Skills						
Knowledge of the Industry						
Other (please specify)						

[If A2 is selected as "Film and TV Distribution"]

Skill Area	Severe Difficulty	Significant Difficulty	Some Difficulty	Almost no Difficulty	No Difficulty	Not Applicable
Sales and Business Development Skills						
Rights Management Skills						
Platform Strategy Skills						
Management/ Financial/ Business Skills						
Marketing/ Promotion Skills						
Digital Media Skills						
Workflow and Other Workplace Skills						
Knowledge of the Industry						
Other (please specify)						

[If A2 is selected as "Broadcasting"]

Skill Area	Severe Difficulty	Significant Difficulty	Some Difficulty	Almost no Difficulty	No Difficulty	Not Applicable
Sales and Business Development Skills						
Rights Management Skills						
Creative Skills						
Technical Skills						
Platform Strategy Skills						
Management/ Financial/ Business Skills						
Marketing/ Promotion Skills						
Digital Media Skills						
Workflow and Other Workplace Skills						
Knowledge of the Industry						
Other (please specify)						

[If A2 is selected as "Digital Media"]

Skill Area	Severe Difficulty	Significant Difficulty	Some Difficulty	Almost no Difficulty	No Difficulty	Not Applicable
Production Management Skills						
Creative Skills						
Technical Skills						
Management/ Financial/ Business Skills						
Marketing/ Promotion Skills						
Workflow and Other Workplace Skills						
Knowledge of the Industry						
Other (please specify)						

D4. Please indicate the likelihood that your company will address one or more of the skills issues (as identified in the previous question) over the next 5 years using the following potential solutions.

Potential Solution	Extremely Likely	Very Likely	Somewhat Likely	Not Very Likely	Not at all Likely	Don't Know
Providing more training directly to employees						
Facilitating more training with 3rd party suppliers						
Working more closely with academic institutions						
Implementing or broadening of an internship or mentorship program						
Recruitment of new types of workers with different skills sets (e.g., computer scientists)						
Lobbying government for increased or different funding						
Increasing salary or benefits to attract new employees						
Reducing workload to attract new employees						
Increasing use of freelance or contract employees						
Other (please specify)						

D5. Over the past 5 years, what are the top 3 new skills or occupations that have emerged as those in the highest demand by employers in the [pipe A2 response] industry?

1. _____

2. _____

3._____

D6. Over the next 5 years, what do you expect will be the top 3 in demand skills or occupations in the [pipe A2 response] industry?

1. _____

2. _____

3._____

C Survey questionnaire: worker-level

A. Demographic Information

A1. Please provide the following information

Note that your name is only required to ensure that we do not receive duplicate questionnaires. It will remain confidential and will at no time be shared with WIFT-T, its Board, your employer, or any other party. Your responses will never be presented on an individual basis.

Name	_____
Province/Territory	[drop-down menu of provinces and territories]
City/Town	_____
Age	[drop-down menu w/ age ranges, from under 18 to 65+, in increments of 5]
Gender	[drop-down menu with female, male, trans-gendered, other]

A2. To which of the following equity groups do you feel that you belong? (check all that apply)

Aboriginal

Physical and/or mental disability

Visible ethnic minority

None of the above

B. Employment Status

B1a. Are you currently employed by a company? (select one)

Yes (proceed to B1b)

No (proceed to B1d)

B1b. Please identify the company that currently employs you:

_____

B1c. Which of the following employment statuses best describes your current position?

Full-time employee (proceed to B2)

Part-time employee (proceed to B2)

Contract employee (proceed to B1e)

B1d. Which of the following employment statuses best describes your current position?

Freelance (proceed to B1e)

Between contracts (proceed to B1e)

Unemployed

B1e. How many contracts or freelance engagements have you had over the past 12 months?

_____ (numbers only)

B2. How many years have you worked in the screen-based industries?

Remember, for the purposes of this study, the "screen-based industries" include film and television production (including animation), film and television distribution, broadcasting, and digital media (including games development).

_____ (numbers only)

B3. Please select the screen-based industry in which you primarily work. (select one)

Film and TV Production

Film and TV Distribution

TV Broadcasting

Interactive Digital Media (including video games)

[NOTE TO DRAFT: This question will branch to four different job position pages]

B4. Please select the job description that best matches your position. (select one)

Film and TV Production

- Producer
- Production Manager
- Screen/voice Performer
- Director
- Cinematographer/DOP
- Screenwriter
- Sound Engineer/Grip/Sound mixer
- Camera Operator and related crew
- Production Support Services (e.g., craft, transportation, wardrobe, etc).
- Set Designer

- Digital Asset Manager
- Post-production Supervisor
- Editor (linear and non-linear)
- Special Effect and/or Stunt Worker
- Visual Effects Artist
- Animator (digital or analog)
- None of the above/other

Film and TV distribution

- Sales Manager
- Sales Representative
- Business Affairs Manager
- Business Affairs Worker
- None of the above/other

TV Broadcasting

- Production Manager
- News Writer
- Story Editor
- On-air Talent
- Technical Producer
- Broadcast Engineer
- Programming Technician
- Tape Operator
- Digital Asset Manager
- Interactive Producer
- Performer
- Programmer
- Scheduler
- On-Air Promotions Producer
- Graphic designer
- Marketing/Communications Coordinator
- None of the above/other

Interactive Digital Media (including video games)

- Independent Developer
- Interactive Producer
- Studio Manager
- Production Manager
- Creative Director or Manager
- Technical Director or Manager
- Performer
- Level Designer
- Graphic Artist/animator/illustrator
- Coder/technical Developer
- Business Affairs, Legal or Financial Staff
- Marketing, Communications or Promotional Staff
- HR Staff
- Clerical or Administrative Staff
- None of the above/other

B5. Please select the salary range that best reflects your earnings from your indicated job description in 2010.

No earnings in 2010 from this job

Under $20,000

$20,000 to just under $40,000

$40,000 to just under $60,000

$60,000 to just under $80,000

$80,000 to just under $100,000

$100,000 to just under $120,000

$120,000 to just under $140,000

$140,000 to just under $160,000

$160,000 and above

C. Career Development

C1a. Have you accessed any in-career training in the last 12 months?

Yes (proceed to C1b)

No (proceed to C1f)

C1b. In what areas did you receive training? (select all that apply)

Financial and/or accounting skills (e.g., production financing, budgeting, etc.)

Marketing skills (e.g., use of social media, promotional techniques, etc.)

Creative and/or artistic skills (i.e. new uses of existing tool for new creative/artistic outputs)

Technical skills (i.e. use of new tools in the creative process, production and/or distribution)

Leadership skills (e.g., interpersonal skills, managerial skills, team dynamics, etc.)

Project management skills (e.g., workflow management, resource planning, etc.)

Other skills (please specify)

C1c. What types of organizations delivered this training? (Please select all that apply)

Employer

Post-secondary institution (i.e. college or university)

Private training institution

Professional development organization (e.g., WIFT, the Banff Centre)

Union, guild or professional association

Equipment or technology provider

Other (please specify)

C1d. Who paid for this training? (select one)

Your employer

You

Split between you and your employer

No one (it was offered without cost to you or your employer)

Other (please specify)

C1e. Approximately how much did this training cost?

[Dropdown menu with $500 ranges from 0-$499 to $5000 and above]

C1f. What was the primary reason that you did not access any in-career training? (select one)

No need

Lack of time

Lack of financial resources

Not aware of any relevant training courses

C2. Please indicate the degree to which the following workplace issues currently impact your career development

Issue	Severe Impact	Significant Impact	Some impact	Almost no impact	No impact	Not Applicable
Overlooked for promotion						
Overlooked for contract work						
Increased responsibility for same pay						
Workplace harassment						
Workplace bullying						
Work/life balance						
Lack of resources to work effectively						
Lack of feedback						
Overt discrimination						

C3. Are there any other workplace issues that you would like to raise at this time?

- [open-ended text box]
- No other issues at this time

D Interview guide questionnaire

Recruitment and remuneration

1) In your experience, is it your perception that [women, Aboriginals, visible minorities and persons with disabilities] face greater challenges in being hired in the screen-based industries? If no, has it always been so? How was the situation different 5 or 10 years ago? If yes, what might the source of the disparity be?
2) In your experience are [women, Aboriginals, visible minorities and persons with disabilities] receiving equal pay for equal work in the screen-based industries? Is this as true for all occupations and employment levels (e.g., new entrant, mid-career, and senior level)? If yes, has it always been so? How was the situation different 5 or 10 years ago? If no, in which areas of the industry have you observed the most disparity between compensation levels (e.g., which occupations have the biggest salary/compensation gaps; which career levels show the biggest compensation gaps)?
3) Does your company have an equity policy in hiring? What is it and how has it worked? What evidence do you see that your company has a commitment toward equity in hiring?
4) Are you satisfied with what government and regulatory bodies (e.g., CRTC) are doing about promoting and supporting the recruitment of designated groups? Why or why not? What more should they do?
5) Are you satisfied with what employers and unions are doing to promote the recruitment of designated groups? Why or why not? What more should they do?

Skills and training

1) From your experience do [women, Aboriginals, visible minorities and persons with disabilities] have equal access to professional development resources (i.e. in-career training) in the screen-based industries? If no, why do you think that is? And how might this reality be improved? If yes, has it always been so? How was the situation different 5 or 10 years ago?
    a. If you answered "YES" equity groups have equal access to professional development resources and "YES" [women, Aboriginals, visible minorities and persons with disabilities] face greater challenges being hired and promoted, what other possible sources can you identify for this discrepancy?
2) What strategies should be put in place to increase equity groups skill sets such as digital skills, financial skills, and leadership skills? e.g., Mentoring, Coaching, Informal training, Post-secondary/Formal education

Career progression

1) In your experience are [women, Aboriginals, visible minorities and persons with disabilities] promoted into senior decision making roles (leadership roles) as quickly as others? Is there enough evidence of equity groups making progress in the top jobs and on boards? If no, why do you think that is? And how might this reality be improved?
2) Do you identify women, Aboriginals, visible minorities and persons with disabilities to groom for leadership roles? If yes, has it always been so? How was the situation different 5 or 10 years ago?

3) In your experience, have you observed any other barriers to career progression for [women, Aboriginals, visible minorities and persons with disabilities]? Are there, for example, unique employment challenges that [women, Aboriginals, visible minorities, persons with disabilities] face in the screen-based industries? What (if anything) could be done by the industry to address these challenges and/or help overcome these barriers? If no, has it always been so? What changed and why?

Changing business models and digital technology

1) Digital technology has had an impact on every component of the value chain in the screen-based industries, business models are changing and organizations are under increasing pressure to adapt and evolve in order to survive.

2) Given this new reality, what are your impressions about the impact of emerging digital technologies, globalization and changing business models on the overall representation of [women, Aboriginals, visible minorities and persons with disabilities] in your industry? If no, has it always been so? What changed and why?

3) In your experience, has the connected and digital environment affected the representation or participation of women and visible minorities in your industry? If yes, what has changed? Has the impact been positive or negative (e.g., representation increased or decreased)? Why do you think this is the case? If no, why do you think that the new environment is not having any impact on employment diversity and equity in your industry?

4) With the increase of digital technology uses in your industry, have you observed that [women, Aboriginals, visible minorities and persons with disabilities] are embracing them freely, or do they feel challenged or disadvantaged by digital technologies?

Overall progress

1) What is your impression of the overall progress (or lack of progress) for representation of [women, Aboriginals, visible minorities and persons with disabilities] in your industry?

2) What is your overall impression about the progress (or lack thereof) of equity (e.g. equal opportunity, equal pay) in your industry? Can you identify any particular sub-sector of the industry which seems chronically underrepresented?

3) Are you familiar with the 2004 Industry Research Study *Frame Work: Employment in Screen-Based Media*? If yes, did the results and insights in WIFT-T's 2004 Industry Research Study - *Frame Work* help you your organizational or individual decision-making in the area of employment equity? What more information and data do you need in order to adapt your business practices and decision-making?

4) Do you have any personal stories or other thoughts you would like to share? (e.g., personal experiences about career progression/management, recruitment, etc.)