



*Frame Work: Employment in
Canadian Screen-Based Media —
A National Profile*

FINAL REPORT

Submitted to:

Women in Film and Television - Toronto
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Toronto, Ontario
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**EKOS RESEARCH ASSOCIATES INC. and
PAUL AUDLEY & ASSOCIATES LTD.**

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Frame Work: Employment in Canadian Screen-Based Media – A National Profile

Frame Work was commissioned by Women In Film and Television - Toronto, with the financial support of 23 industry and government partners. The report provides a snapshot of work trends in the Canadian screen-based media industry today - who is working, how we work and our preparedness for an increasingly global future.

Women in Film and Television - Toronto (WIFT-T) is an internationally affiliated professional organization that recognizes, trains and advances women in film, television and new media. Operating locally, nationally and internationally, WIFT-T delivers more than 400 hours of skills development programs per year to the industry at large. In 2003, 170 industry faculty shared their expertise, helping WIFT-T deliver professional training to 3,000 industry professionals from across Canada.

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STUDY CONSULTANTS



For more than two decades, EKOS has been transforming research into credible knowledge and reliable advice. With offices in Ottawa and Toronto, EKOS Research Associates is a full-service consulting practice, specializing in: market research; public opinion research and strategic communications advice; program evaluation and performance measurement; and human resources and organizational research. The EKOS team offers clients methodological expertise, an impressive range of experience in all types of social research, and a solid grounding in the real world application of research results. EKOS consultants have produced respected studies in virtually all areas of public and corporate concern, and have acquired a sophisticated knowledge of a vast range of issues.



Paul Audley & Associates Ltd., is a leading research and consulting firm specializing in the cultural industries and the communications and information sector. Among the special interests of the 20 year-old firm has been the integration of cultural and economic factors in the development of public policies affecting the publishing, film, sound recording, broadcasting and new media industries.



Delvinia is a leading digital agency, developing, planning and executing high-impact interactive marketing and research solutions. Delvinia is dedicated to helping our clients acquire, retain and better understand their customers through the use of digital channels.



Humewood Communications Corporation provides management consulting services to private businesses and public agencies in the television and film industries in Canada. We are experts in content and would be pleased to be of service to you.

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EXECUTIVE SUMMARY

RESEARCH IMPETUS:

Canada's media industry is in transition. Technological change, globalization and an increasingly multi-cultural population and viewing audience are transforming the film, television and new media landscape in this country. Corporate and government stakeholders throughout the industry today are working to address key industry issues including media diversity, skills training and workforce competitiveness.

In order to succeed in a global knowledge-based economy, stakeholders must understand its most valuable resource: its intellectual capital. This includes understanding key employment trends, skills gaps and workforce composition. Industry and government have increasingly recognized the need for national statistics in order to plan wisely.

Frame Work: Employment in Canadian Screen-Based Media — A National Profile provides a snapshot of Canadian work in the film and television industries and examines the growing new media industry. The report makes available statistical information about Canada's screen-based media workforce, work trends and our preparedness for an increasingly global future.

The study includes examination of:

- Employment in public and private broadcasting, film and television production, distribution and new media content production.
- Workforce participation by women and, where data is available, visible minorities, Aboriginal persons and persons with disabilities in the film, television and new media industries.
- Overview of standard occupations in key areas.
- Salaries and distribution of earnings.
- Skills gaps in key job categories.
- Freelance vs. full-time work.
- Participation in education and professional development programs.

Frame Work is designed to be a catalyst for industry-wide dialogue and proactive planning for this key sector of Canada's knowledge economy.

PROJECT PARTNERS:

Frame Work was commissioned by Women in Film and Television - Toronto and supported by an industry coalition of 22 corporate and government partners. The study was guided by a Steering Committee and a New Media Committee made up of Canadian screen-based media industry leaders.

Lead study partners are Bell Globemedia, the Cultural Human Resources Council and Human Resources and Skills Development (HRSD) Canada.

Frame Work sponsors include Canadian Heritage, the City of Toronto, the Directors Guild of Canada - Ontario, EKOS Research Associates Inc., Industry Canada, the National Film Board of Canada, the Ontario Ministry of Culture, the Ontario Media Development Corporation and Telefilm Canada.

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PROJECT CONSULTANTS:

- The study was prepared by consultants Paul Audley and Associates Ltd. and EKOS Research Associates Inc. with the assistance of Delvinia Interactive Inc. and Humewood Communications Corporation.

SUMMARY OF METHODOLOGY:

Five main sources were used to gather data for this study, as follows:

- Statistics Canada data, from the 2001 Census, the 2003 Labour Force Survey, the Participation and Limitation Activity Survey, and the film and video industry surveys it conducts, most recently in 2002.
- Employment equity data obtained from Human Resources and Skills Development Canada, collected by the Department under the *Employment Equity Act* from federally regulated organizations with 100 or more employees.
- A series of national surveys conducted in key sectors of Canada's screen-based media industries: film and television distribution companies, film and television production companies, new media production companies and their employees, new media freelance workers, unions and guilds serving the interests of those working in screen-based industries, and education and training organizations providing instruction in screen-based media.

- Data provided directly by CBC/Radio-Canada, CBC English Television, the National Film Board of Canada, and the Canadian Radio-television and Telecommunications Commission (CRTC) for broadcasters with less than 100 employees.
- Literature on screen-based industries, which was accessed in order to establish a context for each of the sectors.

KEY FINDINGS:

1. SCREEN-BASED MEDIA WORKFORCE: SKILLED, INCREASINGLY DIVERSE AND IN TRANSITION

The people working in Canada's screen-based media today are highly skilled and more likely to reside in the GTA, Quebec and British Columbia. Many work for or own Micro and Small and Medium Enterprises (SME) (5-19 employees), make their living as freelancers or work on a contract basis.

Women are participating in screen-based media work in healthy numbers, increasing their share in film and television significantly. The workforce remains, however, one in which men dominate key occupations including senior management, top creative positions, and new media-related and technical positions.

Visible minorities, Aboriginal peoples and people with disabilities are participating in varying degrees throughout the sector but are largely underrepresented. Visible minorities are making inroads in the smaller entrepreneurial companies of film and television production and new media.

Film and television production, distribution and broadcasting are industries being transformed by technology and structural changes at every level as we enter an increasingly digital and global future. The sector is already facing significant skills shortages in key technical, financial and business occupations – the very occupations where growth will be greatest.

2. SCREEN-BASED MEDIA WORK: HIGHLY SKILLED, ENTREPRENEURIAL AND REGIONALLY CONCENTRATED

Work in screen-based media tends to be highly skilled, with heavy labour concentrations in the Greater Toronto Area (GTA), Quebec and British Columbia. With the exception of television broadcasting, the sector is dominated by Micro firms (1-4 employees) and SME Companies (5-19 employees) that rely on a combination of full-time employees and freelance workers.

CANADIAN MOTION PICTURE AND VIDEO INDUSTRY:

- In 2001, the total labour force for this sector was 59,480 including 47,660 wage and salary earners, 11,680 self-employed freelancers and contractors and 135 unpaid family workers. These numbers include 4,870 labour force members who were not employed.
- Toronto is the largest industry centre from an employment perspective. Fully one-third of Canada's motion picture and video industry labour force resides in the GTA. Other labour force concentrations can be found in Quebec (29.2%) and British Columbia (20.3%).
- The motion picture and video industry is a highly skilled sector: 73% of the labour force works at high- or medium- skilled occupations.
- Despite the skilled nature of the industry, the average worker earned \$31,511 in 2000, similar to the average earnings of the workforce at large. Average salaries were higher in the GTA (\$38,700) and British Columbia (\$33,900) than in other areas of the country.

PRODUCTION COMPANIES:

- In 2001, a total of 28,670 people were engaged in the film and television production industry, either as an employee, freelancer or working owner.
- The majority of production companies in the industry are small in terms of paid employees, falling into the Micro (1-4 employees) and SME (5-19 employees) categories. In fact, 60% of private firms have fewer than five paid employees, including working owners, and 19% have no paid employees at all. Only 11.5% have 20 or more paid employees.
- Freelance work is an important reality for the production industry: Non-union contractors represent 40.9% of the total "in-house" workforce of production companies surveyed.
- Almost one-third of private production firms (31.1%) identified domestic documentary/lifestyle television production as their primary business activity.
- Production company employees are most likely to work in senior management (14.6% of total employees), post-production, excluding editing (11.1% of total employees) and writing (11% of total employees).

FILM AND TELEVISION DISTRIBUTION COMPANIES:

- In 2001/2002, employment in the film and television distribution sector was estimated to be about 1,909 (exclusive of very-short-term jobs of less than 13 weeks during the year).
- One hundred and twenty-five firms in Canada were identified as having significant film and television distribution activities.
- The largest concentration of distribution firms is in the GTA (46%).

- The majority of distribution firms are small from an employment perspective, 28% having 0-4 employees and 38.1% with 5-19 employees.
- Freelancers represent, on average, 12.2% of the combined freelance and paid workforce of distribution firms participating in the survey.

BROADCASTING COMPANIES:

- In 2003, conventional broadcasters accounted for 7,850 jobs and pay/specialty services accounted for 4,832 jobs.
- Broadcasting is a highly skilled industry. Employees in medium- and high-skilled occupations represent 82.6% of the workforce. Together, professionals and semi-professionals/technicians accounted for about two-thirds of employment.
- Most work in broadcasting is full time. However, close to 8% of employees working for Canada's largest broadcasters are short-term employees.
- In 2001, CBC/Radio-Canada employed 8,518 people, exclusive of very-short-term employees (working less than 13 weeks in the year).
- One-fifth (20.3%) of CBC/Radio-Canada total employment is made up of short-term employees (of 13 weeks or more) – making contract workers an important component of its workforce.
- The CBC/Radio-Canada workforce is highly skilled with almost half (48.4%) of its employees in high-skilled occupations; almost 40% are in professional occupations.

NEW MEDIA COMPANIES:

- Recent estimates indicate there are 1,775 new media firms in Canada.
- The largest concentration of firms is in the GTA (37%) followed by Quebec (15.3%), British Columbia (15.7%) and the Prairies (15.3%).
- New media firms are small: three in five new media firms in Canada (59.8%) have fewer than five paid employees and 30.1% have no employees at all. Only 9.8% of firms have 20 or more employees.
- New media firms' revenues are more likely to come from providing new media services (59%) than from producing original new media content (41%).
- The most common primary activity for new media firms is, by far, website development (identified by 36.4% of firms), followed by website component development (11.1%) and television production (10.3%).
- Freelance work is an important part of new media employment: contractors represent, on average, 51.5% of the total combined workforce of paid employees and contractors in the industry.

- New media workers are most likely to have jobs as web developers, graphic designers, production managers and production designers in new media firms.

EDUCATION:

- Approximately 173 public and private institutions and training facilities were identified in Canada that offered film, television and new media programs.
- The estimated total number of students enrolled in a Canadian screen-based media program in 2003 was 2,754.

3. WORKFORCE GENDER DIVERSITY: SIGNIFICANT GAINS OVER 15 YEARS BUT CHALLENGES STILL AHEAD

Women have made substantial gains in the film and television workforce since 1989 when WIFT-T first published its groundbreaking study measuring women's participation in the Canadian film and television industries. This can be attributed, in part, to a cross-industry effort to increase representation by women at all levels. The successful integration of women into our screen-based media workforce is an example of how industry and government, working cooperatively, can significantly shape the composition of employment in this sector.

For example:

- At large private broadcasters, women significantly increased their representation in upper level management positions to 28% in 2001 from 7% in 1988. Similarly, in 1988, women accounted for only 21% of middle managers at private broadcasters. Today they represent a full 35% of this category.
- Our national public broadcaster, CBC/Radio-Canada, has seen the women's share of its workforce increase to 43% in 2001 from 37% in 1988. Also in 2001, women accounted for close to 44% of managers, up from just 19% in 1988.
- There has been a significant increase in female representation among film and television producers working in private production companies, to 60.9% in 2003 from 29% in 1989.
- The majority of private production companies in Canada (60%) have at least one female owner.
- In Canada's private film and television production firms, women hold 50% of senior management positions.
- A full 59.5% of employees at the NFB today are women, a rise from 52% in 1989. As well, today close to 44% of NFB senior managers are women.
- Between 36% and 44% of teachers in screen-based media programs are female, with the highest percentage teaching in television programs.

- About one-half of film students are female (51.6%), whereas just over a third of the enrolment in television and new media programs is female (37.4% and 36.3%).

Despite these successes, women are still not fully participating in key areas of these industries:

- Senior management in most areas of screen-based media industries is still dominated by men. Women represent only 27% of senior managers in the motion picture and video sector. At our large private broadcasters, women are significantly underrepresented in senior management, accounting for 28% of these positions. At CBC/Radio-Canada, women make up 15% of the highest level management occupations and in new media firms, women make up 27% of senior executives.
- Women are still underrepresented in some key creative roles. For example, they account for just under 10% of directors belonging to the Directors Guild of Canada. As well, women make up just 15% of film and video camera operators.
- Women entrepreneurs in film and television production are less likely than men to successfully take their business beyond SME status. Women make up more than 39% of micro production firm owners but account for only 27.3% of larger firm ownership.
- Women continue to dominate clerical positions in every facet of this industry, accounting for 88% of production company clerical workers, 85% of clerical workers in large private broadcasters and 79% of new media company administrative/clerical positions.
- While women have made some inroads into traditionally male-dominated technical occupations, they are still underrepresented in technical jobs in all screen-based media sectors. This is a worrisome trend given that technical skills and occupations have been identified as high-growth areas of the future.
- For example, women account for just 22% of film and television production audio and video recording technicians in the motion picture and video industry. Women represent just 4% of grip lighting positions and 1.7% of positions in sound in NABET. According to the STCVQ, only 3% of members in technical positions are women. In addition, women today make up only 13% of computer programmers working in new media firms.

4. WORKFORCE DIVERSITY: VISIBLE MINORITIES, ABORIGINAL PERSONS AND PERSONS WITH DISABILITIES – SETTING BENCHMARKS FOR PROGRESS

Canada's population and its viewing audiences are increasingly multicultural. In order to attract Canadian viewers, reflect a true picture of Canada, and remain competitive, our screen-based media workforce must be inclusive. Broadcasters, government and stakeholders throughout the industry have identified greater cultural diversity as a cultural and business imperative. Stakeholders have also recognized the need for greater representation of people with disabilities in the screen-based media industries. Figures in this report represent national benchmarks for progress, including comparisons to equity group participation in the workforce at large. Regional comparisons, also important, have been highlighted where appropriate.

PERSONS IN VISIBLE MINORITY GROUPS:

Visible minorities have made inroads into a number of areas of screen-based media work, particularly in new media. For example:

- In Canada's motion picture and video industries, visible minorities represent 11.9% of the workforce, which is close to their share of the overall national workforce at 12.6%. Note however that in Canada's biggest media centre, Toronto, visible minorities account for a full 34.6% of the workforce overall.
- Seventeen per cent of new media employees are members of a visible minority group. Fully 19% of senior new media firm executives are visible minorities and close to 15% of new media companies have at least one visible minority working owner.
- Members of visible minorities represented 7.8% of the CBC English Television workforce in 2001.

However, they are significantly underrepresented in key occupations and management positions throughout the sectors. For example:

- Visible minorities represent only 5.6% of senior managers in the motion picture and video sector and 6.5% of private production company ownership.
- As of 2001, members of visible minorities represented only 5.6% of the workforce in Canada's large private broadcasters, and only 2.2% of senior management positions in this industry.
- As of 2001, visible minorities were not represented amongst CBC/Radio-Canada's most senior management group.
- Visible minority groups account for 14% of teachers of new media programs. However, they represent just 6.2% of film program teachers and less than 1% of teachers in television programs.

ABORIGINAL PERSONS:

Aboriginal peoples remain underrepresented in almost all areas of screen-based media. For example:

- As of 2001, in Canada's motion picture and video sector, Aboriginal persons represented 1.5% of the workforce, compared to their 2.6% share of the workforce overall.
- Aboriginal persons account for 1.2% of the private film and television production company owners and only 0.8% of private production firm employees.
- Just 1.5% of new media employees and 1.3% of new media freelancers are Aboriginal. There are no Aboriginal senior executives working in Canadian new media firms.
- As of 2001, Aboriginal persons made up 0.8% of the large private broadcaster workforce and 1.3% of workers at CBC/Radio-Canada and at CBC English Television.

- Aboriginal teachers represent 0.5% to 3.0% of the teachers in screen-based media programs.
- Aboriginal students are underrepresented in film programs (0.9%) compared to their overall share of the labour force (2.6%). However, Aboriginal students are well-represented in television and new media programs (9.7% and 5.1% respectively).

PERSONS WITH DISABILITIES:

With some notable exceptions, people with disabilities are underrepresented in most areas of screen-based media.

- People with disabilities account for 3.3% of private production company employees (employer identified), less than their 5.3% share of the workforce.
- However, only 2.3% of private production firms have at least one owner with a disability and the NFB currently has no middle or senior managers with disabilities.
- While people with disabilities account for only 1.6% of employees in Canada's large private broadcasters, they actually have a 2.2% share of the senior management ranks (compared to their 5.3% share of the workforce overall).
- People with disabilities are underrepresented amongst new media employees at 1.3%. However, 4.6% of new media freelancers have a disability. This is close to their overall share of the workforce.
- Compared to their share in the overall workforce (5.3%), persons with disabilities are considerably underrepresented among the teaching staff of screen-based programs (between 0.7% to 2.0%).
- Students with disabilities are significantly underrepresented in all screen-based media programs (0.4% to 1.4%), compared to their share of the labour force (5.3%).

5. THE CANADIAN SCREEN-BASED MEDIA WORKFORCE OF THE FUTURE: TECHNICALLY SAVVY, ENTREPRENEURIAL AND MULTI-DISCIPLINED WITH SOPHISTICATED BUSINESS AND FINANCIAL SKILLS

Traditional screen-based media industries including film and television production, distribution and broadcasting are experiencing significant change with the rise of digital technology, globalization and media consolidation. At the same time, the young new media sector, by its nature, is in constant transition, with new technologies, products and applications being developed every month.

Based on the responses of educators and employers, a distinct portrait can be drawn of the ideal screen-based media workforce of the future.

FILM AND TELEVISION SKILLS IN DECLINE:

According to the educators surveyed, skills associated with analog technology and film have seen reduced demand over the last 10 years. Examples are:

- editing on a “steenbeck” or celluloid;
- linear/analog editing;
- post-production on film;
- analog sound mixing;
- negative cutting; and
- 35 mm and 16 mm formats.

FUTURE SKILLS IN DEMAND:

TOP FILM AND TELEVISION PRODUCTION SKILLS OF THE FUTURE:

The top skills expected to be in demand by the industry in the next five years are:

- Creative business development and marketing skills including:
 - Creative financing, working with private funders and sponsors, creative merchandising and developing alternative revenue streams; and
 - Pitching proposals, leading international sales and marketing initiatives, working with international distributors and co-producers.
- Advanced management and financial skills including:
 - Corporate finance, financial planning and accounting: advanced skills to grow and sustain an SME company in a highly volatile industry;
 - International and domestic business affairs and intellectual property and copyright expertise; and
 - Human resource management.
- Technical skills including:
 - Digital production;
 - CGI applications;
 - Three-dimensional graphics and special effects;
 - Digital animation;

- Video/web editing; and
- Computer-aided design.
- Working with new technologies including:
 - Understanding high definition and digital technologies;
 - Online distribution; and
 - Interactive storytelling, interactive content creation and production of convergent media.
- Versatility and entrepreneurship, including:
 - Working in more than one function interchangeably;
 - Ability to handle any area of the business as opposed to specializing; and
 - Ability to handle editing and post-production in-house using new technologies.

FILM AND TELEVISION DISTRIBUTION:

The top skills expected to be in greatest demand by the industry in the next five years are:

- New technologies as they relate to distribution including:
 - Distribution software and new format skills;
 - Website management and internet marketing; and
 - Understanding digital and high definition formats.
- Creative business skills including:
 - Creative deal-making requiring understanding of financing models, co-production agreements and foreign broadcast environments; and
 - International business practices/legalities.

NEW MEDIA:

The top skills expected to be in greatest demand by the industry in the next five years are:

- Technical/programming skills including:
 - Mobile/PDA technologies;
 - Wireless technologies;
 - 3D Animation and game development;
 - Flash programming including: dynamic flash, flash for television;
 - High language programming such as ASP, PHP, XHTML; and
 - Combined editorial and technical skills.

- Creative design skills including:
 - Formal graphic design skills;
 - Writing/editing skills for interactive content;
 - Design/development for cross-platform content (TV, Web, PDA etc.);
 - Information architecture and content management skills; and
 - Digital video skills.
- Sales and business skills including:
 - Business analysis;
 - Strategic business development; and
 - Strong communication/people skills.

UNIONS AND GUILDS:

- Top skills of the future:
 - Business skills for creative professionals including: contracting, accounting, marketing and promotion;
 - Business development skills for creative professionals including: pitching projects, project management, directing/producing your own projects;
 - Working with digital technologies and HD, e.g., non-linear editing;
 - Career planning; and
 - Multi-tasking: combining traditional specialist areas such as lighting/grip and hair/makeup.

6. EMPLOYERS REPORT SIGNIFICANT SKILLS SHORTAGES IN KEY GROWTH AREAS TODAY: ARE WE PREPARED FOR THE FUTURE?

As technology advances, so does the need for a skilled workforce. Today, the screen-based media industries face the critical challenge of ensuring our workforce is trained to exploit new digital technologies on the one hand, and the increased need for creative/sophisticated business and financial skills on the other.

The film and television production, distribution and new media sectors are already experiencing skills shortages in both these areas. Worse, the problem could well grow in the years to come: technical and business skills are the very skills predicted to be most in demand over the next five years. For example:

- A full 40% of production companies surveyed reported experiencing at least some difficulty in finding people with the skills they need in key job categories. Skilled people in business-related occupations in particular are in short supply amongst production companies and are predicted to be in high demand in the next five years.
- The greatest current skills shortages by occupation were reported in:
 - Financing and Accounting (45% of firms reporting difficulty finding skilled people);
 - Business Affairs (41% of firms reporting difficulty finding skilled people); and
 - Development (41.8% of firms reporting difficulty finding skilled people).
- The greatest skills shortages, irrespective of occupations, were reported in:
 - Business development and marketing; and
 - Management, financial, legal and operations.

FILM AND TELEVISION DISTRIBUTION:

- Substantial proportions of distribution firms are experiencing difficulty filling their skill needs in most job categories including:
 - Acquisitions (74.9% of firms reporting difficulty finding skilled people);
 - Sales (66% of firms reporting difficulty finding skilled people); and
 - Clerical Support (66% of firms reporting difficulty finding skilled people).

NEW MEDIA:

- Just over one-third (37%) of new media firms are experiencing some or great difficulty in filling skill needs.
- Creative/design and technical/programming skills are the areas where new media firms are experiencing the greatest skill shortages.
- On the other hand, business development skills such as promoting projects and services are, by far, the skills new media freelancers feel they are most lacking. Half of new media freelancers identified this essential business skill as one they think they will need to remain competitive.

REASONS FOR SHORTAGES... AND SOLUTIONS:

In most parts of the industry, poor job security and lack of appropriate training were cited as the leading reasons for skills shortages. While employers generally rate on-the-job training as the most effective, it has been demonstrated in this report that the film, television and new media production industries rely, to a significant degree, on freelance workers. Assuming this trend will continue and possibly grow, new and innovative training strategies must be introduced to ensure workforce competitiveness.

As the pace of change accelerates, skills training and lifelong learning will become more critical. The skills shortages we are experiencing today have the potential to grow exponentially in the years ahead. Skills shortages, if not addressed, can and do affect productivity and economic prosperity.

1. INTRODUCTION

This study, **Frame Work: Employment in Canadian Screen-Based Media — A National Profile**, provides a snapshot of Canadian employment in the film and television industries, and examines the growing new media industry. For the first time, important information about Canada's screen-based media workforce, work trends, and preparedness for an increasingly global future is being made available. This is critical if best practices in investment, arts promotion, export and skills development are to be adopted by the industry. As such, **Frame Work** will be an invaluable tool for all stakeholders in this key sector of Canada's knowledge-based economy.

Frame Work was commissioned by Women in Film and Television – Toronto and a coalition of twenty-two government and industry partners. Lead partners include Bell Globemedia, the Cultural Human Resources Council of Canada and Human Resources and Skills Development Canada. Sponsors and supporters include Canadian Heritage, Industry Canada, the Ontario Ministry of Culture, the Ontario Media Development Corporation, the City of Toronto, Telefilm Canada, the National Film Board of Canada, The Directors Guild of Canada - Ontario, EKOS Research Associates Inc. and broadcasters across Canada.

Digital technology and the rise of the global knowledge economy are transforming the way media products are produced, distributed and consumed in Canada. Major trends include:

- Globalization of Canada's entertainment industry and increased international competition;
- Rapid growth of knowledge-based economic sectors;
- Accelerated technological change in screen-based media;
- Industry restructuring and vertical integration; and
- An increasingly diverse Canadian population and multi-cultural viewing audience.

As a result of these changes, the skills required for conventional film and television occupations are changing rapidly as new jobs, new technologies and new industries emerge. For the growing new media industry, constant change is the business norm. To secure Canada's position as a leader in the global entertainment industry, stakeholders must understand and address key employment trends, skills gaps, and growth areas where development is critical. For this to occur, comprehensive, industry-specific employment data must be made available, such as those presented in this report. At the same time, Canada's population is changing. Increasingly, the Canadian viewing audience and the workforce is culturally diverse. An examination of the participation of women and workers from diverse backgrounds, as is being provided by this study, is important in order for the sector to prepare and build a competitive, inclusive workforce for the decade to come.

Specifically, the research issues addressed by the results presented in this report include the following:

- Employment in public and private broadcasting, film and television production, distribution and new media content production;
- Participation by women, and where data are available, visible minorities and other equity groups in film, television and new media;
- Overview of standard job categories (occupations);
- Salaries and distribution of earnings;
- Skills gaps in key job categories;
- Freelance vs. full-time employee work; and
- Participation in education and professional development programs.

Following a description of the study methodology, the remainder of the report is organized into four parts:

- I Production, Distribution, and Broadcasting;
- II New Media;
- III Sector Institutions; and
- IV Summary Tables.

Comparisons over time are indicated in the summaries of each chapter, based mainly on evidence gleaned from a similar earlier study: “A Statistical Profile of Women in the Canadian Film and Television Industry”, Foundation for Toronto Women in Film and Video, January, 1990.¹

¹ See Appendix A for more about the comparability of this earlier report and the current study.
2 • EKOS RESEARCH ASSOCIATES, 2004

2. METHODOLOGY

Five main sources were used to gather data for this study, as follows:

- The primary line of evidence was a series of surveys conducted with five different sectors of the screen-based industry: film and television distribution companies; film and television production; new media companies and their employees and freelancers; unions and guilds serving the interests of those working in the screen-based industry; and education and training organizations providing instruction in screen-based media.
- Second was Statistics Canada data from the 2001 Census, the 2003 Labour Force Survey, the Participation and Limitation Activity Survey (for disability figures), and the film and video industry surveys it conducts, most recently in 2002 (see below for more detail on these surveys). These data were provided in unpublished form by Statistics Canada or obtained from its website. This information was used as a reference point for equity group representation results derived from survey data collected for this study.
- Third was employment equity data obtained from Human Resources and Skills Development Canada (HRSD (CANADA)), collected by the Department under the Employment Equity Act from federally regulated organizations with 100 or more employees. Such data were used to examine equity group representation, occupational mix, and salary distribution of private television broadcasters, Canada's public television broadcaster (Canadian Broadcasting Corporation) Radio-Canada (CBC/Radio-Canada), and the National Film Board of Canada (NFB).
- Fourth was data provided directly by CBC/Radio-Canada, the NFB, and the Canadian Radio-television and Telecommunications Commission (CRTC) for broadcasters with less than 100 employees.
- Fifth was literature on screen-based industries, which was accessed in order to establish a context for each of the sectors.

Visible minority, Aboriginal and disability equity results were primarily derived from survey responses where employees and freelancers identified themselves as a member of an equity group.² These data were collected through Statistics Canada's 2001 Census, HRSD's employment equity program under the *Employment Equity Act*, the CRTC, the NFB, CBC/Radio-Canada, primary evidence gathered through new media employee and freelancer surveys conducted for this study, and WIFT surveys of production, distribution and new media employers with respect to owners. For some sub-sectors, equity group representation estimates are based on employer-provided information, either tracked through the company's formal equity reporting program, or based on the employer's existing knowledge. Where equity group results are employer-based, they are clearly indicated in the report.

² See Appendix B for official definitions of equity groups as used under the Employment Equity Act.

Further, it should be noted that national workforce figures have been used as a benchmark against which industry-level equity group representation is compared. This provides a consistent and reliable standard against which to assess how this industry is doing. Moreover, according to the 2001 Census, equity group representation in the workforce is very similar to their representation in the overall population³. Please note, as well, that regional comparisons, also important, have been highlighted in the report where appropriate.

The survey methodology for each of five sectors of the screen-based industry is considered in turn below: film and television production; film and television distribution; new media; television broadcasters; education and training institutions; and unions and guilds.

2.1 FILM AND TELEVISION PRODUCTION

Information with respect to this sector was obtained from two sources, corresponding to the public and private aspects of the industry. First, the public portion of the industry is represented by the National Film Board of Canada (NFB). The NFB is required to collect equity data and submit it to HRSD (CANADA) under the Employment Equity Act (see more details under the Television Broadcasters below). The data used to measure equity group representation for the NFB were provided directly by the organization, including statistics with respect to its fully funded productions, as well as in its 2000/2001 Employment Equity Annual Report.

For private film and television producers, information was obtained using a web-based survey, supplemented by data from Statistics Canada's 2002 Survey of the Film, Video and Audio-Visual Industry. The survey instrument was designed by EKOS in consultation with Paul Audley & Associates Ltd., Humewood Communications, and WIFT-T.

The survey sample frame of 822 film and television production companies was initially compiled by Kealy Wilkinson, and supplemented by Humewood Communications with input from WIFT-T. The list was drawn from a number of sources, including: (1) a list of producers in the on-line version of the 2003 *CFTPA Guide*, produced by the Canadian Film and Television Production Association; (2) the *Qui Fait Quoi Annual Guide* for 2003, for firms in Quebec; and (3) other producers known to the contractor.

The survey was administered as a web-based survey from January to April 2004, with a reminder in February and personal follow-up telephone calls in February and March 2004, focusing on those companies considered to be the major players. Some respondents completed the survey on their own and some in concert with a WIFT-T representative over the phone. A total of 122 firms supplied employment data in their response to the survey for a 14.8 per cent response rate, discounting "bad" e-mail addresses.

³ For corroboration, see: [http://www.HRSD\(Canada\).gc.ca/asp/gateway.asp?hr=en/lp/lo/lsw/ve/ee_tools/data/tables/annual/2001/CPT-tables.shtml&hs=wzp](http://www.HRSD(Canada).gc.ca/asp/gateway.asp?hr=en/lp/lo/lsw/ve/ee_tools/data/tables/annual/2001/CPT-tables.shtml&hs=wzp).

The total employment of firms responding to the survey and providing employment data is 1,935 which represents 17.4 per cent of the total estimated industry employment of 8,596 in 2001-02. The total employment count was estimated based on employment figures derived from Statistics Canada's Film, Video and Audio-Visual Production Industry Survey. Data on employment provided from the survey were for the entire production industry, including commercial, industrial, and educational producers. For purposes of the estimate for film and television production, the latter producers' share of total industry revenues (77 per cent = \$2.0 billion / \$2.6 billion) was applied to the total employment figure of 11,169, and the result was an estimated employment figure of 8,596. For employee-level estimates based on the WIFT-T Producers Survey, the sampling error is ± 2.0 per cent, assuming random sampling (which is not necessarily the case here), which provides a high degree of confidence in the results.

The 122 firms responding to the survey represent 14.8 per cent of the 822 firms in the original sample frame. The sampling error, therefore, is ± 8.2 per cent for firm-level estimates, assuming random sampling (which, again, is not necessarily the case here), which still provides a good degree of confidence in the results.

2.2 FILM AND TELEVISION DISTRIBUTION

Information for the film and television distribution segment of the industry was obtained using a web-based survey, supplemented with data from Statistics Canada's Film, Video and Audio-Visual Distribution and Videocassette Wholesaling Survey⁴. The survey instrument was designed by EKOS in consultation with Paul Audley & Associates Ltd., Humewood Communications, and WIFT-T.

The survey sample frame of 113 film and television distribution companies was compiled by Humewood Communications with input from WIFT-T. The list was drawn from a number of sources, including (1) a list of members of the Canadian Association of Film Distributors (CAFDE) as reported in an article that appeared in the April 28, 2003 edition of *Playback*; (2) a list of distributors in the 2003 *CFTPA Guide*, produced by the Canadian Film and Television Production Association; (3) the *Qui Fait Quoi Annual Guide* for 2003, for firms in Quebec; and (4) other distributors known to the contractor.

The survey was administered as a web-based survey from November 2003 to March 2004, with a reminder in November and personal follow-up telephone calls in February and March 2004, focusing on those companies considered to be the major players. Some respondents completed the survey on their own and some in concert with a WIFT-T representative over the phone. A total of 21 firms responded to the survey, for a 18.5 per cent response rate, discounting "bad" e-mail addresses.

The 21 firms responding to the survey represent 18.5 per cent of the original sample frame of 113 firms. The sampling error, therefore, is ± 19.8 per cent for firm-level estimates, assuming random

⁴ Source: Statistics Canada: <http://www.statcan.ca/Daily/English/or1215/d031215b.htm> and <http://www.statcan.ca/english/Ogdb/arts15.htm>.

sampling (which, again, is not necessarily the case here). This is a large estimated error and thus these results should be treated appropriately.

The total employment of the 21 firms responding to the survey amounts to 327, which represents about 17.8 per cent of the total industry employment, estimated to be 1,833 in 2001/02⁵. For employee-level estimates, the sampling error, therefore, is ± 4.9 per cent, assuming random sampling (which, again, is not necessarily the case here), which provides a good level of confidence in the results.

The estimated employment of the industry was derived from data produced by Statistics Canada's Film, Video and Audio-Visual Distribution and Videocassette Wholesaling Industry Survey⁶. Total employment in the entire sector including videocassette wholesaling was 3,900 in 2000/2001. The latter sub-sector's revenues were about \$1.5 billion, which is about 53 per cent of the total revenues of \$3.0 billion for the sector. Thus, employment in the distribution sub-sector was estimated to be $0.47 * 3,900 = 1,833$.

2.3 NEW MEDIA

a) New Media - Employers

The new media employer survey instrument was designed by EKOS in consultation with Paul Audley & Associates Ltd., Delvinia Interactive and WIFT-T. The survey sample frame of 1,232 new media firms was compiled by Delvinia from its proprietary list of companies. This list is used for the company's annual Interactive Media Producers' Survey and is updated on an annual basis and supplemented with companies from associations across the country. The survey took place over the October/November 2003 period.

The survey was administered as a web-based survey completed by Delvinia interviewers in conversation with survey respondents. Initially, potential respondents were informed of, and encouraged to participate in, the survey by e-mail. Soon after, potential respondents were called individually by telephone by Delvinia interviewers, who entered their responses using the Web version of the survey. All 1,232 firms were called, some more than once. In some cases, up to three messages were left with a potential respondent. A total of 1,649 calls were made, with 40 of the numbers being out of service or wrong numbers, and 20 companies declining to participate. In total, 261 firms responded to the survey, out of the 1,232 invited to participate and called, for a 21 per cent response rate.

The total employment of firms responding to the survey and providing employment data is 1,914, which represents 8.7 per cent of the total estimated industry employment of 21,835. For employee-level estimates, the sampling error is, therefore, ± 2.1 per cent, assuming random sampling (which is not necessarily the case here), which provides a high degree of confidence in the results.

⁵ Statistics Canada: <http://www.statcan.ca/english/freepub/87F0010XIE/2003002/data.htm>

⁶ Statistics Canada: <http://www.statcan.ca/Daily/English/or1215/d031215b.htm> and <http://www.statcan.ca/english/Ogdb/arts15.htm>.

The 261 firms responding to the survey represent 14.7 per cent of the 1,775 new media firms estimated to exist in the industry. The sampling error is ± 5.6 per cent for firm-level estimates, assuming random sampling (which, again, is not necessarily the case here). This provides a good degree of confidence in the survey estimates.

The estimated counts of firms and employment for the industry were obtained from Delvinia, based on its survey experience.

b) New Media – Employees and Freelancers

Two separate surveys were conducted of new media employees and new media freelancers in parallel. The survey instrument for the employee survey was developed by EKOS Research Associates in concert with Delvinia Interactive and the resulting data are presented in this report. The instrument for the freelancers survey was developed in concert with the Cultural Human Resources Council and its New Media Steering Committee, and the resulting data were provided by that organization for inclusion in this report. There was no sampling frame for these surveys, as no comprehensive lists of new media employees and freelancers existed. Thus, survey distribution relied on a combination of circulation of the survey's web-address to participating professional associations who then passed it on to members, and a "viral" approach whereby those who responded were encouraged to provide the e-mail of colleagues for subsequent distribution of the survey link. Respondents who completed the survey qualified for a prize, and were given an additional chance to win for every colleague suggested (up to 10).

In the second week of March 2004, an e-mail invitation to participate in the surveys was developed and provided to 80 participating professional associations that had agreed to pass the survey invitation on to their members. The survey took place over the period March 10 to March 31, 2004. A reminder was sent March 16, 2004.

Of the 2,530 respondents who "touched" both surveys, 1,140 were filtered out because they were not residents of Canada or they were employers of others and not freelancers or employees on their own. Of the 685 new media employees who started answering survey questions, 108 dropped out, leaving 577 who completed the survey. Of the 705 freelancers who actually started answering the survey questions, 129 dropped out, leaving the 576 who completed the survey, on whose responses this survey is based.

Based on an estimated population of 8,165 new media freelancers, the error associated with a survey sample of 576 responses is ± 3.9 per cent, assuming random sampling of respondents (which is not necessarily the case). As for employees, based on an estimated population of 21,835 new media employees, the error associated with a survey sample of 577 responses is ± 4.0 per cent, assuming random sampling among respondents (which is not necessarily the case). This provides a good degree of confidence in the survey results.

2.4 TELEVISION BROADCASTERS

Data for the main public broadcaster in Canada, the Canadian Broadcasting Corporation/Radio-Canada (CBC/Radio Canada), and CBC English Television were obtained from two sources: (1) CBC/Radio-Canada itself; and (2) the Workplace Equity Unit of Human Resources and Skills Development Canada (HRSD (CANADA))⁷.

Data for private broadcasters were also obtained from two sources: (1) the CRTC, to which smaller broadcasters (with less than 100 employees) applying for broadcast licences must submit equity data; and (2) the Workplace Equity Unit of Human Resources and Skills Development Canada (HRSD (CANADA)), to which larger broadcasters (100 and more employees) must submit employment equity data, as noted above. Data used are for 2001. More recently, 2002 data have become available but comparisons for selected statistics indicated circumstances in 2002 are little different from 2001.

In case of the large broadcasters, out of the list of what are called by HRSD (CANADA) “telecommunications broadcasters” in the list of all companies submitting workplace equity data to HRSD (CANADA), 37 were identified as being involved in television broadcasting, either exclusively or in combination with radio as well. Also included are speciality and cable channels. Satellite and cable broadcast distribution undertakings (BDUs) and those organisations that are exclusively radio broadcasters were excluded. Once identified, a request was made to HRSD (CANADA) to provide all the equity data in electronic form for ease of computation. Data for CBC/Radio-Canada were analyzed separately.

2.5 EDUCATION AND TRAINING INSTITUTIONS

Information used to examine those teaching and participating in new media training and education was obtained using a web-based survey. The survey instrument was designed by EKOS in consultation with Paul Audley & Associates Ltd., Humewood Communications, and WIFT-T. The survey sample frame of 173 education and training facilities providing instruction in film, television or new media was compiled by Paul Audley & Associates Ltd. through a review of the calendars of private and public training and education institutions.

The survey was administered as a web-based survey from November 2003 to April 2004, with a reminder in November and personal follow-up telephone calls in February and March 2004. Some respondents completed the survey on their own and some in concert with a WIFT-T representative over the

⁷ Federally-regulated private and public sector organizations with 100 or more employees (500 in number) and provincially-regulated employers covered by the Federal Contractors Program (900 in number) must, by law, submit employment equity data under the Employment Equity Act to HRSD (CANADA) and these data are available on the Labour Program section of the HRSD (CANADA) website, or electronically by request. The latest year for which equity data were available at the time of writing was 2001. In 2001, 2 million people, or 12 per cent of Canada’s employment, were covered under the Act. Excluded are very short-term employees (working less than 12 weeks in the calendar year).

phone. Twenty-eight schools provided useful information, 23 of which responded to the questions on the numbers of teachers and graduates.

2.6 UNIONS AND GUILDS

A list of unions and guilds representing artistic, creative and technical employees and freelancers working in the screen-based industries was drawn from a number of sources, including the on-line version of the *CFTPA Guide*, produced by the Canadian Film and Television Production Association as of August 1, 2003, the hard copy of the *CFTPA Guide*, and the *Qui Fait Quoi Annual Guide* for 2003. Individual locals are excluded where contact information was obtained for the union or guild's national office.

Included in this study are only unions or guilds negotiating collective agreements on behalf of employees or freelancers. Excluded are those organizations that are only advocates for their members' interests and do not negotiate collective agreements. Excluded as well are unions or guilds that primarily represent employees of public sector organizations (e.g., CBC/Radio-Canada, NFB) and organizations that have only U.S. addresses.

Fourteen unions were e-mailed an invitation to participate in the survey in October 2003, and reminded twice in January 2004 by the research team. Over the months of February and March, several personal calls were made to the contact person at unions that did not respond to the original invitation or the reminders. Six of the 14 unions invited to participate did so. The six unions that participated are considered to be among the major "players" representing workers in the screen-based industries.

PART I: PRODUCTION, DISTRIBUTION AND BROADCASTING

3. MOTION PICTURE AND VIDEO INDUSTRIES

In this chapter, key data are presented concerning the labour force of Canada's motion picture and video industries based on Statistics Canada data from the 2001 Census, in which individuals have self-identified as members of particular equity groups. This industry group 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. Thus, *this sector includes two industries that separately are the subject of the next two chapters of this report – film and television production (Chapter 4) and film and television distribution (Chapter 5) – as well as motion picture exhibition, which is outside the scope of this study*⁸. The main issues addressed in this chapter are: the size and regional distribution of the sector's labour force; equity group representation of the labour force; the job categories labour force members occupy; and their salaries.

3.1 LABOUR FORCE PROFILE

The Census data were obtained for the total labour force of the sector. In 2001, the total labour force for this sector was 59,480, including 47,660 wage and salary earners, 11,680 self-employed workers (freelancers and contractors), and 135 unpaid family workers. The number includes 4,870 labour force members who were *not* working at the time of the 2001 Census.

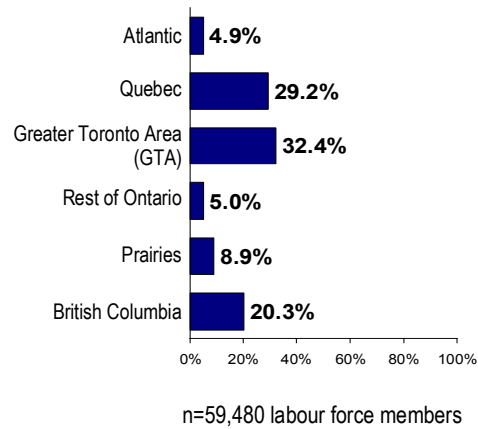
a) Regional Profile

The majority of the sector's labour force resided in the Greater Toronto Area (GTA) and Quebec, reflecting population and market patterns (Exhibit 3.1).

- ▶ About one-third (32.4 per cent) lived in the GTA, with other concentrations living in Quebec (29.2 per cent) and British Columbia (20.3 per cent).

⁸ Census data could not be obtained for a more detailed industry breakdown.

Exhibit 3.1:
Labour Force Regional Distribution of Motion Picture and Video Sector



2001 Census, Statistics Canada

b) Equity Group Representation

Women are slightly underrepresented in the motion picture and video sector compared to their share in the overall workforce⁹ (Table 3.1). For Aboriginal persons and visible minority groups, the difference between their share of this sector's workforce and the national workforce is negligible.

- Women represent 41.6 per cent of this sector's workforce (first data column in Table 3.1), which is less than their 47.3 per cent of the total national workforce (second column).
- Members of Aboriginal and visible minority equity groups are also underrepresented to some extent.
 - Aboriginal persons represented 1.5 per cent of the motion picture and video workforce, which is less than their overall 2.6 per cent workforce share.
 - Visible minorities represented 11.9 per cent of the motion picture and video workforce, which is slightly less than their overall 12.6 per cent workforce share¹⁰.

⁹ Equity group results are based on information provided by the individual in which he/she has self-identified as a member of an equity group. Results for persons with a disability were not available for this sector.

¹⁰ It should be noted that equity group representation is quite a bit higher in regions (such as the GTA) where the industry is concentrated. For example, visible minorities have a 34.6 per cent share of the Toronto workforce as a whole.

Table 3.1: Equity Group Representation in Workforce, Motion Picture and Video Sector, 2001*

Equity Group	Motion Picture and Video Sector	National
Female	41.6	47.3
Aboriginal	1.5	2.6
Visible minority	11.9	12.6

* Labour force members in an equity group as a percentage of the total labour force of the sector. There 59,480 labour force members of the motion picture and video sector in 2001..

Source: Source: Computations based on Statistics Canada 2001 Census data.

c) Profile by Type of Job

People working in the motion picture and video sector are more likely to work part time (i.e., working less than 30 hours a week) than those in the economy at large (last row of Table 3.2)¹¹.

- 28.4 per cent of jobs in the industry are part-time, compared to 19.3 per cent of jobs in the economy overall (data columns 2 and 3 of the last row of the table).
- Some regional differences are apparent (not shown in a table):
 - Part-time employment in the industry is particularly common in Prince Edward Island (50.0 per cent), New Brunswick (46.6 per cent), Manitoba (50.8 per cent), Saskatchewan (44.6 per cent), and Alberta (44.3 per cent).
 - Part-time employment is somewhat less than average (i.e., 28.4 per cent) in the three provinces where the industry's labour force is concentrated: Quebec (23.9 per cent is part-time), Ontario (27.8 per cent), and British Columbia (26.5 per cent).

The incidence of part-time employment is somewhat higher among women and Aboriginal persons than it is among all employed by the motion picture and video industry (column 2 of Table 3.2).

- Over one-third of women and Aboriginal persons employed in the industry (36.6 and 34.2 per cent) occupy part-time jobs (rows 1 and 3 of the table), which is somewhat greater than the 28.4 per cent part-time proportion of total employment in the industry (last row of the table).
 - On average, women worked 34.1 hours a week in 2001, compared to 38.3 hours for the entire workforce of the sector (based on Census data from Statistics Canada

¹¹ The high incidence of part-time employment in the industry can be partly explained by the inclusion of movie theatres in this group, which employ large numbers of people such as cashiers and food counter attendants, who typically work on a part-time basis.

- On the other hand, 29.4 and 27.9 per cent of persons with a disability and persons in a visible minority group work part-time (rows 2 and 4 of the table), which differs only slightly from the overall incidence in the industry (28.4 per cent).

Table 3.2: Incidence of Part-Time Jobs*, by Equity Group, Motion Picture and Video Sector, 2001

Equity Group	Employed Labour Force - Motion Picture and Video Sector	Part-Time Percentage of Employed Labour Force in Group (%)	
		Motion Picture and Video Sector	National
Female	24,305	36.6	28.7
Aboriginal	845	34.2	21.6
Visible minority	6,665	27.9	20.2
Total	59,480	28.4	19.3

* Employed labour force in equity group in part-time jobs as a percentage of total employed labour force in equity group.

Source: Computations based on Statistics Canada 2001 Census data.

Not surprisingly, given the higher overall incidence of part-time employment in the industry, the proportion working part-time in each equity group is also higher than it is in the national workforce (column 2 compared to column 3 of Table 3.2).

- For example, 36.6 per cent of women in the motion picture and video industry work part-time, compared to 28.7 per cent of women in the overall workforce (column 1 versus column 2, first row of table).
- There are similar differences for the other equity groups (rows 2 and 3 of the table).

d) Profile by Skill Level

The motion picture and video labour force is considerably higher skilled than the workforce at large¹² (Table 3.3).

- Over one-third (36.7 per cent) of those working in the motion picture and video sector occupy high-skilled jobs (managerial or requiring a university education), compared to just over one-quarter (26.4 per cent) in the workforce at large (data column 2 of the table).
- Similarly, only 27.0 per cent in the sector work in lower skilled jobs (requiring less than a college education) compared to 45.3 per cent of the workforce at large.

¹² Census employment by occupation were made available by detailed National Occupational Classification (NOC) code. Based on the educational and equivalent requirements of the occupation, the occupations were re-grouped into three skill levels: high-skilled (requiring university or equivalent, including managerial occupations); medium-skilled (requiring college or equivalent); and lower-skilled (requiring less than college or equivalent).

Table 3.3: Broad Skill/Occupational Mix*, Motion Picture and Video Sector, 2001

Skill Level	Motion Picture and Video Labour Force	Motion Picture and Video Skill Mix*	National Skill Mix*
High-Skilled	21,145	36.7	26.4
Medium-Skilled	20,910	36.3	28.4
Lower-Skilled	15,589	27.0	45.3
Total	57,644**	100.0	100.0

* Percentage distribution by broad occupational group indicative of skill level.

** Based on sums of employment in detailed occupations for which figures could be released publicly. For this reason, sum here differs from the actual total employment of the sector (59,480).

Source: Computations based on Statistics Canada 2001 Census data.

Women and members of visible minority groups are over-represented in lower-skilled jobs in the sector (Table 3.4).

- Almost one-half (49.5 per cent) of the lower skilled jobs in the sector are occupied by women, compared to 37.9 per cent of all jobs (data column 2 of the table, row 3 versus the last row).
- Women are underrepresented in medium-skilled jobs (28.6 per cent).
- Women account for 38.6 per cent of those working in high-skilled jobs. This is similar to their share of the overall labour force (37.9 per cent).

Table 3.4: Equity Group Representation (%)* by Skill Level, Motion Picture and Video Sector, 2001

Skill Level	Employment Level	Equity Group Representation		
		Female	Aboriginal	Visible Minority
High-Skilled	21,145	38.6	0.5	8.7
Medium-Skilled	20,910	28.6	1.6	7.8
Lower-Skilled	15,589	49.5	1.0	16.1
Total**	57,644**	37.9	1.0	10.4

* Total employment in equity group in skill level as a percentage of total employment in skill level.

** Based on sums of employment in detailed occupations for which figures could be released publicly. For this reason, percentages differ somewhat from those in Table 3.1

Source: Computations based on Statistics Canada 2001 Census data.

- Members of visible minority groups are over-represented in lower-skilled jobs (16.1 per cent, versus 10.4 per cent overall, last row of table)
 - They are also underrepresented in high- and medium-skilled jobs (8.7 and 7.8 per cent).
- Aboriginal persons have similar shares across skills levels (0.5 to 1.0 per cent).

e) Occupational Profile (Job Categories)

A picture of the key job categories in the motion picture and video sector, along with equity group representation in each, is presented in Table 3.5a (higher-skilled occupations) and Table 3.5b (medium- and higher-skilled occupations)¹³. Occupations with at least 250 employees in 2001 are shown, ordered by employment level, within each skill level. Results are highlighted in the tables where an equity group's representation is significantly different from its representation in the sector overall. The results indicate the following:

- ▶ Women account for the majority share in many key higher-skilled occupations, particularly public relations and communications professionals (72.2 per cent), financial managers (58.5 per cent); sales, marketing and advertising managers (58.2 per cent); journalists (56.2 per cent); and financial auditors and accountants (54.5 per cent).
 - They are particularly *underrepresented* in two higher-skilled technical occupations: computer programmers and interactive media developers (21.9 per cent).
 - They are also significantly underrepresented in the creative category of painters, sculptors and other visual artists (23.2 per cent).
 - Women account for 36.2 per cent of today's producers, directors and choreographers, the largest high-skilled occupation in the sector.

¹³ Note that Statistics Canada did not release, for privacy reasons and as a matter of policy, figures for a job category, or for an equity group within a job category, where there were fewer than 35 persons. There was also suppression if the occupation is so dominated by one or the other sex (e.g., females among secretaries, or males among truck drivers) that the release of the employment for one sex would, by subtraction, reveal the employment of the other sex that is less than 35. This was the case for bookkeepers, secretaries, receptionists, janitors and carpenters. In all instances, proportions for the respective cells in the Table 7.5 are marked as **x**.

Table 3.5a: Equity Group Representation (%)* in Key Higher-Skilled Occupations
Motion Picture and Video Sector, 2001**

Occupation	Employment Level	Equity Group Representation		
		Female	Aboriginal	Visible Minority
Producers, directors and choreographers and related	8,040	36.2	0.9	8.0
Managers: publicity, motion pictures, broadcasting and performing arts	2,485	41.6	x	9.5
Actors and comedians	2,035	44.7	2.2	18.9
Other services managers	1,165	43.8	x	15.0
Senior managers: trade, broadcasting and other services	990	26.8	x	5.6
Authors/writers	960	40.6	x	x
Financial auditors and accountants	660	54.5	x	18.9
Journalists	650	56.2	0.0	x
Sales, marketing and advertising managers	550	58.2	x	x
Editors	430	32.6	x	x
Retail trade managers	405	43.2	0.0	21.0
Public relations and communications professionals	395	72.2	x	12.7
Computer programmers and interactive media developers	320	21.9	x	14.1
Painters, sculptors and other visual artists	280	23.2	x	x
Financial managers	265	58.5	0.0	18.9
Total	59,480	37.9	1.0	10.4

* Workers in equity group in occupation as a percentage of total number of workers in occupation.

** "Key" occupations are considered those in which there are at least 250 workers.

x Proportion unknown because of suppression by Statistics Canada: number not released if less than 35, or if occupation dominated by one sex or the other.

Source: Computations based on Statistics Canada 2001 Census data.

- In medium-skilled occupations, women are particularly over-represented among administrative officers (82.2 per cent); wholesale trade sales representatives (54.0 per cent); theatre, fashion and other creative designers (51.3 per cent); and retail trade supervisors (50.0 per cent).
 - Women are particularly *underrepresented* in two medium-skilled technical positions: audio and video recording technicians (22.4 per cent), and film and video camera operators (15.2 per cent).

- Women are over-represented in most lower-skilled occupations presented, particularly accounting and related clerks (84.7 per cent), general office clerks (80.8 per cent), cashiers (74.3 per cent), food counter attendants and kitchen help (60.1 per cent), and customer service and information clerks (58.6 per cent)¹⁴.

¹⁴ Note that many of these occupations, e.g., cashiers and food counter attendants, are fairly specific to exhibitors (movie theatres).

- Aboriginal persons exhibit little variation in representation across occupations, except for their over-representation among carpenters (8.5 per cent, compared to their 1.0 per cent overall share).
- Persons in a visible minority group also represent negligible or zero percentage of the employment in a few occupations at all levels. They are particularly *over-represented*, compared to their 10.4 per cent sector workforce share, among:
 - higher-skilled occupations of retail trade managers (21.0 per cent); actors and comedians (18.9 per cent); financial auditors and accountants (18.9 per cent); financial managers (18.9 per cent); other services managers (15.0 per cent); and
 - medium-skilled bookkeepers (17.3 per cent); and
 - most lower-skilled occupations, particularly photographic and film processors (36.4 per cent) and cashiers (22.2 per cent).

Table 3.5b: Equity Group Representation (%)* in Key Medium- and Lower-Skilled Occupations, Motion Picture and Video Sector, 2001**

Occupation	Employment Level	Equity Group Representation		
		Female	Aboriginal	Visible Minority
<i>Medium –Skilled</i>				
Supervisors: motion pictures, broadcasting, performing arts	4,590	28.5	2.1	8.2
Other technical & coordinating: motion pictures, broadcasting, performing arts	3,845	38.9	1.2	6.5
Audio and video recording technicians	2,885	22.4	x	10.2
Film and video camera operators	2,175	15.2	1.8	8.3
Graphic designers and illustrators	1,785	29.1	x	14.6
Theatre, fashion, exhibiting, other creative designers	780	51.3	x	9.6
Secretaries (except medial, legal)	490	x	x	9.2
Administrative officers	450	82.2	x	13.3
Wholesale trade (non-technical) sales reps.	435	54.0	0.0	11.5
Carpenters	355	x	8.5	x
Retail trade supervisors	280	50.0	x	x
Bookkeepers	260	x	x	17.3
Other service supervisors	250	44.0	0.0	x
<i>Lower –Skilled</i>				
Cashiers	3,245	74.3	1.4	22.2
Other elemental service occupations	3,025	36.5	2.0	17.4
Food counter attendants, kitchen help and related	2,620	60.1	2.1	17.7
Retail sales clerks/persons	1,130	65.9	x	16.8
Customer service, information and related clerks	640	58.6	x	18.8
Accounting and related clerks	555	84.7	0.0	14.4
General office clerks, typists, word processing operators	520	80.8	x	13.5
Truck drivers	340	x	x	x
Receptionists and switchboard operators	330	x	x	x
Janitors, caretakers, and building superintendents	285	x	0.0	x
Photographic and film processors	275	21.8	0.0	36.4
Total	59,480	37.9	1.0	10.4

* Workers in equity group in occupation as a percentage of total number of workers in occupation.

** "Key" occupations are considered those in which there are at least 250 workers.

x Proportion unknown because of suppression by Statistics Canada: number not released if less than 35, or if occupation dominated by one sex or the other.

Source: Computations based on Statistics Canada 2001 Census data.

3.2 SALARIES

The focus in this section is the average gross annual earnings of those who work in the motion picture and video sector¹⁵. The average worker in the industry earned \$31,511 annually in 2000, which is similar to the average earnings in the workforce at large (\$31,395). There was wide variation in average earnings across provinces (not shown in a table).

- The average salaries of motion picture and video workers was higher in the GTA (\$38,700) and British Columbia (\$33,900) than it was in other areas of the country.
- In all other provinces but Quebec, where the average was \$30,700 in 2000, the average salary was considerably lower, specifically \$23,000 or less.

Annual salaries of women, Aboriginals and visible minorities who work in the motion picture and video sector were lower than the overall average salary in the sector (data columns 1 and 2 of Table 3.6).

- Aboriginal persons and persons in a visible minority group earned about two-thirds of what the average worker earned (68.9 and 67.6 per cent) (column 2).

**Table 3.6: Mean Annual Earnings*, by Equity Group
Motion Picture and Video Sector, 2000**

Equity Group	Motion Picture and Video Annual Earnings		National Annual Earnings (\$)
	Level (\$)	Relative to Total (%)*	
Female	26,400	83.8	24,100
Aboriginal	21,700	68.9	20,300
Visible minority	21,300	67.6	26,100
Total	31,511	100.0	31,395

* Annual earnings as a percentage of total earnings in sector, among those who worked in 2000.

Source: Computations based on Statistics Canada 2001 Census data.

¹⁵ Refers to total income received during calendar year 2000 as wages and salaries from employment and net income from a non-farm unincorporated business and/or professional practice (including self-employed/freelance work). Note that this refers to earnings of all workers, including those working part-time and/or part-year, who would be expected to bring the average down.

For women and Aboriginals, the average salary in this sector exceeds their average salary in the economy at large (data column 1 compared to column 3, Table 3.6)¹⁶.

- ▶ The average salaries of females and Aboriginal persons who work in the sector (\$26,400 and \$21,700) are slightly greater than the salaries of these groups in the workforce at large (\$24,100 and \$20,300)

3.3 SUMMARY OF KEY FINDINGS

The labour force of the motion picture and video sector is concentrated in three areas of the country: the Greater Toronto Area (32 per cent), Quebec (20 per cent) and British Columbia (20 per cent). There is a higher incidence of part-time jobs in this sector than the labour force at large, but also a higher incidence of higher skilled jobs. All equity groups are somewhat underrepresented in this sector compared to the overall labour force, but the incidence of part-time employment is higher in all equity groups than it is in the sector's overall labour force. As well, women and members of visible minority groups are over-represented in lower-skilled jobs.

The average worker in this industry earned a salary comparable to the average salary in the workforce at large, though there was significant variation in average earnings across the provinces. Annual salaries of equity group members working in this sector are lower than the overall average salaries in the sector. Nevertheless, members of all equity groups, except for visible minorities, are paid higher salaries in this sector than their counterparts in the economy at large.

¹⁶ Note that earnings for the total workforce are computed in the same way as they were for the sector, i.e., including part-time and part-year workers. As noted above, the incidence of part-time employment is higher in the television and motion picture sector than it is in the overall economy, which would be expected to bring down the average salary of its members more so than the total workforce. Despite this, the sector still had higher earnings.

4. FILM AND TELEVISION PRODUCTION

Canada's film and video production had total revenues of \$2.6 billion in 2001-2002¹⁷. Almost two-thirds of the industry's total 2001 revenues (64.7 per cent) were derived from production activities, and most of these from sales of conventional television and pay and specialty service programming (\$1.1 billion). About one-quarter of the total production revenues were accounted for by exports.

In 2001, an estimated 28,670¹⁸ individuals worked in film and television production companies, either as an employee, freelancer, or working owner. It is estimated that there were 8,596 employees, 20,028 freelancers, and 42 working owners.

In the most recent years for which Statistics Canada data were available, the industry's profit margins narrowed, but increased government aid attenuated the impact of these declines. The profit margin declined from 4.7 per cent of revenues in 1999, to 3.2 per cent in 2000, to 1.2 per cent in 2001. In 2001, non-repayable revenue from government reached \$195 million, up 2.7 per cent in 2000 and 18.1 per cent in 1999. Of concern within the industry since 2001 have been cuts by institutions such as the Canadian Television Fund production industry. However, the funds cut from the Canadian Television Fund were national in 2004-2005. Increased tax credits have also been established.

The production industry is concentrated, and increasingly so. Almost one-half the industry's revenues (48 per cent) were accounted for by the five largest firms in terms of revenues, an increase of seven percentage points over the previous year. The industry is also concentrated from a regional perspective, as 55.3 per cent of the industry's production revenues are generated by firms located in Ontario, with Quebec firms generating 25.9 per cent revenues, and BC firms 12.4 per cent.

In this chapter, information is presented on equity group representation, skill and salary distribution, and skills and training issues in the film and television production industry. Results are presented separately for private and public producers. For private sector producers, the results presented are based on the responses from firms responding to the survey conducted for this study. For the public

¹⁷ Most of the information in this first section were obtained from Statistics Canada, specifically its Film, Video and Audio-Visual Production Survey (<http://www.statcan.ca/Daily/English/031219/d031219b.htm> and <http://www.statcan.ca/english/freepub/87-010-XIE/2003002/data.htm>). Another source of information on the subject is Mercadex International Inc., "Face of the Future: Literature Review", presented in the Cultural Human Resources Council, 2000. Excluded from these figures are the \$1.0 billion generated from in-house productions by broadcasters (which are the subject of another chapter in this report). For the source of this latter result, see *Profile 2004: An Economic Report of the Canadian Film and Television Industry*. http://www.cftpa.ca/newsroom/pdf_profile/profile2004-english.pdf

¹⁸ Calculation based on the 77 per cent of the industry's total revenues that were generated by the film and television companies. That proportion was applied to the total industry's workforce figures, from Statistics Canada's Film, Video and Audio-Visual Production Survey (<http://www.statcan.ca/english/freepub/87-010-XIE/2003002/data.htm>) (e.g., 28,670 = .77 * 37,234)..

producer (that is the National Film Board of Canada) results are based on publicly available data obtained from Human Resources and Skill Development Canada.

A. Private Film and Television Production Companies

The main issues addressed in this chapter are: workforce composition among private production companies, their working owners, and freelancers; the salaries of employees in the industry; and skills issues such as skills shortages and workplace training.

4.1 PROFILE OF PRIVATE PRODUCTION COMPANIES

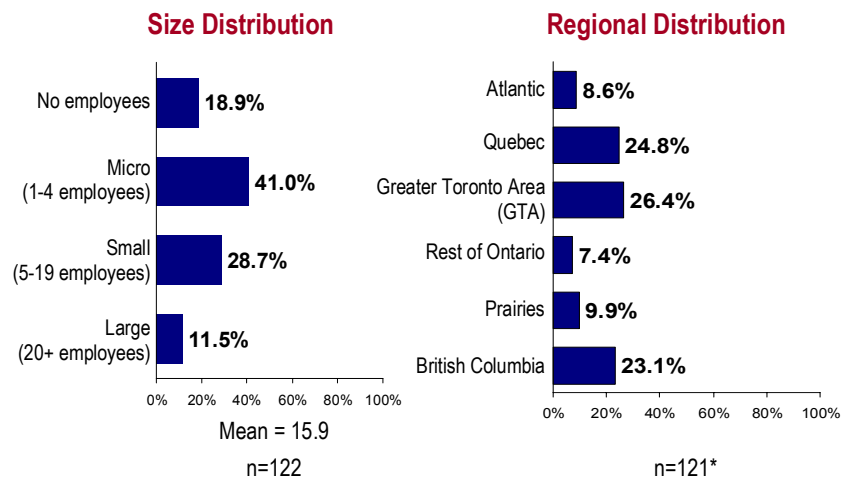
The majority of production firms in the industry are small in terms of number of paid employees (Exhibit 4.1¹⁹).

- Three in five production firms participating in the survey (59.9 per cent) have fewer than five paid employees (including working owners), with 18.9 per cent having no paid employees and 41.0 per cent having 1-4 employees.
- Only 11.5 per cent have 20 or more paid employees.
- The mean number of employees is 15.9, based on the 122 firms that supplied employment data in the survey.
 - The size of the firm varies by region: Quebec firms (mean=10.2 employees) are considerably smaller than firms located in the GTA (mean=27.3) and, to a lesser extent, in BC (mean=15.9)²⁰.

¹⁹ In the exhibit and in this chapter “firm size” is the number of its paid employees (in receipt of a T4 slip) in July 2003, including working owners.

²⁰ These were the only regions that had sufficient observations on which to compute a mean.

**Exhibit 4.1:
Size and Regional Distribution of Film and Television Production Firms**



EKOS Research
Associates Inc.

* Firms that provided total employment data that also had a regional code.

WIFT Survey of Film and Television Production Companies, 2004

Production firms participating in the survey are concentrated, in fairly equal proportions, in three regions of the country: the Greater Toronto Area (GTA), Quebec, and British Columbia (BC) (Exhibit 4.1).

- About one-quarter of the firms are located in each of the GTA (26.4 per cent), Quebec (24.8 per cent) and BC (23.1 per cent).
 - Comparisons with the original sample frame and Statistics Canada data reveal concentrations in the same three regions.
- Fewer than 10 per cent of the firms are found in each of the other regions of the country.

The most common primary business activities of production companies surveyed are related to domestic production, mainly for television (Table 4.1).

- Almost one-third of the firms (31.1 per cent) identified domestic documentary/lifestyle television production as their primary business activity, a fifth (22.1 per cent) identified domestic feature film production (first data column of the table). Domestic television drama production (9.8 per cent) and domestic children's television production (9.0 per cent) were mentioned by about a tenth of production of companies.
 - Domestic television drama was the most frequently mentioned secondary business activity (by 14.8 per cent of the firms), followed by domestic feature film (11.5 per cent) and domestic documentary/lifestyle television production (9.0 per cent) (second data column of the table).

- It is interesting to note that commercial production²¹ was among the least frequently mentioned primary activity (1.6 per cent), but the third most frequently mentioned secondary activity (9.0 per cent). Distribution is another activity more frequently mentioned as a secondary activity than a primary one (6.6 vs. 0.8 per cent).
- Fewer than 10 per cent identified other listed activities as their primary business activity.

Table 4.1: Primary and Secondary Activities of Film and Television Production Firms*

Production Activity	Percentage indicating as <i>Primary Activity</i>	Percentage indicating as <i>Secondary Activity</i> ¹
Domestic documentary/lifestyle television	31.1	9.0
Domestic feature film	22.1	11.5
Domestic television drama	9.8	14.8
Domestic children's television	9.0	4.9
Miscellaneous film	5.7	1.6
Foreign service television	4.1	5.7
Foreign service feature film	3.3	6.6
New media	3.3	4.9
Commercial	1.6	9.0
Corporate video/publicity	1.6	4.1
Miscellaneous television	0.8	3.3
Distribution	0.8	6.6
<i>Other</i>	6.6	16.4
Total	100.0	100.0
<i>N (sample size)</i>	122	122

*One response per column.

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

The primary business activities of the production firms surveyed do not vary much by firm size.

- Firms with fewer than 19 employees most frequently identified domestic documentary/lifestyle television production and domestic feature film production as their primary business activity. No primary activity stood out among the largest firms (20 or more employees).

²¹ Note that the survey targeted film and television producers and did not target commercial production firms.

By region, there is some variation in primary production activity

- Domestic documentary/ lifestyle television production was the most frequently identified primary business activity everywhere except for the GTA (where it was the second most frequently identified)
- Domestic feature film production was the second most frequently identified primary business activity in all regions of the country except the GTA (where it was number one), the rest of Ontario (where it was number three), and the Prairies (where only one of the 13 firms participating in the survey identified this activity).

4.2 EMPLOYMENT PROFILE – PRIVATE PRODUCERS

Survey results for the average number employed and representation by equity group are presented in this section, first for working owners, and then for paid employees.

a) Working Owners/Proprietors

The average Canadian production firm has 2.1 working owners/proprietors. They have on average 0.9 female owners (column 1 of Table 4.2).

Female representation among working owners of production firms is slightly lower than their representation in the labour force overall (Table 4.2).

- Three in five production firms (60.2 per cent) have at least one female owner, 14.9 per cent have at least one owner who is a member of a visible minority group, and about two per cent have at least one owner who is an Aboriginal person or who has a disability (column 2 of table 4.6).
 - The last row indicates that seven in ten firms with working owners (70.2 per cent) have at least one who is a member of any of the equity groups.
- On average, 36.4 per cent of production firms' owners are female; 6.5 per cent are members of a visible minority group; and approximately one per cent are Aboriginal (1.2 per cent) or have a disability (0.8 per cent) (column 3 of table).

Table 4.2: Working Owners/Proprietors in Equity Groups

Equity Group	Mean Number in Group	Percentage with at Least One Owner in Group (%)	Mean Equity Group Representation*(%)
Female	0.9	60.2	36.4
Disability	0.0	2.3	0.8
Aboriginal	0.0	2.4	1.2
Visible minority	0.2	14.9	6.5
Overall	2.1**	70.2***	N/A
<i>N (sample size)</i>	<i>85-108</i>	<i>85-108</i>	<i>84-106</i>

* Per-company mean of: number of owners in equity group as a percentage of all owners (among firms supplying employment data).

** Indicates the mean number of working owners/proprietors per firm.

*** Indicates the percentage of firms with at least one member of any of the equity groups (n=114).

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

Women are more likely to own small production companies than large firms. (Table 4.3a).

- Female representation declines from 39.2 per cent for micro firms (1-4 employees) to 27.3 per cent for large firms (20 or more employees).
- There is little variation in the representation of other equity groups in the ownership of production companies.

Table 4.3a: Mean Equity Group Representation (%)* among Working Owners, by Firm Size

Equity Group	Size of Firm (Number of Employees)				All Firms
	Zero	Micro (1-4)	SME (5-19)	Large (20+)**	
Female	39.2	38.1	35.6	27.3	36.0
Disability	0.0	2.0	0.0	0.0	0.7
Aboriginal	6.7	0.0	0.0	0.0	1.0
Visible minority group	10.0	1.8	10.2	6.8	8.7

* Per-company mean of: number of working owners in equity group in type of job as a percentage of all working owners.

** Small number of respondents means results for this size category should be treated with caution (n=11-43).

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

Production firms in BC and Ontario outside the GTA have the highest representation of female owners in the country, while those in the GTA have the lowest representation (Table 4.3b):

- Female representation is higher in BC (42.8 per cent) and Rest of Ontario (41.7 per cent), and lower in the GTA (28.4 per cent) and on the Prairies (29.6 per cent).
- Representation of persons with a disability varies little by region.
- Aboriginal persons are somewhat over-represented in the Prairies (5.6 per cent).
- In Toronto, visible minority owners represent the highest average proportion of owners of production firms in the country (13.6 per cent).

- It should be noted that visible minority representation varies widely by area of the country in the overall workforce, from just over 30 per cent of the overall workforces of Toronto and Vancouver; to 10-18 per cent of the workforces of most other larger and medium-sized Census Metropolitan Areas (CMAs); to five per cent of the workforces of most of the smaller CMAs²².

Table 4.3b: Mean Equity Group Representation (%)* among Working Owners, By Region

Equity Group	Atlantic**	Quebec	Toronto	Rest of Ont.**	Prairies	BC	Canada
Female	39.4	37.8	28.4	41.7	29.6	42.8	36.0
Disability	0.0	0.0	1.3	2.3	0.0	1.7	0.7
Aboriginal	0.0	1.8	0.0	0.0	5.6	0.0	1.0
Visible minority group	0.0	9.5	13.6	10.0	5.6	7.1	8.7

* Per company mean of: number of paid employees in equity group in type of job as a percentage of all paid employees in job type.

** Small number of respondents means results for these regions should be treated with caution.

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

b) Paid Workforce

This section profiles the paid workforce of film and television production firms, focusing on how well women and other equity groups are represented. These employee equity group representation results for Aboriginal, disability and visible minority equity groups are **not** based on self-identified data provided by employees, but on responses provided in the survey by employers on their employees (in some cases the responses provided by employers were based on self-identified data provided by their employees using a formal tracking system as part of an employment equity plan. See Chapter 3 for equity groups results based on self-identified data (from the Census) as provided by employees of the motion picture and video sector, of which production companies form a part. The paid workforce is considered here to consist of employees, including working owners, on a firm's payroll (in receipt of a T4 slip) in July 2003 (or on average over the previous 12 months if July was atypical); excluded are contractors/freelancers, who are dealt with in another section.

The average Canadian production firm surveyed employs 15.9 paid employees. Out of this, 8.3 are women, 1.7 are from a visible minority group. (first data column of Table 4.4). None are people with disabilities and 0.5 per cent are Aboriginal persons.

The proportion of total production employment represented by women and persons from a visible minority group is similar to their overall workforce share (data columns 2 and 3 of Table 4.4).

²² Source is Census 2001 and the 2001 Participation and Activity Limitation Survey; representation figures produced by the Employment Equity unit of HRSD (CANADA): [http://www.HRSD\(Canada\).gc.ca/en/lp/lo/lsw/ee_tools/data/tables/annual/2001/Table03.pdf](http://www.HRSD(Canada).gc.ca/en/lp/lo/lsw/ee_tools/data/tables/annual/2001/Table03.pdf)

- Women represent just less than one-half of employment in production firms participating in the survey (45.9 per cent; data column 2 of table) which is only slightly less than their overall workforce share (47.3 per cent, data column 3 of Table 4.4).
- Similarly, persons in a visible minority group account for about one in eight persons in the industry (12.4 per cent), which is very similar to their share in the national labour force (12.6 per cent). It should be noted, however, that in a major media centre like Toronto where many of the production companies are concentrated, the visible minority share of the overall workforce is much higher - for example, visible minorities make up 34.6% of Toronto's workforce.

Table 4.4: Mean Number Employed and Equity Group Representation (%)*, *Employer Identified*

Equity Group	Mean Number in Group	Equity Group Representation (%)	
		Production Firms	National Labour Force**
Female	8.3	45.9	47.3
Disability	0.0	3.3	5.3
Aboriginal	0.5	0.8	2.6
Visible minority	1.7	12.4	12.6
Total	15.9	N/A	N/A
<i>N (sample size)</i>	<i>77-122</i>	<i>71-99</i>	<i>N/A</i>

* (1) Sum of number of paid employees in equity across firms, as a percentage of (2) sum of total number of paid employees across the same group of firms. Each computation is based on a different number of observations, where the number in **both** the numerator (paid employment in the equity group) and denominator (total number of paid employees) exists, for that particular equity group.

** Based on 2003 Labour Force Survey data (females) and 2001 Census data (other equity groups) obtained from Statistics Canada.

Source: WIFT-T Survey of Film and Television Production Companies, 2004, plus Statistics Canada 2003 Labour Force Survey data and 2001 Census data.

Aboriginal persons and persons with a disability are underrepresented in production firms, compared to their labour force share (data columns 2 and 3 of Table 4.4).

- Persons with a disability represent 3.3 per cent of employment in production firms, which is somewhat less than their overall labour force share of 5.3 per cent. This could be partly attributed to the fact that not all disabilities are apparent to the employer.
- The corresponding figures for Aboriginal persons are 0.8 and 2.6 per cent, respectively.
- Aboriginal persons represent less than 0.8 per cent of production firm employees, which is less than their share in the overall workforce in general (2.6 per cent).

The results for equity group representation are presented first by type of job (i.e., part-time/full-time, permanent/short-term) and then by job category (occupational group).

(i) Type of Job

A very small proportion of permanent jobs in the production industry are part-time (4.4 per cent) (last row of Table 4.5²³). The proportion of female employees occupying part-time jobs is somewhat higher than the proportion of all employees occupying such jobs in the industry.

- 5.9 per cent of women employed in the industry occupy part-time jobs (row 1 of table), which is somewhat greater than the 4.4 per cent part-time proportion in the overall total employment (last row of Table 4.5).
- Aboriginal persons and persons in a visible minority group are less likely to work part time than their counterparts in the general workforce (last three Table 4.5)

Table 4.5: Incidence of Part-Time Jobs*, by Equity Group, Employer Identified

Equity Group	Part-Time Incidence (%)
Female	5.9
Disability	**
Aboriginal	0.0
Visible minority	2.0
Total	4.4

* (1) Sum of number of paid employees in a part-time job in equity group across firms, as a percentage of (2) sum of total number of paid employees in equity group, across the same group of firms. Each computation is based on a different number of observations, where the number in **both** the numerator (in equity group) and denominator (total number of paid employees) exists, for that particular equity group (n=71-99)

** Too few observations on which to compute a result.

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

On average, each equity group accounts for a proportion of the permanent workforce of production firms that is similar to their proportion of the total workforce (first and second data columns of Table 4.6²⁴). Note again that equity group results are based on employer estimates, not self-identified data.

- Women represent, on average, a little over one-half of permanent employees in production firms (57.2 per cent) while visible minorities represent 12.7 per cent of permanent employees. Persons with a disability account for 0.6 per cent of permanent positions, and Aboriginal persons account for 1.4 per cent.
 - This is very similar to their overall proportions in the production sector for all groups: women (57.8 per cent), members of visible minority groups (11.8 per cent), persons with a disability (0.5 per cent) and Aboriginal persons (2.0 per cent) (column 1 of Table 4.6).

²³ For response burden reasons, the question of part- or full-time as asked for only permanent employees. The part-time estimate, therefore, likely under-estimates the incidence of part-time employment, since it excludes short-term employees, among whom the incidence of part-time employment is likely relatively high.

²⁴ Results presented in the rest of this section are the mean per-company percentage of that equity groups account for. These are compared to the mean per- company percentage of total employment accounted for by these groups.

- This suggests that equity group representation in short-term jobs is at a similar level, implying equity groups are not over-represented in short-term jobs.

The average proportion of women in part-time permanent jobs is higher than it is in full-time jobs, while for other equity groups the proportions are the same or higher in full-time jobs (third and fourth data columns of Table 4.6)

- Women represent 65.8 per cent of permanent part-time employment in production firms, which is higher than their proportion in permanent full-time jobs (58.2 per cent).
 - This suggests over-representation of women in part-time jobs.
- As for other equity groups, members of a visible minority group account for a higher proportion of permanent full-time jobs than part-time (13.9 versus 6.9 per cent), while for other groups there is little difference.

Table 4.6: Mean Equity Group Representation, *Employer Identified*, by Type of Job,

Equity Group	Total	Permanent Total	Permanent Full-Time	Permanent Part-Time
Female	57.8	57.2	58.2	65.8
Disability	0.5	0.6	0.7	0.0
Aboriginal	2.0	1.4	1.5	0.0
Visible minority	11.8	12.7	13.9	6.9
<i>N (sample size)</i>	68-93	57-72	49-60	18-24

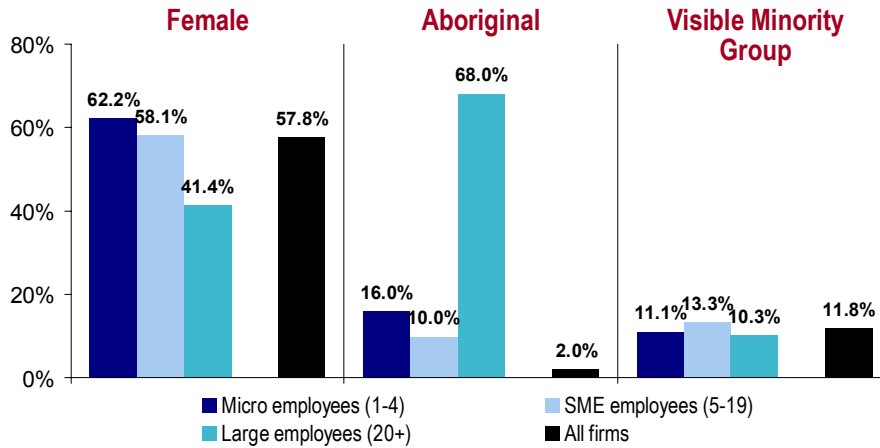
* Per-company mean of: (1) number of paid employees (including working owners) in job type as a percentage of (2) all paid employees, for each equity group. Each computation is based on a different number of observations, where employment in **both** the numerator (the job type) and denominator (total) exists, for that particular equity group.

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

Average female representation decreases with firm size in the production industry while there is no pattern in representation by firm size for the other equity groups (Exhibit 4.2):

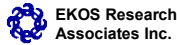
- Average female representation declines with the number of employees in a firm, from 62.2 per cent in “micro” firms (1-4 employees) to 41.4 per cent in large firms (20 or more employees).

**Exhibit 4.2:
Equity Group Representation* by Firm Size, Employer Identified**



*Mean of: number of paid employees in equity group in firm size group as a percentage of all paid employees in size group.

Negligible disability representation to show results by firm size.



WIFT Survey of Film and Television Production Companies, 2004

Differences in average equity group representation can also be observed by region (Table 4.7²⁵). Significant differences are highlighted in the table.

- Average female representation is considerably higher in British Columbia (68.5 per cent) and lower in the Atlantic, Quebec and Prairie regions (48.0, 51.3 and 49.4 per cent).
- Persons with a disability are, on average, over-represented in BC firms (2.4 per cent), compared to their 0.5 per cent average share of employment in all firms (last column of table).
- Aboriginal persons are over-represented in the Atlantic and Prairie regions (7.7 and 7.6 per cent), while the visible minority representation is considerably higher in BC (23.3 per cent).
- The representation of persons in a visible minority group is considerably higher in BC (23.3 per cent), and lower in Quebec and the Atlantic provinces (2.3 and 5.7 per cent).
 - Note again in the overall workforce the wide variation in visible minority representation by area of the country, from just over 30 per cent of the overall workforces of Toronto and Vancouver; to 10-18 per cent of the workforces of most other larger and medium-sized Census Metropolitan Areas (CMAs); to five per cent of the workforces of most of the smaller CMAs²⁶.

²⁵ Note that results for the Atlantic provinces and the Rest of Ontario are not commented on because of small sample sizes in these regions.

²⁶ Source is Census 2001 and the 2001 Participation and Activity Limitation Survey; representation figures produced by the Employment Equity unit of HRSD (CANADA): [http://www.HRSD\(Canada\).gc.ca/en/lp/lo/lsw/e/ee_tools/data/tables/annual/2001/Table03.pdf](http://www.HRSD(Canada).gc.ca/en/lp/lo/lsw/e/ee_tools/data/tables/annual/2001/Table03.pdf)

Table 4.7: Mean Equity Group Representation (%),* Employer Identified, by Region

Equity Group	Atlantic**	Quebec	Toronto	Rest of Ont.**	Prairies	BC	Canada
Female	48.0	51.3	60.3	54.3	49.4	68.5	57.8
Disability	0.0	0.0	0.0	0.0	0.0	2.4	0.5
Aboriginal	7.7	0.1	0.0	1.3	7.6	0.1	2.0
Visible minority group	2.3	5.7	13.0	8.1	10.6	23.3	11.8
<i>N (sample size per region)</i>	6-8	17-21	18-26	4-6	4-9	15-23	68-93

* Per-company mean of: number of paid employees in equity group in region as a percentage of all paid employees in region.

** Small number of respondents means results for these regions should be treated with caution.

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

(ii) Job Category (Occupational Group)

The job categories of the film and production industry are presented in Table 4.8 in order of the number of people each employs. The job categories with the largest number of employees are: senior managers, writers, post-production (non-editing) and finance and accounting.

- One-tenth or more of production company employees work in four job categories: senior managers (14.6 per cent), post-production workers (11.1 per cent), writers (11.0 per cent), and finance and accounting (10.1 per cent)²⁷.
- Other fairly large job categories are in the human resources and producer areas, with 9.5 and 8.5 per cent of the employment in the industry.
- The job categories occupying the fewest number of people in the industry, according to the survey results, are associate producer (2.3 per cent), communications (3.1 per cent), and assistant editor (3.6 per cent).
- Employment in the industry is fairly evenly spread out among the other occupations listed in the table, with between 5.0 and 7.9 per cent of the employment in the industry.

²⁷ Note that percentages of job categories do not add to 100 per cent because each computation is based on a different number of observations, where employment in **both** the numerator (the job category) and denominator (total) exists and for a different set of job categories. Also note that senior managers in other job category areas are included with the senior manager job category, which contributes to its high proportion.

Table 4.8: Occupational Composition*, Paid Employees

Job Category	Percentage of Total*
Senior management (e.g., president, executive vice-president, senior vice-president, vice-pres.)	14.6
Post-production (activities that do not fit within editor/assistant editor job category)	11.1
Writer	11.0
Finance and accounting	10.1
Human resources	9.5
Producer	8.5
Editor	7.9
Director	7.6
Administrative/clerical support	7.4
Development (activities that do not fit within researcher/story editor job category)	6.9
Researcher/story editor	6.6
Production manager	5.8
Business affairs	5.5
Executive producer	5.0
Assistant editor	3.6
Communications	3.1
Associate producer	2.3
<i>N (sample size)</i>	<i>58-94</i>

* (1) Sum of number of paid employees in job category across firms, as a percentage of (2) sum of total number of paid employees across firms. Percentages do not add to 100 per cent because each computation is based on a different number of observations, where employment in **both** the numerator (the job category) and denominator (total) exists.

** Senior managers undertaking activity in other job category areas are included with senior managers.

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

Women's representation varies widely across production firm job categories (column 1 of Table 4.9, which lists occupations in the order of number of employees²⁸), but they are underrepresented in the three largest job categories: senior management, post-production, and writing.

- Compared to their share of production firms' workforce overall, women are underrepresented in seven job categories: editor (32.1 per cent); assistant editor (39.6 per cent); post-production (39.6 per cent); director (40.8 per cent); executive producer (44.2 per cent); writer (46.6 per cent); and senior manager (49.5 per cent).²⁹
- The average proportion of women is particularly high in six job categories: communications (93.3 per cent); administrative/clerical support (87.5 per cent); associate producer (85.4 per cent); finance and accounting (83.2 per cent); and business affairs (74.1 per cent).
 - Women are somewhat over-represented in three other job categories: development (64.5 per cent); producer (60.9 per cent); researcher/story editor (60.5 per cent).

²⁸ Note again that the employee equity group representation results for Aboriginal and visible minority equity groups are **not** based on self-identified data provided by employees, but on responses provided in the survey by employers on their employees.

²⁹ Figures which are discussed in the text are shaded in Table 4.9.

Aboriginal and visible minority equity groups are also represented to varying degrees across job categories (columns 2 and 3 of Table 4.9³⁰). Significant differences are highlighted in the table. Noteworthy examples of Aboriginal over-representation are in the assistant editor and writer job categories (40.0 and 20.0 per cent), though note the small sample size for this group (n=5).

- ▶ Visible minorities are particularly over-represented in finance and accounting (47.2 per cent). Examples where they are over-represented but to a lesser extent are: researcher /story editor and production manager (both 22.2 per cent).
- ▶ There were insufficient observations to observe differences in equity group representation in different job categories by firm size and region.

Table 4.9: Mean Equity Group Representation (%)*, Employer Identified, by Job Category

Job Category	Female	Aboriginal***	Visible Minority
Senior management (e.g., president, executive vice-president, senior vice-president, vice-president)	49.5	--	23.1
Post-production (activities that do not fit within editor/assistant editor)	39.6	8.2	20.0***
Writer	46.6	20.0	4.2***
Finance and accounting	83.2	--	47.2
Human resources	--	--	--
Producer	60.9	--	8.3
Editor	32.1	0.0	0.0***
Director	40.8	8.2	8.2***
Administrative/clerical support	87.5	--	19.1***
Development (activities that do not fit within researcher/story editor)	64.0	--	--
Researcher/story editor	60.5	--	22.2***
Production manager	83.8	--	22.2***
Business affairs	74.1	--	10.0
Executive producer	44.2	--	21.4***
Assistant editor	39.6	40.0	20.0***
Communications	93.3	--	--
Associate producer	85.4	--	21.4***
<i>N (sample size per equity group)**</i>	15 - 60	5	5 - 16
Total	57.8	2.0	11.8

* Per-company mean of: (1) number of paid employees in equity group in job category as a percentage of (2) all paid employees in job category. Not shown are cells where fewer than five respondents entered employment information for the particular equity group in the particular job category.

** The number of responses on which a result is based differs according to equity group and job category.

*** Means should be treated with caution as based on 5-10 observations.

Source: WIFT-T Survey of Film and Television Production Companies, 2004

³⁰ Note that low responses for the disability equity group across all job categories precluded presenting any results for this group. For other equity groups as well, some results could not be presented for certain job categories for the same reason, while many of the results that are presented should be treated with caution owing to small sample size.

4.3 EMPLOYEES' SALARIES – PRIVATE PRODUCERS

This section examines salary levels in the industry overall and the positioning of equity groups in terms of their relative salaries. Average salaries are considered to be the average annual wages and salaries of a company's full-time paid employees (including working owners, but not contractors or freelancers), and excluding employer contributions to pension and health plans, etc. Job categories are presented in Table 4.10 in decreasing order of average annual salaries³¹.

First, three job categories stand out as high-salary job categories in the production industry: executive producer (\$130,333); senior manager (\$126,057); and producer (\$111,895) (column 1 of Table 4.10). In general terms, annual salaries rise with firm size, though there are insufficient data to report actual mean salaries by firm size.

Second, women are paid salaries that exceed the overall salary, for all job categories for which sufficient data were supplied in the survey (columns 2 and 3 of Table 4.10).

- The average annual salary of women is more than 10 per cent higher than the overall salary for three job categories: business affairs (123 per cent of the total salary of that job category); producer (119.2 per cent); and production manager (111.6 per cent).
- The average annual salary of women is somewhat higher than the overall salary in finance and accounting (105.8 per cent).
- Women's salaries are fairly close to the overall mean in two job categories: senior management (102 per cent of the total salary for that job category) and administrative/clerical support (100.5 per cent).

³¹ Low response counts for certain cells mean that some results should be treated with caution.

Table 4.10: Mean Annual Salaries (%), Total and Women*, by Job Category

Job Category	Total	Female	Female/Total (%)
Executive producer	130,333	**	--
Senior management (e.g., president, executive vice-president, senior vice-president, vice-president)	126,057	128,600	102.0
Producer	111,895	133,375	119.2
Production manager	55,041	61,400	111.6
Director	43,129	**	--
Finance and accounting	41,345	43,733	105.8
Writer	40,227	**	--
Business affairs	39,773	48,929	123.0
Post-production (activities that do fit within editor/assistant editor)	32,911	**	--
Associate producer	30,429	**	--
Development (activities that do fit within researcher/story editor)	29,430	**	--
Administrative/clerical support	29,299	29,450	100.5
Editor	25,727	**	--
Researcher/story editor	22,125	**	--
Assistant editor	19,333	**	--
<i>N (sample size)</i>	6-36	5-15	N/A

* Per company mean of annual salaries per job category for full-time employees. Insufficient data to report for the communications and human resource categories, and for all job categories for equity groups other than women. Small number of respondents means results should be treated with caution.

** Insufficient data to report for these job categories for women.

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

4.4 INDEPENDENT FREELANCERS/CONTRACTORS – PRIVATE PRODUCERS

Freelancers/contractors are an important part of the film and television production industry. Here, independent freelancers/contractors (referred to here interchangeably as contractors or freelancers) are defined as those working for the company but who are not on the payroll and not hired under a union contract. That is, these are contractors who perform essentially in-house production work. All results presented in this section are for July 2003 (or on average over August 2002 to July 2003 period if July was atypical).

Table 4.11: Independent Freelancers/Contractors and Equity Groups, Employer Identified

Equity Group	Mean Number Hired in Group	Percentage Hiring At Least One Freelancer in Group (%)	Mean Equity Group Representation* (%)	Mean Equity Group Representation Paid Workforce (%)
Female	5.4	66.0	43.7	57.8
Disability	0.1	2.7	0.1	0.5
Aboriginal	0.7	13.0	4.5	2.0
Visible minority	1.5	27.5	8.1	11.8
Total	11.3**	84.6***	--	--
<i>N (sample size)</i>	<i>77 - 113</i>	<i>77 - 113</i>	<i>55-85</i>	<i>68-93</i>

* Per company mean of: number of freelancers in equity group as a percentage of the total freelancers.

** Indicates the mean number of freelancers hired per firm.

*** Indicates the percentage of firms with at least one freelancer who is a member of one of the equity groups (n=78). The percentage with at least one freelancer overall is 77.9 per cent.

Source: WIFT-T Survey of Film and Television Production Companies, 2004

Contractors represented a little less than one-half of the total combined workforce of paid employees and contractors in the production industry in July 2003 (Total row of Table 4.11).

- Production firms hired, on average, 11.3 freelancers/contractors in July 2003.
 - Over three-quarters of firms (77.9 per cent) had at least one freelancer (indicated in footnote of Table 4.11)
- On average, independent contractors represent 40.9 per cent of production firms' paid-plus-contractor workforce³².
- Smaller production firms rely on contractors for "in-house" production work to a much greater extent than larger firms (not shown in table). Distinct differences by region emerge.
 - Reliance on contractors/freelancers declines with firm size, being much lower for larger firms (14.1 per cent in firms with 20 or more employees) than smaller ones (49.8 per cent in firms with 1-4 employees)
 - Reliance is lower in BC firms (34.2 per cent) and in the GTA (31.8 per cent) than in firms in the Prairies (53.4 per cent) (not shown).

Equity group representation among freelancers/contractors is presented in the first four rows of Table 4.11 and indicates the following.

- Production firms had a contract with 5.4 female contractors on average, 1.5 members of a visible minority groups, and less than one contractor with a disability or who is Aboriginal (data column 1 of table).
- Two-thirds of production firms (66.0 per cent) had a contract with least one female contractor, over one-quarter (27.5 per cent) hired at least one contractor in a visible minority group,

³² Firms' reliance on contractors/freelancers is measured as the number of freelancers as a percentage of the number of paid employees plus the number of contractors.

13.0 per cent hired at least one Aboriginal contractor, and only 2.7 per cent at least one with a disability (column 2).

- The vast majority of firms with freelancers (84.6 per cent) had at least one who was a member of one of the equity groups (second last row of column 2).
- Compared to their paid workforce share, female and visible minority contractors are underrepresented, whereas Aboriginal persons are over-represented (column 3 versus 4 of Table 4.11).
 - Compared to their share of the paid workforce (exclusive of contractors), female contractors are underrepresented (43.7 versus 57.8 per cent in the paid workforce), as are visible minority contractors (8.1 versus 11.8 per cent). Aboriginal persons are over-represented (4.5 versus 2.0 per cent). Persons with a disability have similar representation among owners and paid employees (0.1 and 0.5 per cent).
- Some differences are noted by region (not shown in a table):
 - Among notable regional differences are that female representation among contractors tends to be lower in the Prairies (33.8 per cent), Aboriginal representation is higher in the Prairies (10.0 per cent) and in the GTA (8.3 per cent), while visible minority group representation is considerably higher in the Prairies (16.3 per cent) and in the GTA (11.0 per cent).

4.5 SKILLS AND TRAINING ISSUES – PRIVATE PRODUCERS

Addressed in this section are skill shortages, suggested reasons for and solutions to skill shortages being experienced, and perceived quality of existing training.

a) Skill Shortages in Occupations

A substantial proportion of the production firms surveyed were experiencing some or significant difficulty in filling their needs in most job categories. (Table 4.12³³).

- More than 40 per cent of production firms were experiencing at least some difficulty (reporting 3, 4, 5, 6 or 7 on the 7-point scale) filling their needs in: finance and accounting (45.3 per cent), development (41.8 per cent), and business affairs (42.2 per cent) (last column of table).

³³ The table presents job categories in descending order experiencing “at least some difficulty”, last column. Respondents were asked to assess their difficulty on a 7-point scale, where 1=no difficulty, 4=some difficulty, and 7=significant difficulty. The responses were aggregated into three groups: 1-2 = no/little difficulty, 3-5 = some difficulty, and 6-7= significant difficulty. Those experiencing at least some difficulty are those indicating 3-7, inclusive.

- The highest proportion experiencing significant difficulty (6 or 7 on the scale) was in business affairs (20.0 per cent), and third highest proportion was in finance and accounting (15.4 per cent) (second last column of table).
- The second highest proportion experiencing significant difficulty was in the executive producer job category (17.1 per cent).
- The job categories where less than 30 per cent of producers were having at least some difficulty are: human resources (26.6 per cent); administrative/clerical support (27.9 per cent); associate producer (26.2 per cent); and assistant editor (22.1).

In general terms, the incidence of skill shortages (proportion experiencing difficulties filling needs) in job categories declines as firm size grows (not shown in table).

- The proportion with no skill shortages increases with firm size for finance and accounting, business affairs, communications, human resources, executive producer, development, researcher/story editor.
- There is no clear pattern by firm size for other job categories.

Table 4.12: Percentage Distribution by Degree of Difficulty in Filling Needs in Job Categories*

Job Category	No/little Difficulty (1-2)	Some Difficulty (3-5)	Significant difficulty (6-7)	At Least Some Difficulty (3-7)
Finance and accounting (n=97)	54.7	29.9	15.4	45.3
Development (activities that do not fit within researcher/story editor) (n=79)	58.2	31.7	10.1	41.8
Business affairs (n=90)	58.9	21.2	20.0	41.2
Executive producer (n=88)	62.5	20.5	17.1	37.6
Production manager (n=88)	64.0	28.4	5.7	36.1
Communications (n=87)	64.4	31.0	4.6	35.6
Editor (n=95)	65.2	28.4	6.3	34.7
Researcher/story editor (n=90)	65.5	24.5	10.0	34.5
Post-production (activities that do not fit within editor/assistant editor) (n=87)	65.5	29.8	4.6	34.4
Writer (n=91)	60.4	26.6	6.6	33.2
Director (n=90)	66.7	26.6	6.6	33.2
Producer (n=97)	67.0	26.8	6.2	33.0
Senior management (e.g., president, executive vice-president, senior vice-president, vice-president) (n=66)	68.1	18.1	13.7	31.8
Administrative/clerical support (n=97)	72.1	22.7	5.2	27.9
Human resources (n=87)	73.5	20.3	6.3	26.6
Associate producer (n=76)	73.6	23.6	2.6	26.2
Assistant editor (n=86)	77.9	18.6	3.5	22.1

* Firms were asked to respond on a 7-point scale, where 1=no difficulty and 7=significant difficulty. Distributions exclude those answering with "don't know" or "not applicable". Occupations are listed in descending order of the percentage indicating at least some difficulty (reporting 3, 4, 5, 6 or 7). N=110.

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

By region (Table 4.12A), production firms in the GTA are the least likely to experience any skill shortages in most job categories, while Quebec firms are the most likely to experience skill shortages in certain categories. Note that the focus is on firms indicating **any** difficulty in filling skill needs in job categories³⁴.

- Production firms in Quebec are more likely than other regions to have some skills shortages in several job categories, with the difference being particularly great in finance and accounting (65.2 per cent with some shortages), administrative/clerical support (54.5 per cent), associate producer (50.0 per cent).
- Toronto firms are least likely among the three regions to be experiencing any shortages in most job categories. The two job categories in which these firms are most likely to experience any shortages, and at a level similar to other regions, are writer (40.7 per cent) and administrative/clerical support (40.0 per cent).
- BC firms are most likely, among the three regions, to experience shortages in post-production (61.9 per cent) and assistant editor (47.6 per cent)

Table 4.12A: Percentage Any Skill Shortages in Job Categories,* by Region**

Job Category	Quebec	Toronto	BC
Finance and accounting	65.2	34.6	52.2
Development (activities that do not fit within researcher/story editor)	62.5	31.8	54.5
Business affairs	55.6	26.9	52.2
Executive producer	47.8	28.6	42.9
Production manager	47.4	30.4	50.0
Communications	44.4	26.1	56.5
Editor	54.2	28.0	56.5
Researcher/story editor	59.1	26.1	52.2
Post-production (activities that do not fit within editor/assistant editor)	52.6	29.2	61.9
Writer	57.9	40.7	47.8
Director)	57.9	24.0	50.0
Producer)	47.8	33.3	36.0
Senior management (e.g., president, executive vice-president, senior vice-president, vice-president)	37.5	29.4	33.3
Administrative/clerical support	54.5	40.0	40.9
Human resources	46.2	14.3	37.5
Associate producer	50.0	31.8	31.8
Assistant editor	36.8	21.6	47.6

* Proportion of firms indicating 2, 3, 4, 5, 6, or 7 on a 7-point scale (i.e. **not** 1), on a 7-point scale, where 1=no difficulty and 7=significant difficulty. Distributions exclude those answering with "don't know" or "not applicable".

** Only regions with sufficient number of observations shown.

N=12-27.

³⁴ That is, firms indicating 2, 3, 4, 5, 6, or 7 on a 7-point scale (i.e. **not** 1), on the 7-point scale. Only regions with sufficient observations are shown in the table.

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

b) Skill Shortages Irrespective of Occupation

Producers were asked to indicate the degree to which they were experiencing shortages in nine broad skill areas irrespective of occupation. In each of the skill areas, at least 36 per cent of producers had some or significant difficulty filling their skill needs, with business development and marketing skill being the areas where the greatest difficulty was being experienced (Table 4.13)³⁵.

- Over 40 per cent of respondents were experiencing some or significant difficulty (reporting 3, 4, 5, 6, or 7, on the 7-point scale) filling their needs with respect to business development and marketing (46.9 per cent) and management, financial, legal and operations skills (45.7 per cent) (last column of table).
 - These are also the two areas where the largest proportions of firms are experiencing great difficulty (16.3 and 13.6 per cent indicated 6 or 7 on the scale, second last column of table).
- The two areas where the lowest proportion are experiencing significant difficulty are technical skills (3.2 per cent) and computer skills (3.0 per cent) (second last column of table).

The incidence of skill shortages declines as firm size grows in a number of skill areas (not shown in a table), as it did for job categories.

- Smaller firms are less likely than larger firms to have difficulty meeting needs in management, technical skills, management/financial/legal/operations skills, business development/marketing skills, new media production skills, and knowledge of the industry.

³⁵ In the table, skills area in descending order of the proportion indicating “at least some difficulty”, last column. Respondents were asked to respond on 7-point scale, where 1=no difficulty, 4=some difficulty and 7=significant difficulty. The responses were aggregated into three groups: 1-2 = no/little difficulty, 3-5 = some difficulty, and 6-7= significant difficulty. Those experiencing at least some difficulty are those indicating 3-7, inclusive.

Table 4.13: Percentage Distribution by Degree of Difficulty in Filling Needs in Skill Areas*

Skill Area	No/little Difficulty (1-2)	Some Difficulty (3-5)	Significant Difficulty (6-7)	At Least Some Difficulty (3-7)
Business development and marketing (e.g., pitching, proposals, production financing, international sales and export) (n=98)	53.1	30.6	16.3	46.9
Management/financial/legal/operations (e.g., business/financial planning, intellectual property and copyright, human resources management, corporate finance, financial accounting) (n=103)	54.3	32.1	13.6	45.7
Creative (e.g., research, story development, script writing, storyboarding, directing) (n=101)	57.4	33.6	9.0	42.9
Knowledge of industry (n=101)	57.4	33.7	8.9	42.7
Generic (e.g., communications, teamwork, interpersonal, thinking, problem-solving, perseverance, adaptability, leadership, continuous learning) (n=98)	58.2	33.7	8.1	41.8
Technical (e.g., computer animation, special effects and other post-production including editing) (n=93)	59.2	37.6	3.2	40.8
New media production (e.g., interactive story telling, interactive applications, games development, website development) (n=80)	62.5	27.5	10.1	37.6
Production management (e.g., executive producing, producing, budgeting, scheduling) (n=100)	65.0	27.0	8.0	35.0
Computer (e.g., use of software applications, computer programming) (n=98)	64.3	32.7	3.0	35.7

* Firms were asked to respond on a 7-point scale, where 1=no difficulty and 7=significant difficulty. Skill areas are shown in descending order of proportion indicating 3, 4, 5, 6 or 7.

N=110

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

Again, by region (Table 4.13A), production firms in the GTA are the least likely to experience any skill shortages in most skills areas, while Quebec firms are the most likely. Note that the focus is on firms indicating **any** difficulty in filling skill needs in skill areas³⁶.

- Across all skills areas, a significantly lower proportion of production firms in the GTA have skill shortages than other regions, particularly: new media production (23.8 per cent with skills shortages); technical skills (30.4 per cent with skills shortages); management/financial etc. skills (34.6 per cent per cent with skills shortages); and generic skills (37.0 per cent with skills shortages).
- Quebec firms have significantly higher proportions experiencing any shortages in most skill areas, particularly business development and marketing (81.0 per cent), new media production (77.8 per cent), and computer skills (71.4 per cent).

³⁶ That is, firms indicating 2, 3, 4, 5, 6, or 7 on a 7-point scale (i.e. **not** 1), on a 7-point scale, where 1=no difficulty and 7=significant difficulty. Only regions with sufficient observations are shown in the table.

Table 4.13A: Percentage Experiencing Any Shortages in Skill Areas*, by Region**

Skill Area	Quebec	Toronto	BC
Business development and marketing (e.g., pitching, proposals, production financing, international sales and export)	81.0	44.4	54.2
Management/financial/legal/operations (e.g., business/financial planning, intellectual property and copyright, human resources management, corporate finance, financial accounting)	62.5	34.6	57.7
Creative (e.g., research, story development, script writing, storyboarding, directing)	63.6	44.4	57.7
Knowledge of industry	78.3	44.4	68.0
Generic (e.g., communications, teamwork, interpersonal, thinking, problem-solving, perseverance, adaptability, leadership, continuous learning)	65.2	37.0	69.6
Technical (e.g., computer animation, special effects and other post-production including editing)	69.6	30.4	50.0
New media production (e.g., interactive story telling, interactive applications, games development, website development)	77.8	23.8	42.9
Production management (e.g., executive producing, producing, budgeting, scheduling)	43.5	37.0	48.0
Computer (e.g., use of software applications, computer programming)+	71.4	38.5	50.0

* Proportion of firms indicating 2, 3, 4, 5, 6, or 7 on a 7-point scale (i.e. **not** 1), where 1=no difficulty and 7=significant difficulty.

** Only regions with sufficient number of observations shown.

N=10-26

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

c) Skill Shortages: Causes and Solutions

The top three reasons for skill shortages identified were: poor job security in the workplace, low salary and benefit levels, and lack of appropriate training courses (Table 4.14)³⁷.

- The most frequently identified reasons for the skill shortages, identified by the 110 film and television production firms that had experienced shortages, were as follow:
 - poor job security in workplace, frequent layoffs, rapid turnover (a rank score of 74 points, with 15 firms saying this is the most important reason);
 - salary and benefit levels being too low to attract and retain the “right” people (a rank score of 69 points, with 18 firms saying this is the most important reason); and
 - lack of appropriate courses in training/education facilities (a rank score of 61 points, with 12 firms saying this is the most important reason).

³⁷ Firms were asked to rank potential factors as the first, second and third most important reasons for the skill shortages experienced (identified in a prior question). A summary rank “score” was computed for each factor as follows: three points for being ranked first, two points for second, and one point for third.

Table 4.14: Perceived Reasons for Employers' Skill Shortages

Reason for Skill Shortage	Number of Times Ranked* as:			Overall Rank Score**
	1 st	2 nd	3 rd	
Poor job security in workplace, frequent layoffs, rapid turnover	15	18	11	74
Salary/benefit levels too low to attract/retain "right" people	18	5	4	69
Lack of appropriate courses in training/education facilities	12	9	16	61
Recent graduates do not have "right" attitude	9	7	9	50
Excessive workload; poor work-family balance	3	12	17	50
Insufficient workplace training due to cost	6	6	8	38
Young people not entering the field	7	0	13	34
Skills of existing workers out-of-date	2	5	3	19
Rapid growth in demand for industry products/services	5	1	1	18
Employer/youth lack information on available training courses	0	7	0	14
Rapid growth in the number of firms in the industry	1	2	6	13
Work not sufficiently challenging/stimulating	1	1	3	8
Insufficient workplace training due to fear of poaching***	1	0	7	8
Rapid growth/spread of technology	0	1	4	6

* Respondents were asked to rank a list of potential factors first, second, and third in terms of importance as reasons for skill shortages (n=110).

** Computed as sum of "points" awarded as follows: three points for each time the reason was ranked first, two for second, and one for third.

*** "Poaching" in the sense of losing trained workers to other companies.

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

- Also frequently suggested as reasons for the shortages are: recent graduates not having the "right" attitude (50 points); excessive workload and poor work-family balance (50 points); insufficient workplace training due to cost (38 points); and young people not entering the field (34 points).
- There were insufficient responses to observe differences by firm size and region.

Hiring freelancers is the solution production firms are most likely to adopt, followed by providing workplace training to more workers and having existing workers work overtime (Table 4.15).

- The solutions production firms that had experienced shortages (n=110) were most likely to adopt were comprised of (along with the proportion indicating highly likely: 6 or 7 on a 7-point scale³⁸): hiring more freelancers (41.6 per cent); providing workplace training to more workers (27.2 per cent); and having existing workers work overtime (22.0 per cent) (last column of table).
 - BC firms were much more likely to suggest increasing salaries and benefits than firms from other regions.
 - Firms with no employees were, not surprisingly, most likely to hire more freelancers to address skills shortages, than firms in other size brackets,

³⁸ Film and television production companies were asked to indicate the likelihood their company would adopt a number of potential solutions to the skill shortage problems earlier identified. They were asked to indicate degree of likelihood on a 7-point scale, where 1=not at all likely, 4=somewhat likely, and 7=extremely likely.

while larger firms were more likely to have employees work overtime as a way of addressing skill shortages.

- Other solutions with a lower, though still fairly high, likelihood of being adopted by production companies are: lobbying government to put more funds into training institutions (18.2 per cent), improving the workplace training they provides (18.0 per cent), working with training institutions to improve their curricula (16.5 per cent), recruiting aggressively (15.9 per cent), and increasing salaries to attract skilled workers (15.3 per cent).
- Solutions with a low likelihood of being adopted (i.e., solutions that over one-half the firms said they would likely *not* adopt) are: hiring increased numbers of recent graduates (53 per cent reporting 1 or 2 on the 7-point scale); making do with less qualified workers (69.6 per cent); reducing workload to attract/retain qualified workers (74.7 per cent); and producing less (68.6 per cent).

Table 4.15: Likelihood of Adopting Certain Solutions to Skill Shortages,* Percentage Distribution

Solution	Not Likely (1-2)	Somewhat Likely (3-5)	Highly Likely (6-7)
Hire more freelancers/contract workers; out-source; contract-out (n=84)	14.3	44.1	41.6
Provide workplace training to more employees (n=81)	30.8	42.0	27.2
Have existing employees work overtime (n=83)	46.9	30.0	22.0
Lobby government to put more funds into training institutions (n=77)	49.1	33.8	18.2
Improve the quality of the training you provide (n=79)	34.2	46.8	18.0
Work with training institutions to design/offer needed training programs/courses/curricula (n=79)	49.4	34.2	16.5
Recruit more aggressively (n=82)	46.3	37.8	15.9
Increase salaries/benefits to retain/attract qualified workers (n=85)	38.8	45.9	15.3
Hire increased numbers of recent graduates (n=83)	53.0	37.4	9.6
Make do with less qualified workers; reduce skill requirements (n=82)	69.6	22.0	8.6
Produce less (n=86)	68.6	25.6	5.9
Reduce workload to retain/attract qualified workers (n=83)	74.7	20.4	4.8

* Respondents asked to indicate the likelihood that their firm would adopt potential solutions to skill shortages that they identified in prior questions, using a 7-point scale, where 1=not at all likely and 7=extremely likely. Distributions exclude those responding with "don't know".

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

d) Perceived Quality of Training

Choosing among different sources of training, film and television production companies were, not surprisingly, most likely to say that employer-provided training in the workplace is of the highest quality in meeting the demands of the workplace (Table 4.16).

- About one-third (34.2 per cent) indicated that this employer-provided workplace training is of high quality (reporting 6 or 7 on a 7-point scale)³⁹, compared to 21.6 per cent or less for other sources. Only 12.2 per cent of respondents said this training is of low quality.
- Generally speaking, private training institutions were seen to provide somewhat higher quality training than public institutions (21.6 versus 16.6 per cent who said the training was of high quality).
 - BC firms were significantly more likely to say the training provided by private institutions was of low quality (44.1 per cent).
 - There were no real differences by region for public educational institutions.

Table 4.16: Perceived Quality of Training from Different Sources*, Percentage Distribution

Source of Training	Low Quality (1-2)	Moderate Quality (3-5)	High Quality (6-7)
Employer in the workplace (n=82)	12.2	53.7	34.2
Unions/guilds (n=65)	21.5	57.0	21.5
Private training facilities (n=74)	27.0	51.4	21.6
Public training/educational institution (n=90)	20.0	63.3	16.6

* Respondents asked to respond on 7-point scale, where 1=extremely low quality and 7=extremely high quality. Computations of distributions exclude those indicating no training was provided by the source or who had no opinion.

** Indicates the number out of those who answered the question (n=110) who said that no production training was provided in the area (excluded from computation of distribution).

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

e) Current Skills in Demand

In an industry that is being rapidly transformed by technology, it is not surprising that technical skills such as computer animation and special effects were most often identified as the key skills emerging in the past 10 years. Other skills frequently identified as being in high demand include: new media production (e.g., interactive storytelling) and production management (e.g., executive producing, budgeting) (Table 4.17, column 1, which lists skill/occupational areas in descending order of frequency of mention⁴⁰).

- The three skills mentioned most frequently as being in demand were technical skills (29.3 per cent), new media production skills (22.4 per cent) and production management skills (21.1 per cent) (column 1).

³⁹ Production companies were asked to assess the quality of training provided to workers in film and television production by different sources, in terms of meeting the demands of the workplace. They were asked to respond on a 7-point scale, where 1=of extremely poor quality, 4= of moderate quality, and 7=of extremely high quality.

⁴⁰ All respondents were asked the open-ended question but only 62 wrote in skills, of which only 58 were usable. More than response could be and was provided. Responses were later re-coded and assigned to the skill areas presented in the next table.

- Other skill areas in high demand are: management/financial (17.2 per cent), business development/marketing (15.5 per cent), and general technology (12.1 per cent).
- Generic skills (3.4 per cent), knowledge of the industry (1.7 per cent), and technician skills (1.7 per cent) were the least likely to be identified as having emerged.
- No real patterns by firm size could be observed (not shown in table), though the following is noted:
 - production management, business development/marketing and new media productions were identified significantly more frequently in firms with no employees;
 - technical skills were identified significantly more frequently in firms with 1-4 employees;
 - management/financial, new media production skills were identified significantly more frequently in firms with 5-19 employees; and
 - technical, computer, financial/management, and new media production skills, general technology familiarity (e.g., with HDTV), and knowledge of the industry were identified significantly more frequently in firms with 20 or more employees.

Table 4.17: Skills that have Emerged as being, or are Expected to be, in High Demand

Skill/Occupational Area	Percentage indicating Skill/Occupation in High Demand*	
	Emerged as being, in Last 10 Years	Expected to be, in Next 5 Years
Technical (e.g., computer animation, special effects and other post-production including editing)	29.3	23.8
New media production (e.g., interactive story telling, interactive applications, games development, website development)	22.4	12.7
Production management (e.g., executive producing, producing, budgeting, scheduling)	21.1	11.1
Management/financial (e.g., business/financial planning, intellectual property and copyright, human resources management, corporate finance, financial accounting, business affairs/skills)	17.2	22.2
Business development/marketing (e.g., pitching, proposals, production financing, international sales and export, promotion/publicity)	15.5	25.4
Technology (e.g., high-definition television, digital)	12.1	15.9
Creative (e.g., research, story development, script writing, storyboarding, directing)	8.6	12.7
Computer (e.g., use of software applications, computer programming)	6.9	4.8
Administrative	5.2	3.2

Generic (e.g., communications, teamwork, interpersonal, thinking, problem-solving, perseverance, adaptability, leadership, continuous learning; multi-tasking)	3.4	3.2
Knowledge of industry	1.7	1.6
Technicians	1.7	3.2
<i>N (sample size)</i>	58	63

* Respondents could indicate multiple responses, so percentages add up to greater than 100 per cent.
Source: WIFT-T Survey of Film and Television Production Companies, 2004.

- Notable differences by region (not shown in table) are:
 - technical skills were identified significantly more frequently by BC and Quebec firms than firms in other regions;
 - management/financial skills were identified significantly more frequently by BC firms than firms in other regions;
 - new media production skills were identified significantly more often by firms in the GTA and Quebec than firms in other regions; and
 - technical and new media production skills were identified significantly more often by firms in the GTA and Quebec than firms in other regions.

f) Future Skills in Demand

The skills that production firms expect to be in high demand in the next five years are in the business development/marketing, technical, and management/ financial areas (column 2 of Table 4.17).

- The three most frequently identified were business development/marketing (25.4 per cent), technical (23.8 per cent), and management/financial (22.2 per cent).
 - Many more indicated that skills in the business development/marketing and management/financial area will be in high demand in the next five years, than indicated them as having emerged in the last 10 years (15.5 and 17.2 per cent, from column 1).
- Another skill area that is expected to emerge as being in high demand is technology generally (e.g. high-definition television and digital) (15.9 per cent). This is distinguished from technical skills (computer animation and special effects).
- Interestingly, only 12.7 per cent said that new media production was going to be an area in high demand in the next five years, and only 4.8 per cent said computer skills.
- Firms with 5-19 employees were more likely than firms in other size categories to indicate they expect skills to emerge in many areas, particularly computer, management/financial, business development/marketing, and generic skills.
- No notable differences by region were observed.

Examples of the specific skills producers expect to emerge in the next five years are provided in Table 4.18.

Table 4.18: Examples of Skills that are Expected to be in High Demand*

Technical
<input type="checkbox"/> Digital production skills
<input type="checkbox"/> CGI applications
<input type="checkbox"/> Three dimensional graphics and special effects
<input type="checkbox"/> Digital animation
<input type="checkbox"/> Video/web editing
<input type="checkbox"/> Computer aided design

Working with new technology
<input type="checkbox"/> High-definition
<input type="checkbox"/> Interactive content skills
<input type="checkbox"/> Development of convergent medias
<input type="checkbox"/> Working with digital technology
<input type="checkbox"/> On-line distribution

Business development
<input type="checkbox"/> Creative financing skills
<input type="checkbox"/> International sales
<input type="checkbox"/> Working with private investors and sponsors
<input type="checkbox"/> Innovative promotions and marketing tactics

Financial
<input type="checkbox"/> International business affairs
<input type="checkbox"/> Understanding of advanced financial structures and production

Versatility
<input type="checkbox"/> Ability to manage a variety of jobs
<input type="checkbox"/> Ability to handle any area of the business vs. specialist
<input type="checkbox"/> In-house editing and post-production using new technologies

* Open-ended question. Multiple responses permitted.

Source: WIFT-T Survey of Film and Television Production Companies, 2004.

B. Public Producer - National Film Board of Canada

The National Film Board of Canada (NFB) is Canada's only non-broadcast public producer and distributor of film and television material. Its mandate is "to produce and distribute distinctive, culturally diverse, challenging and relevant audiovisual works that provide Canada and the world a unique Canadian perspective". In 2000/01, its expenditures amounted to \$63 million. In that year, 63 per cent of its staff were involved in production, about 15 per cent in distribution and the rest in marketing and administration⁴¹, suggesting it be considered primarily as a producer rather than a distributor. In 2002, total NFB employment amounted to 439.

The NFB, since it opened its doors in the late 1960s to Aboriginal filmmakers and to women through its innovative Studio D, has been considered a leader in gender and cultural diversity. Currently, the NFB administers a range of grants and training initiatives designed to stimulate greater participation in the Aboriginal and visible minority filmmaking community. Programs include the Aboriginal Filmmaking Program, the REEL DIVERSTIY program and the Spark Initiative. The NFB supports numerous culturally diverse media arts festivals and conferences as well.

All figures reported are for the NFB as a whole, not just the production side of the organization. Results are based on data obtained mainly from the Workplace Equity unit of Human Resources and Skills Development (HRSD (CANADA)) collected by the Department under the *Employment Equity Act*, as well as the NFB 2001/02 *Employment Equity Annual Report*⁴².

4.6 EMPLOYMENT PROFILE - NFB

Women are well represented at the NFB, while members of other equity groups tend to be underrepresented (Table 4.19).

- ▶ Three in five employees of the NFB (59.5 per cent) are women (row 1 of column 1 of the table). This is greater than the proportion in the total workforce of all firms submitting equity data under the Act (44.9 per cent) and the national workforce (47.3 per cent) (rows 2 and 3).

⁴¹ <http://www.tbs-sct.gc.ca/rma/dpr/00-01/NFB00dpre.pdf> and <http://www.nfb.ca/e/publications/section4e.pdf>

⁴² Employers covered under the Act must annually submit equity group representation data to HRSD (CANADA). Covered under the Act are all federally regulated employers with 100 or more employees, including organizations in industries such as banking, communications, and international and inter-provincial transportation. *The data submitted to the department are based on information collected by employers in surveys of employees in which the latter self-identify themselves as a member of one equity or another.* In 2001, there were approximately 394 such employers (private-sector employers and Crown corporations), representing approximately 612,344 employees. Also covered are all federal departments, representing approximately 155,360 employees. Note that as this report was being written, Employment Equity for 2002 became available; however, comparison between 2001 and 2002 on selected variables suggest that there has been little change between the two years. See HRSD (CANADA) website: <http://www.hrdc.gc.ca/en/gateways/topics/wzp-qxr.shtml>

- The representation of persons with a disability (1.5 per cent) is lower at the NFB than it is in the national labour force, 5.3 per cent).
- Aboriginal representation at the NFB (1.3 per cent) is only somewhat lower than it is in the total workforce of all firms under the Act (1.6 per cent) and in the national workforce (2.6 per cent).
- The percentage of the NFB workforce represented by persons in a visible minority group (6.7 per cent) is also lower than in the workforce of all firms under the Act and the total national workforce (11.7 and 12.6 per cent)

In 2003-2004, the NFB produced 105 films and co-produced a further 40, for a total of 145. Of the 105 fully funded NFB productions, 21 (or 20 per cent) of these were produced or directed by culturally diverse filmmakers. These filmmakers are not represented in the NFB employment roles, though they are an essential part of the NFB creative workforce.

**Table 4.19: Equity Group Workforce Representation (%)*:
NFB versus Various Reference Groups, 2001**

Workforce of:	Female	Disability	Aboriginal	Visible Minority
1. National Film Board of Canada (NFB)	59.5	1.5	1.3	6.7
2. All firms under <i>Employment Equity Act</i> **	44.9	2.3	1.6	11.7
3. Total national workforce***	47.3	5.3	2.6	12.6

* Total employment in equity group as a percentage of total employment in the particular group of firms

** Based on Employment Equity data obtained from HRSD (CANADA). Excludes public service employers.

*** Based on Census 2001 data from Statistics Canada. The result for the disability equity group is based on unpublished Census data.

Source: Publicly available Employment Equity data, obtained from HRSD (CANADA), plus Census 2001 data.

Occupations and Skill Mix

Most of the jobs at the NFB are either high-skilled or medium-skilled. The NFB workforce is higher skilled than the workforce of all organizations under the Act and the workforce at large (Table 4.20).

- High-skilled jobs represent 43.7 per cent of the employment at the NFB and medium-skilled jobs represent 38.7 per cent.
- These proportions are considerably higher than in the workforce of all firms that submit data under the Employment Equity Act⁴³ (23.7 per cent high-skilled and 27.7 per cent medium-skilled, column 3) and the national workforce⁴⁴ (26.4 and 28.4 per cent, column 4).

⁴³ All employers submitting equity data under the Act are referred to as “all firms under the Act”.

⁴⁴ Based on Census 2001 data obtained from Statistics Canada.

Employment at the NFB is concentrated in four occupational groups: professionals, administrative and senior clerical workers, clerical workers, and semi-professionals (Table 4.20⁴⁵).

- Together, these occupations accounted for about 90 per cent of NFB employment in 2002, with professionals accounting for 36.7 per cent of the employment; administrative and senior clerical workers, 22.1 per cent; clerical workers, 15.9 per cent; and semi-professionals and technicians, 15.3 per cent.

Table 4.20: Occupational/Skill Mix*, NFB, 2002

Occupational Group	Employment	Percentage Distribution		
		NFB	All Firms Under the Act	National Workforce
High-Skilled	192	43.7	23.7	26.4
Senior Managers	9	2.0		
Middle and other Managers	22	5.0		
Professionals	161	36.7		
Medium-Skilled	170	38.7	27.7	28.4
Semi-Professionals and Technicians	67	15.3		
Supervisors – Clerical and Service	6	1.4		
Administrative & Senior Clerical Workers	97	22.1		
Lower-Skilled	77	17.5	48.8	45.3
Clerical Workers	70	15.9		
Semi-Skilled Manual Workers	7	1.6		
Total NFB	439	100.0	100.0	100.0

* Percentage distribution by occupational group.

Source: Computations based on National Film Board of Canada Employment Equity 2001-2002 Annual Report, obtained from the NFB.

Though women are underrepresented among higher-skilled employees at the NFB compared to their share of all employees at the organization (Table 4.21), their share in some higher-skilled categories is greater than it is in higher skilled categories of all firms under the Equity Act (not shown in table⁴⁶).

- Women make up 43.7 per cent of NFB senior managers. This is considerably higher than women's share of senior managers in all firms submitting data under the Act (19.6 per cent; not shown in table).

⁴⁵ Results based on Employment Equity data were obtained from the NFB Employment Equity *Annual Report*, 2001-2002. The occupational groups for which the data are provided are called the Employment Equity Occupational Groups, which are used to capture employment equity data from firms (as described above) and are based on the National Occupational Classification (NOC). Each of the NOC occupational groups has a skill level assigned to it that identifies the level of education required of occupants: requiring university education is defined as higher-skilled; requiring a college education or equivalent, medium-skilled; and requiring less than college, lower-skilled. See Appendix C for details on this grouping.

⁴⁶ See HRSD (CANADA) website for the 2002 Employment Equity Annual report (covering the year 2001): http://www.hrdc.gc.ca/en/lp/lo/lsw/e/we/ee_tools/reports/annual/2002/pdf/2002annualreport.pdf

- Women represent 54.0 per cent of NFB professionals in 2001, which again is higher than women's share of professionals in all firms under the Act (44.5 per cent; not shown in table). This is still less, however, than their overall share of the NFB workforce.
- Women represent 27.3 per cent of higher-skilled middle and other managers, which is considerably lower than their 60.8 per cent share of total NFB employment, as well as women share of middle managers in all firms under the Act (42.4 per cent, not shown in the table).
- In the medium-skilled ranks, women represent about one-third of semi-professional/technical (35.8 per cent) positions, which is much higher than women's share of all semi-professionals under the Act (16.9 per cent, not shown in the table). At the same time, it is much lower than their share of total NFB employment.

Table 4.21: Equity Group Representation (%)*, by Occupational Group, NFB, 2002

Occupational Group	Employment	Equity Group Representation			
		Female	Disability	Aboriginal	Visible Minority
High-Skilled					
Senior Managers**	9	44.4	0.0	0.0	0.0
Middle and other Managers	22	27.3	0.0	0.0	9.1
Professionals	161	54.0	1.2	1.2	9.3
Medium -Skilled					
Semi-Professionals and Technicians	67	35.8	1.5	3.0	7.5
Supervisors – Clerical and Service**	6	33.3	0.0	0.0	0.0
Administrative & Senior Clerical Workers	97	88.7	1.0	1.0	4.1
Lower -Skilled					
Clerical Workers	70	82.8	1.4	1.4	5.7
Semi-Skilled Manual Workers**	7	0.0	14.3	0.0	14.3
Total NFB	439	60.8	1.4	1.4	7.1

* Total employment in equity group in occupation as a percentage of total employment in occupation.

** Because of the low employment in these occupations (less than 10 employees), equity group representation is not commented on for these occupations.

Source: National Film Board of Canada Employment Equity 2001-2002 Annual Report, obtained from the NFB.

- In clerical positions, traditionally occupied by women, women are significantly *over*-represented, compared to their overall share of employment at the NFB. They represent 88.7 per cent of the employment in medium-skilled administrative and senior clerical positions, and 82.8 per cent of lower skilled clerical positions.
 - These proportions are also *higher* than their counterparts in the workforce of all firms under the Act: 81.0 per cent of those in administrative and senior clerical positions in this group are female, and 66.6 per cent in clerical job categories are.

As for other equity groups, persons with a disability are over-represented in the lower skilled job category and visible minority groups have varying degrees of representation. Aboriginal persons do not

display any particular patterns of over- or under-representation in job categories compared to their share of all NFB employees (Table 4.22) or their share of the same job categories in all firms under the Act.

- Persons with a disability are particularly over-represented in semi-skilled manual categories (14.3 per cent), compared to their share of all NFB employees (1.4 per cent) and this group's share of all semi-skilled manual workers under the Act (2.4 per cent, not shown in table).
- Visible minority groups have varying degrees of representation across job categories:
 - over-representation among semi-skilled manual workers (14.3 per cent) compared to their share of all NFB employees (7.1 per cent., last row of table) and compared to this group's share of all such personnel under the Act (8.4 per cent, not shown in table).
 - under-representation among clerical workers (5.7 per cent) compared to their share of all such personnel under the Act (13.8 per cent, not shown in table);
 - under-representation among higher-skilled professionals (9.3 per cent) compared to their share of professionals in all firms under the Act (16.5 per cent, not shown in table).

4.7 SALARIES – NFB

The NFB workforce is somewhat better paid than the workforce of all firms submitting data under the *Employment Equity Act*⁴⁷.

- About one-third of NFB employees (32.8 = 1.6 + 31.2 per cent) earn less than \$40,000 a year, compared to 38.0 per cent (1.6 + 36.4 per cent) of those in all firms submitting data under the Act (sum of first two rows of Table 4.23).
- There is a higher proportion earning \$60,000 or more annually at the NFB than in all firms under the Act (28.9 = 23.9 + 5.0 per cent, compared to 24.3 = 15.8 + 8.5 per cent) (sum of last two rows of table).

⁴⁷ Data on salary breakdowns are presented for permanent full-time employees, based on data for 2001 (the latest year available) obtained directly from the HRSD (CANADA) Employment Equity page of the website, based on data submitted by the NFB to HRSD (CANADA). Including part-time and short-term employees would have distorted the results because such employees would typically be paid lower salaries because of the fewer hours they work.

**Table 4.23: Salary Distribution: Permanent Full-Time Workforce:
NFB versus Reference Group, 2002**

Salary Bracket (Annual)	Employment Level -- NFB	Percentage Distribution of Workforce of:	
		NFB	All Firms under <i>Employment Equity Act</i>
<\$20,000	7	1.6	1.6
\$20,000-\$39,999	137	31.2	36.4
\$40,000-\$49,999	105	23.9	23.7
\$50,000-\$59,999	63	14.4	14.0
\$60,000-\$84,999	105	23.9	15.8
\$85,000 or greater	22	5.0	8.5
Total NFB	439	100.0	100.0

Source: National Film Board of Canada Employment Equity 2001-2002 Annual Report, obtained from the NFB.

Visible minority group representation is greatest in the lowest and highest salary brackets, while female representation at the NFB generally declines as salary level rises, as it does for all firms under the Act (Table 4.24).

- For persons in a visible minority group, representation is greatest in the lowest salary bracket (14.3 per cent) and in the highest bracket (9.1 per cent), and much higher than these persons' share of the total NFB workforce (7.1 per cent, last row of table).
 - These persons' share in the lowest salary bracket (14.3 per cent) is also higher than it is in this bracket for the workforce of all firms under the Act (10.4 per cent, not shown in table), while their shares in the next two brackets (6.6 per cent for \$20,000-39,999; and 7.6 per cent for \$40,000-49,999) are *lower* (14.2 per cent and 10.6 per cent, not shown in table).
- Women's workforce share at the NFB is greatest in the \$20,000-39,999 salary bracket (78.8 per cent) and then declines steadily to 31.8 per cent in the \$85,000 and over salary bracket.
 - However, women working at the NFB are better represented in the higher salary brackets than their counterparts in all firms under the Act, whereas their representation in the lower salary brackets tends to be higher.
- For persons with a disability and Aboriginal persons, no real differences are apparent in equity group representation by salary level.

Table 4.24: Equity Group Representation (%)*, by Salary Level, NFB, 2002

Salary Bracket (Annual)	Employment	Equity Group Representation			
		Female	Disability	Aboriginal	Visible Minority
<\$20,000	7	57.1	0.0	0.0	14.3
\$20,000-\$39,999	137	78.8	0.0	3.6	6.6
\$40,000-\$49,999	105	61.9	2.2	1.0	7.6
\$50,000-\$59,999	63	54.0	1.0	0.0	1.6
\$60,000-\$84,999	105	46.7	1.9	1.0	8.6
\$85,000 or greater	22	31.8	0.0	0.0	9.1
Total NFB	439	60.8	1.4	1.4	7.1

* Number of employees in salary bracket as a percentage of total number employees 437.

Source: Computations based on National Film Board of Canada Employment Equity 2001-2002 Annual Report, obtained from the NFB.

4.8 SUMMARY OF KEY RESULTS

The highlights of this chapter are the following. Where applicable, in order to show changes over time, comparisons to the late 1980s are presented, based on findings from the 1990 report, "A Statistical Profile of Women in the Canadian Film and Television Industry" (produced by the Foundation for Toronto Women in Film and Video, now WIFT-T).

a) Private Producers

The film and television production sector is characterized by a concentration of small firms in three regions of the country: the Greater Toronto Area, Quebec and British Columbia. The predominant primary business activities of the production sector are domestic documentary/lifestyle television and domestic feature film.

Average equity group representation among the owners of production companies is lower than it is among all paid employees of these companies. Female representation among owners tends to decline with firm size and is higher in BC and in areas of Ontario outside Toronto. In contrast, members of visible minority groups have higher representation in small-medium size enterprises and in the Greater Toronto Area. This is not surprising given that visible minorities represent a full 34.6 per cent of the workforce overall in the GTA.

Among paid employees, women are better represented in part-time jobs than full-time jobs, while the reverse is true for members of visible minority groups. Female representation tends to fall with firm size, but there are no firm size differences for other equity groups. The representation of women is lower in the Prairies and Atlantic regions but higher in British Columbia, while Aboriginal persons are well represented in the Prairies and visible minority groups in BC.

Women tend to be underrepresented in the sector's three largest job categories: senior management, post-production and writing. However, they are over-represented in the fourth largest job category, finance and accounting, as are members of visible minority groups. Aboriginal persons are well

represented among writers. Evidence suggests that women have made progress since 1989 in terms of representation in a number of key job categories: writers, producers and directors; differences in concepts used in the earlier study make it difficult to compare figures exactly between 1989 and now.

Women tend to be paid better salaries than men in most job categories in production firms, including the higher-salary categories of executive producer, senior manager and producer.

A sizable minority of production firms are experiencing at least some difficulty in filling their skill needs, with over 40 per cent experiencing some difficulty in the areas of finance and accounting, development activities outside research and story editing, and business affairs. Similarly, large minorities of producers have been experiencing shortages in all skill areas irrespective of job category, such as business development and marketing and management, financial, legal and operations skills. The incidence of shortages declines with firm size. Quebec firms were most likely to experience skill shortages in most skill areas, while Toronto firms were least likely, although shortages in all regions were substantial.

According to employers, skill shortages in the production sector were most likely to have been caused by poor job security, low salary and benefit levels, and lack of appropriate training courses. Production firms that had experienced shortages were most likely to resolve them either through hiring more freelancers, providing workplace training to more workers, or having existing workers work overtime. These firms view employer-provided training in the workplace to be of the highest quality among various training sources, in terms of meeting the demands of the workplace.

Skill/occupational areas in the production sector that have emerged over the last 10 years are technical skills, new media production and production management. Areas where growth is expected to occur in the next five years are business development/marketing, technical and management/financial skills.

b) Public Producer

The National Film Board of Canada's workforce is higher skilled and better paid than the employees of all firms represented by HRSD (CANADA) Employment Equity data.

Three in five employees at the NFB are women, a proportion that is higher than that in all firms submitting data under the Equity Act. Moreover, the proportion of women at the NFB has increased from 52 per cent in 1989. Persons with a disability and members of visible minority groups tend to be underrepresented, compared to the workforce at large. However, fully 20 per cent of NFB films produced last year were made by Aboriginal persons and members of visible minority groups.

Women are underrepresented in higher-skilled job categories compared to their share of the NFB workforce, but are in fact better represented in some higher skilled occupations than women in all firms under the Act. Moreover, representation of women at the NFB in the senior manager occupational group, 44 per cent in 2001, has increased since 1989 when it was just 31 per cent.

Women's representation declines with salary level at the NFB. However, their representation in upper salary brackets at the NFB is actually higher than it is in the upper salary brackets of all firms under the Act. Visible minority group representation is greatest in the lowest *and* highest salary brackets.

5. FILM AND TELEVISION DISTRIBUTION

Revenues from Canada's film and television distribution industry reached a record high of \$1.6 billion in 2002/03, up 9.5 per cent over the previous year. During the 1990s, revenues almost doubled from \$671 million in 1991/92 to \$1.3 billion in 1999/2000⁴⁸. American and other foreign films represented the lion's share (91 per cent) of domestic sales of the film and television distribution industry. Of the \$1.3 billion in sales to Canadian destinations, most (\$934 million, or 72 per cent) went to conventional television and cinema/drive-in markets, the rest went to home video, pay television, and other markets (educational institutions, government and other). In 2001/2002, employment in the film and television distribution sector was estimated to be about 1,909⁴⁹.

The main issues addressed in this chapter are: employees of film and television distribution firms, their working owners, and freelancers; the salaries of employees in the industry; and skills issues including skills shortages and workplace training.

5.1 PROFILE OF FILM AND TELEVISION DISTRIBUTION COMPANIES

The results presented in this chapter are based primarily on the responses of 21 employers who responded to a web-based survey of film and television distribution firms, out of the original sample frame of 125 firms invited to participate. The total employment of firms responding to the survey amounts to 327, which represents about 18 per cent of the total industry employment, estimated above to be 1,833. The small survey sample size precluded desegregation of the results by firm size and region.

⁴⁸ Source: Statistics Canada: <http://www.statcan.ca/Daily/English/040514/d040514b.htm> and <http://www.statcan.ca/english/freepub/87F0010XIE/2004001/data.htm>. The figure excludes \$1.5 million in revenues generated by videocassette wholesaling, which was considered part of the industry by Statistics Canada.

⁴⁹ This was computed as follows, based on Statistics Canada data. Total employment in the entire sector including distribution and videocassette wholesaling was 4,033 in 2002/2003. The distribution sub-sector's revenues were about \$1.6 billion, which is about 47 per cent of the total revenues of \$3.3 billion for the sector. Thus, employment in the distribution sub-sector were estimated to be $0.47 * 4,033 = 1,909$.

The majority of firms providing employment data in the survey are small (Exhibit 5.1⁵⁰).

- One-quarter (23.8 per cent; n=5 firms) have fewer than five paid employees; 38.1 per cent (n=8) have 5-9 employees; and 38.1 per cent (n=8) have 10 or more employees
- The *median* number of employees per firm is 8.0⁵¹.

The largest concentration of distribution firms is in the Greater Toronto Area (GTA) (Exhibit 5.1).

- The majority of the 21 firms participating in the survey in a substantive way (67.7 per cent) is in the GTA.
- The regional composition of the 125 firms in the original sample frame (113 of which had a variable indicating region) confirms that the industry is concentrated in the GTA.

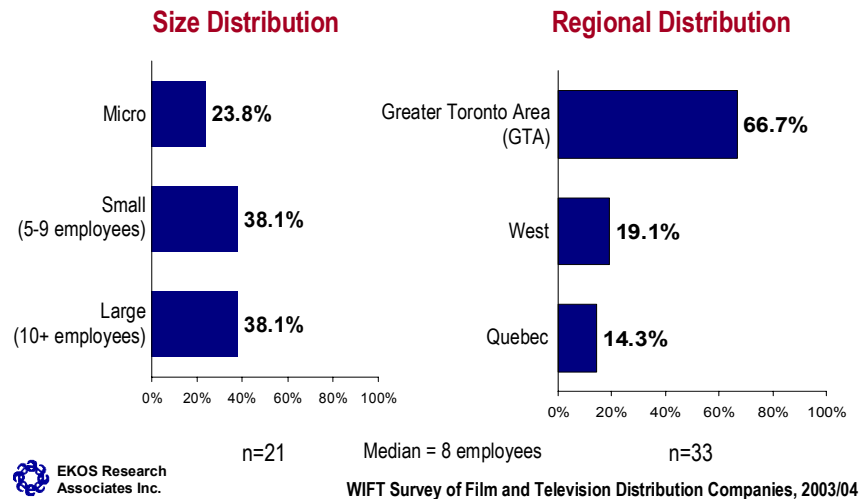
Response rates were higher among firms located in the GTA and Western Canada compared to the original sample frame, and lower among firms located in Quebec.

- Firms from the GTA are over-represented in the survey dataset (66.7 per cent of respondents, compared to their 46.0 per cent share in the original sample frame) as are Western Canada firms (19.1 per cent compared to 9.1 per cent).
- Firms from Quebec are underrepresented (19.1 per cent of respondents, compared to 41.6 per cent in the original sample frame).

⁵⁰ In the exhibit and in this chapter “firm size” refers to the number of its paid employees (in receipt of a T4 slip) in July 2003, including working owners.

⁵¹ Given the nature of the industry, i.e., a large number of small firms and a few large ones, only median employment level is reported in this chapter, as the mean would have been a misleading measure of the average size of firms in the industry.

**Exhibit 5.1:
Size and Regional Distribution of Film and
Television Distribution Firms**



The mean percentage of firms' revenues generated by film and television distribution is 73.3 per cent.

5.2 EMPLOYMENT PROFILE

Survey results for representation by equity group are presented in this section, first for working owners, and second for paid employees (including working owners).

a) Working Owners

The median number of working owners in distribution firms is 2.0. Women and members of visible minority groups are well represented in the ownership of film and television distribution firms, while other equity groups are not (Table 5.1).

- Almost one-half of distribution firms have at least one owner who is a member of one of the equity groups, with 47.3 per cent having at least one female owner; one-fifth (21.1 per cent) with at least one owner who is a member of a visible minority group; 5.3 per cent with at least one owner who has a disability; and no firms with an owner who is Aboriginal (data column 1 of the table).
- On average, about one-third of owners of distribution firms are female (30.6 per cent); 14.1 per cent are members of a visible minority group; and negligible proportions are members of the other two equity groups (Aboriginal persons and persons with a disability) (column 2).

Table 5.1: Working Owners/Proprietors in Equity Groups

Equity Group	Percentage of Firms with at Least One in Group (%)	Mean Equity Group Representation *(%)
Female	47.3	30.6
Disability	5.3	0.3
Aboriginal	0.0	0.0
Visible minority	21.1	14.1

* Per-company mean of: (1) number of owners in equity group as a percentage of (2) total number of owners (n=16).

Source: WIFT-T Survey of Film and Television Distribution Companies, 2003/2004.

b) Paid Workforce

This section profiles the paid workforce of film and television distribution firms, including how well women and other equity groups are represented⁵². The paid workforce is considered here to consist of employees, including working owners, on a firm's payroll in July 2003 (in receipt of a T4 slip); excluded are contractors/freelancers, which are dealt with in another section. The results are presented first by type of job (i.e., part-time/full-time, permanent/short-term) and then by job category (occupational group).

At the industry level, women represent over one-half of the total employment of film and television distribution firms, and are over-represented in comparison to their share of the national labour force (Table 5.2).

- Women represent 61.8 per cent of the employment of distribution firms participating in the survey (first data column of table). This is greater than the 47.3 per cent of the total national employment represented by women (second column of table) (based on Labour Force Survey data, 2003).

Other equity groups are underrepresented, compared to their national labour force share.

- Less than four per cent of the total employment of distribution firms is represented by members of each of the other equity groups (first data column of Table 5.2).
- These proportions are less than these groups' share of the national labour force (second column): 5.3 per cent of all Canadians in the workforce identified themselves as a person with a disability, 2.6 per cent identified themselves as an Aboriginal person, and 12.6 per cent identified themselves as a member of a visible minority group (according to 2001 Census data).

⁵² Note that the employee equity group representation results for Aboriginal, disability and visible minority equity groups are **not** based on self-identified data provided by employees but on responses provided in the survey by employers on their employees. See Chapter 3 for equity groups results based on self-identified data (from the Census) as provided by employees of the motion picture and video sector, of which distribution companies form a part.

Table 5.2: Equity Group Representation in Paid Workforce (%)*, Employer Identified

Equity Group	Distribution Firms*	National**
Female	61.8	47.3
Disability	1.0	5.3
Aboriginal	0.7	2.6
Visible minority	3.6	12.6

* (1) Sum of number of paid employees in an equity group across firms, as a percentage of (2) sum of total number of paid employees across the same group of firms. Each computation is based on a different number of observations where data on employment for **both** the numerator (the particular equity group) and the denominator (the firm's total workforce) exist (n=17-21).

** Based on 2003 Labour Force Survey data (females) and 2001 Census data (other equity groups) obtained from Statistics Canada.

Source: WIFT-T Survey of Film and Television Distribution Companies, 2003/2004, plus Statistics Canada 2003 Labour Force Survey and 2001 Census.

(i) Job Type

Equity group representation by job type is explored at the firm-level, using the mean per-company percentage accounted for by equity group in different job types (permanent and full-time)⁵³.

Women's average per-firm share of permanent employment is somewhat higher than it is of total employment of distribution firms, suggesting they are slightly underrepresented in short-term jobs in the distribution industry (Table 5.3).

- Women represent, on average, 63.9 per cent of distribution firms' total permanent workforce (data column 2 of table), compared to their average 60.9 per cent share of firms' total workforce, including short term employees (column 1 of table). This suggests that women are slightly over-represented in permanent positions.
 - This further suggests women are slightly underrepresented in short-term jobs.
- Other equity groups have similar permanent and total employment shares: persons with a disability (1.3 and 1.6 per cent), visible minority groups (7.1 and 6.8 per cent), and Aboriginal persons (3.1 and 2.2 per cent).

Women's average share of full-time permanent employment (30 or more weekly work hours) is slightly lower than their average share of total permanent employment (Table 5.3).

- Women represent, on average, 58.3 per cent of full-time permanent employment (data column 3 of table), compared to their 60.0 per cent average share of total permanent employment (column 1).

⁵³ This equity group representation measure, which is a per-firm *average* proportion of the workforce in each firm, differs from the measure presented in Table 5.2, which is the proportion of the total workforce across the firms. Note again that equity group results are based on employer estimates, not self-identified data.

- Other equity groups have similar shares: persons with a disability (2.1 and 1.6 per cent), visible minority groups (7.5 and 6.8 per cent), and Aboriginal persons (3.1 and 2.2 per cent).

Table 5.3: Mean Equity Group Representation in Workforce (%)*, Employer Identified, by Type of Job

Equity Group	Total	Total Permanent	Full-time Permanent **
Female	60.9	63.9	58.3
Disability	1.6	1.3	2.1
Aboriginal	2.2	3.1	3.1
Visible minority	6.8	7.1	7.5

* Per-company mean of: (1) number of paid employees in equity group in type of job as a percentage of (2) total number of paid employees in job type. Each computation is based on a different number of observations, where employment in **both** the numerator (the job type) and denominator (total) exist, for that particular equity group (n=16-21).

** Insufficient observations to present results for part-time permanent jobs.

Source: WIFT-T Survey of Film and Television Distribution Companies, 2003/2004.

(ii) Job Category (Occupation)

Women and members of visible minority groups tend to be over-represented in sales, administrative and clerical positions and underrepresented in senior management positions, relative to these equity groups' shares of the workforce of distribution firms (Table 5.4).⁵⁴

- Women, on average, are generally unrepresented in senior management ranks compared to their average share of a firm's total paid workforce (45.5 per cent in row 1, compared to 60.9 per cent in last row of table). Similarly, they are over-represented in administrative support, marketing and clerical support occupations (75.0 per cent or higher).
- Persons with a disability are, on average, unrepresented in all job categories, except administrative support (3.1 per cent, compared to their overall average 1.6 per cent share), while Aboriginal persons are unrepresented in all categories but marketing (5.0 per cent, compared to their 2.2 per cent overall average share).
- Persons in a visible minority group are, on average, underrepresented in senior management (0.0 per cent), acquisition (0.0 per cent), and marketing (3.9 per cent) (these percentages are lower than their average workforce share, 6.8 per cent, last row of the table). They are over-represented in all other job categories, particularly lower skilled clerical support (17.9 per cent, second last row of table).

⁵⁴ Note again that equity group results are based on employer estimates, not self-identified data.

Table 5.4: Mean Equity Group Representation in Workforce (%)*, Employer Identified, by Job Category

Job Category	Female	Disability	Aboriginal	Visible Minority
Senior management	45.5	0.0	0.0	0.0
Acquisition**	66.3	0.0	0.0	0.0
Marketing	76.1	0.0	5.0	3.9
Sales	68.8	0.0	0.0	9.1
Administrative support	79.9	3.1	0.0	9.3
Clerical support**	75.0	0.0	0.0	17.9
Total	60.9	1.6	2.2	6.8

* Per-company mean of: (1) number of paid employees in equity group in job category as a percentage of (2) number of all paid employees in job category. Each computation is based on a different number of observations, where employment in **both** the numerator (the job category) and denominator (total) exist, for that particular equity group (n=6-19).

** Results based on the responses of 4-8 firms and therefore are subject to caution as to reliability.

Source: WIFT-T Survey of Film and Television Distribution Companies, 2003/2004.

5.3 EMPLOYEE SALARIES

This section examines salary levels in the industry overall and the positioning of equity groups⁵⁵ in terms of their relative salaries⁵⁶.

As would be expected, salaries of senior managers in distribution firms are considerably higher than salaries of occupants of other job categories.

- The per-company mean annual salary for senior managers is \$93,594, compared to \$52,200 or less in other job categories (first data column of Table 5.5⁵⁷).

Distribution firms tend to pay women lower than average salaries in senior management and administrative jobs. In marketing jobs, women are paid higher than the average salary of the position.

- On average, among senior managers, women are paid \$37,333 per year compared to \$93,594 overall, or 40.5 per cent of the overall average salary. Similarly, their average annual salary in administrative positions (\$18,600) is less than the overall mean salaries for that position (\$34,400), or 54.1 per cent of the overall mean.

⁵⁵ Recall again that the equity group results are based on data supplied by employers, and not self-identified data provided by employees.

⁵⁶ Average salaries is considered to be the per-company mean annual wages and salaries of a company's full-time permanent employees (including working owners, but not contractors or freelancers), and excluding employer contributions to pension and health plans, etc.. Salaries of the permanent full-time workforce are shown in order to control for hours worked: inclusion of short-term and part-time employees, whose salaries are lower due to fewer hours worked, would have distorted the means. Low response counts for certain cells mean that some results should be treated with caution (noted in the text) and some results could not be reported at all.

⁵⁷ Caution should be exercised in considering these estimates, owing to the small number of responses to the respective survey questions.

- By contrast, in marketing jobs, women, on average, are paid \$37,750, which is 18 per cent higher than the average annual salary of that job (\$32,000).

Table 5.5: Mean Annual Salary(\$), Full-Time Permanent Workforce, Total vs. Women*

Job Category	Total (\$)	Female (\$)	Female Salary as Percentage of Total
Senior management	93,594	37,333	40.5
Marketing	32,000	37,750	118.0
Sales	52,200	**	—
Administrative support	34,400	18,600	54.1

* Annual average in each job category per company. All results should be treated with caution as they are based on only 4-8 survey responses. There were too few responses to the question on average salaries in acquisition and clerical jobs to report the results, and for any other equity group besides women.

** Fewer than four firms provided data for females in the sales job category.

Source: WIFT-T Survey of Film and Television Distribution Companies, 2003/2004.

5.4 INDEPENDENT FREELANCERS/ CONTRACTORS

One-half of film and television distribution firms hired at least one freelancer/contractor over the previous 12 months, but reliance on freelancers is not great in the industry.

- The median number of freelancers/contractors per distribution firm is 2.0. One-half (50 per cent) of distribution firms hired at least one freelancer.
- However, freelancers represent, on average, 12.2 per cent of the combined freelancer and paid workforce of distribution firms participating in the survey.

Representation of women among distribution firms' freelancers is fairly high (Table 5.6).

- One-third of firms (32.4 per cent) hired at least one female contractor, 11.8 per cent hired at least one contractor in a visible minority group, and none hired in the other two equity groups (data column 1 of table).
- Female contractors represent, on average, one-half of freelancers (50.0 per cent), and visible minority groups 14.6 per cent, while Aboriginal persons and persons are not represented (column 2).
 - Compared to the paid workforce (exclusive of contractors), female representation among contractors is lower (50.0 vs. 60.9 per cent as in Table 5.3), while visible minority group representation is higher (14.6 per cent compared to 6.8 per cent).

Table 5.6: Independent Freelancers/Contractors and Equity Groups, Employer Identified

Equity Group	Percentage of Firms Hiring At Least One in Group (%)	Mean Equity Group Representation among Freelancers* (%)
Female	32.4	50.0
Disability	0.0	0.0
Aboriginal	0.0	0.0
Visible minority	11.8	14.6

* Per-company mean of: (1) number of freelancers in equity group as a percentage of (2) the number of all freelancers and paid employees (equity group representation among freelancers). Each computation is based on a different number of observations, where number in **both** the numerator (in equity group) and denominator (total number of contractors) exist, for that particular equity group. Results should be treated with caution as to reliability, as they are based on a small number of observations (n=8-9).

Source: WIFT-T Survey of Film and Television Distribution Companies, 2003/2004.

5.5 SKILLS AND TRAINING ISSUES

Skills and training issues are a second major focus of this study. Addressed in this section are difficulties that film and television distribution companies are experiencing in filling skill needs, suggested reasons for and solutions to skill shortages, and perceived quality of existing training.

a) Skill Shortages in Occupations

Substantial proportions of distribution firms are experiencing difficulty in filling their skill needs in most job categories, with a majority experiencing shortages in two categories: acquisitions and sales (Table 5.7)⁵⁸.

- A majority of companies reported experiencing at least some difficulty (indicating 3, 4, 5, 6 or 7 on a 7-point scale) in filling their skill needs in acquisitions (74.9 per cent) and in sales (66.7 per cent) (data columns 2 and 3 of the table).
- A substantial minority are experiencing at least some difficulty in filling skill needs in clerical support and marketing (43.9 and 43.8 per cent).
- One-third or less are experiencing shortages in administrative and senior management job categories (35.6 and 29.5 per cent).

⁵⁸ Respondents were asked to assess their difficulty on a 7-point scale, where 1=no difficulty, 4=some difficulty, and 7=significant difficulty. The responses were aggregated into three groups: 1-2 = no/little difficulty, 3-5 = some difficulty, and 6-7=significant difficulty.

Table 5.7: Degree of Difficulty in Filling Needs in Job Categories,* Percentage Distribution

Job Category	No/little Difficulty (1-2)	Some Difficulty (3-5)	Significant Difficulty (6-7)	At Least Some Difficulty (3-7)
Acquisition (n=8)**	25.0	62.4	12.5	74.9
Sales (n=12)	33.3	41.7	25.0	66.7
Clerical support (n=7)**	57.1	43.9	0.0	43.9
Marketing (n=16)	56.3	31.3	12.5	43.8
Administrative (n=14)	64.3	28.5	7.1	35.6
Senior management (n=17)	66.5	17.7	11.8	29.5

* Respondents asked to respond on 7-point scale, where 1=no difficulty and 7=significant difficulty. Computations of distributions exclude those not responding to the question or responding with "don't know".

** Responses should be treated with caution because of small sample size.

Source: WIFT-T Survey of Film and Distribution Companies, 2003/2004.

b) Shortages in Skills Areas (Irrespective of Occupation)

At least one-half of distribution companies is experiencing at least some difficulty in finding people with skills in most areas (Table 5.8).

- One-half or more of distribution companies responding to the question has experienced at least some difficulty (reporting 3, 4, 5, 6, or 7⁵⁹) in finding people with the following skills: knowledge of their industry (47.8 per cent = 23.6 + 24.2); marketing/sales (50.0 per cent = 33.3 + 16.7); generic skills (68.5 per cent = 57.9 + 10.6); and management, financial and legal skills (50.1 per cent = 43.8 + 6.3) (data columns 2 and 3 of table).
- Firms have experienced the least amount of difficulty finding people with computer skills, with two-thirds (68.4 per cent) having experienced no/little difficulty in this area (reporting 1 or 2 on the scale).

Table 5.8: Degree of Difficulty in Filling Needs in Skill Areas,* Percentage Distribution

Skill Area	No/little Difficulty (1-2)	Some Difficulty (3-5)	"Great" Difficulty (6-7)	At Least Some Difficulty (3-7)
Generic** (n=19)	31.6	57.9	10.6	68.5
Knowledge of the industry (n=17)	47.0	23.6	24.2	47.8
Marketing/sales (n=18)	50.0	33.3	16.7	50.0
Management/financial/legal (n=16)	49.9	43.8	6.3	50.1
Computer (n=19)	68.4	31.7	0.0	31.7

* Respondents asked to respond on 7-point scale, where 1=no difficulty and 7=significant difficulty. Computations of distributions exclude those not responding to the question or responding with "don't know".

** For example, communication, teamwork, interpersonal, thinking, and problem-solving skills.

⁵⁹ Respondents asked to respond on 7-point scale, where 1=no difficulty, 4=some difficulty and 7=significant difficulty.

Source: WIFT-T Survey of Film and Television Distribution Companies, 2003/2004.

c) Reasons for and Solutions to Skill Shortages

The top three reasons identified for skill shortages by film and television distribution firms are low salary and benefit levels, lack of youth entering the field, and recent graduates not having the “right” attitude (Table 5.9)⁶⁰.

- The most frequently identified reasons for skill shortages currently being experienced by distribution companies are: salary and benefit levels being too low to attract and retain the “right” people (a rank score of 20 points), young people not entering the field (19 points, with six firms identifying this as the number one reason), and recent graduates not having the “right” attitude (17 points).
- Two other fairly frequently cited reasons are lack of appropriate courses in training and education facilities (12 points) and excessive workload or poor family-work balance (10 points).
- Respondents were much less likely, if at all, to identify other reasons for skill shortages, as indicated in Table 5.9.

Table 5.9: Perceived Reasons for Employers’ Skill Shortages

Reason for Skill Shortage	Number of times ranked as:			Overall Rank Score**
	1 st	2 nd	3 rd	
Salary/benefit levels too low to attract/retain “right” people	3	5	1	20
Young people not entering the field	6	0	1	19
Recent graduates do not have “right” attitude	3	3	2	17
Lack of appropriate courses in training/education facilities	1	3	3	12
Excessive workload; poor work-family balance	2	1	2	10
Poor job security in workplace; frequent layoffs, rapid turnover	0	1	2	4
Insufficient workplace training due to cost	0	0	3	3
Employer/youth lack information on available training courses	0	0	2	2
Work not sufficiently challenging/stimulating	0	1	0	2
Insufficient workplace training due to fear of poaching***	0	0	0	0
Skills of existing workers out-of-date	0	0	0	0
Rapid growth in demand for industry products/services	0	0	0	0
Rapid growth/spread of technology	0	0	0	0
Rapid growth in the number of firms in the industry	0	0	0	0

* Respondents were asked to rank a list of potential factors first, second, and third in terms of importance as reasons for skill shortages (n=18).

** Computed as sum of “points” awarded as follows: three points for each time the reason was ranked first, two for second, and one for third.

*** “Poaching” in the sense of losing trained workers to other companies.

Source: WIFT-T Survey of Film and Television Distribution Companies, 2003/2004.

⁶⁰ Firms were asked to rank potential factors as the first, second and third most important reasons for the skill shortages experienced (identified in a prior question). A summary rank “score” was computed for each factor as follows: three points for being ranked first, two points for second, and one point for third.

The three solutions that distribution firms are most likely to adopt to address the shortages relate to training: improve quality of workplace training, work with training institutions to improve their training, and provide workplace training to more employees (Table 5.10).

- The solutions distribution firms are most likely to adopt to address skill shortages involve (along with the proportion indicating highly likely: 6 or 7 on a 7-point scale⁶¹): improving quality of workplace training (38.5 per cent), working with training institutions to improve their training (38.5 per cent), providing workplace training to more employees (30.8 per cent).
- It is interesting to note that distribution firms are as likely to hire more freelancers/contract workers to solve the skill shortages (30.8 per cent) as they are to ask existing employees to work overtime (30.8 per cent).
- Other solutions distribution companies might adopt include: increasing salaries/benefits to attract or retain qualified workers (23.1 per cent); hiring increased number of recent graduates (23.1 per cent); and recruiting more aggressively (23.1 per cent).
- Courses of action that distribution firms are *not* likely to take to address skill shortages are to reduce workload, make do with less qualified workers, lobby government, and produce less.

Table 5.10: Likelihood of Adopting Certain Solutions to Skill Shortages,* Percentage Distribution

Solution	Not Likely (1-2)	Somewhat Likely (3-5)	Highly Likely (6-7)
Improve the quality of the training you provide	15.4	56.2	38.5
Work with training institutions to design/offer needed training programs/courses/curricula	23.1	46.2	38.5
Provide workplace training to more employees	23.1	46.2	30.8
Hire more freelancers/contract workers; out-source; contract-out	38.5	30.8	30.8
Have existing employees work overtime	38.5	30.8	30.8
Increase salaries/benefits to retain/attract qualified workers	15.4	61.6	23.1
Hire increased numbers of recent graduates	23.1	53.9	23.1
Recruit more aggressively	30.8	46.2	23.1
Reduce workload to retain/attract qualified workers	46.2	46.2	7.7
Lobby government to put more funds into training institutions	61.5	30.8	7.7
Make do with less qualified workers; reduce skill requirements	61.5	30.8	7.7
Produce less	92.3	7.7	0.0

* Respondents asked to indicate the likelihood that their firm would adopt potential solutions to skill shortages that they identified in prior questions, using a 7-point scale, where 1=not at all likely and 7=extremely likely (n=13).

Source: WIFT-T Survey of Film and Television Distribution Companies, 2003/2004.

⁶¹ Film and television distribution companies were asked to indicate the likelihood their company would adopt a number of potential solutions to the skill shortage problems earlier identified. They were asked to indicate degree of likelihood on a 7-point scale, where 1=not at all likely, 4=somewhat likely, and 7=extremely likely.

d) Perceived Quality of Training

Choosing among different sources of training, film and television distribution companies were most likely to say that employer-provided training in the workplace is of the highest quality in terms of meeting the demands of the workplace (Table 5.11).

- Distribution employers are most likely to say employer-provided training is of high quality (reporting 6 or 7 on a 7-point scale)⁶². Over one-third (38.5 per cent) indicated that this training is of high quality, compared to 25.0 per cent or less for other sources. No respondents said this training is low quality.
- They were least likely to say training provided by unions/guilds and educational institutions is of high quality (16.7 per cent for each type of training).

Table 5.11: Perceived Quality of Training from Different Sources*, Percentage Distribution

Source of Training	Low Quality (1-2)	Moderate Quality (3-5)	High Quality (6-7)
Employer in the workplace (n=13)	0.0	61.5	38.5
Private training facilities (n=8)	12.5	62.5	25.0
Unions/guilds (n=6)	33.3	50.0	16.7
Public training/educational institution (n=9)	22.2	55.5	16.7

* Respondents asked to respond on 7-point scale, where 1=extremely low quality and 7=extremely high quality (n=6-12). Computations of distributions exclude those indicating no training was provided by the source or who had no opinion.

Source: WIFT-T Survey of Film and Television Distribution Companies, 2003/2004.

e) Current Skills in Demand

A broad range of skills were reported as being in high demand by the industry, but computer-related skills in general were most frequently identified⁶³.

- High-demand computer-based skills include: database management, use of digital technology, computer animation, special effects animation, Internet marketing, digital marketing, familiarity with new formats (e.g., DVD and HDTV), and website management.
- Non-computer skills in high demand today are: financial analysis, communication, interpersonal, organizational, marketing, complex sales including pre-sale financing and selling from the development stage, and acquisition of not yet produced programs.

⁶² Distribution companies were asked to assess the quality of training provided to workers in film and television distribution by different sources, in terms of meeting the demands of the workplace. They were asked to respond on a 7-point scale, where 1=of extremely poor quality, 4= of moderate quality, and 7=of extremely high quality. Note the results are based on the responses of just 6-12 firms that responded to the questions.

⁶³ Respondents were asked, in an open-ended question, what skills they feel have emerged as being in high demand over the last ten years. Responses were then re-grouped into homogenous categories, of which computer-related skills is one.

f) Future Skills in Demand

A range of skills and occupations were expected to be in high demand over the next five years, with computer-related skills cited most frequently⁶⁴.

- ▶ Examples of high demand computer-based skill areas include: digital technology and distribution skills, distribution software and new format skills, website management, Internet marketing, and high definition television skills.
- ▶ Non-computer based “new” skills include new marketing techniques; international business practices/legalities; and “creative deal-making requiring understanding of financing models, co-production agreements and foreign broadcast environments”.

5.6 SUMMARY OF KEY RESULTS

The highlights of this chapter are the following. Where applicable, in order to show changes over time, comparisons to the late 1980s are presented, based on findings from the 1990 report, “A Statistical Profile of Women in the Canadian Film and Television Industry” (produced by the Foundation for Toronto Women in Film and Video, now WIFT-T).

Film and television distribution companies tend to be small and are concentrated in the Greater Toronto Area. Women represent, on average, about a third of the owners of distribution firms, while visible minority groups represent a fifth. Other equity groups represent negligible proportions.

Women represent 62 per cent of the total paid employment of film and television distribution firms and are over-represented compared to their share of the national labour force. Female participation in distribution firms remains virtually unchanged from 1989. Other equity groups are underrepresented compared with their national labour force shares.

Women and members of visible minority groups tend to be underrepresented in senior management positions and over-represented in sales, administration, and clerical positions, compared to their share of the total workforce of distribution firms. Women are also over-represented in marketing and, to a lesser degree, acquisition. Persons with a disability are unrepresented in all categories except administrative support, while Aboriginal persons are unrepresented in all categories except for marketing.

Women in senior management have, on average, lower salaries than the overall average for this position. Women in administrative jobs also tend to have lower salaries. On the other hand, women in marketing positions are paid more than the average salary for that job category.

⁶⁴ Respondents were asked, in an open-ended question, what skills they expected will emerge as being in high demand in the next five to ten years. Responses were then re-grouped into homogenous categories, of which computer-related skills is one.

Substantial proportions of distribution firms are experiencing difficulty in filling their skill needs in most job categories, with a majority experiencing shortages in two categories: acquisitions and sales. Similarly, at least one-half of distribution companies are experiencing at least some difficulty finding people with skills in most skill areas, regardless of job category. In particular, companies are experiencing trouble with finding people who have knowledge of the industry, marketing/sales skills, generic skills, and management/financial/legal skills.

Respondents most frequently attributed skill shortages to low salary and benefit levels, lack of youth entering the field, and recent graduates not having the “right” attitude. To resolve their skill shortages, firms are most likely to adopt one of three approaches: improving the quality of workplace training, working with training institutions to improve their training, and providing workplace training to more employees. Among various sources of training, distribution companies were, not surprisingly, most likely to say that employer-provided training best meets the demands of the workplace, in terms of meeting the demands of the workplace.

6. TELEVISION BROADCASTING

In this chapter, information is presented on equity group representation, skill and salary distribution in the broadcasting industry. Results are presented separately for private and public television broadcasters. The results presented are based on data obtained mainly from the Workplace Equity unit of Human Resources and Skills Development (HRSD) Canada collected by the Department under the *Employment Equity Act* for the year 2001⁶⁵. These data were supplemented by data provided by the Canadian Broadcasting Corporation/Radio-Canada (CBC/Radio-Canada), the Canadian Radio-television and Telecommunications Commission (CRTC), and the 2001 Census of Canada.

Among the challenges and trends faced by the television broadcasting industry, similar to those faced by other screen-based industries, are the following: technological developments such as the move to digital broadcasting, interactive television, new broadcasting formats such as high-definition, and satellite broadcasting; massive media consolidation; and continuing demand for Canadian productions arising out of the regulatory framework regarding Canadian content.

Canada's broadcasters, both public and private, have identified diversity on our screens and in their employment ranks as a key competitive strategy and an important cultural objective. The increase in women's representation in Canadian broadcast employment since the first WIFT-T study in 1990 — A Statistical Profile of Women in the Canadian Film and Television Industry — can be attributed in part to the efforts of the industry to increase women's participation in the system at all levels.

Today, individual broadcasters administer a range of grants and investment programs, training and equity strategies, and they support industry organizations, festivals and activities, furthering cultural diversity. In addition, in 2002, at the direction of the CRTC, the Canadian Association of Broadcasters (CAB) established the Task Force for Cultural Diversity on Television, comprised of five industry and four non-industry representatives. The Task Force's mandate is to develop and oversee a research strategy that will create a realistic and sound set of best practices and other practical initiatives and solutions to ensure the fair and accurate reflection and representation of Canada's cultural, ethnic, racial and Aboriginal communities on Canadian television. The Task Force anticipates that this work will be completed in 2004.

⁶⁵ Employers covered under the Act (referred to in this chapter as "all firms under the Act") must annually submit equity group representation data to HRSD (CANADA). Covered under the Act are all federally regulated employers with 100 or more employees, including organizations in industries such as banking, communications, and international and inter-provincial transportation. *The data submitted to the department are based on information collected by employers in surveys of employees in which the latter self-identify themselves as a member of one equity group or another.* In 2001, there were approximately 394 such employers (private-sector employers and Crown corporations), representing approximately 612,344 employees. Also covered are all federal departments, representing approximately 155,360 employees. Note that as this report was being written, Employment Equity data for 2002 became available. Comparison between 2001 and 2002 on selected variables suggests that there has been little change between the two years. See HRSD (CANADA) website: <http://www.hrdc.gc.ca/en/gateways/topics/wzp-gxr.shtml>

A. Private Broadcasters

In 2003, total revenues generated by the Canadian private conventional off-air television sector and pay/specialty broadcasting sector amounted to about \$4.0 billion⁶⁶, evenly split between the two groups of broadcasters. Since 1999, conventional broadcasters' annual revenues have varied little, rising from \$1.9 billion in 1999 and \$2.1 billion in 2003, but for pay/specialty channels, revenues have nearly doubled, from \$1.0 to \$1.9 billion. Employment in 2003 was 7,850 at conventional broadcasters and 4,832 at pay/specialty services.

The results for this section are presented for two groups of broadcasters. The first group is composed of smaller private broadcasters (with fewer than 100 employees), whose results are based on data submitted to the CRTC⁶⁷. The second group includes the 36 large private sector television broadcasters (with 100 or more employees), whose results are based on publicly available data for 2001 obtained from the Workplace Equity unit of Human Resources and Skills Development Canada (HRSD (CANADA))⁶⁸. In 2001, the total number of people employed by these large broadcasters was 12,511, including those involved in radio and television. Included in the group of broadcasters are those involved in both radio and television, as well as those involved just in television. It was not possible to separate radio from television activities in the results presented.

6.1 EMPLOYMENT PROFILE – PRIVATE BROADCASTERS

a) Small Broadcasters

Equity group representation, particularly for women, is lower in smaller private broadcasters than it is in larger ones (first two rows of Table 6.1).

- ▶ Women represent only 11.2 per cent of small broadcasters' employment, compared to 40.6 per cent in larger broadcasters (rows 1 and 2 of the table).
- ▶ Equity group representation is also lower in smaller broadcasters than larger private ones for persons in a visible minority group (1.7 versus 5.6 per cent) and for persons with a disability (0.3 versus 1.6 per cent), but about the same for Aboriginal persons (0.7 and 0.8 per cent).

⁶⁶ CRTC source: <http://www.crtc.gc.ca/eng/publications/reports/BrAnalysis/tv2003/tv2003.pdf> and <http://www.crtc.gc.ca/eng/publications/reports/BrAnalysis/p&sp2003/p&sp2003.pdf>. The total number of reporting units for these data was 205.

⁶⁷ The data provided by the CRTC were for equity group representation only. Results based on the CRTC data, which in turn are based on annual returns from licensees, should be treated with caution because of concerns over the quality of the data, owing to their not being audited. Moreover, the CRTC data cover television, radio, and cable broadcasters as well as television broadcasters; it was impossible for that organization to separate television broadcasters from the rest.

⁶⁸ Note again that some of the television broadcasters may also be involved in radio broadcasting or production and that very short-term employees (working less than 13 weeks in the calendar year) are excluded from the results.

b) Large Broadcasters

Equity group representation in larger broadcasters for all groups⁶⁹, except for persons in a visible minority group, is fairly similar to that of all broadcasters⁷⁰ and all communications firms, but lower than that of all firms submitting data under the *Employment Equity Act*.

- Women represent 40.6 per cent of employees at Canada's large broadcasters, less than their share of the total workforce (47.3 per cent). This is at par with television broadcasting companies and all communications companies (rows 2 and 3), but somewhat lower than all firms submitting data under the Act and the total workforce (rows 4 and 5).
- Persons with a disability represent less than 1.6 per cent of employment in private broadcasters, 2.3 per cent in all communications firms, and 5.3 in the national workforce.
- Members of visible minority groups represent 5.6 per cent of the private broadcasters' workforce, compared to 10.8 per cent in all communications firms and 12.6 per cent of the national workforce.

**Table 6.1: Equity Group Representation (%)*:
Private Sector Television Broadcasters Versus Various Reference Groups, 2001**

Workforces of:	Female	Disability	Aboriginal	Visible Minority
1. <i>Small private broadcasters</i> **	11.2	0.3	0.7	1.7
2. <i>Large private TV broadcasters</i>	40.6	1.6	0.8	5.6
3. <i>All large broadcasters</i> ***	40.4	1.6	1.1	7.0
4. <i>All communications firms</i>	41.3	2.3	1.4	10.8
5. <i>All firms under Employment Equity Act</i>	44.9	2.3	1.6	11.7
6. <i>National workforce</i> ****	47.3	5.3***	2.6	12.6

* Total employment in equity group as a percentage of total employment in the particular group of firms.

** Owing to concerns over data quality (CRTC), the figures represent the average over the 2000-2003 period.

*** Including television, radio, cable, satellite, and Internet public and private broadcasters.

**** Based on unpublished Census 2001 data obtained from Statistics Canada.

Source: Computations based on (1) unaudited, unpublished data received from the CRTC and, (2) publicly available *Employment Equity* data, obtained from HRSD (CANADA).

(i) Job Type

Large private sector television broadcasters make greater use of short-term workers than all firms submitting equity data under the Act, but make less use of part-time employment arrangements.

⁶⁹ Employment Equity data were obtained from HRSD (CANADA) for 36 broadcasters that were exclusively or largely television broadcasters.

⁷⁰ Include all public and private television, radio, cable, satellite and Internet broadcasters that submit data under the *Employment Equity Act*.

- The 7.9 per cent of employment in large private broadcasters' that is short-term (first data column of Table 6.2) is much higher than the 1.6 per cent in all firms under the Act (not shown).
- Conversely, 9.3 per cent of private broadcasters' employment is part-time permanent (Table 6.2), which is much lower than the 15.3 per cent incidence in all firms under the Act (again not shown).

Female employees are somewhat over-represented in part-time and short-term positions compared to their overall share of broadcasting employment (data column 3 of Table 6.2).

- 44.1 per cent of part-time employees and 46.9 per cent of short-term employees are women, compared to their 40.6 per cent share of total employment and 39.6 per cent share of permanent full-time employment.
- This is not true of employees in other equity groups which exhibit few differences across types of jobs.

Table 6.2: Equity Group Representation (%)*, by Type of Job: Large Private Sector Television Broadcasters, 2001

Type of Job	Percentage Distribution	Employment Level	Equity Group Representation			
			Female	Aboriginal	Disability	Visible Minority
Permanent full-time	82.8	10,354	39.6	0.8	1.6	5.8
Permanent part-time	9.3	1,165	44.1	1.0	1.5	5.5
Short-term	7.9	992	46.9	0.5	0.7	3.7
Total	100.0	12,511	40.6	0.8	1.6	5.6

* Total employment in equity group as a percentage of total employment in type of job, across 36 firms.

Source: Computations based on publicly available Employment Equity data, obtained from HRSD (CANADA).

(ii) Skill Level

Compared to all firms submitting data under the *Employment Equity Act* and to the national workforce, large private broadcasters have greater concentrations of employees in higher-skilled positions (Table 6.3).

- Using the occupational code to indicate level of education/skill required⁷¹, employees in high-skilled occupations represent one-third (33.6 per cent) of large broadcaster employees, compared to less than one-quarter of the workforces of all firms submitting data under the Act as well as the national workforce (23.7 and 26.4 per cent, columns 2 and 3 of the table).

⁷¹ The occupational groups for which the data are based are taken from the National Occupational Classification (NOC). Each of the NOC occupational groups has a skill level assigned to it that identifies the level of education required of occupants, with university requirement identified as higher-skilled; college requirement, medium-skilled; and other educational/training requirement, lower-skilled. See Appendix D for details on this grouping.

- The proportion of large broadcaster employees in the lower-skilled jobs (17.4 per cent) is also much lower than all firms and the national workforce (48.8 and 45.3 per cent, respectively).

**Table 6.3: Broad Skill/Occupational Mix*:
Large Private Television Broadcasters versus Reference Groups, 2001**

Skill/Occupational Group	Large Private Broadcasters	All Firms under Employment Equity Act	National Workforce
Higher-Skilled	33.6	23.7	26.4
Medium-Skilled	49.0	27.7	28.4
Lower-Skilled	17.4	48.8	45.3
Total	100.0	100.0	100.0

* Percentage distribution by broad occupational group indicative of skill level.

Source: Computations based on publicly available Employment Equity data, obtained from HRSD (CANADA), plus Census 2001 data obtained from Statistics Canada.

(iii) Occupation/Job Category

Employment in large private sector television broadcasters is concentrated in two occupational groups: professionals and semi-professionals/technicians (first data column of Table 6.4).

- Together, professionals and semi-professionals/technicians accounted for about two-thirds of employment in these firms in 2001 (67.4 per cent = 23.8 + 43.6 per cent); together accounting for almost 8,500 jobs (2,978 + 5,460) out of the total employment of 12,511 in these firms.
 - Examples of professional positions common to the broadcasting industry are: editors, including news editors; and journalists, including news writers and reporters⁷².
 - Examples of semi-professional/technical positions common to the broadcasting industry are: film/video camera operators; broadcast technicians; audio/video recording technicians; and announcers, including newscasters.
- Other occupations of note are: clerical workers (1,236 employees, representing 9.9 per cent of total employment at large private broadcasters), middle and other managers (990 employees, 7.9 per cent), and intermediate sales and service workers (843 employees, 6.7 per cent).

Women are underrepresented in higher-skilled senior management positions and medium-skilled semi-professional positions, and technicians (data column 2 of Table 6.4⁷³). Significant differences are highlighted in the table.

⁷² Examples taken from the National Occupational Classification system, available on the Statistics Canada website <http://www23.hrdc-drhc.gc.ca/2001/e/groups/5.shtml>. See Appendix D for a list of these occupations.

⁷³ In the table, findings of interest (i.e., where there are large differences from the equity group's proportion of total employment) are highlighted/shaded and commented on in the text for occupational categories for which there are at least 50 employees.

- Compared to their proportion of total employment in large broadcasters (40.6 per cent, last row of Table 6.4), women are significantly underrepresented in senior management positions (28.0 per cent), semi-professional and technician positions (28.7 per cent), and certain medium and lower-skilled positions strongly associated with men, such as skilled crafts and trades workers (7.3 per cent).
 - However, not shown in the table is the fact that women in senior management and semi-professional/technician positions are better represented in TV broadcasting companies than they are in the workforces of all firms submitting workplace equity data under the Act (19.6 versus 16.9 per cent).
- Women are significantly over-represented in traditionally female-dominated clerical jobs, where they represent at least 70 per cent of the employment (compared to their 41.7 per cent share overall): administrative/senior clerical positions (91.0 per cent), clerical personnel (84.7 per cent), and clerical/service supervisory positions (70.5 per cent).
- For other equity groups, the only noteworthy differences from the group's share of total employment are that persons in visible minority groups (last column of Table 6.4) are over-represented in clerical and sales supervisors (9.0 per cent, versus their 5.6 per cent share of total employment in private broadcasters), administrative and senior clerical workers (9.2 per cent), and other sales and service workers (8.8 per cent), compared to this group's share of total employment among television broadcasters (5.6 per cent).

6.2 SALARIES – LARGE PRIVATE BROADCASTERS

Permanent full-time employees of large private sector broadcasters are paid slightly better than all firms under the jurisdiction of the *Employment Equity Act* (Table 6.5).

- The proportion earning \$85,000 and more a year is somewhat higher in private broadcasters than all firms (11.3 versus 8.5 per cent).
- About one-third (30.9 per cent = 1.4 + 29.5) of employees in large private broadcasters earn under \$40,000 a year, compared to 38.0 per cent of employees in all firms under the Act.

**Table 6.4: Equity Group Representation (%)*, by Occupational Group:
Large Private Sector Television Broadcasters, 2001**

Occupational Group	Total Employment	Equity Group Representation			
		Female	Disability	Aboriginal	Visible Minority
Higher-Skilled	4,200				
Senior Managers	232	28.0	2.2	0.0	2.2
Middle and other Managers	990	34.9	1.8	1.0	4.9
Professionals	2,978	39.3	1.2	0.7	6.9
Medium-Skilled	6,132				
Semi-Professionals and Technicians	5,460	28.7	1.7	0.8	4.7
Supervisors - Clerical and Service	122	70.5	0.0	0.0	9.0
Supervisors - Crafts and Trades**	8	0.0	0.0	0.0	12.5
Administrative & Senior Clerical Workers	423	91.0	1.9	0.2	9.2
Skilled Sales and Service Workers	37	40.5	0.0	2.7	5.4
Skilled Crafts and Trades Workers	82	7.3	2.4	0.0	7.3
Lower-Skilled	2,179				
Clerical Workers	1,236	84.7	1.8	1.2	7.9
Intermediate Sales and Service Workers	843	44.4	1.4	0.2	3.3
Semi-Skilled Manual Workers**	9	11.1	0.0	0.0	0.0
Other Sales and Service Workers	68	14.7	1.5	1.5	8.8
Other Manual Workers**	23	0.0	0.0	4.3	4.3
Total	12,511	40.6	1.6	0.8	5.6

* Total employment in equity group in occupation as a percentage of total employment in occupation, across 36 firms.

** Employment in these job categories is less than 25.

Source: Computations based on publicly available Employment Equity data, obtained from HRSD (CANADA).

**Table 6.5: Salary Distribution, Permanent Full-Time Workforce,
Large Private Sector Television Broadcasters versus All Firms, 2001**

Salary Bracket (Annual)	Tot. Permanent Full-Time Employment – Private Broadcasters	Percentage Distribution of Workforce of:	
		Large Private Broadcasters	All Firms under Employment Equity Act
<\$20,000	143	1.4	1.6
\$20,000-\$39,999	3,051	29.5	36.4
\$40,000-\$49,999	2,490	24.0	23.7
\$50,000-\$59,999	1,853	17.9	14.0
\$60,000-\$84,999	1,642	15.9	15.8
≥\$85,000	1,175	11.3	8.5
Total	10,354	100.0	100.0

Source: Computations based on publicly available Employment Equity data, obtained from HRSD (CANADA).

Women are over-represented in lower income brackets and underrepresented in higher income brackets (Table 6.6)

- Over one-half of the occupants in the two lowest income brackets are women (52.4 and 54.6 per cent, column 1 of table), whereas they represent 39.6 per cent of all permanent full-time employment (last row of table).
- In contrast, 37.5 per cent or less of those in the top three income brackets are women (26.0-37.5 per cent).
- No patterns of over- or under-representation are apparent for other equity groups across salary brackets, apart from visible minority groups being somewhat over-represented in the \$20,000 to \$39,999 bracket (7.1 per cent), compared to their 5.8 per cent share of all permanent full-time employment (last row of table).

Table 6.6: Equity Group Representation (%)*, by Salary Level: Permanent Full-Time Workforce, Large Private Sector Television Broadcasters, 2001

Salary Bracket (Annual)	Tot. Permanent Full-Time Employment	Equity Group Representation			
		Female	Disability	Aboriginal	Visible Minority
<\$20,000	143	52.4	0.7	4.2	2.1
\$20,000-\$39,999	3,051	54.6	2.0	1.0	7.1
\$40,000-\$49,999	2,490	40.5	1.8	0.7	5.9
\$50,000-\$59,999	1,853	26.0	1.3	0.7	5.0
\$60,000-\$84,999	1,642	37.5	2.5	2.6	3.8
≥\$85,000	1,175	28.7	1.4	0.3	3.6
Total	10,354	39.6	1.6	0.8	5.8

* Total permanent full-time employment in equity group in salary bracket as a percentage of total in bracket, across 36 firms.
 Source: Computations based on publicly available Employment Equity data, obtained from HRSD (CANADA).

B. Public Broadcaster – CBC/Radio-Canada

CBC/Radio-Canada is Canada's national public broadcaster. CBC/Radio-Canada's mandate, as set out in the 1991 *Broadcasting Act*, is to "provide radio and television services incorporating a wide range of programming that informs, enlightens and entertains."⁷⁴ In 2003, CBC/Radio-Canada revenues amounted to \$370,870, almost all of which came from television (\$352,448)⁷⁵. The corporation received \$987,000 in federal government funds in 2002⁷⁶. Most of CBC/Radio-Canada's revenues (exclusive of government funds) are generated by advertising and program sales. In 2001, according to HRSD

⁷⁴ CBC source: http://cbc.radio-canada.ca/htmen/fast_facts.htm

⁷⁵ CRTC source: <http://www.crtc.gc.ca/eng/publications/reports/BrAnalysis/tv2003/tv2003.pdf>

⁷⁶ CBC source: CBC Annual Report, 2002/2003: http://www.cbc.radio-canada.ca/htmen/annual_report/2002-2003/pdf/CBC_2002-2003_annual_report.pdf

(CANADA) Employment Equity data, the total number of people employed by CBC/Radio-Canada was 8,518, exclusive of very short-term employees (less than 13 weeks).

In 2004, CBC/Radio-Canada engaged in a major research and planning process to devise a strategy that will enhance CBC/Radio-Canada's reflection of Canada's diversity both in its programming and within its workforce. This strategy is expected to be implemented in CBC/Radio-Canada's 2004/05 season.

It should be noted that the results presented in this chapter for the CBC/Radio Canada cover all employees of the Corporation, regardless of whether they are involved in television or radio broadcasting, in the English or French service, and the corporate offices, as information distinguishing radio from television employment was not available (as was the case for large broadcasters involved in both television and radio broadcasting whose data were presented in the first part of the chapter).

6.3 EMPLOYMENT PROFILE – CBC/RADIO-CANADA

Generally speaking, the proportion of the workforce represented by equity groups is about the same at CBC/Radio-Canada as it is in other firms submitting data under the *Employment Equity Act*⁷⁷ and somewhat lower than in the national workforce⁷⁸.

- ▶ Women represent about 43.2 per cent of employees in the total CBC/Radio-Canada paid workforce (row 1 of Table 6.7). This is somewhat higher than it is in the paid workforces of private sector broadcasters and all television broadcasting companies⁷⁹ (40.6 and 40.4 per cent, rows 2 and 3), but somewhat lower than all firms submitting data under the *Employment Equity Act* and the total national workforce (44.9 and 47.3 per cent, rows 4 and 5).
- ▶ As for other equity groups, members of visible minority groups represent 4.8 per cent of the CBC/Radio-Canada workforce, and persons with a disability and Aboriginal persons each represent under two per cent of the workforce.
 - Data received from CBC/Radio-Canada (too late for inclusion in this report) indicate that visible minority representation at CBC English Television in 2001 was considerably higher at 7.9 per cent, than the overall corporation.
- ▶ Representation of Aboriginal and disability equity groups is a little higher at CBC/Radio-Canada than it is for private broadcasters (row 2) and similar to all telecommunications broadcasters and all firms under the Act (rows 3 and 4), but lower than the total national workforce, particularly for persons with a disability (5.3 per cent, row 5).

⁷⁷ All employers covered under the Act are referred to in this chapter as "all firms under the Act". See the beginning of this chapter for more details on employment equity data.

⁷⁸ Based on Statistics Canada data from the 2001 Census.

⁷⁹ These include all public and private television, radio, cable, satellite and Internet broadcasters that submitted data under the *Employment Equity Act*.

- Representation of visible minority groups is lower at CBC/Radio-Canada than all reference groups, particularly in comparison to the total national workforce (4.8 versus 12.6 per cent).

**Table 6.7: Equity Group Workforce Representation (%)*:
CBC/Radio-Canada versus Various Reference Groups, 2001**

Workforce of:	Female	Disability	Aboriginal	Visible Minority
1. CBC/Radio-Canada	43.2	1.9	1.3	4.8
2. Large private television broadcasting firms	40.6	1.6	0.8	5.6
3. All telecommunications broadcasting firms**	40.4	1.6	1.1	7.0
4. All firms under <i>Employment Equity Act</i>	44.9	2.3	1.6	11.7
5. Total national workforce***	47.3	5.3	2.6	12.6

* Total employment in equity group as a percentage of total employment in the particular group of firms.

** Including television, radio, cable, satellite, and Internet public and private broadcasters.

*** Based on unpublished data provided by Statistics Canada.

Source: Computations based on publicly available *Employment Equity data*, obtained from HRSD (CANADA), including Census 2001 data.

a) Job Type

CBC/Radio-Canada relies on short-term employment arrangements to a much greater degree than private sector broadcasters and all firms complying with the *Employment Equity Act*, but it is also *less* likely to rely on part-time employment arrangements (Table 6.8).

- One-fifth (20.3 per cent) of CBC/Radio-Canada total employment is short-term, versus only 7.9 per cent of private sector broadcasters' employment and 1.6 per cent of employment in all firms under the Act.
- However, CBC/Radio-Canada relies to a lesser degree on permanent part-time jobs than private broadcasters and, particularly, all firms under the Act (2.0 per cent versus 9.3 and 15.3 per cent, respectively).
- Over three-quarters of CBC/Radio-Canada jobs (77.7 per cent) are permanent full-time jobs, which is somewhat lower than the proportion in large private television broadcasting companies and all firms submitting equity data to HRSD (CANADA) (82.8 and 83.1 per cent, respectively).

**Table 6.8: Distribution of Employment by Job Type:
CBC/Radio-Canada Television and Radio Broadcasting versus Various Reference
Groups, 2001**

Type of Job	CBC/Radio-Canada Employment	Percentage Distribution of Workforce of:		
		CBC/Radio-Canada	Private Broadcasters	All Firms under Employment Equity Act
Permanent full-time	6,622	77.7	82.8	83.1
Permanent part-time	168	2.0	9.3	15.3
Short-term	1,728	20.3	7.9	1.6
Total CBC/Radio-Canada	8,518	100.0	100.0	100.0

Source: Computations based on publicly available Employment Equity data, obtained from HRSD (CANADA).

Female employees at CBC/Radio-Canada are over-represented in non-standard jobs (part-time and short-term positions) compared to their overall share of CBC/Radio-Canada employment (Table 6.9):

- Over four in five part-time permanent employees (82.7 per cent, row 2 of the table) and over one-half of short-term employees (53.6 per cent, row 3) are women, compared to their 43.2 per cent share of total employment (last row).
- For the other equity groups, there is little difference in representation between job types, apart from over-representation of Aboriginal persons in part-time jobs (3.6 versus 1.3 per cent).

**Table 6.9: Equity Group Workforce Representation (%)*, by Type of Job:
CBC/Radio-Canada Television and Radio Broadcasting, 2001**

Type of Job	Female	Disability	Aboriginal	Visible Minority
Permanent full-time	39.5	2.3	1.3	4.6
Permanent part-time	82.7	1.2	3.6	3.6
Short-term	53.6	0.8	0.8	5.4
Total CBC/Radio-Canada	43.2	1.9	1.3	4.8

* Total employment in equity group in type of job as a percentage of total employment in type of job.

Source: Computations based on publicly available Employment Equity data, obtained from HRSD (CANADA).

b) Skill/Occupation

The CBC/Radio-Canada workforce is highly skilled. There is a greater concentration of CBC/Radio-Canada employees in higher-skilled positions⁸⁰ than employees in private sector broadcasters, all firms under the *Employment Equity Act*, and the total workforce (Table 6.10).

⁸⁰ As with private broadcasters, occupations are re-grouped according to the level of education required for each (based on the NOC): occupations requiring university education or equivalent are considered higher-skilled; requiring a college or equivalent, medium-skilled; and requiring less than college, lower-skilled. Managerial occupations do not have an educational requirement

- Almost one-half of CBC/Radio-Canada employment (48.4 per cent, column 1 of table) is in higher-skilled occupations, compared to about one-third of positions in private sector broadcasters (33.6 per cent, column 2), and one-quarter of the workforce of all firms under the Act and the nation at large (23.7 and 22.6 per cent, columns 3 and 4).
 - The greater proportion in the higher-skilled job categories at CBC/Radio-Canada compared to private broadcasters is due to the greater proportion of professionals at CBC/Radio-Canada (39.8 versus 23.8 per cent) (see Table 6.11).
- There is a lower proportion of lower-skilled jobs at CBC/Radio-Canada (12.5 per cent, column 1 of Table 6.10) than in private broadcasters (17.4 per cent, column 2) and, particularly, all firms under the Act and the national workforce (48.8 and 49.1 per cent, respectively).
- There is a lower proportion in medium-skilled jobs at CBC/Radio-Canada than in private broadcasters (39.1 versus 49.0 per cent) but a higher proportion than in all firms under the Act and the national workforce (27.7 and 28.6 per cent) (Table 6.10).
 - The higher share in the medium-skilled category in private broadcasters compared to CBC/Radio-Canada can be attributed to a greater proportion of semi-professionals in the former (43.6 versus 35.7 per cent) (Table 6.11).

Table 6.10: Broad Skill/Occupational Mix*: CBC/Radio-Canada Television versus Reference Groups, 2001

Skill/Occupational Group	CBC/Radio-Canada	Large Private Broadcasters	All Firms under Employment Equity Act	National Workforce
High-Skilled	48.4	33.6	23.7	26.4
Medium-Skilled	39.1	49.0	27.7	28.4
Lower-Skilled	12.5	17.4	48.8	45.3
Total	100.0	100.0	100.0	100.0

* Percentage distribution by broad occupational group indicative of skill level.

Source: Computations based on publicly available Employment Equity data, obtained from HRSD (CANADA), and Census 2001 data obtained from Statistics Canada.

Looking at detailed occupations, CBC/Radio-Canada employment is concentrated in two occupational groups: professionals and semi-professionals/technicians (Table 6.11⁸¹). See Appendix D for the detailed occupations that make up these groups.

associated with them, but are considered high-skilled for purposes of this analysis. See Appendix C for details on this grouping.

⁸¹ Results based on Employment Equity data were obtained from HRSD (CANADA), for the CBC as a whole including radio broadcasting. Results were also provided by the CBC for women in occupational groups at CBC English television and they indicate essentially the same pattern for women as the results presented here. The occupational groups for which the data are provided are called the Employment Equity Occupational Groups, which are used by HRSD (CANADA) to capture employment equity data from firms (as described above) and are based on the National Occupational Classification (NOC).

- ▶ Together, these occupations accounted for almost three-quarters of the employment of CBC/Radio-Canada in 2001 (74.5 per cent = 39.8 + 35.7), each with over 3,000 jobs at the Corporation (3,389 and 3,044, respectively).
- ▶ Other occupations of note at CBC/Radio-Canada include: clerical workers (873 employees, representing 10.2 per cent of total employment at CBC/Radio-Canada) and middle and other managers (713 employees, 8.4 per cent) (Table 6.11).

Table 6.11: Detailed Occupational Mix*: CBC/Radio-Canada Television and Radio Broadcasters versus Private Television Broadcasters, 2001

Occupational Group	CBC/Radio-Canada Employment	Percentage Distribution of Workforce of:	
		CBC/Radio-Canada	Private Broadcasters
High-Skilled	4,122		
Senior Managers	20	0.2	1.9
Middle and other Managers	713	8.4	7.9
Professionals	3,389	39.8	23.8
Medium-Skilled	3,332		
Semi-Professionals and Technicians	3,044	35.7	43.6
Supervisors – Clerical and Service	22	0.3	1.0
Supervisors – Crafts and Trades	0	0.0	0.1
Administrative & Senior Clerical Workers	212	2.5	3.4
Skilled Sales and Service Workers	17	0.2	0.3
Skilled Crafts and Trades Workers	37	0.4	0.7
Lower-Skilled	1,064		
Clerical Workers	873	10.2	9.9
Intermediate Sales and Service Workers	171	2.0	6.7
Semi-Skilled Manual Workers	17	0.2	0.1
Other Sales and Service Workers	3	0.0	0.5
Other Manual Workers	0	0.0	0.2
Total	8,518	100.0	100.0

* Percentage distribution by occupational group.

Source: Computations based on publicly available Employment Equity data, obtained from HRSD (CANADA).

Women are over-represented among higher-skilled professionals, compared to their share of total employment at CBC/Radio-Canada, and significantly underrepresented at CBC/Radio-Canada in the medium-skilled semi-professional/technician occupational categories (Table 6.12)⁸². Significant differences are highlighted in the table. As noted above, these are, by far, the two largest occupations at CBC/Radio-Canada in terms of employment.

- ▶ Women represent 48.4 per cent of professionals, which is greater than their 43.2 per cent share of total employment of CBC/Radio-Canada (last row of the table).

⁸² In Table 6.12, findings of interest (i.e., where there are large differences from the equity group's proportion of total employment) are highlighted/shaded and commented on in the text for occupational categories for which there are at least 25 employees.

- This proportion is higher than women’s share of professionals in all firms under the Act (44.5 per cent, not shown in table).
- Conversely, they represent only one-quarter (23.6 per cent) of medium-skilled semi-professionals.
- Women are also underrepresented among senior managers (15 per cent), but it should be noted that there were only 20 individuals in total classified as senior managers at CBC/Radio-Canada in 2001.
 - Not shown in the table is the fact that women in senior management and semi-professional/technician positions are better represented at CBC/Radio-Canada than they are in the workforces of all firms submitting workplace equity data under the Act (19.6 and 16.9 per cent, respectively).
- Women were over-represented in occupations traditionally held by women: medium-skilled administrative and senior clerical positions (84.9 per cent); lower-skilled clerical workers (77.9 per cent); and lower-skilled intermediate sales and service positions (67.8 per cent).

Table 6.12: Equity Group Representation (%)*, by Occupational Group: CBC/Radio-Canada Television and Radio Broadcasters, 2001

Occupational Group	Female	Disability	Aboriginal	Visible Minority
High-Skilled				
Senior Managers**	15.0	0.0	0.0	0.0
Middle and other Managers	44.2	2.4	1.0	3.2
Professionals	48.4	1.4	1.1	4.3
Medium-Skilled				
Semi-Professionals and Technicians	23.6	2.2	1.5	4.3
Supervisors – Clerical and Service**	45.5	0.0	0.0	9.1
Administrative & Senior Clerical Workers	84.9	1.9	1.4	3.8
Skilled Sales and Service Workers**	58.8	0.0	0.0	0.0
Skilled Crafts and Trades Workers	24.3	5.4	0.0	0.0
Lower-Skilled				
Clerical Workers	77.9	2.5	1.6	9.3
Intermediate Sales and Service Workers	67.8	2.9	0.0	8.2
Semi-Skilled Manual Workers**	5.9	5.9	0.0	0.0
Other Sales and Service Workers**	0.0	0.0	0.0	0.0
Total CBC/Radio-Canada	43.2	1.9	1.3	4.8

* Total employment in equity group in occupation as a percentage of total employment in occupation.

** Equity group representation not commented on for these occupations as they have less than 25 employees in total.

Source: Computations based on publicly available Employment Equity data, obtained from HRSD (CANADA).

- As for the other equity groups, few noteworthy differences can be observed, except that:
 - Persons with a disability are somewhat over-represented in medium-skilled crafts and trades workers (5.4 per cent) and lower-skilled manual workers

(5.9 per cent), compared to their overall share (1.9 per cent, last row of the table).

- Members of a visible minority group are over-represented in two lower-skilled occupations: clerical and intermediate sales and service workers (9.3 and 8.2 per cent), compared to their overall share (4.8 per cent).
- However, these proportions are actually less than this group's share of these job categories in the workforce of all firms under the Act (13.8 and 11.0 per cent, not shown in table).
- On the other hand, this group's share of professionals (4.3 per cent) is less than their share of all professionals under the Act (16.5 per cent, not shown in table).

Data for CBC English television was obtained for occupations associated more directly with broadcasting and is suggestive of function rather than level⁸³. The results indicate that women are over-represented among managers/officers and clerical employees, and underrepresented in technical positions (Table 6.13). Significant differences are highlighted in the table:

- Women represent 57.1 per cent of managers/officers, which is considerably higher than their share of the total CBC/Radio-Canada workforce (43.1 per cent).
- Women represent the highest proportion (79.2 per cent) of employment in clerical functions, an area where women are traditionally dominant insofar as numbers are concerned.
- They represent 12.7 per cent of the employment in technical occupations, where men are generally dominant.
- Women are well represented at CBC English Television in key creative positions. Representation of women among producers, announcers and hosts, journalists and other program presentation, and production, design and staging employees ranges between 41.5 and 48.0 per cent.

Table 6.13: Female Workforce Representation (%)* by Occupation: CBC English Television, 2002

Occupation	Percentage of Workforce
Management – officers	57.1
Producers	47.2
Announcers – hosts	51.9
Journalists and other program presentation	41.5
Production, design and staging	48.0
Technical	12.7
Clerical	79.2
Total CBC English Television	44.9

* Female employees as a percentage of total employment in each occupation.
 Source: Unpublished data obtained from CBC/Radio-Canada in September 2003.

⁸³ Data were obtained directly from the CBC indicating total employment and employment of women in English television.

6.4 EARNINGS – CBC/RADIO-CANADA

CBC/Radio-Canada employees are paid better than the employees of private broadcasters and all firms providing data under the *Employment Equity Act*⁸⁴ (Table 6.14).

- 13.5 per cent of CBC/Radio-Canada full-time permanent workforce earn less than \$40,000 a year, compared to 30.9 per cent of the private sector broadcaster full-time permanent workforce (sum of first two rows of the table).
- In each of the next three brackets, there are greater proportions at CBC/Radio-Canada than in private sector broadcasters.
- However, the proportion earning \$85,000 and more a year at CBC/Radio-Canada is about one-half that of private sector broadcasters (6.4 versus 11.3 per cent).

Table 6.14: Salary Distribution: Permanent Full-Time Workforce: CBC/Radio-Canada Television and Radio Broadcasters versus Reference Groups, 2001

Salary Bracket (Annual)	Tot. Perm. Full-Time Employment -- CBC/Radio-Canada	Percentage Distribution of Permanent Full-Time Workforce of:		
		CBC/Radio-Canada	Large Private Broadcasters	All Firms under <i>Employment Equity Act</i>
<\$20,000	2	0.0	1.4	1.6
\$20,000-\$39,999	897	13.5	29.5	36.4
\$40,000-\$49,999	2,148	32.4	24.0	23.7
\$50,000-\$59,999	1,851	28.0	17.9	14.0
\$60,000-\$84,999	1,297	19.6	15.9	15.8
≥\$85,000	427	6.4	11.3	8.5
Total CBC/Radio-Canada	6,622	100.0	100.0	100.0

Source: Computations based on publicly available *Employment Equity* data, obtained from HRSD (CANADA).

Equity group representation for women and persons in a visible minority group is generally greater in the lower salary brackets than it is in the higher ones (Table 6.15)

- Women's workforce share at CBC/Radio-Canada is 65.9 per cent of the \$20,000-39,999 salary bracket, but is less than 40 per cent for brackets over \$40,000. Representation in three of the four upper brackets is similar to women's share of the overall workforce (39.5 per cent, last row of table).

⁸⁴ Data on salary breakdowns are presented for permanent full-time employees. Including part-time and short-term employees would have distorted the results because such employees would typically be paid lower salaries because of the fewer hours they work.

- Moreover, their representation in the \$20,000-39,999 salary bracket is higher than in this bracket for all firms under the Act (54.1 per cent, not shown in table).
- For persons with a disability and Aboriginal persons, no real pattern is apparent by salary level.
- For persons in a visible minority group, representation declines from 8.1 per cent in the \$20,000-39,999 salary bracket to 3.9 per cent in the next salary bracket and then holds steady at this level across the higher salary brackets.
 - Moreover, these persons' share of the upper two salary brackets (3.8 and 3.5 per cent) is lower than this group's share of these brackets among all firms under the Act (10.2 and 11.5 per cent, not shown).

Table 6.15: Equity Group Representation (%)*, by Salary Level: Permanent Full-Time Workforce, CBC/Radio-Canada Television and Radio Broadcasting, 2001

Salary Bracket (Annual)	Tot. Permanent Full-Time Employment	Equity Group Representation			
		Female	Disability	Aboriginal	Visible Minority
<\$20,000		50.0	0.0	0.0	0.0
\$20,000-\$39,999	2	65.9	2.5	0.7	8.1
\$40,000-\$49,999	897	39.1	2.6	1.3	3.9
\$50,000-\$59,999	2,148	29.8	1.9	0.9	4.5
\$60,000-\$84,999	1,851	37.5	2.5	2.6	3.8
≥\$85,000	1,297	35.4	1.4	0.9	3.5
Total CBC/Radio-Canada	427	39.5	2.3	1.3	4.6

* Number of permanent full-time employees in salary bracket as a percentage of total number of permanent full-time employees.
 Source: Computations based on publicly available Employment Equity data, obtained from HRSD (CANADA).

6.5 SUMMARY OF KEY FINDINGS

The highlights of this chapter are the following. Where applicable, in order to show changes over time, comparisons to the late 1980s are presented, based on findings from the 1990 report, "A Statistical Profile of Women in the Canadian Film and Television Industry" (produced by the Foundation for Toronto Women in Film and Video, now WIFT-T), as well as data provided by the Canadian Broadcasting Corporation/Radio-Canada.

a) Private Broadcasters

Larger private television broadcasters tend to have higher representation of equity groups, particularly women, than smaller private broadcasters. However, all equity groups are underrepresented in both groups of broadcasters compared to the national labour force. The evidence suggests the representation of women has risen somewhat since the late 1980s.

About 17 per cent of jobs in large private television broadcasters are permanent part-time or short-term, which is similar to all firms under the Act. Women are over-represented in such jobs compared to women's share of the total workforce of these firms.

The workforce of large private broadcasters is higher skilled than the workforce of all firms submitting data under the Employment Equity Act. Women are underrepresented in higher-skilled senior management positions and medium-skilled semi-professional and technician positions, compared to all firms under the Act. However, women significantly increased their representation in these positions, from seven per cent in 1988 to 28 per cent in 2001. Similarly, they have increased their share of semi-professionals and technicians from 22 per cent in 1989 to 29 per cent in 2001.

Visible minorities are over-represented among medium- and lower-skilled clerical and sales supervisors, administrative and senior clerical workers, and other sales and service workers.

Permanent full-time employees of large private broadcasters are paid somewhat higher salaries than those in all firms under the Act. Women are over-represented in lower income brackets and underrepresented in higher brackets.

b) Public Broadcaster

Women represented about 43 per cent of the CBC/Radio-Canada workforce in 2001, which is similar to the national labour force. This represents progress since 1988 when the proportion of women at CBC/Radio-Canada was 37 per cent. Representatives of disability and visible minority equity groups are underrepresented, though more recent data from CBC/Radio-Canada suggest that minority group representation at CBC English television is closer to that of the national workforce. The representation of Aboriginal persons and members of visible minority groups held steady since the mid-1990s, while the representation of persons with a disability has declined since mid-1990s.

CBC/Radio-Canada has a highly skilled workforce compared to all firms submitting data under the Employment Equity Act and the national labour force. Women are somewhat over-represented among higher-skilled professionals compared to their share of the CBC/Radio-Canada workforce and compared to professionals in all firms under the Employment Equity Act. Moreover, they have made significant progress since 1989 in terms of representation in this job category (from 34 to 48 per cent). Similarly, women have increased their share of announcers at CBC/Radio-Canada from 40 per cent in 1995 to 52 per cent in 2002.

While women are somewhat underrepresented in senior management ranks at CBC/Radio-Canada compared to their share of employment in this organization, they are better represented than they are among senior managers of all firms under the Employment Equity Act. The same is true regarding middle managers and other managers. Moreover, women have significantly increased their share of middle and other managers, from 19 per cent in 1988 to 44 per cent in 2001.

Persons with a disability are somewhat over-represented among medium-skilled crafts and trades workers, as well as lower-skilled manual workers. Visible minorities are over-represented in lower-skilled clerical and sales/service workers.

CBC/Radio-Canada pays its full-time permanent workforce higher salaries than earned by the workforce of private broadcasters and all firms for which data was available; however, representation of women and visible minorities tends to be greater, on the whole, in the lower salary brackets.

PART II: NEW MEDIA

7. NEW MEDIA EMPLOYERS

As a young industry, new media is difficult to define. There is considerable debate surrounding what constitutes “new media”. Essentially, new media embraces three elements: digital communication, interactivity, and interconnected networks⁸⁵. Other concepts strongly associated with new media are: new artistic forms and outputs; use of computers for development and delivery of products; and other new means of creating, preserving, promoting or distributing cultural products. What also characterizes the new media sector is it is constantly changing. Employment categories, industry models and products created today by the sector may be obsolete within a few years. Therefore, this study must be seen as a freeze frame portrait of the industry at the present time.

New media firms and their employees more often work on a range of commercial and entertainment projects than a single type of project. It is typical for one new media firm to be providing “service” work (e.g., website design) for another and, at the same time, developing its own products for distribution to consumers or other companies. This chapter examines independent new media companies and freelancers that develop new media content, whether it is produced as a service to another company or intended as a product for the marketplace. Excluded are companies whose primary activity is not in new media, even though they may have in-house new media capacity.

New media companies and their employees work in a global industry. Export success and global competitiveness are key to business survival. As well, a great deal of new media high-end work being done in Canada is now being undertaken by branch facilities of foreign-owned companies. This has created a landscape where Canada’s fledging new media industry is characterized largely by, on the one hand, micro and small-medium firms, and, on the other, corporation operations with headquarters in the U.S and Japan.

Until recently, the new media industry experienced rapid growth. During the 1990s, the expansion of the new economy, based on digital information, the Internet and e-commerce, resulted in marked growth for the sector. In 2000-2001, however, the pace of growth slowed as the “dot-com” investment and convergence bubbles both began to subside and, worldwide, key economies began flirting with recession. In the last two years, there has been significant industrial “churn” as many of the small, often under-capitalized businesses that made up one-half of the sector found themselves unable to sustain operations.

Increasingly, components of the new media sector are intersecting with Canada’s conventional film and television industries, but there are important differences. First, in the new media sector, there is little differentiation between the production/marketing of consumer entertainment and of commercial content for corporate clients. Many companies and professionals in new media work in both spheres simultaneously, and, unlike film and television, no attempt will be made to distinguish the production, distribution and

⁸⁵ Mercadex International Inc., “Face of the Future: Literature Review”, for the Cultural Human Resources Council, March, 2002.

broadcasting of new media, as we did in earlier chapters with film and television. Second, freelance new media professionals are not unionised as many such positions are in film and television and are, therefore, in less rigidly defined job categories. Third, almost every established private and public organization has a website and therefore, to some extent, is involved in new media production, but our concern here will be with private sector companies involved primarily in provision of new media products and services.

Most recent estimates of the number of firms in the new media industry indicate there are 1,775 such firms, with the smaller firm segment of the industry growing the fastest⁸⁶. The majority of the firms in the industry are small, with about one-half having fewer than 10 employees, according to one estimate⁸⁷. New media firms are concentrated in Ontario (particularly Toronto), Quebec (mainly Montreal), and British Columbia (particularly Vancouver), though another hub is emerging in Calgary. The industry was said to have generated total revenues of about \$3.5 billion in 2002. Total full-time employment in the industry is estimated to be 17,930⁸⁸.

Results for the new media industry are presented first, from the perspective of new media employers, and then, in the next chapter, from the perspective of new employees and freelancers. The main issues addressed in these chapters are: equity group representation among employees of new media firms, their working owners, and freelancers; the salaries of employees in the industry; and skills issues including skills shortages and workplace training.

7.1 PROFILE OF NEW MEDIA FIRMS

The results presented in this chapter are based on the responses of 261 employers who responded to a combined web- and telephone-based survey of new media employers.

a) Number of Employees

The majority of firms are small.

- Three in five new media firms (59.8 per cent) have fewer than five paid employees (Exhibit 7.1⁸⁹).
- The exhibit indicates similar proportions of about 30 per cent in each of the three smaller size categories (zero⁹⁰, 1-4 and 5-19 employees), and less than 10 per cent in larger firms (20 or more employees).

⁸⁶ Delvinia Interactive Inc., 2003 Interactive Media Producers' Survey.

⁸⁷ Cited in report referenced in Mercadex (2002).

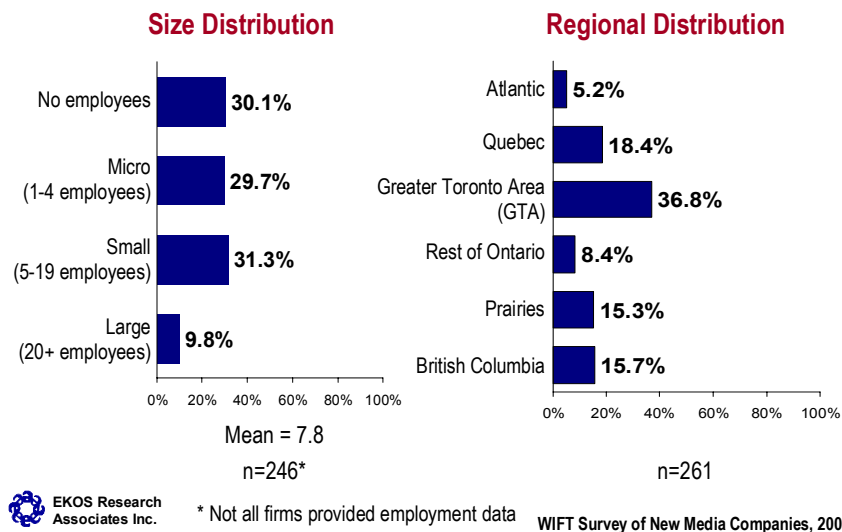
⁸⁸ Delvinia Interactive Inc., 2003 Interactive Media Producers' Survey.

⁸⁹ In the exhibit and in this chapter "firm size" is the number of its paid employees (in receipt of a T4 slip) in July 2003, including working owners.

⁹⁰ Firms with zero employees are those that are one-person shops and firms that rely exclusively on freelancers.

- The mean number of employees is 7.8.

Exhibit 7.1: Size and Regional Distribution of New Media Firms



b) Region

The largest concentration of firms is in the Greater Toronto Area, followed by Quebec, British Columbia and the Prairies (Exhibit 7.1).

- Over one-third of firms (37 per cent) are in the Greater Toronto Area (referred to as GTA or Toronto).
- High proportions are also found in Quebec, British Columbia and the Prairies (15.3 to 18.4 per cent).
- From a regional perspective, the respondent firms are representative of the population of new media firms, apart from modest under-representation of the area of Ontario outside Toronto, and over-representation of BC.
- New media firms tend to be considerably larger in Quebec (mean=16.5 employees) than they are in other regions of the country (mean=6.6 or less) (not shown in exhibit).

c) Revenues and Activities

According to our survey results, on average 80 per cent of firms' revenues are from new media products or services.

- The mean percentage of firms' revenues coming from new media production or services provision is 80 per cent.

- There is little variation according to the number of employees in a firm, ranging from 78 per cent for firms with 5-19 employees to 86 per cent for firms with 20 or more employees.
- By region, there is also very little variation in the percentage of revenues from new media activity – ranging from 77 per cent in the Prairies to 84 per cent in areas of Ontario outside Toronto.

New media firms' revenues are most likely to come from providing new media services than from producing original new media content.

- The mean percentage of firms' new media revenues that came from producing original new media content was 41 per cent and the mean percentage from providing new media services was 59 per cent.
- The mean percentage of revenues from original content is decidedly lower on the Prairies (29 per cent) than it is in other regions of the country, and lower in firms with 1-4 employees (34 per cent) than in firms in other size categories.

Website development is the most prominent new media activity that firms are engaged in.

- The most frequently identified primary activity was, by far, website development (building and maintaining websites), which was identified by over one-third (36.4 per cent) of the firms (column 1 of Table 7.1)⁹¹.
- Other activities mentioned by 20 or more firms were: website component development (11.1 per cent); film or television production (10.3 per cent); and web-based marketing and advertising (8.0 per cent). No other activity stood out in this respect.
- The proportion of firms indicating website development as their primary new media activity was highest among firms in BC (51 per cent) and on the Prairies (45 per cent).
- By firm size, this proportion was higher in firms with 1-4 employees (45 per cent) and firms with no employees (39 per cent) than it was in firms in larger size brackets (16 and 18 per cent, for firms with 5-19 employees and 20+ employees, respectively).

⁹¹ Note that written-in responses to this question were re-coded and added to existing categories or to categories created on the basis of the responses. Also note that only responses identified by 2 per cent or more of respondents are shown in the table.

Table 7.1: Primary and Secondary Activities of New Media Firms

Activity	Percentage indicating as <i>Primary Activity</i>	Percentage indicating as <i>Secondary New Media Activity</i> ¹	Percentage indicating as <i>“Main” New Media Activity</i> ²
No (other) new media activity	N/A	11.1	12.2
Website development (building or maintaining websites and their content)	36.4	9.9	18.9
Website component development (“backend”: Java, databases, interfaces, etc.)	11.1	9.9	3.3
Film or television production	10.3	N/A	N/A
Web-based marketing and advertising	8.0	5.8	2.2
Providing technical services related to software (e.g. creating software tools, programming)	5.4	6.4	4.4
Creating CD-ROM or DVD-ROM products for specialty audiences such as business or training/education markets or governments	4.6	9.9	5.6
Non web-based marketing, advertising and/or publicity	4.6	N/A	N/A
Interactive game development	3.4	1.8	14.4
Creating CD-ROM or DVD-ROM products for consumers	2.3	1.2	4.4
Graphic design, web or otherwise	2.3	--	--
Animation	2.3	--	--
Other	0.1 ³	1.9	10.0
Don't know/No answer	0.4	10.5	21.2
<i>N (sample size)</i>	261	171	90

¹ Among those indicating a new media activity as primary.

² Among those **not** indicating a new media activity as primary. Question asked of those who responded with film and television production or “don't know” to the first question on primary activity.

³ One-quarter of the firms originally indicated “other” and wrote in a particular activity, and these responses were re-coded into existing activities as well as additional ones created on the basis of the responses, some of which were new media, some of which were not.

Source: WIFT-T Survey of New Media Companies, 2003

Website development is also a prominent secondary new media activity of these firms, or the main new media activity of firms whose primary activity is not in new media.

- New media activity was most frequently identified as the most prominent secondary activity by the 171 firms whose primary activity is in new media (column 2 of Table 7.1).
 - One-fifth (20.5 per cent) identified non web-based marketing, advertising and publicity; and about one-tenth (9.9 per cent) identified each of website development, website component development, and creating CD-/DVD-ROM products for specialty audiences.
 - One-tenth (11.1 per cent) indicated that they had no other new media activity.
- Website development figures prominently among the 90 firms whose primary activity is **not** in new media (column 3 of Table 7.1).

- Almost one-fifth (18.9 per cent) of these firms identified website development and 14.4 per cent identified interactive game development as their primary new media activity.
- A little over one-tenth (12.2 per cent) indicated that they had no new media activity.

7.2 EMPLOYMENT PROFILE

Survey results are first presented for equity group representation for working owners of new media firms and then for non-standard employment, equity group representation and occupations of paid employees of new media firms.

a) Working Owners/Proprietors

Equity group representation among working owners of new media firms is fairly low (Table 7.2).

- New media firms have, on average, 2.2 working owners/proprietors, but less than one owner who is a member of an equity group (column 1 of table).
- Under 40 per cent of new media firms have at least one owner who is a member of any one equity group, with 37.7 per cent having at least one female owner; 14.5 per cent at least one owner who is a member of a visible minority group; and less three per cent with at least one owner who is Aboriginal (2.6 per cent) or who has a disability (2.5 per cent) (column 2).
- On average, just under one in four new media firms' owners are female (22.9 per cent); about one in ten (10.5 per cent) are members of a visible minority group; and under two per cent are Aboriginal (1.3 per cent) or have a disability (1.5 per cent) (column 3).

Table 7.2: Working Owners/Proprietors in Equity Groups

Equity Group	Mean Number in Group	Percentage with at Least One Owner in Group (%)	Mean Equity Group Representation* (%)
Female	0.6	37.7	22.9
Disability	0.0	2.5	1.5
Aboriginal	0.0	2.6	1.3
Visible minority	0.3	14.5	10.5
All owners (incl. non-equity group owners)	2.2	N/A	N/A

* Mean of: number of owners in equity group as a percentage of all owners.
Source: WIFT-T Survey of New Media Companies, 2003.

Female representation among the ownership of new media firms declines with increasing firm size, as it does with the paid workforce overall.

- Variations by firm size in equity group representation among owners can be observed only for women, in a pattern similar to that observed for paid employees (Table 7.2a). Female representation declines from 31.4 per cent for micro firms (1-4 employees) to 13.7 per cent for large firms (20 or more employees).

Table 7.2a: Mean Equity Group Representation (%)* among Working Owners, by Firm Size

Equity Group	Size of Firm (Number of Employees)				All Firms
	Zero	Micro (1-4)	SME (5-19)	Large (20+)**	
Female	24.7	31.4	15.8	13.7	22.9
Disability	2.8	0.0	0.4	1.5	1.5
Aboriginal	0.7	2.2	1.6	0.0	1.3
Visible minority group	7.3	13.2	11.1	14.6	10.5

* Mean of: number of paid employees in equity group in type of job as a percentage of all paid employees in job type.

** Small number of respondents means results for this size category should be treated with caution.

Source: WIFT-T Survey of New Media Companies, 2003.

There is also much regional variation in equity representation among owners (Table 7.2b):

- Female representation is decidedly higher in BC (30.2 per cent), and decidedly lower in the Prairies (14.8 per cent).
- Representation of persons with a disability is somewhat higher in Toronto (3.0 per cent).
- Aboriginal persons are somewhat over-represented in Ontario outside the greater Toronto area (4.6 per cent).
- Visible minority owners are considerably over-represented in Toronto (15.8 per cent) and BC (14.5 per cent) and underrepresented in other regions except the Prairies, reflecting geographic concentrations of those groups.

Table 7.2b: Mean Equity Group Representation (%)* among Working Owners, By Region

Equity Group	Atlantic**	Quebec	Toronto	Rest of Ont.**	Prairies	BC	Canada
Female	27.2	17.2	25.0	22.2	14.8	30.2	22.9
Disability	0.0	0.0	3.0	2.3	0.0	0.8	1.5
Aboriginal	0.0	0.0	1.1	4.6	0.2	2.9	1.3
Visible minority group	0.0	3.3	15.8	4.6	9.4	14.5	10.5

* Mean of: number of paid employees in equity group in type of job as a percentage of all paid employees in job type.

** Small number of respondents means results for these regions should be treated with caution.

Source: WIFT-T Survey of New Media Companies, 2003.

b) Paid Workforce

This section addresses the important issue of how well women and other equity groups are represented in the paid workforce of new media firms⁹². The paid workforce is considered here to consist of employees, including working owners, on a firm's payroll in July 2003 (in receipt of a T4 slip); excluded are contractors/freelancers, which are dealt with in another section. The results are presented first by type of job (i.e., part-time/full-time, permanent/short-term) and then by job category (occupational group).

To set the context for this section, new media firms employ 2.2 women on average, 1.1 persons in a visible minority group, and far less than one person in the other equity groups (0.1 person with a disability and 0.1 Aboriginal person) (data column 1 of Table 7.3a⁹³).

The proportion of total employment of new media firms represented by women is lower than it is in the overall workforce.

- Women represent one-third of the employment (32.3 per cent) of new media firms participating in the survey (column 2 of Table 7.3a). This is much lower than their 47.3 per cent share of total national employment (column 3 of table).

**Table 7.3a: Mean Number Employed and Equity Group Representation (%)*,
Employer Identified**

Equity Group	Mean Number in Group	Equity Group Representation (%)	Percentage of National Workforce in Group**
Female	2.2	32.3	47.3
Disability	0.1	1.8	5.3
Aboriginal	0.1	0.8	2.6
Visible minority	1.1	17.4	12.6
Total	7.8	100.0	--

* (1) Sum of number of paid employees in equity across firms, as a percentage of (2) sum of total number of paid employees across the same group of firms.

** Based on 2003 Labour Force Survey data (females) and 2001 Census data (other equity groups) obtained from Statistics Source: *WIFT-T Survey of New Media Companies, 2003*.

⁹² Note that the evidence presented is for only those working in new media firms and not for those engaged in new media activity in non-new media firms.

⁹³ Note that the employee equity group representation results for Aboriginal, disability and visible minority equity groups are **not** based on self-identified data provided by employees but on responses provided in the survey by employers on their employees. See the next chapter for equity group results based on self-identified data (from the Census) provided by employees.

Other results suggest that persons with a disability and Aboriginal persons are underrepresented in these new media firms, compared to their population share, while persons in a visible minority group are over-represented (rows two through four, data columns 2 versus 3 of the table).

- 1.8 per cent of the total employment of new media firms is represented by persons with a disability. This is lower than the 5.3 per cent of the workforce who identified themselves as a person with a disability (according to the 2001 Census).
- 0.8 per cent of the total employment of new media firms is represented by Aboriginal persons. This is somewhat lower than the 2.6 per cent who identified themselves as an Aboriginal person (according to the 2001 Census) in the workforce at large.
- Persons in a visible minority group account for 17.4 per cent of the total employment in new media. This is higher than the 12.6 per cent of Canadians in the workforce who identified themselves as a member of a visible minority group (according to the 2001 Census).

(i) Type of Job

Just 6.6 per cent of those employed by new media firms occupy part-time jobs (working, on average, less than 30 hours a week) and 7.0 per cent occupy short-term jobs.

- This proportion is considerably lower than the 18.9 per cent of total national employment that is part-time (according to Statistics Canada's Labour Force Survey).

The degree to which women occupy non-standard jobs (defined as part-time and short-term jobs) in the new media industry is no higher than it is for all new media employees, while the degree to which members of a visibility minority group do is considerably higher (Table 7.3b).

- 6.6 per cent of women employed in the industry occupy part-time jobs (row 1 of column 1 of the table), which matches their proportion in the overall new media workforce (last row of the table).
- 7.0 per cent of women employed in the industry occupy short-term jobs, which is the same proportion in the overall new media workforce (column 2).
- One-third of persons with a disability (33.3 per cent) are working in part-time jobs, which is considerably higher than the 6.6 per cent incidence of part-time employment among all employees in the industry (row 2 compared to row 5).
- The incidence of non-standard jobs is lower among members of a visible minority than the overall incidence (1.5 versus 6.6 per cent, row 4 versus row 5).

Table 7.3b: Incidence of Non-Standard Jobs*, Paid Employees, by Equity Group, Employer Identified

Equity Group	Part-Time (%)	Short-Term (%)**
Female	6.6	7.0
Disability	33.3	**
Aboriginal	***	**
Visible minority	1.5	**
Total	6.6	7.0

* (1) Sum of number of paid employees in job type in equity group across firms, as a percentage of (2) sum of total number of paid employees in equity group across the same group of firms.

** Question on short-term jobs asked about only females among equity groups.

*** Too few observations on which to compute a result.

Source: WIFT-T Survey of New Media Companies, 2003.

Women occupy a greater proportion of non-standard jobs in new media firms than they do of all jobs in these firms.⁹⁴

- Women represent, on average, just over one-third of total employment in new media firms (35.9 per cent), an average of about one-tenth (10.8 per cent) is represented by members of visible minority groups, and under two per cent by persons with a disability (1.8 per cent) and Aboriginal persons (0.8 per cent) (column 1 of Table 7.4a).
- Compared to their overall workforce share (35.9 per cent), women are over-represented in non-standard jobs, which are part-time jobs (45.3 per cent) and short-term jobs (41.7 per cent) (rows 1 and 5 of last column of the table). As for other equity groups, no major patterns of over- or under-representation can be observed.

Table 7.4a: Mean Equity Group Representation (%),* Paid Employees, by Type of Job, Employer Identified

Equity Group	Mean Percentage		
	Overall	Full-Time	Part-Time
Full-/Part-Time			
Female	35.9	33.0	45.3
Disability	1.8	1.7	0.0
Aboriginal	0.8	0.4	0.0
Visible minority	10.8	8.3	6.1**
Permanent/Short-Term		Permanent	Short-Term
Female***	35.9	34.7	41.7

* Mean of: (1) number of paid employees (including working owners) in job type as a percentage of (2) all paid employees, for each equity group. Each computation is based on a different number of observations, where employment in **both** the numerator (the job type) and denominator (total) exists, for that particular equity group.

** Results should be treated with caution. The apparent anomaly of both the part-time and full-time having proportions less than the total can be potentially explained by the small number of responses received to the question and one or two large firms skewing the results.

*** Questions on permanent and short-term jobs asked about only females among equity groups.

Source: WIFT-T Survey of New Media Companies, 2003.

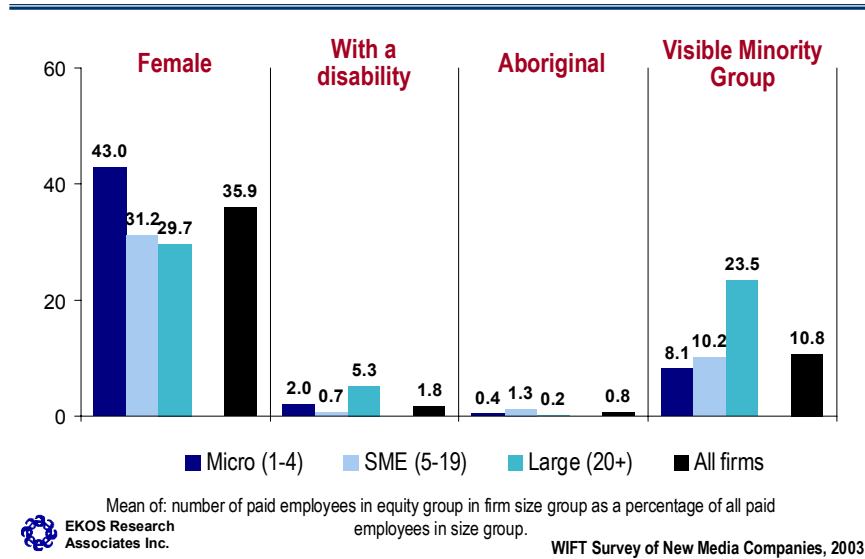
⁹⁴ A measure of equity group representation is the mean company percentage of different forms of non-standard employment (part-time and short-term) accounted for by the different equity groups. These percentages are compared to the mean company percentage of *total* employment in these firms that is accounted for by the equity groups.

Average female representation decreases with increasing firm size while visible minority group representation increases (Exhibit 7.2):

- Average female representation declines with the number of employees in a firm, from 43 per cent in “micro” firms (1-5 employees) to 29.7 per cent in large firms (20 or more employees).
- Conversely, visible minority group representation rises with firm size, from 8 per cent in “micro” firms to 23.5 per cent in large firms.
- Disability group representation is somewhat higher in large firms (5.3 per cent) than it is in firms in smaller size categories (2 per cent or less).

Exhibit 7.2:

Equity Group Representation by Firm Size: ,Employer Identified



Differences in equity group representation can also be observed by region (Table 7.4b).

- Female representation is considerably higher in areas of Ontario outside Toronto (48.4 per cent) than it is in other regions of the country, while visible minority representation is considerably higher in BC (23.7 per cent) than it is elsewhere (14.7 per cent or less).
- The representation of persons with a disability is somewhat higher in Quebec (6.3 per cent), while Aboriginal representation is somewhat higher in the Prairies (2.6 per cent).
- Visible minority group representation is considerably higher in BC (23.7 per cent) and, to a lesser degree, Toronto (14.2 per cent).
 - It should be noted again that visible minority representation varies widely in the overall workforce, from just over 30 per cent of the overall workforces of Toronto and Vancouver, to 10-18 per cent of the workforces of most other

larger and medium-sized Census Metropolitan Areas (CMAs) and to five per cent of the workforces of most of the smaller CMAs⁹⁵.

Table 7.4b: Mean Equity Group Representation (%),* Paid Employees, by Region, Employer Identified

Equity Group	Atlantic**	Quebec	Toronto	Rest of Ont.**	Prairies	BC	Canada
Female	34.0	33.9	36.4	48.4	30.1	36.3	35.9
Disability	0.0	6.3	0.4	0.1	1.6	0.7	1.8
Aboriginal	1.1	0.1	0.4	0.0	2.6	1.3	0.8
Visible minority group	0.0	2.2	14.2	4.7	10.7	23.7	10.8

* Mean of: number of paid employees in equity group in region as a percentage of all paid employees in region.

** Small number of respondents means results for these regions should be treated with caution.

Source: WIFT-T Survey of New Media Companies, 2003.

(ii) Job Category (Occupational Group)⁹⁶

There are greater concentrations of employees in the production and creative areas in new media firms than there are in other areas (Table 7.5a).

- New media firms on average employ 2.3 workers in the technical area and 1.6 workers in the creative area (rows 4 and 3 of column 1 of the table). Employees in these occupational areas represent 35.2 and 28.8 per cent of employment in the industry compared to 23.5 per cent or lower in other areas (column 2).
- New media firms employ on average 1.5 employees in each of the management and production areas, and 0.9 in marketing and sales (rows 1 and 2 of column 1). The patterns are similar for the proportion of total employment (column 2).
- These firms employ less than one employee, on average, in the marketing/sales and administrative/clerical areas (0.9 and 0.3, rows 5 and 6 of column 1).

⁹⁵ Source is Census 2001 and the 2001 Participation and Activity Limitation Survey; representation figures produced by the Employment Equity unit of HRSD (CANADA): [http://www.HRSD\(Canada\).gc.ca/en/lp/lo/lswewe/ee_tools/data/tables/annual/2001/Table03.pdf](http://www.HRSD(Canada).gc.ca/en/lp/lo/lswewe/ee_tools/data/tables/annual/2001/Table03.pdf)

⁹⁶ The small number of firms with 20 or more employees were asked to provide employment data for a more detailed set of job categories than indicated here, but there were insufficient responses to be able to report means for these detailed groups, and so they were re-grouped to fit into the broader job categories.

Table 7.5a: Job Categories: Mean Number and Composition*, Paid Employees

Job Category	Mean Number	Percentage of Total*
Management (e.g., president, operations manager, controller, senior account executive, executive producer)	1.5	23.5
Production (e.g., production or project manager/coordinator, illustrator/ animator producer, associate producer, audio/video specialist)	1.5	22.9
Creative (e.g., creative/art director, graphic designer, writer/researcher)	1.9	28.8
Technical (e.g., webmaster, developer/programmer, database programmer)	2.3	35.2
Marketing/sales, business development/product manager	0.9	14.1
Administrative and clerical support	0.3	11.3
Total	7.8	—

* (1) Sum of number of paid employees in job category across firms, as a percentage of (2) sum of total number of paid employees across firms. Percentages do not add to 100 per cent because each computation is based on a different number of observations (where employment in both the numerator (the job category) and denominator (total) exists).

Source: WIFT-T Survey of New Media Companies, 2003.

Women exhibit wide variation in representation across job categories of new media firms (column 1 of Table 7.5b), to some extent reflecting traditional employment patterns.

- The average proportion of women in management and creative positions matches fairly closely their average proportion of a firm's total workforce (36.5 and 38.8 per cent versus 35.9 per cent) (rows 1 and 3 compared to the last row).
- However, women are underrepresented in technical jobs (23.4 per cent) and, to a lesser extent, in production jobs (29.9 per cent), areas which historically have been dominated by men.
- They are particularly over-represented in administrative and clerical jobs (68.3 per cent), an area traditionally associated with women, and, to a lesser degree, in marketing/sales jobs (49.2 per cent).

Table 7.5b: Mean Equity Group Representation (%)*, Employer Identified, by Job Category

Job Category	Female	Disability	Aboriginal	Visible Minority
Management (e.g., president, operations manager, controller, senior account executive, executive producer)	36.5	0.3	0.3	5.6
Production (e.g., production or project manager/coordinator, illustrator/animator producer, associate producer, audio/video specialist)	29.9	0.0	0.5	6.2
Creative (e.g., creative/art director, graphic designer, writer/researcher)	38.8	0.0	0.0	7.9
Technical (e.g., webmaster, developer/programmer, database programmer)	23.4	0.0	1.1	10.2
Marketing/sales, business development/product manager	49.2	3.0	1.3	10.3
Administrative and clerical support	68.3	0.0	0.0	7.7
<i>N (sample size for each equity group)**</i>	<i>50-81</i>	<i>78-122</i>	<i>80-117</i>	<i>63-100</i>
Total	35.9	1.8	0.8	10.8

* Mean of: (1) number of paid employees in equity group in job category as a percentage of (2) all paid employees in job category.

** The number of responses on which a result is based differs according to equity group and job category.

Source: WIFT-T Survey of New Media Companies, 2003.

- As for other equity groups, the results in Table 7.5b indicate that:
 - Persons with a disability are underrepresented in all categories but marketing/sales (3.0 per cent).
 - Aboriginal persons exhibit fairly similar levels of representation across job categories.
 - Persons in a visible minority group are underrepresented in all job categories, particularly management and production (5.6 and 6.2 per cent), except for technical and marketing, where their proportion matches fairly closely the average proportion of a firm's total workforce (about 10 per cent).

- There were insufficient observations to assess differences in equity group representation in different job categories by firm size and region.

7.3 EMPLOYEES' SALARIES

This section examines salary levels in the industry overall and the positioning of equity groups in terms of their relative salaries⁹⁷.

Mean salaries for most job categories increase with the number of employees in a firm (Table 7.6).

- ▶ This is particularly true in management positions (rising from \$41,838 in “micro” firms to \$56,161 in large firms), in sales/marketing job categories (rising from \$39,400 to \$57,300), and in administrative/clerical support jobs (from \$22,588 to \$36,625).
- ▶ By region (not shown), salaries in most job categories tend to be lower in Quebec and BC and higher in Toronto.

Table 7.6: Mean Annual Salary in Job Categories, by Firm Size

Job Category	Size of Firm (Number of Employees)			All Firms
	Micro (1-4)	SME (5-19)	Large (20 +)**	
Management (e.g., president, operations manager, controller, senior account executive, executive producer)	41,838	45,555	56,161	46,027
Production (e.g., production or project manager/coordinator, illustrator/animator producer; associate producer, audio/video specialist)	36,889	38,848	38,512	38,187
Creative (e.g., creative/art director, graphic designer, writer/researcher)	38,897	37,115	41,460	38,508
Technical (e.g., webmaster, developer/programmer, database programmer)	40,667	43,886	46,317	42,643
Marketing/sales, business development/product manager	39,400	43,503	57,300	42,487
Administrative and clerical support	22,588	29,429	35,625	32,450
<i>N (sample size)</i> ***	16-37	14-28	5-8	40-85

* Means shown are the average of the mean salaries across the firms (unweighted).

** Result based on the responses of less than 10 companies and should be treated with particular caution.

*** The number of responses on which a result is based differs according to firm size and job category.

Source: WIFT-T Survey of New Media Companies, 2003.

⁹⁷ In this section, average salaries is considered to be the average annual wages and salaries of a company's full-time paid employees (including working owners, but not contractors or freelancers), and excluding employer contributions to pension and health plans, etc.. Low response counts for certain cells mean that some results should be treated with caution.

The salaries of equity group members relative to overall salaries vary considerably according to job category⁹⁸ (Table 7.7).

- Women (column 3) tend to get paid less than men (column 2) in higher-skilled management and production jobs.
- This is also true in lower-skilled clerical/administrative positions, but the small sample size on which the calculation of male salaries in this job category is based (six firms) needs to be noted.
- Women's and men's average salaries are within about \$1,000 of each other's in the other three job categories: marketing/sales, technical and creative.

Table 7.7: Mean Annual Salaries* (\$) in Job Categories, by Equity Group, Employer Identified

Job Category	Total	Male (Imputed**)	Female	Visible Minority
Management (e.g., president, operations manager, controller, senior account executive, executive producer)	46,027	47,485	40,951	51,375****
Production (e.g., production or project manager/coordinator, illustrator/animator producer; associate producer, audio/video specialist)	38,187	44,136)	39,848)	47,455****
Creative (e.g., creative/art director, graphic designer; writer/researcher)	38,508	38,706	38,048	45,221
Technical (e.g., webmaster; developer/programmer, database programmer)	42,643	43,839	44,933	47,517****
Marketing/sales; business development/product manager	42,487	42,273	43,071	41,571****
Administrative and clerical support	32,450	42,667***	29,800	30,333***
<i>N (sample size***</i>	<i>40-85</i>	<i>6-30</i>	<i>12-25</i>	<i>3-10</i>

* Means shown are the average of the mean salaries across the firms (unweighted).

** For response-burden reasons, there was no question in the survey on male salaries, and so a male average salary had to be imputed. For each job category, the average wage for males was imputed on the basis of (1) firms employing males but no females, in which case the male salary was assumed to be the reported total salary, and (2) firms employing females and the number was less than the reported total workforce, in which case the male salary was imputed on the basis of the weighted difference between the reported average female and total salaries.

*** The number of responses on which a result is based differs according to equity group and job category.

*** Result based on the responses of less than 10 companies and should be treated with particular caution.

Source: WIFT-T Survey of New Media Companies, 2003.

⁹⁸ The small number of firms with 20 or more employees were asked to provide salary data for a more detailed set of job categories than indicated here, but there were insufficient responses to be able to report means for these detailed groups, and so they were re-grouped to fit into the broader job categories.

- ▶ Members of a visible minority group (column 4 compared to column 1 of Table 7.7) are paid, on average, salaries that are higher than the average for management, production, creative, and, to a much lesser extent, technical and administrative/clerical positions, and lower than the average salary in marketing positions.

7.4 INDEPENDENT FREELANCERS/ CONTRACTORS

Freelancers/contractors are an important part of the new media industry. The new media employer survey results on this issue are presented in Table 7.8 and indicate the following.

- ▶ New media firms hired, on average, 4.5 freelancers/contractors in July 2003; they hired 1.7 female contractors, and less than one contractor with a disability, who is Aboriginal, or who is in a visible minority group (column 1 of Table 7.8).
- ▶ Just over one-half of the firms (52.4 per cent) hired at least one female contractor, about one-quarter (23.9 per cent) hired at least one contractor in a visible minority group, but only about five per cent or less hired a contractor in the other two equity groups (5.2 and 3.3 per cent in the Aboriginal and disability equity groups) (column 2 of Table 7.8).

Table 7.8: Independent Freelancers/Contractors and Equity Groups, Employer Identified

Equity Group	Mean Number Hired in Group	Percentage Hiring At Least One Freelancer in Group (%)	Mean Equity Group Representation* (%)
Female	1.7	52.4	33.3
Disability	0.0	3.3	0.9
Aboriginal	0.1	5.2	1.9
Visible minority	0.5	23.9	12.7
All freelancers (incl. non-equity group freelancers)	4.5	75.7	51.6

* Mean of: number of freelancers in equity group as a percentage of the total number of freelancers.

Source: WIFT-T Survey of New Media Companies, 2003

Contractors represent on average about one-half of the total combined workforce of paid employees and contractors in the industry (column 3 of Table 7.8).

- ▶ On average, independent contractors represent 51.6 per cent of new media firms' paid-plus-contractor workforce⁹⁹ (last row of column 3 of Table 7.8).
 - Reliance on contractors/freelancers (measured as the number of contractors or freelancers as a percentage of the paid workforce) declines with firm size, being lower for larger firms than smaller ones (not shown).

⁹⁹ Firms' reliance on contractors/freelancers is measured as the number of freelancers as a percentage of the number of paid employees plus the number of contractors.

- Reliance is higher in BC and the Greater Toronto Area (both about 60 per cent) and lower in the rest of Ontario (43 per cent) and, particularly, Quebec (33 per cent) (not shown).
- Female contractors represent, on average, one-third of all contractors (33.3 per cent), visible minority groups almost 13 per cent, and Aboriginal persons and persons with a disability less than two per cent (column 3 of Table 7.8).
 - Compared to their share of the paid workforce (exclusive of contractors), visible minority contractors are somewhat over-represented: visible minority contractors represent 12.7 per cent of all contractors (compared to visible minority paid employees, who represent 10.8 per cent of the paid workforce, as in Table 7.2).
 - By firm size (results not shown), female representation among contractors varies little; Aboriginal and disability group representation declines by firm size; and visible minority group representation is higher among firms with no paid employees (16 per cent) than it is in other size categories (not shown).
 - By region (not shown), Aboriginal representation among contractors is higher in the Prairies (5.2 per cent), while visible minority group representation is considerably higher in the greater Toronto area (12.3 per cent). There is little regional variation for the other two equity groups.

7.5 SKILLS AND TRAINING ISSUES

Survey results are presented in this section with respect to skills and training issues, specifically: meeting skill needs; skills in demand; workforce training; and the funding of training.

a) Meeting Skill Needs

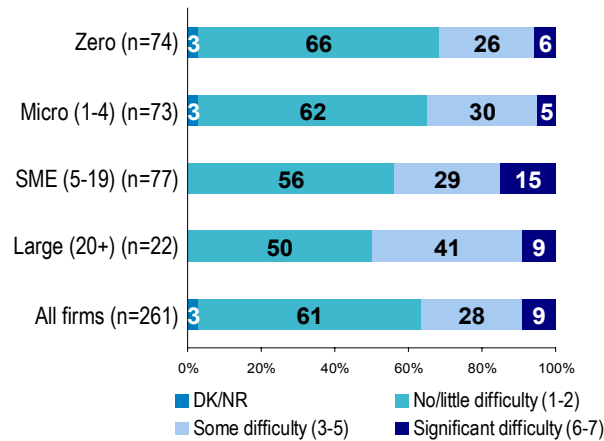
Two in five new media firms are experiencing at least some difficulty in meeting their skill needs (Exhibit 7.3).

- Twenty-eight per cent are experiencing some difficulty (reporting 3, 4 or 5 on the seven-point scale¹⁰⁰) and nine per cent are experiencing significant difficulty (reporting 6 or 7). Sixty-one per cent are experiencing no or little difficulty (reporting 1 or 2).
- The incidence is lower among smaller firms: the proportion with some/significant difficulties in meeting skill needs increases with the size of firm, from 32 (=26 + 6) per cent of firms with no

¹⁰⁰ Respondents were asked to respond on a 7-point scale, from 1=no difficulty, up to 7=significant difficulty, and responses were aggregated for purposes of this report as follows: 1-2 (=no/little difficulty), 3-5 (=some difficulty), and 6-7 (=significant difficulty).

employees, to 50 (=41 + 9) per cent of firms in the largest size category (20 or more employees).

**Exhibit 7.3:
Difficulties in Filling Skill Needs, by Firm Size**



Percentage distribution by degree of difficulty in filling skill needs

WIFT Survey of New Media Companies, 2003

Distinct differences in the incidence of difficulties in meeting skill needs emerged by geographical region as well (Table 7.9):

- ▶ The incidence is considerably lower in firms in Toronto and in the rest of Ontario: 70-71 per cent of new media firms are experiencing little or no difficulty finding people with the skills they need, compared to 64 per cent or less in other regions of the country.
- ▶ The incidence of hiring difficulties is higher in Quebec and BC, where 44 and 51 per cent, respectively, of firms are experiencing no/little difficulty, compared to 60 per cent or more in other regions.

Table 7.9: Filling Skill Needs: Percentage Distribution by Degree of Difficulty *, By Region

Level of Difficulty	Atlantic**	Quebec	Toronto	Rest of Ont.**	Prairies	BC	Canada
No/little difficulty (1-2)	64	44	71	70	60	51	61
Some difficulty (3-5)	29	44	21	27	25	42	28
Great difficulty (6-7)	7	10	7	0	13	12	9
Don't know/no answer	0	2	1	0	3	5	3
Total	100	100	100	100	100	100	100
<i>N (sample size)</i>	12	48	96	22	40	41	261

* Firms were asked to respond on a 7-point scale, where 1=no difficulty and 7=significant difficulty. Responses are grouped as shown.

** Small number of respondents means results for these regions should be treated with caution.

Source: WIFT-T Survey of New Media Companies, 2003.

b) Skills in Shortage and in Demand

Creative/design and technical/programming skills are the areas where new media firms are experiencing the greatest skill shortages (Table 7.10).

- Of the 71 firms responded in a previous question that they were experiencing at least some difficulty, just over one-quarter (27 per cent) identified specific skills they were having difficulty filling (first column of Table 7.10):
- The most frequently mentioned skills in shortage were, by far, creative/design skills and technical/programming skills (38 per cent of the firms writing in a skill mentioned each of these skills).
 - Of the 13 firms that indicated a specific technical/programming skill, the most frequently mentioned distinct technical/programming skills in shortage are web programming and flash programming (each mentioned by three firms).
- Much less frequently mentioned as skills in shortage were sales/marketing (14.1 per cent), production skills (12.7 per cent), production (12.7 per cent) and business management and practice skills (11.3 per cent).

Table 7.10: Skills in Shortage and in Expected High Demand

Skill Area	Percentage indicating Skill Areas*	
	Where Shortages Currently being Experienced**	Expected to be in High Demand in Next 5 Years
Technical/programming	38.0	68.2
Creative/design	38.0	13.4
Sales/marketing	14.1	7.8
Production	12.7	8.9
Business management/practice	11.3	6.1
Soft skills: communication, demonstrating initiative, problem solving	8.5	8.4
Writing/research	7.0	2.8
Project management	2.8	3.4
<i>N (sample size)</i>	71	179

* Respondents could indicate multiple responses, so percentages add up to greater than 100 per cent.

** Among the 71 businesses that indicated they were experiencing difficulties in meeting needs.

Source: WIFT-T Survey of New Media Companies, 2003

- Differences by firm size and region were also observed (not shown in table):
 - creative/design skills were reported to be in shortage in firms with 1-4 employees (47 per cent) and in firms in BC (50 per cent);

- technical programming skills were reported to be in shortage in firms with 5-19 employees (57 per cent) and in firms in BC (67 per cent); and
- business management/practice skills were in particular shortage in firms with zero employees (27 per cent).

Technical/programming was the skill area expected to be in greatest demand by the industry in the next five years.

- Technical/programming (68 per cent) and, to a much lesser extent, creative/design (13 per cent) skills were the most frequently mentioned skills in this regard (by the 179 new media firms that answered the respective question) (column 2 of Table 7.10).
 - Among the 80 firms that identified a particular technical/programming skill, the most frequently mentioned were (see Appendix E for the verbatim detail):
 - ✕ flash programming (23 times);
 - ✕ web programming (18);
 - ✕ wireless/PDA programming and technician (14 times); and
 - ✕ action scripting (10).
- The only variation observed by firm size or region was the much higher likelihood of production skills being identified as emerging in firms with zero employees (16 per cent, compared to 8.9 per cent overall).

c) Workforce Training

About one-half of new media firms provided training to their new media workforce in 2003¹⁰¹ (Table 7.11a).

- About one-half (49 per cent) provided **no** training to their workforce (Table 7.11a, last column).

New media firms provided training to one in four employees (not shown in table).

- On average, new media firms provided training to 25.1 per cent of their new media workforce in 2003.

¹⁰¹ Actually the period December 2002 to November 2003.

Table 7.11a: Provision of Training: Percentage Distribution By Percentage of Workforce Provided Training in Previous 12 Months, By Firm Size

Percentage of Workforce Provided Training	Size of Firm (Number of Employees)				All Firms
	Zero	Micro (1-4)	SME (5-19)	Large (20+)**	
0%	65	59	33	23	49
Over 1% and ≤25%	2	8	40	36	6
Over 25% and ≤99%	4	11	13	14	12
100%	18	12	17	18	16
Don't know/no answer	11	10	8	9	9
Total	100.0	100.0	100.0	100.0	100.0
<i>N (sample size)*</i>	74	73	77	22	261*

* The sample sizes for each firm size category do not add to the total for all firms because not every firm provided information on number of employees in the firm.

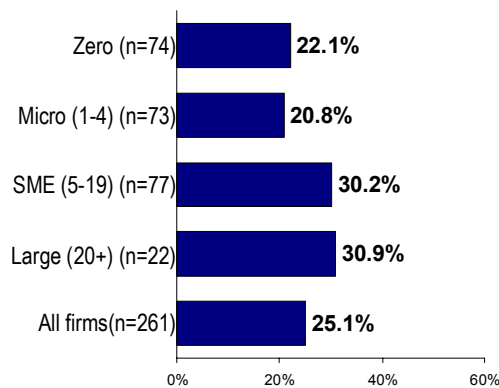
** Small size means results for this size category should be treated with caution.

Source: WIFT-T Survey of New Media Companies, 2003.

Firm size matters: smaller firms are less likely to train (as the broader literature on training generally finds) and more likely to train a lower proportion of their workforce:

- The mean proportion trained rises from 20.8 per cent for “micro” firms (with 1-4 employees) to 30.9 per cent for large firms (with 20 or more employees) (Exhibit 7.4).
- This is corroborated by the first row of Table 7.11a , which indicates that the proportion providing training to zero employees falls from 59 per cent for micro firms, to 23 per cent for large firms.

**Exhibit 7.4:
Mean Percent of Workforce Trained**



Mean percentage of new media workforce trained over previous 12 months

Firms in the Atlantic region and GTA were least likely to train their employees (Table 7.11b):

- About three in five new media firms in the Atlantic region and in the GTA (64 and 60 per cent, respectively) trained **no** employees, compared to, for example less than 40 per cent of firms in the Prairies (38 per cent) and Quebec (31 per cent).
- The intensity of training was considerably lower in the Atlantic provinces than it was elsewhere: new media firms in the Atlantic region trained, on average, only 8.3 per cent of their new media workforce, and BC firms trained, on average, 20 per cent of their new media workforce (20.7 per cent), compared to over 30 per cent for firms in Quebec and the Prairies.

Table 7.11b: Provision of Training: Percentage Distribution by Percentage of Workforce Provided Training in Previous 12 Months, By Region

Percentage of Workforce Provided Training	Atlantic*	Quebec	Toronto	Rest of Ont.*	Prairies	BC	Canada
0%	64	31	60	55	38	44	49
Over 1% and ≤25%	14	23	11	9	18	22	6
Over 25 and ≤99%	7	17	5	14	15	10	10
100%	0	15	20	23	18	10	16
Don't know/no answer	14	15	4	0	13	15	9
Total	100	100	100	100	100	100	100
Mean % trained	8.3	30.7	24.5	27.6	30.7	20.7	25.1
N (sample size)	14	48	96	22	40	41	237

* Small number of respondents means results for these regions should be treated with caution.
Source: WIFT-T Survey of New Media Companies, 2003.

Technical/programming skills was the skill area where new media firms were, by far, the most likely to have provided training to their employees, just as this is the skill area expected to be in high demand in the next five years.

- Firms (n=109) that had said in the previous question that they had provided some training in the previous 12 months were asked to indicate, in an open-ended question, the particular skill areas in which they had provided the training, and the responses presented in Table 7.12 indicate the following:
 - The most frequently mentioned areas where training was provided were in technical and programming (66.1 per cent), and, to a much lesser extent, in business/management practices (17.4 per cent) and creative/design (11 per cent). Note that, for the latter two job categories, the order is reversed compared to the order of skills identified as being in shortage and future demand.
 - Among the 29 firms that identified a particular technical/programming skill, the most frequently mentioned specific skill, by far, was flash programming (by 11 firms).
 - By firm size, large firms (with 20 or more employees) were more likely than firms in other regions to have provided training in technical/programming

skills (71 per cent), sales/marketing (27 per cent), business management/practice skills (21 per cent), and “soft” skills (14 per cent).

- By region, BC firms were more likely to provide training than firms in other regions in technical programming (78 per cent) and creative/design (28 per cent).

Table 7.12: Skills in which Training is being Provided

Skill Area	Percentage Providing Training in Skill Area in Previous 12 Months
Technical/programming	66.1
Business management/practice	17.4
Creative/design	11.0
Sales/marketing	9.0
Soft skills: communication, demonstrating initiative, problem solving	7.3
Project management	7.3
Production	5.5
Writing/research	1.8
Account management	1.8
None	4.6
<i>N (sample size)</i>	<i>109</i>

* Respondents could indicate multiple responses, so percentages add up to greater than 100 per cent.

Source: WIFT-T Survey of New Media Companies, 2003.

d) Funding Training

Training is primarily provided in-house (through internal staff) (Table 7.13a).

- Over one-third (37 per cent) of firms indicated their training is funded through internal staff (respondents could indicate more than one source).
- One-fifth of firms (20 per cent) funded their training through a dedicated training budget.
- Training provision/funding source differed according to the size of the firm, with larger firms more likely to have internal staff provide training and to have a dedicated training budget, which is what the general literature on workplace training indicates.

Table 7.13a: Source of Training Funds: Percentage using Different Sources of Funds, By Firm Size

Training Funding Source	Size of Firm (Number of Employees)				All Firms
	Zero	Micro (1-4)	SME (5-19)	Large (20+)**	
Internal staff	33	26	47	50	37
Dedicated training budget	5	11	35	50	20
Government programs	3	5	9	5	5
Association membership	5	3	7	5	5
<i>N (sample size)</i> ***	66	66	71	20	223

* Percentages do not add to 100 per cent because several firms did not provide any responses to the question.

** Small number of respondents means results for this size category should be treated with caution.

*** The sample sizes for each firm size category do not add to the total for all firms because not every firm provided information on number of employees in the firm.

Source: WIFT-T Survey of New Media Companies, 2003.

Some significant differences by region were identified (Table 7.13b):

- Firms in Toronto are less likely than firms in other regions to provide training through internal staff, while firms on the Prairies and in Quebec are more likely to fund training using a dedicated training budget.
- Firms in Quebec are more likely than firms in other regions to use government programs to fund training, and are more likely, along with firms in the Atlantic provinces and BC to have training provided as part of their business association membership.

Table 7.13b: Source of Training Funds: Percentage with Different Sources of Training Funds, By Region

Training Funding Source	Atlantic**	Quebec	Toronto	Rest of Ont.	Prairies	BC	Canada
Internal staff	50	54	30	23	26	46	36
Dedicated training budget	0	37	13	18	34	17	21
Government programs	0	12	3	5	3	9	6
Association membership	17	0	16	0	6	14	5
<i>N (sample size)</i>	12	41	92	22	35	35	237

* Percentages do not add to 100 per cent because several firms did not provide any responses to the question, though some indicated more than one source as well.

** Small number of respondents means results for these regions should be treated with caution.

Source: WIFT-T Survey of New Media Companies, 2003.

7.6 SUMMARY OF KEY RESULTS

The new media industry is dominated by small firms and the largest proportion of firms are in the Greater Toronto Area. On average, females represent about one-fifth of the working owners of new media firms, with female representation declining as firm size increases. Persons in a visible minority group represent on average about 10 per cent of new media firm owners, with representation again higher in larger firms.

Women represent about one-third of the new media total workforce, which is lower than their share of the national workforce (47.3 per cent). Persons with a disability are also underrepresented (two versus 10 per cent). Conversely, visible minority groups are somewhat over-represented (17 versus 13 per cent). Average female representation falls as firm size increases, while visible minority group representation tends to rise. Visible minority group representation tends to be higher in BC, and, to a lesser extent, in the Greater Toronto Area.

Female representation across job categories in new media firms varies considerably, with females being underrepresented in technical and production jobs, and over-represented in administrative/clerical jobs and marketing/sales jobs. Visible minorities are underrepresented mainly in management and production jobs.

Mean salaries in most job categories tend to increase with the number of employees in a firm. Women tend to be paid lower salaries than men in higher-skilled management and production jobs, whereas salaries of men and women are quite similar in marketing/sales, technical and creative positions. Visible minorities tend to be paid higher relative salaries for most job categories.

A substantial proportion of new media firms (37 per cent) are experiencing at least some difficulty in meeting skill needs, with the lowest incidence of difficulties in Toronto and the rest of Ontario, and the highest incidence in Quebec and B.C. The highest incidence of skills shortages were observed in creative/design and technical/programming skills, with distinct differences by firm size. Technical/programming is also the skill area in which the greatest proportion (68 per cent) expect there to be high demand in the next five years.

About one-half of new media firms provided no training to their new media employees in 2003. On average, new media firms provided training to one-quarter of their workforce, with firms being far more likely to provide training to their employees in technical/programming skills, reflecting where shortages are greatest. Firms in the Prairie region and Quebec are most likely to fund training with a dedicated funding budget, while firms in Toronto are the least likely to provide training through internal staff.

8. NEW MEDIA – EMPLOYEES AND FREELANCERS

In the preceding chapter, material on equity group representation, salaries, and skills and training issues was presented based on responses to a survey of new media employers. In this chapter, the perspective of employees and freelancers working in the new media industry is considered, based on responses to surveys of employees and freelancers themselves. Therefore, unlike the preceding chapter, equity group representation results here are based on information submitted by employees and freelancers themselves. Issues addressed include the activities of the firms these individuals work for, the equity group representation among these individuals, the roles or job categories they occupy, and new media skills and training issues.

A. New Media Employees

8.1 PRIMARY ACTIVITY OF FIRMS WHERE EMPLOYED

New media employees work predominantly for firms whose primary activity is website development.

- By a significant margin, website development (designing, building, and maintaining websites) was most frequently identified as the primary business activity of the firms they work for (42.6 per cent of employees surveyed) (Table 8.1).
- Other activities mentioned by over five per cent of new media employees comprise: film or television production (11.8 per cent); website component development (6.2 per cent); web-based marketing and advertising (6.2 per cent); and interactive game development (5.4 per cent).
- A higher proportion of employees in British Columbia cited interactive game development as their firms' primary activity (13 per cent, compared to 5.4 per cent overall) (not shown).

Table 8.1: Primary Activity of Firms that New Media Employees Work For

Activity of Firm	Percentage Indicating as Primary Activity of Firm
Website development (designing, building or maintaining websites and their content)	42.6
Film or television production	11.8
Website component development (“backend”: Java, databases, interfaces, etc.)	6.2
Web-based marketing and advertising	6.2
Interactive game development	5.4
Creating CD-ROM or DVD-ROM products for specialty audiences such as business or training/education markets or governments	3.8
Providing technical services related to software (e.g. creating software tools, programming)	2.6
Business presentations	2.4
E-commerce service	2.1
Creating CD-ROM or DVD-ROM products for consumers	1.9
Hardware service	0.5
Don't know/No answer	14.4
Total	100.0

n = 577

Source: WIFT-T Survey of New Media Employees, 2004

8.2 EMPLOYEE PROFILE

This section addresses the important issue of how well women and other equity groups are represented in the new media employee workforce. The results (based on employee self-identification through a confidential voluntary survey) are presented first by type of job (i.e., part-time/full-time) and then by job category (occupational group).

Women are somewhat underrepresented in new media employment, compared to their share of the national workforce.

- Roughly four in ten employees surveyed are women (42.8 per cent) compared to 47.3 per cent in the Canadian labour force (column 2 of Table 8.2).

Aboriginal employees, along with employees with a disability in particular, are also underrepresented in new media employment, while there is a proportionally larger percentage of employees from a visible minority group.

- Less than two per cent of employees participating in the survey are Aboriginal persons (1.5 per cent) or persons with a disability (1.3 per cent). According to 2001 Canadian Census statistics, 2.6 per cent of the employed labour force is Aboriginal and 5.3 per cent are persons with a disability.

- One in six (16.9 per cent) new media employees are members of a visible minority group. This is higher than the 12.6 per cent of the Canadian workforce who identified themselves as a member of a visible minority group (according to the 2001 Census).

Table 8.2: Self-Identified New Media Employee Equity Group Representation*

Equity Group	Number of New Media Employees in Equity Group	Percentage of New Media Employees in Equity Group	Percentage of National Labour Force in Equity Group
Female	247	42.8	47.3*
Disability	8	1.3	5.3**
Aboriginal	9	1.5	2.6**
Visible minority group	98	16.9	12.6**
All employees	577	100.0	100.0

Source: WIFT-T Survey of New Media Employees, 2004; *2003 Labour Force Survey; **2001 Census.

Differences in equity group representation can be observed by region (Table 8.3).

- Female representation is higher in British Columbia (47.6 per cent) and the Greater Toronto Area (GTA) (47.1 per cent) than it is in other regions of the country; it is lowest in Quebec (31.2 per cent).
- Visible minority representation is somewhat higher in the Prairies region (20.8 per cent) than it is elsewhere in Canada. Representation is much lower in Quebec (6.8 per cent).
- Aboriginal representation is slightly higher in the Prairies (3.7 per cent). The representation of persons with a disability does not vary considerably by region.

Table 8.3: Equity Group Representation* (%), By Region**

Equity Group	Quebec	GTA	Rest of Ont.	Prairies	BC	Canada
Female (n=247)	31.2	47.1	43.2	36.8	47.6	42.8
Disability (n=8)	0.0	0.8	1.6	1.9	1.8	1.3
Aboriginal (n=9)	0.0	0.0	1.5	3.7	0.9	1.5
Visible minority group (n= 98)	6.8	18.3	17.3	20.8	15.9	16.9
N (no. of employees)	48	138	146	114	124	577

* Number of self-identified employees in equity group in region as a percentage of total number of employees in region.

** Atlantic region not shown due to small number of respondents from this region.

Source: WIFT-T Survey of New Media Employees, 2004.

a) Type of Job

Approximately one in six new media employees (16.8 per cent) is working part-time. The incidence of part-time employment among women and members of a visible minority group is comparable to that of all new media employees, but is considerably higher among Aboriginal persons and those with a disability (Table 8.4).

- 16.6 per cent of female employees and 14.4 per cent of employees who are members of a visible minority occupy part-time jobs – which is very similar to the percentage among all employees (16.8 per cent).
- More than one-third of Aboriginal employees (37.5 per cent) and almost three in ten employees with a disability (28.6 per cent) are working in part-time jobs, which is considerably higher than the incidence of part-time employment among all new media employees.

Table 8.4: Incidence of Part-Time Jobs*, by Equity Group

Equity Group	Percentage Working Part-Time (%)
Female (n=247)	16.6
Disability (n=8)	28.6
Aboriginal (n=9)	37.5
Visible minority group (n= 98)	14.4
All employees (n=577)	16.8

* Percentage of self-identified employees in equity group and overall who are working less than 30 hours a week.
Source: WIFT-T Survey of New Media Employees, 2004.

b) Job Category/Salaries

The occupational composition of new media employees indicates that web developers, graphic designers, and production managers are the most frequently occupied jobs in new media (Table 8.5).

- Web developers and graphic designers are the most common job categories among employees surveyed (15.4 per cent and 14.4 per cent, respectively).
- Aside from these two positions, the most common roles are production managers (12 per cent), creative/art director (8.5 per cent), and producer/associate producer (7.6 per cent).
- Eleven other positions were identified by employees in new media firms representing 5.5 per cent or less of all employees, ranging from senior executives to technical specialists.

Table 8.5: Occupational Composition*

Occupation	Percentage of Total
Web developer	15.4
Graphic designer	14.4
Production manager	12.0
Creative/art director	8.5
Producer/associate producer	7.6
Programmer	5.5
Senior executive	5.2
Writer/researcher	3.6
Marketing/sales	3.5
Other technical	3.5
Administrative/clerical	3.3
Audio/video specialist	3.3
Illustrator/ animator	2.6
Account executive	2.1
Webmaster	1.7
Product manager	1.0
Other/Don't know	6.8
Total (n=577)	100.0

* Respondents asked to identify only **one** role (occupation).
 Source: WIFT-T Survey of New Media Employees, 2004.

Table 8.6 presents the distribution of annual salaries for new media employees, within job categories¹⁰². Job categories are listed in descending order of the proportion of employees earning \$48,000 or greater (fifth data column of the table), and are grouped into three tiers according to level.

- Salaries of over \$48,000 are reported more often by senior executives, producers/associate producers, and illustrator/animators (73.3, 61.4, and 53.4 per cent, respectively).
- The proportion with salaries above \$48,000 reported by production managers, programmers, and writer/researchers (39.1, 37.5, and 33.4 per cent, respectively) is comparable to the overall proportion of new media employees earning this salary (35.9 per cent)
- Compared to the overall earnings distribution, salaries over \$48,000 are less commonly reported by graphic designers, web developers, and audio/video specialists (16.8, 18.0, and 21.1 per cent, respectively, compared to 35.9 per cent overall).

¹⁰² The survey asked employees to indicate which of four monthly earnings categories they fit into; these data were converted to an annual figure, which is represented in the table.

Table 8.6: Annual Salary Distribution (%) of Job Categories

Job Category *	Less than \$24,000	\$24,000 to 47,999	\$48,000 to 71,999	\$72,000 and Over	\$48,000 and Over	n**
High-Salary						
Senior executive	3.3	13.3	20.0	53.3	73.3	30
Producer/associate producer	11.4	25.0	40.9	20.5	61.4	44
Illustrator/ animator	13.3	26.7	26.7	26.7	53.4	15
Medium-Salary						
Administrative/clerical	21.1	21.1	21.1	21.1	42.2	19
Creative/art director	12.2	40.8	18.4	22.4	40.8	49
Production or project manager/coordinator	14.5	40.6	27.5	11.6	39.1	69
Programmer	6.3	53.1	34.4	3.1	37.5	32
Writer/researcher	14.3	47.6	28.6	4.8	33.4	21
Other technical	20.0	35.0	20.0	10.0	30.0	20
Marketing/sales	15.0	55.0	25.0	5.0	30.0	20
Lower-Salary						
Audio/video specialist	31.6	42.1	15.8	5.3	21.1	19
Web developer	21.3	55.1	13.5	4.5	18.0	89
Graphic designer	22.9	53.0	12.0	4.8	16.8	83
All employees	16.1	41.4	21.7	14.2	35.9	577
<i>N (no. of employees)</i>	93	239	125	82	207	–

*Job categories indicated by less than 15 survey respondents have been excluded from this analysis (product manager, account executive, webmaster)

** Numbers do not add to the total (577) because of the exclusion of job categories with few respondents, and those who did not indicate a job category.

Source: WIFT-T Survey of New Media Employees, 2004.

Equity groups tend to be over-represented to the greatest extent in the lower salary brackets (Table 8.7).

- 47.3 per cent of women report an annual salary of less than \$24,000, which is higher than their 42.8 per cent share of the workforce overall (although, a slightly higher proportion of women also report earnings of at least \$72,000 – 46.3 per cent).
- Members of visible minority groups are somewhat more likely to report annual earnings of less than \$24,000 (22.9 per cent) than their overall share (16.9 per cent), and somewhat less likely to report earnings of \$48,000 and over.
- Representation of Aboriginal persons and persons with a disability does not vary considerably by salary level.

Table 8.7: Equity Group Representation (%)* by Annual Salary Level

Equity Group	Less than \$24,000	\$24,000 to 47,999	\$48,000 to 71,999	\$72,000 and Over	Overall
Female (n=247)	47.3	41.0	40.0	46.3	42.8
Disability (n=8)	2.5	0.5	1.7	1.3	1.3
Aboriginal (n=9)	1.2	1.8	0.0	1.3	1.5
Visible minority group (n= 98)	22.9	19.4	10.2	11.8	16.9
N (no. of employees)	93	239	125	82	577

* Number of self-identified employees in equity group in salary level as a percentage of all employees at the salary level.

Source: WIFT-T Survey of New Media Employees, 2004.

Women exhibit widely-ranging degrees of representation in job categories at all salary levels but they are particularly over-represented in mid-level job categories (column 1 of Table 8.8)¹⁰³. Significant differences are highlighted in the table.

- ▶ Compared to their 42.8 per cent share overall, women are significantly over-represented in several mid-level job categories, particularly the typically female-dominated administrative/clerical support positions (78.9 per cent); marketing/sales (65.0); production manager (63.8 per cent); writer/researcher (61.9); and “other technical” (55.0 per cent).
 - They are underrepresented among creative/art directors (30.6 per cent) and, particularly, programmers (12.5 per cent).
- ▶ In the high-level job categories, women are significantly underrepresented in the senior executive job category (26.7 per cent) and illustrator/ animator category (0.0 per cent).
- ▶ In the low-level categories, women are particularly *underrepresented* among audio/video specialists (10.5 per cent).

Members of visible minority groups, like women, are over-represented to the greatest extent in the mid-level job categories and underrepresented in the higher levels, while equity group representation varies little across job categories for the other two equity groups (column 2 of Table 8.8)¹⁰⁴.

- ▶ Compared to their 16.9 per cent share overall, members of visible minority groups are over-represented in mid-level marketing/sales (36.8 per cent), programmer (27.6 per cent) and administrative/clerical support (23.5 per cent) job categories.
- ▶ They are noticeably underrepresented in two higher-salary job categories: illustrator/animator (7.1 per cent); and producer/associate producer (9.8 per cent).
- ▶ Persons with a disability are most over-represented in the “other technical” job category (6.3 per cent, compared to their 1.3 per cent share of all employees).

¹⁰³ Job categories where women represent 55 per cent or greater or 30 per cent or less are highlighted in the table and commented on in the text.

¹⁰⁴ Job categories where persons in a minority group represent 22 per cent or greater or 10 per cent or less are highlighted in the table and commented on in the text.

- Aboriginal employees are over-represented to a significant extent in the administrative/clerical positions (11.1 per cent, compared to their 1.5 per cent share of all employees).

Table 8.8: Equity Group Representation (%)* within Job Categories**

Job Category *	Female	Disability	Aboriginal	Visible Minority	n***
High-Salary					
Senior executive	26.7	3.8	0.0	19.2	30
Producer/associate producer	50.0	2.6	2.4	9.8	44
Illustrator/ animator	0.0	0.0	0.0	7.1	15
Medium-Salary					
Administrative/clerical	78.9	0.0	11.1	23.5	19
Creative/art director	30.6	2.3	2.2	13.3	49
Production or project manager/coordinator	63.8	1.5	1.5	16.4	69
Programmer	12.5	0.0	0.0	27.6	32
Writer/researcher	61.9	0.0	0.0	15.0	21
Other technical	55.0	6.3	0.0	13.3	20
Marketing/sales	65.0	0.0	0.0	36.8	20
Lower-Salary					
Audio/video specialist	10.5	0.0	0.0	12.5	19
Web developer	32.6	1.2	2.4	18.1	89
Graphic designer	48.2	0.0	0.0	18.2	83
All employees	42.8	1.3	1.5	16.9	577
<i>N (no. of employees)</i>	247	8	9	98	–

* Number of self-identified employees in equity group in salary level as a percentage of all employees at the salary level.

** Job categories with fewer than 15 survey respondents have been excluded from this analysis (product manager, account executive, webmaster).

*** Numbers do not add to the total (577) because of the exclusion of job categories with fewer than 15 respondents, and those who did not indicate a job category.

Source: WIFT-T Survey of New Media Employees, 2004.

8.3 SKILLS AND TRAINING ISSUES - EMPLOYEES

a) Skills – Needed and Acquired

By a wide margin, employees feel that they are most lacking in the area of promoting projects and services (Table 8.9).

- 43.3 per cent of employees indicated that they need training in this particular skill area.
- There is also a perceived need for project management skills (29.8 per cent), proposing projects (28.8 per cent), and operating tools and equipment (25.1 per cent) (column 1 of Table 8.9).
- Employees perceive themselves to be fairly well-positioned in terms of their ability to demonstrate interpersonal and personal skills (only 13.0 and 10.2 per cent, respectively, say they need these skills).
- There is some regional variation in these results (not shown in the table):
 - Employees in British Columbia are somewhat more likely to indicate that they still need improvement in their ability to research/explore ideas and interpersonal and personal skills.
 - Employees in the Prairies are more apt to say that they have had to acquire skills in operating tools and equipment.

Table 8.9: New Media Skills, Acquired and Needed (%)

Skill	Percentage Indicating Skill*...		
	Is Needed	Has had to be Acquired	Is not Applicable
Promoting project/services	43.3	47.1	12.5
Managing a project	29.8	70.0	5.7
Proposing projects	28.8	66.0	9.5
Operating tools and equipment	25.1	73.0	9.9
Developing a project/producing	21.7	77.5	6.6
Interacting with client	21.1	77.3	5.9
Designing a project	19.6	78.9	8.0
Sharing knowledge/information	15.1	85.3	5.0
Identifying project objectives	14.6	84.1	6.1
Research/exploring ideas	14.2	86.1	5.7
Demonstrating interpersonal skills	13.0	88.0	4.7
Demonstrating personal skills	10.2	90.1	4.9

*A respondent could identify more than one skill in each column and could identify a skill as being both acquired and (still) needed.

n = 577

Source: WIFT-T New Media Employees Survey, 2004.

The ranking of skills that employees said they have acquired through recent training (column 2 of Table 8.9) is, not surprisingly, essentially the opposite of skills that are seen as still being needed.

- All skills, except for promoting projects/services (47.1 per cent), have been acquired through training by at least two-thirds of new media employees. Also note that the greatest proportion of new media employees (12.5 per cent) said this skill was not applicable (last column of table).

b) Training Obstacles

Cost and available time are perceived by employees to be the most significant obstacles to new training opportunities (Table 8.10).

- More than one-half of the new media employees cited the cost of training (57.6 per cent) and not having the time to attend the sessions (54 per cent) as the principal impediments to training.
- Poor quality of the instruction/curriculum is not perceived to be a considerable barrier, as only 2.8 per cent of new media employees said this was “to a great extent” a barrier.

Table 8.10: Training Obstacles (%), New Media Employees

Training Obstacle	Per Cent Indicating “To a Large Extent**”
Cost of training	57.6
Lack of time	54.0
Not knowing what training is available	21.5
No training that is geographically close	18.2
Lack of space/seats in courses at schools	14.8
Lack of appropriate training courses	10.6
Poor quality instruction/curriculum that is available	2.8

*Respondents were asked to respond on a 7-point scale, from 1 = to no extent, up to 7 = to a great extent. Shown here is the proportion indicating 6 or 7 = to a large extent. Computations exclude those not responding to the question or responding with “don’t know”.
n = 577

Source: WIFT-T New Media Employee Survey, 2004

B. New Media Freelancers

Results on self-identified equity group representation, earnings and skills and training issues are presented in this section on new media freelancers. The source for the material presented in this section is the Cultural Human Resources Council New Media Freelancer Survey.

8.4 PRIMARY ACTIVITY OF FIRMS WHERE HIRED

New media freelancers work predominantly for firms whose primary activity is website development (Table 8.11).

- By a considerable margin, website development (designing, building, and maintaining websites) was most frequently identified as the primary business activity of the firms they work for (57.5 per cent).
- Activities mentioned to a lesser degree include: film or television production (9.2 per cent), website component development (5.6 per cent), creating CD-ROM or DVD-ROM products for specialty audiences (4.5 per cent), and web-based marketing or advertising (4.3 per cent).
- A higher proportion of freelancers in Ontario cited website development as their firms' primary activity (61.4 per cent, compared to 57.5 per cent overall), and a greater proportion in Quebec cited creating CD-ROM or DVD-ROM products for specialty audiences (13.9 per cent, compared to 4.5 per cent overall) (not shown in table).

Table 8.11: Primary Activity of Firms that New Media Freelancers Work For

Activity of Firm	Percentage Indicating as Primary Activity
Website development (designing, building, or maintaining websites and their content)	57.5
Film or television production	9.2
Website component development ("backend": Java, databases, interfaces, etc.)	5.6
Creating CD-ROM or DVD-ROM products for specialty audiences (such as business or training/education markets or governments)	4.5
Web-based marketing or advertising	4.3
Creating CD-ROM or DVD-ROM products for consumers	4.0
Business presentations	3.0
Interactive game development (either stand-alone PC, platform-based or online)	1.9
Providing technical services related to software	1.7
E-commerce service development (transactional services)	0.9
Providing technical services related to hardware (e.g., hardware troubleshooting or Internet hosting)	0.0
Other/Don't know	7.5
Total (n=576)	100.0

Source: CHRC Survey of New Media Freelancers, 2004

8.5 FREELANCER PROFILE

This section addresses the important issue of how well women and other equity groups are represented in the new media freelance workforce. The results are based on confidential self-identification by the freelancers who participated in the survey. They are presented first by type of job (i.e., part-time/full-time) and then by salary level and job category (occupational group).

Women are somewhat underrepresented among new media freelancers, compared to their share of the national work force (Table 8.12).

- Roughly two in five freelancers surveyed are women (43.1 per cent, column 2 of table), compared to 47.3 per cent in the Canadian labour force (column 3).

Aboriginal freelancers, and especially freelancers with a disability, are also underrepresented among new media freelancers, compared to these equity groups' share of the overall workforce, while freelancers who are members of a visible minority group are slightly over-represented.

- Less than two per cent of freelancers participating in the survey are Aboriginal persons (1.3 per cent) and less than five per cent are persons with a disability (4.6 per cent). According to 2001 Canadian Census statistics, 2.6 per cent of the employed labour force is Aboriginal and 5.3 per cent are persons with a disability.
- One in seven (14.7 per cent) new media freelancers are members of a visible minority group. This is higher than the 12.6 per cent of Canadians who identified themselves as a member of a visible minority group (according to the 2001 Census).

Table 8.12: Equity Group Representation*

Equity Group	Number of New Media Freelancers in Equity Group	Percentage of New Media Freelancers in Equity Group	Percentage of National Labour Force in Equity Group
Female	248	43.1	47.3*
Disability	26	4.6	5.3**
Aboriginal	7	1.3	2.6**
Visible minority group	85	14.7	12.6**
All freelancers	576	100.0	100.0

* Number of self-identified freelancers in equity group as a percentage of all freelancers.

Source: CHRC Survey of New Media Freelancers 2004; *2003 Labour Force Survey; **2001 Census.

Differences in equity group representation can be observed by region (Table 8.13).

- Female representation is higher in British Columbia (47.7 per cent) than it is in other regions of the country; it is lowest in the Prairies (31.5 per cent).

- Visible minority representation is somewhat higher in British Columbia (17.2 per cent) and the regions of Ontario outside the GTA (18.4 per cent) than it is elsewhere in Canada. Representation is much lower in Quebec (2.9 per cent) and the Prairies (4.9 per cent).
 - It should be noted again that visible minority representation varies widely in the overall workforce, from just over 30 per cent of the overall workforces of Toronto and Vancouver; to 10-18 per cent of the workforces of most other larger and medium-sized Census Metropolitan Areas (CMAs); to five per cent of the workforces of most of the smaller CMAs¹⁰⁵.
- Aboriginal representation is slightly higher in British Columbia (2.6 per cent).
- Representation of persons with a disability is somewhat higher in the Prairies (9.4 per cent) and in British Columbia (7.1 per cent).

Table 8.13: Equity Group Representation* (%), By Region**

Equity Group	Quebec	GTA	Rest of Ont.	Prairies	BC	Canada
Female (n=248)	36.1	43.9	45.8	31.5	47.7	43.1
Disability (n=26)	0.0	1.6	3.8	9.4	7.1	4.6
Aboriginal (n=7)	0.0	0.8	1.2	1.2	2.6	1.3
Visible minority group (n=85)	2.9	16.2	18.4	4.9	17.2	14.7
All freelancers (n=576)	36	139	177	89	130	576

* Number of self-identified freelancers in equity group in region as a percentage of all freelancers in region.

** Atlantic region not shown due to small number of respondents from this region.

Source: CHRC Survey of New Media Freelancers, 2004

a) Type of Job

Almost one-half of new media freelancers are working part-time, and the incidence of part-time work among all equity groups, particularly Aboriginal freelancers and freelancers with a disability, is even higher (Table 8.14).

- Seven in ten Aboriginal freelancers (71.4 per cent) and two-thirds of freelancers with a disability (66.7 per cent) are working part-time, compared to 45.5 per cent overall.
- A little over one-half of females and persons in a visibility minority group (54.8 and 58.4 per cent) work part-time.

¹⁰⁵ Source is Census 2001 and the 2001 Participation and Activity Limitation Survey; representation figures produced by the Employment Equity unit of HRSD: [http://www.HRSD\(Canada\).gc.ca/en/lp/lo/lsw/ee_tools/data/tables/annual/2001/Table03.pdf](http://www.HRSD(Canada).gc.ca/en/lp/lo/lsw/ee_tools/data/tables/annual/2001/Table03.pdf)

Table 8.14: Incidence of Part-Time Work*, by Equity Group

Equity Group	Percentage who are Working Part-Time (%)
Female (n=248)	54.8
Disability (n=26)	66.7
Aboriginal (n=7)	71.4
Visible minority group (n=85)	58.4
All freelancers (n=576)	45.5

* Number of self-identified equity group freelancers working less than 30 hours a week as a percentage of all part-time freelancers.

Source: CHRC Survey of New Media Freelancers, 2004.

b) Job Category/Earnings

The occupational composition of new media freelancers indicates that web developers, graphic designers, and creative/art directors are the roles new media freelancers most frequently assume (Table 8.15).

- ▶ Web developers, graphic designers, and creative/art directors are the most common job categories among freelancers surveyed (19.6 per cent, 14.8 per cent, 14.4 per cent, respectively).
- ▶ Aside from these three positions, the most common roles are producer/associate producer (7.6 per cent), programmers (6.9 per cent), and production or project manager/coordinator (6.4 per cent), and writer/researcher (6.1 per cent).
- ▶ Nine other positions were identified by new media freelancers representing 5.0 per cent or less of all freelancers, ranging from senior executives to technical specialists, each.

Table 8.15: Occupational Composition

Occupation (Most Frequent)	Percentage of Total
Web developer	19.6
Graphic designer	14.8
Creative/art director	14.4
Producer/associate producer	7.6
Programmer	6.9
Production or project manager/coordinator	6.4
Writer/researcher	6.1
Senior Executive	5.0
Webmaster	4.3
Illustrator animator	3.0
Audio/video specialist	3.0
Account Executive	2.6
Marketing/sales specialist	1.7
Product Manager	1.4
Other technical activity	0.9
Database specialist	0.3
Administrative/clerical/support	0.0
Other/don't know	1.9
Total (n=576)	100.0

Source: CHRC Survey of New Media Freelancers, 2004

The following table presents the distribution of annual earnings for new media freelancers, by job category¹⁰⁶. In Table 8.16, job categories are listed in descending order of the proportion of freelancers earning \$48,000 or greater, and are grouped into three tiers.

- Salaries over \$48,000 are reported more often by “other technical” freelancers, those in marketing and sales, programmers, and creative/art directors (40.0, 31.7, 30.3 and 30.0 per cent), compared to 22.4 per cent of all freelancers who earn this amount.
- The proportion of earnings above \$48,000 reported by production or project managers and coordinators, webmasters, audio/video specialists, illustrator/animations, web developers and writers and researchers (26.0 to 18.8 per cent) is comparable to the overall proportion of freelancers earning this amount (22.4 per cent).
- Earnings over \$48,000 are less commonly reported by graphic designers and producer/associate producers (8.5 and 14.4 per cent, respectively), compared to this bracket's 22.4 per cent overall share).

¹⁰⁶ The survey asked freelancers to report their earnings in monthly earnings categories; these data were converted to annual figures, which are represented in the table.

Table 8.16: Annual Earnings Distribution (%) of Job Categories*

Job Category*	Less than \$24,000	\$24,000 to 47,999	\$48,000 to 71,999	\$72,000 and Over	\$48,000 and over	n**
High-Salary						
Other technical	33.3	20.0	20.0	20.0	40.0	15
Marketing/sales	40.9	13.6	18.2	13.5	31.7	22
Programmer	30.3	39.4	15.2	15.1	30.3	33
Creative/art director	35.0	30.0	8.3	21.7	30.0	60
Medium-Salary						
Production or project manager/coordinator	48.1	16.7	9.3	16.7	26.0	54
Webmaster	45.7	11.4	14.3	11.5	25.8	35
Audio/video specialist	46.7	23.3	10.0	13.3	23.3	30
Illustrator/ animator	42.9	20.0	14.3	5.8	20.1	35
Web developer	50.0	24.4	8.5	10.9	19.4	82
Writer/researcher	50.0	18.7	3.1	15.7	18.8	32
Lower-Salary						
Producer/associate producer	51.4	22.9	8.6	5.8	14.4	35
Graphic designer	53.7	28.0	7.3	1.2	8.5	82
All freelancers	43.9	24.5	10.8	11.6	22.4	576
<i>N (no. of freelancers)</i>	253	141	62	67	129	–

*Job categories with fewer than 15 survey respondents have been excluded from this analysis (account executive, administrative/clerical, database specialist, product manager, senior executive).

** Numbers do not add to the total (576) because of the exclusion of job categories with fewer than 15 respondents, and those who did not indicate a job category.

Source: CHRC Survey of New Media Freelancers, 2004.

Equity groups tend to be over-represented to the greatest degree in lower earnings brackets (Table 8.18).

- Women represent about one-half of those earning less than \$24,000 annually (51.4 per cent), compared to their 43.1 per cent representation among all freelancers (last column of table). As well, their representation in higher earnings brackets is less than their overall share.
- The same pattern holds true for members of visible minority groups (19.5 versus 14.7 per cent overall) and persons with a disability (8.0 versus 4.6 per cent).
- Aboriginal persons exhibit little variation across earnings brackets.

Table 8.18: Equity Group Representation(%)* by Annual Earnings Level

Equity Group	Less than \$24,000	\$24,000 to 47,999	\$48,000 to 71,999	\$72,000 and Over	Overall
Female	51.4	36.2	32.3	37.3	43.1
Disability	8.0	1.6	0.0	1.6	4.6
Aboriginal	2.2	1.5	0.0	0.0	1.3
Visible minority group	19.5	8.5	8.8	6.3	14.7
<i>N (no. of freelancers)</i>	253	141	62	67	576

* Number of self-identified freelancers in equity group at an earnings level as a percentage of all freelancers at the earnings level.

Source: CHRC Survey of New Media Freelancers, 2004.

Women are over-represented to the greatest extent in job categories with lower earnings (column 1 of Table 8.17)¹⁰⁷. Significant differences are highlighted in the table.

- At the low-level job categories, women are over-represented among producer/associate producers (60.0 per cent) and graphic designers (54.9 per cent), compared to their 43.1 per cent share overall (last row of the table).
- At the medium salary level, women are over-represented among production and project managers and coordinators (55.6 per cent) and writer/researchers (59.4 per cent), whereas they are underrepresented among illustrators/animators (25.7 per cent), audio/visual specialists (30.0 per cent), and web developers (31.7 per cent).
- At the higher-salary level, women are underrepresented among programmers (27.3 per cent) and the other technical job category (25.0 per cent), while they are over-represented in marketing/sales (63.6 per cent).

¹⁰⁷ For the results for females, percentages that are 55 per cent or greater or 31 per cent or less are shaded in the table and commented on in the text. Similarly, for other equity groups, notable results are highlighted and commented on in the text.

Table 8.17: Equity Group Representation* (%), by Job Category**

Job Category	Female	Disability	Aboriginal	Visible Minority	n***
High-Salary					
Other technical	25.0	9.1	0.0	16.7	15
Marketing/sales specialist	63.6	0.0	0.0	9.5	22
Programmer	27.3	6.3	0.0	9.7	33
Creative/art director	45.0	5.7	1.9	17.0	60
Medium-Salary					
Production or project manager/coordinator	55.6	2.0	1.9	15.4	54
Webmaster	37.1	0.0	0.0	11.4	35
Audio/video specialist	30.0	4.3	0.0	8.3	30
Illustrator/ animator	25.7	3.4	0.0	30.0	35
Web developer	31.7	5.6	2.7	15.3	82
Writer/researcher	59.4	10.0	3.4	0.0	32
Lower-Salary					
Producer/associate producer	60.0	0.0	0.0	17.2	35
Graphic designer	54.9	3.8	1.3	18.2	82
Total	43.1	4.6	1.3	14.7	576
<i>N (no. of freelancers)</i>	248	27	7	85	–

* Number of self-identified freelancers in equity group in job category as a percentage of all freelancers in job category.

** Job categories indicated by less than 15 survey respondents have been excluded from this analysis (account executive, administrative/clerical, database specialist, product manager, senior executive).

*** Numbers do not add to the total (576) because of the exclusion of job categories with fewer than 15 respondents, and those who did not indicate a job category.

Source: CHRC Survey of New Media Freelancers, 2004

The other equity groups exhibit little variation in representation apart from the following:

- Compared to their 4.6 per cent share of all freelancers, persons with a disability are over-represented in the writer/researcher and other technical job categories (10.0 and 9.1 per cent, (column 2 of Table 8.17).
- Compared to their 14.7 per cent share overall, members of visible minority groups are over-represented in the mid-level illustrator/animator job category (30.0 per cent) and underrepresented among audio/video specialists (8.3 per cent) (column 4 of the table).

8.6 SKILLS AND TRAINING ISSUES - FREELANCERS

a) New Media Skills – Needed and Acquired

This section addresses the issue of new media skills or competencies that freelancers feel they have acquired through recent training and those that they feel they still need.

Promoting projects and services is, by far, the area in which the highest proportion of new media freelancers feel they are lacking skills (column 1 of Table 8.19).

- One-half of freelancers (49.5 per cent) identified this competency as one they think they still need.
- There is also a perceived need among freelancers for skills in proposing projects (28.0 per cent), operating tools and equipment (26.4 per cent), and managing projects (24 per cent)
- Freelancers consider themselves to be fairly well-positioned in terms of their ability to demonstrate interpersonal and personal skills (only 10.8 and 9.6 per cent of freelancers, respectively, say they need these skills).

Table 8.19: New Media Skills – Acquired and Needed

Skill	Percentage Indicating Skill* ...		
	Is Needed	Has been Acquired	Not Applicable
Promoting projects/services	49.5	45.6	9.2
Proposing projects	28.0	66.3	9.4
Operating tools and equipment	26.4	70.8	10.4
Managing a project	24.0	74.3	6.3
Developing a project/producing	18.8	79.3	6.8
Sharing knowledge/information	18.6	76.7	8.2
Interacting with a client	16.2	81.4	6.6
Designing a project	15.6	81.3	7.8
Research/exploring ideas	14.2	83.5	6.8
Identifying project objectives	13.0	81.6	8.9
Demonstrating interpersonal skills	10.8	85.8	6.9
Demonstrating personal skills	9.6	86.1	7.3

* A respondent could identify more than one skill in each column and could identify a skill as being both acquired and (still) needed.

n=576

Source: CHRC New Media Freelancer Survey, 2004

- The rank order of skills acquired through training is almost the exact opposite of skills in need (column 2 of Table 8.19).

- With the exception of promoting projects/services (45.6 per cent), the majority of freelancers said they have had to acquire all competencies through training.

b) New Media Training

Cost is perceived by freelancers to be the most significant obstacle to new training opportunities (Table 8.20).

- Two-thirds of freelancers (67.6 per cent) identified cost as a great barrier.
- Almost one-half (47.3 per cent) said lack of time is the largest impediment.
- Lack of space in the training course was not seen as a considerable obstacle for freelancers, as only 1.8 per cent of new media freelancers said this was “to a great extent” a barrier.

Table 8.20: Perceived Obstacles to New Media Training

Training Obstacle	Per Cent Indicating “To a Large Extent” [*]
Cost of training	67.6
Lack of time	47.3
Lack of appropriate training courses	20.3
Poor quality instruction/curriculum that is available	19.5
Not knowing what training is available	13.3
No training that is geographically close	10.1
Lack of space/seats in courses at schools	1.8

^{*} Respondents were asked to respond on 7-point scale, from 1=to no extent, up to 7=to a great extent. Shown here is the proportion indicating 6 or 7 = to a large extent. Percentages indicate the proportion of freelancers who indicated 6 or 7 on the scale. Computations exclude those not responding to the question or responding with “don’t know”.

n=576.

Source: CHRC New Media Freelancer Survey, 2004

8.7 SUMMARY OF KEY RESULTS

a) New Media Employees

New media employees work predominantly for firms involved in website development as the primary business activity. Employees themselves are involved mainly in web development, graphic design and production management.

Women, Aboriginal persons and persons with disabilities are underrepresented in the new media employee workforce, compared to their share of the total workforce, while visible minorities are over-represented. Members of equity groups tend to be over-represented to the greatest extent in lower salary positions. There is a higher incidence of part-time jobs among persons with a disability and Aboriginal persons than there is among all new media employees.

Employees in new media are most likely to feel that they lack the skills to promote projects and services, among a number of skills required in new media. There were differences noted by region: employees in BC are more likely to indicate that they need improvement in their ability to research/explore ideas and in interpersonal and personal skills, while employees in the Prairies are more apt to say they have to acquire skills in operating tools and equipment.

Cost and available time were most frequently identified by new media employees as a significant barrier to new training opportunities.

b) New Media Freelancers

Like new media employees, new media freelancers work predominantly for firms involved in website development as the primary business activity. Freelancers themselves are involved mainly in web development, graphic design and creative/art directing.

Women, Aboriginal persons and persons with disabilities are underrepresented among new media freelancers, compared to their share of the national workforce. Only visible minority groups are over-represented. Freelancers in equity groups tend to be over-represented to the greatest degree in lower earnings brackets.

New media freelancers feel they are lacking the most in terms of promoting projects and services, with the half the freelancers indicating this. Freelancers most frequently cited cost as a significant obstacle to taking advantage of new training opportunities, with a lack of time being identified by a smaller, though still considerable, proportion of them.

PART III: SECTOR INSTITUTIONS

9. EDUCATION AND TRAINING INSTITUTIONS

Education and training facilities perform an important function in supplying the skills needed by the industry. In this chapter, we present results from a survey of public and private education and training institutions with film, television and new media programs. From a list of 173 education and training institutions offering programs in screen-based media that were invited to participate in the web-based survey, 23 (representing a total of 43 screen-based programs) provided data on teachers, students and/or graduates. For some questions on skills, as many as 27 respondents answered the questions.

9.1 EQUITY GROUP REPRESENTATION

Equity group representation is examined and compared across film, television and new media programs, for teachers, students and then graduates.

a) Teaching Staff Profile

Among the 23 private and public institutions for which data on teachers were provided in the survey, the average number of teachers in the 43 screen-based programs is 13.4 per program, and 25 per institution (data column 1 of Table 9.1).

The faculty of film programs is larger than it is for television and new media programs (data column 1 of Table 9.1)¹⁰⁸.

- The mean number of teachers in film programs is 19.9 which is much larger than the means for television and new media (10.5 and 8.4 teachers) (column 1 of table).
- Other results (not shown) indicate that the part-time teachers greatly out-number full-time teachers in these programs.

¹⁰⁸ If the total number of teachers was not provided but counts for part-time and full-time were, then the total was changed to indicate the sum of part-time and full-time. Where the total was not given and only the part-time *or* the full-time was given, then the total was changed to indicate the information on full- or part-time that was provided. In this case, the total underestimates the true total where the part- or full-time number not given is greater than zero.

Rows 1 through 3 of Table 9.1 lay out the mean number of representatives from each equity group in each of the film, television and new media program, with differences between programs reflecting differences in the relative size of the faculties.

**TABLE 9.1: Mean Number of Teachers,
By Screen-based Program and Equity Group, 2002/03 School Year**

Program	No. of Programs	Total*	Female	Disability	Aboriginal	Visible Minority
Film (n=9-16)	16	19.9	8.5	0.3	0.4	1.8
Television (n=7-15)	15	10.5	5.3	0.1	1.0	0.8
New media (n=6-12)	12	8.4	4.0	0.3	1.8	1.8
Tot. mean (per program)	43	13.4	8.8	2.4	1.1	1.5
<i>Number of programs</i>	--	43	33	22	23	25
Tot. mean (for screen-based programs per institution)	--	25.0	13.9	4.1	2.1	2.5
<i>Number of institutions</i>	--	23	21	13	12	15
<i>Number of teachers</i>	--	576	291	53	25	37

* If the total number of teachers was not provided but counts for part-time and full-time were, then the total was changed to indicate the sum of part-time and full-time. Where the total was not given and only the part-time or the full-time was, then the total was changed to indicate the full- or part-time. In this case, the total underestimates the true total where the part- or full-time number not given is greater than zero.

Source: WIFT-T Survey of Education and Training Institutions, 2003/4.

Representation of each equity group varies little across the faculties of screen-based programs, except in the case of persons in a visible minority group, who are much better represented in new media programs than in other programs (Table 9.2).

- Between 35.8 and 43.8 per cent of teachers in screen-based programs are female, with the highest percentage in television (column 1 of the table).
 - Their representation in film programs is lower than across all post-secondary programs generally (45.5 per cent, last row of table), but this is also the case (to a much lesser extent) in the other programs.
- The representation of teachers with a disability varies little across programs (0.7 to 2.0 per cent) (column 2 of table).
 - Compared to their representation in the overall workforce (5.3 per cent, last row of table), however, persons with a disability are considerably underrepresented among the teaching staff of all three screen-based programs.
- The representation of Aboriginal teachers (0.5 to 3.0 per cent) also varies very little across programs (column 3 of table).
 - Their representation is in line with their representation in the overall workforce (2.6 per cent, last row of table).

Table 9.2: Teacher Equity Group Representation (%)*, By Screen-based Program, 2002/03 School Year

Program	Female	Disability	Aboriginal	Visible Minority
Film (n=9-16)	35.8	1.2	1.2	6.2
Television (n=7-15)	43.8	0.7	0.5	0.4
New media (n=6-12)	40.0	2.0	3.0	14.0
Total (for screen-based programs per institution (n=13-21))	38.9	1.2	2.6	7.1
Post-secondary teachers or total labour force	45.5**	5.3***	2.6***	10.3**

* Number in equity group in a program as a percentage of all teachers in the program

** University and college teachers overall (2001).

*** Labour force overall (2001).

Source: WIFT-T Survey of Education and Training Institutions, 2003/4, and 2001 Census.

- Persons in a visible minority group represent 14.0 per cent of teachers of new media programs, which is higher than found among film teachers (6.2 per cent), and, particularly, among teachers in television (0.4 per cent) (column 4 of Table 9.2).
 - Compared to their representation among all post-secondary teachers (10.3 per cent, last row of table), persons in a visible minority group are over-represented among teachers of new media programs and underrepresented in the other programs, particularly in film.

b) Student Profile

Among the 20 private and public institutions for which data on students were provided in the survey, the average number of students in the 28 screen-based is 98.1 on a per-program basis, and 137.7 on a per-institution basis for screen-based programs (column 1 of Table 9.3)¹⁰⁹.

Last school year's mean enrolment in film programs tended to be considerably larger than it was in new media and television (column 1 of Table 9.3).

- The mean enrolment in film programs was 189.5 students last school year, which was much larger than it was in new media and television (93.8 and 47.2).
- Other results (not shown) indicate that the part-time students in these programs greatly outnumber full-time students.

Table 9.3 sets out the mean numbers from the different equity groups for each of three screen-based programs (rows 1 to 3, columns 3-6 of the table).

¹⁰⁹ Numbers underestimate true figure, as explained in first footnote of this chapter.

Table 9.3: Mean Number of Students Enrolled, By Screen-based Program and Equity Group, 2002/03 School Year

Program	No. of Programs	Total Mean*	Female	Disability	Aboriginal	Visible Minority
Film (n=8-9)	9	189.5	101.3	0.9	2.1	12.2
Television (n=6-10)	10	47.2	20.3	0.8	7.4	8.0
New media (n=5-9)	9	93.8	43.3	2.4	6.1	13.9
Total mean (per program)	28	98.4	60.8	1.3	4.9	6.6
<i>Number of programs</i>	--	28	24	18	20	22
Total mean (for screen-based programs per institution)	--	137.7	85.8	1.9	7.5	9.7
<i>Number of institutions</i>	--	20	17	12	13	15
<i>Number of students</i>	--	2,754	1,458	23	97	145

* If the total number of teachers was not provided but counts for part-time and full-time were, then the total was changed to indicate the sum of part-time and full-time. Where the total was not given and only the part-time *or* the full-time was, then the total was changed to indicate the full- or part-time. In this case, the total underestimates the true total where the part- or full-time number not given is greater than zero.

Source: WIFT-T Survey of Education and Training Institutions, 2003/4.

Female representation is much higher among students in film programs than in the other screen-based programs, whereas the reverse is true for other equity groups (Table 9.4).

- About one-half of film students are female (51.6 per cent), compared to one-third of the students in television and new media programs (37.4 and 36.3 per cent) (column 1, rows 1-3).
- In film programs, the representation of disability, Aboriginal and visible minority equity groups (0.4, 0.9 and 5.6 per cent, row 1) is much lower than in:
 - television (1.1, 9.7 and 12.6 per cent, row 2); and,
 - new media (1.4, 5.1 and 11.6 per cent row 3).

Table 9.4: Student Equity Group Representation*, By Screen-based Program, 2002/03 School Year

Program	Female	Disability	Aboriginal	Visible Minority
Film (n=8-9)	51.6	0.4	0.9	5.6
Television (n=6-10)	37.4	1.1	9.7	12.6
New media (n=5-9)	36.3	1.4	5.1	11.6
Total (for screen-based programs per institution) (n=12-17)	45.9	0.7	3.1	8.0
Post-secondary students or overall labour force	56.0**	5.3***	2.6***	12.6***

* Number in equity group in a program as a percentage of all enrolled in the program.

** College and university students combined (1998/99, latest year available), based on data from Statistics Canada's Centre for Education Statistics.

*** Labour force figures (2001), based on data from Statistics Canada Census.

Source: WIFT-T Survey of Education and Training Institutions, 2003/4, and Statistics Canada Census and Centre for Education Statistics.

Compared to their share of all post-secondary students (not shown in the table¹¹⁰), female students are modestly underrepresented in film and significantly underrepresented in the other two programs.

- The representation of women (column 1 of Table 9.4) among film students (51.6 per cent) is somewhat lower than found among all post-secondary students (56.0 per cent, last row of table), whereas the percentage of female enrolment in television and new media programs (37.4 and 36.3 per cent) is much lower than the overall percentage.

Persons with a disability are underrepresented in all programs relative to their share of the total labour force, while representatives of the other two equity groups display varying levels of representation in different programs relative to the total labour force¹¹¹.

- Persons with a disability (second data column of table) are significantly underrepresented in all programs (0.4 to 1.4 per cent), compared to the labour force (5.3 per cent).
- Aboriginal persons (column 3) are underrepresented in film (0.9 per cent) compared to the labour force (2.6 per cent, last row), but they are over-represented in television and new media (9.1 and 5.1 per cent).
- Persons in a visible minority group (column 4) are also underrepresented in film (5.6 per cent) compared to the overall workforce (12.6 per cent, last row), but have similar representation in television and new media (12.6 and 11.6 per cent).

c) Graduates

In the last school year among the 17 private and public institutions for which data on graduates were provided in the survey, the average number of graduates from the 27 screen-based programs is 100.1 per program, and 159.0 per institution (for screen-based programs) (column 1 of Table 9.5)¹¹².

The number of graduates last school year from film programs tended to be considerably larger than it was in new media and television (column 1 of Table 9.5), as it was for students (Table 9.3).

- The mean number of graduates in film programs was 159.7 students last school year, which was much larger than it was in new media and television (96.1 and 30.4 students, respectively).
- Other results (not shown) indicate that the part-time graduates greatly out-number full-time graduates in these programs.

¹¹⁰ Data obtained from Statistics Canada.

¹¹¹ Post-secondary enrolment data were not available at the national level for persons with a disability, Aboriginal persons and those in a visible minority group.

¹¹² Numbers underestimate true figures, as explained in first footnote of this chapter.

**Table 9.5: Mean Number of Graduates
By Screen-based Program and Equity Group, 2002/03 School Year**

Program	No. of Programs	Total Mean*	Female	Disability	Aboriginal	Visible Minority
Film (n=7-11)	11	159.7	88.1	0.1	0.3	8.4
Television (n=4-9)	9	30.4	14.4	0.8	6.4	7.0
New media (n=6-7)	7	96.1	37.7	1.4	5.5	14.3
Total mean (per program)	27	100.1	50.3	0.1	19.7	9.9
No. of programs	--	27	25	16	18	19
Total mean (for screen-based programs per institution)	--	159.0	72.4	1.1	5.6	15.7
No. of institutions	--	17	16	16	18	19
Number of graduates	--	2,703	1,158	11	355	188

* If the total number of teachers was not provided but counts for part-time and full-time were, then the total was changed to indicate the sum of part-time and full-time. Where the total was not given and only the part-time *or* the full-time was, then the total was changed to indicate the full- or part-time. In this case, the total underestimates the true total where the part- or full-time number not given is greater than zero.

Source: WIFT-T Survey of Education and Training Institutions, 2003/4.

Female representation is higher among graduates of film programs than in the other screen-based programs, which is not the case for other equity groups (Table 9.6).

- A little over one-half of film graduates are female (55.2 per cent), compared to the 46.5 and 39.2 per cent of the graduates of television and new media programs who are female (column 1, rows 1-3)
- The representation of persons with a disability, Aboriginal persons and those in a visible minority group in film (0.1, 0.1 and 4.9 per cent, respectively; row 1) is lower than in television (1.4, 14.8 and 4.9 per cent, respectively; row 2) and in new media (4.7, 16.1 and 12.8 per cent, respectively; row 3).

**Table 9.6: Graduates Equity Group Representation (%)*,
By Screen-based Program, 2002/03 School Year**

Program	Female	Disability	Aboriginal	Visible Minority
Film (n=7-11)	55.2	0.1	0.1	4.7
Television (n=4-9)	46.5	1.4	14.8	16.1
New media (n=6-7)	39.2	1.1	4.9	12.8
Total (for screen-based programs per institution) (n=16-19)	49.8	0.5	2.9	8.1
Post-secondary graduates or overall labour force	58.2**	10.1***	2.6***	12.6***

* Number of graduates in equity group in program as a percentage of all graduates in program

** College and university recipients of certificates or degrees (1998/99, latest year available), based on data from Statistics Canada's Centre for Education Statistics.

*** Labour force figures (2001), based on data from Statistics Canada Census.

Source: WIFT-T Survey of Education and Training Institutions, 2003/4, and Statistics Canada Census and Centre for Education Statistics.

Compared to their share of all post-secondary graduates¹¹³, women are underrepresented among the graduates of television, new media, and, to a lesser extent, among film programs.¹¹⁴ (first data column of Table 9.6).

- Women represent 55.2 per cent of film graduates, which is lower than found among all post-secondary graduates (58.2 per cent, last row of table). Their share of the graduates in television and new media programs (46.5 and 39.2 per cent) is also much lower than the overall percentage.

Graduates with a disability are underrepresented relative to their share of the total labour force in all programs, while representatives of other two equity groups display varying levels of representation in different programs relative to the total labour force (Table 9.6).

- Graduates with a disability (second data column of table) are significantly underrepresented in all programs (0.1 to 1.4 per cent), compared to the labour force (5.3 per cent).
- Aboriginal graduates (column 3) are underrepresented in film (0.1 per cent) compared to the labour force (2.6 per cent, last row), but they are over-represented in television and new media (14.8 and 54.9 per cent).
- Graduates in a visible minority group (column 4) are also underrepresented in film (4.7 per cent) compared to their share in the overall workforce (12.6 per cent, last row), but have proportionate representation in television and new media (12.6 and 11.6 per cent).

9.2 SKILLS AND TRAINING ISSUES

The survey collected information from respondents on a number of skills issues, including skills advisory committees; skills in decline and in demand; skills shortages; and skills development.

a) Advisory Committees

All but one of the responding institutions indicated there is an individual or group/committee of industry and/or other experts that provides advice with respect to the content of the film, television, or new media programs provided at the institution. All find the advice provided by this individual or committee to be useful¹¹⁵.

- Of the 28 schools responding to the question, 27 indicated they had such a group or individual.

¹¹³ Data obtained from Statistics Canada

¹¹⁴ Unlike for females, post-secondary graduate data at the national level for persons with a disability, Aboriginal persons and those in a visible minority group were not available.

¹¹⁵ Respondents were asked to respond on a 7-point scale, where 1=not at all useful and 7=extremely useful:

- Of those with such an individual or committee (n=27), all but one said the advice provided by the individual or committee is at least somewhat useful in terms of determining the course content of programs.
 - On the seven-point scale, 13 institutions responded with a 7 (indicating extremely useful), seven with a 6, and five with a 5. Two responded with a “don’t know.”

b) Skills in Decline

Representatives of institutions offering film, television and/or new media programs were most likely to have said skills associated with analog technology and film have become obsolete or have experienced reduced demand over the last 10 years¹¹⁶. See Table F-1 in Appendix F for the detail.

- Out of 26 separate skills mentioned, there were 10 mentions of film-related activities, including editing on a “steenback” or celluloid, linear/analog editing, post-production on film, and negatives cutting.
- There were six mentions of analog or linear technology (including two others associated with film editing) as being in decline.
- Other declining or obsolete skills identified include studio camera operators, theatrical distribution, master control operations, and programming in languages such as COBOL.

c) New Skills that Have Emerged

Out of 60 mentions, the skill area most frequently mentioned as having arisen over the last 10 years is digital. (Table 9.7)¹¹⁷. See Table F-2 in Appendix F for details.

- Out of 60 separate mentions of skills that were said to have arisen in response to the question, 16 are associated with digital technology.
- There were 11 mentions of computer skills associated with the Web, graphics, new media, special effects, including computer graphics.
- There were 10 mentions of various skills associated with production, including high-definition television (HDTV), and web, digital and multi-media production.

¹¹⁶ There were mentions of **26** separate skills that have declined or have become obsolete, with many respondents mentioning more than one (and some none). Respondents were asked, in an open-ended question, what skills or occupations in the respective industry (film, television or new media) have become more or less obsolete, or are experiencing substantially reduced demand over the previous 10 years.

¹¹⁷ There were mentions of **60** separate skills that emerged, with many respondents mentioning more than one (and some who did not provide a response). Respondents were asked, in an open-ended question, what skills or occupations in their respective industry (film, television or new media) have emerged as those in high demand over the previous 10 years.

- Four respondents mentioned editing/compositing.
- Also, a long series of generic and miscellaneous skills were mentioned, including business affairs, project management, entertainment lawyers, trainers, storytellers, scriptwriters, DVD designers for the music industry, and robotics.

Table 9.7: Emerging High Demand Skills Over Last 10 Years*

Skill Area that Has Risen in Last 10 Years	No. of Mentions
Digital /non-linear editing, post-production, compositing, technology, shooting, sound recording, visual effects, production	16
Computer graphics, animation, web design, streaming, using specialized online programming languages, effects, graphic programs, content developer, new media	11
Producing skills, including HDTV, international co-production skills, web video production, interactive project production, lifestyle/reality producing, single camera digital production	10
Editing , compositing	4
Miscellaneous skills, including business affairs, specialty broadcast executives, agents/managers entertainment lawyers, project management, entrepreneurialism, convergent product planning, professional development, storytellers, sound recordists, scriptwriters, DVD designers for music industry, robotics, database management, working on different platforms	20

* Multiple responses were provided to the open-ended question. There were a total of 60 mentions.
 Source: WIFT-T Survey of Education and Training Institutions, 2003/4

a) Skills Expected to be in Demand

Looking to the future, the skill areas most frequently *expected* to be in high demand in the next 10 years are digital technology and high-definition, out of 50 mentions (Table 9.9)¹¹⁸.

- Out of 50 separate skills that were mentioned, nine mentioned skills concerned with digital technology, including projection, production, post-production, problem-solving and asset management.
- Eight were concerned with high-definition television, in various capacities: editing, shooting, production, and make-up.
- Other frequently mentioned areas were: special effects (four mentions), production (four mentions), and content creation (three mentions).
- Seven “generic” skills were also expected to be in high demand, e.g., project management, sales, business skills, and ethics.

¹¹⁸ There were mentions of **50** separate skills expected to increase in demand, with many respondents mentioning more than one (and some who did not provide a response). Respondents were asked, in an open-ended question, what skills or occupations in their respective industry (film, television or new media) they expect will be in high demand by industry in the next 10 years.

- Table 9.8 also shows a number of other wide-ranging expected to be in high demand skills that do not fit well into a category, such as DVD creation, security for new media, webcasting, and motion graphics.

Table 9.8: Skills Expected to be in High Demand in Next Ten Years*

Skill Area Expected to be in Demand in Future	No. of Mentions
Digital cinema/projection, media production, postproduction editing, compositing, problem solving, knowledge asset management, and support for media movement across various digital platforms	9
High-definition television (HDTV), shooting/camera operating, editing, production, post production, make-up	8
Special effects , special effects animation (CGI)	4
Producers , i.e., documentary producers, independent producers, producers with international co-production experience, producers of interactive programming	4
Designers , content creators, writers, i.e., interactive narrative designers/developers for the gaming industry, computer based training designers (curriculum)	3
General skills, such as: <ul style="list-style-type: none"> ☒ Coming up with ideas and presenting them in different media platforms (i.e., TV, radio, web) ☒ Project management with web database integration and understanding of interface - design and dev. ☒ Traditional skills (initiative, leadership, time management, creativity, critical thinking, ethics, org.) ☒ Sales skills (to discover alternative revenue streams) ☒ Ethics ☒ Business skills (budgets, strategic planning) ☒ Development, technology and continuous training 	7
Miscellaneous skills, such as: <ul style="list-style-type: none"> ☒ Compositors for film and video ☒ Editors and videographers with multiple skills such as reporting skills, performance skills, etc. ☒ XML/XHTML and css ☒ Distribution of interactive programming ☒ DVD production/creation ☒ Security (new media) ☒ Interactive website promotion ☒ Skilled service producers in feature films ☒ Database management ☒ Motion graphics ☒ Webcasting 	15

* Multiple responses were provided to the open-ended question. There were **50** separate skills mentioned.

Source: *WIFT-T Survey of Education and Training Institutions, 2003/4*

e) Skills Workers Lack

The majority of respondents feel that those working in screen-based industries (film, television or new media) lack skills in all areas listed, to at least some degree, but the greatest lack is seen in

business-type skills (management, financial, legal, marketing) and in information-related skills (archiving and researching)¹¹⁹ (Table 9.9).

- About 90 per cent indicated at least some lack of **business** type skills (87.5 = 58.3 + 29.2 per cent, columns 2 and 3) and **information**-related skills (90.9 = 63.6 + 27.3 per cent) (columns 1 and 2 of table). In each case, more than one in four said the lack of skills is a “great lack” of skills.
- About three-quarters said there was at least some lack in **creative** skills (e.g., graphic modeling and storyboarding) (72.8 = 54.6 + 18.2 per cent) and **generic** skills (e.g., communication and teamwork) (73.9 = 52.2 + 21.7 per cent). In these cases, one in five indicated these skills to be greatly lacking.
- The lowest proportion saying there was at least some lack was indicated for **computer** skills (e.g., interactive design and programming), for which 58.5 per cent (50.1 + 8.4 per cent) said there was at least some lack.
 - 41.6 per cent of respondents said there was no or little lack of skills in this area (first column of table).

Table 9.9: Lack of Skills: Percentage Distribution According to Degree of Lack* among those Working in Industry

Skill	No/Little Lack (1-2)	Some Lack (3-5)	Great Lack (6-7)
Business Skills (management, financial, legal, and marketing) (e.g., executive production, business planning/management, production, venture financing, sales, marketing) (n=24)	12.5	58.3	29.2
Information-related Skills (e.g., archiving, information retrieval, management, teaching and research skills) (n=22)	9.1	63.6	27.3
Generic Skills/Attributes (e.g., communication, teamwork, interpersonal skills, thinking, problem-solving, perseverance, adaptability, leadership, continuous learning) (n=23)	26.1	52.2	21.7
Creative Skills (e.g., graphic modeling, animation, interface design, graphic design, script writing, storyboarding) (n=22)	27.2	54.6	18.2
Computer Skills (e.g., computer programming, interactive design, games development, website design) (n=24)	41.6	50.1	8.4

* Respondents were asked to respond on a 7-point scale, where 1=not at all lacking, 4=somewhat lacking, and 7=extremely lacking. Those not providing a response or responding with “don’t know” are excluded from the distributions.

Source: WIFT-T Survey of Education and Training Institutions, 2003/4.

¹¹⁹ Respondents were asked to respond on a 7-point scale, where 1=no lack and 7=extreme lack. Respondents indicating 3 or higher were considered as indicating at least some lack.

f) Incidence of and Reasons for Employer Skills Shortages

Almost one-half (48.1 per cent, or 13 respondents) of those who answered the question (n=27) indicated that they think employers are experiencing skill shortages.

- 29.6 per cent (eight respondents) said they are not experiencing shortages, and 22.2 per cent (six respondents) said they did not know.

Poor job security was seen as the greatest cause, by far, of skills shortages employers were experiencing (Table 9.11)¹²⁰.

- Poor job security in the workplace, including frequent layoffs/rapid turnover, was the most frequently identified reason (six ranked it as the number one cause and two ranked it as the second largest cause, for a score of 22).
- Excessive workload/poor work-family balance and graduates not having the right attitude were the second highest ranked reason (each reason with a rank score of 13).
- Much further down the list of perceived reasons for skills shortages are: insufficient salary and benefit levels (rank score of 6), rapid growth in demand for industry's products (rank score of 6), and insufficient workplace training due to cost (rank score of 5).
- Other reasons attracting very little or no response are also indicated in Table 9.11.

¹²⁰ The 13 respondents who indicated employers were experiencing skill shortages were asked to rank, in terms of importance, potential reasons for the skill shortages, as first, second and third. Ranks were aggregated as indicated in the table.

Table 9.11: Perceived Reasons for Employers' Skill Shortages: Number of Times Each Reason Ranked as First, Second or Third*

Reason for Skill Shortage	No. of Times Ranked as			Rank Score**
	1 st	2 nd	3 rd	
Poor job security in workplace; frequent layoffs, rapid turnover	6	2	0	22
Excessive workload; poor work-family balance	2	2	3	13
Recent graduates do not have "right" attitude	2	1	5	13
Salary and benefit levels too low to attract/retain "right" people	0	3	0	6
Rapid growth in demand for industry products and services	0	1	2	6
Insufficient workplace training due to cost	1	0	2	5
Rapid growth/spread of technology	0	1	1	3
Lack of appropriate courses in training/education facilities	0	0	2	2
Skills of existing workers out-of-date	0	1	0	2
Rapid growth in the number of firms in the industry	0	1	0	2
Employer/youth lack information on available training courses	0	0	1	1
Insufficient workplace training due to fear of poaching (losing trained workers to other companies)	0	0	0	0
Young people not entering the field	0	0	0	0
Work not sufficiently challenging/stimulating	0	0	0	0

* Respondents were asked to rank a list of factors in terms of importance as reasons for identified skill shortages in the previous question (n=13).

** Score was computed as follows: 3 points for each first place rank, two points for each second place rank, and one point for each third place rank.

Source: WIFT-T Survey of Education and Training Institutions, 2003/4.

g) Skills Development

The majority of respondents feel that skills in all areas are being developed at least somewhat adequately in education and training institutions (Table 9.12).

- Between 82 and 90 per cent of respondents said that computer, creative, generic, and information-related skills are being developed at least somewhat adequately ¹²¹.
 - 26.1-41.7 per cent said that these skills are being quite adequately developed (responding with 6 or 7 on the scale) (last column of table).
- Opinion was less positive with respect to general business skills (management, financial, legal, marketing). One-quarter (25 per cent) said education and training institutions were **not** adequately developing these skills (responding with 1 or 2 on the scale) (last row of first column of table).
 - This is notable in light of the fact that the largest proportion of respondents thought that workers greatly lacked this skill (from Table 9.9).

¹²¹ Respondents were asked to judge the adequacy of skill development in each area, using a 7-point scale, where 1=not at all adequately, and 7=extremely adequately. Those responding with 3, 4, 5, 6 or 7 are identified as indicating development was at least somewhat adequate (the sum of the last two columns of Table 9.12).

Table 9.12: Adequacy of Skills Development: Percentage Indicating Skills being Developed in Education and Training Institutions, By Degree of Adequacy*

Skill	Not Adequately (1-2)	Somewhat Adequately (3-5)	Quite Adequately (6-7)
Computer Skills (e.g., computer programming, interactive design, games development, website design)	12.5	45.8	41.7
Creative Skills (e.g., graphic modeling, animation, interface design, graphic design, script writing, storyboarding)	8.6	60.8	30.4
Information-related Skills (e.g., archiving, information retrieval, management, teaching and research skills)	17.3	52.2	30.4
Generic Skills/Attributes (e.g., communication, teamwork, interpersonal skills, thinking, problem-solving, perseverance, adaptability, leadership, continuous learning)	13.0	60.8	26.1
Business Skills: Management/Financial/Legal/Marketing Skills (e.g., executive production, business planning/management, production, venture financing, sales, marketing)	25.0	58.4	16.7

* Respondents were asked to respond on a 7-point scale, where 1=not at all adequately, 4=somewhat adequately, and 7=extremely adequately (n=23).

Source: WIFT-T Survey of Education and Training Institutions, 2003/4.

Finally, education and training institutions were asked if they plan any changes in focus in their existing programs in the next five years, in terms of courses to be added, changed or dropped.

- Most respondents talked generally about expected changes, with the introduction of technology, specifically digital technology and high-definition technology, being the only area specified more than once.

9.3 SUMMARY OF KEY RESULTS

Representation of each equity group among teachers varies little across the faculties of film, television and new media programs, except for persons in a visible minority group being much better represented in new media programs than in other programs. Female film teachers are somewhat underrepresented compared to their representation among all post-secondary teachers, teachers with a disability are underrepresented in all programs compared to persons with a disability in the workforce at large, and visible minority group representation is much lower among film teachers than it is in the workforce at large.

As for students, female representation is much higher among students in film programs than in the other screen-based programs, whereas the reverse is true for other equity groups. Compared to their share of all post-secondary students, female students are modestly underrepresented in film, whereas they

are significantly underrepresented in the other two programs. Persons with a disability are underrepresented in all programs relative to their share of the total labour force, while persons in a visible minority group are underrepresented in film alone. Aboriginal persons are underrepresented in film programs compared to their overall workforce share and over-represented in the other two programs. Similar patterns hold true for graduates of these programs.

Institutions offering film, television and/or new media programs most frequently identified skills associated with analog technology and film as having become obsolete or experiencing reduced demand over the last 10 years. On the other hand, these respondents were most likely to identify digital skills as increasing in demand in recent years. The skill areas most frequently *expected* to be in high demand in the next 10 years are digital technology and high-definition.

The two skills seen by representatives of training institutions as most greatly lacking among employees working in screen-based industries are: business-type skills, such as management, financial, legal, marketing; and information-related skills, such as archiving and researching. Almost half of those who answered the question think employers are experiencing skill shortages, and this was most frequently attributed to poor job security, followed by excessive workload and recent graduates not having the right attitude. A majority of respondents thought training institutions are adequately developing skills in all areas, It is worth noting that a quarter felt that their training was not adequate in business skills, an area they saw as greatly needed among employees in screen-based firms.

10. UNIONS AND GUILDS

In this chapter, information on equity group representation, job categories, salaries, and skills and training issues is presented from the perspective of employees and freelancers working in the industry as compiled by the unions and guilds that represent them.

The basis for the results presented in this chapter is a survey of unions and guilds negotiating collective agreements on behalf of freelancers and employees working in the screen-based industries, including television, film and new media. Of the 14 unions and guilds invited to participate in the survey, six responded: Alliance of Canadian Cinema, Television and Radio Artists (ACTRA), Union des artistes (UDA), the Writers Guild of Canada, the Directors Guild of Canada, the National Association of Broadcast Employees and Technicians (NABET), and the Syndicat des techniciennes et techniciens du cinéma et de la vidéo du Québec (STCVQ). These unions and guilds are considered to be among the major organizations representing workers in the screen-based industries. *Note that members of these organizations do not all work in areas that are the focus of other chapters of this report.*

None of the unions and guilds participating in the survey provided statistics on representation by visible minorities, Aboriginal persons or people with disabilities. Most simply do not track this information. This should be encouraged in the future for all unions and guilds in order to measure progress over time.

Results are presented in this chapter on an organization-by-organization basis, as each represents a unique segment of the screen-based sector.

10.1 ALLIANCE OF CANADIAN CINEMA, TELEVISION AND RADIO ARTISTS (ACTRA)

ACTRA is a national organization of 19,500 Canadian professional performers working in the English-language recorded tape or digital media, including film, television, and video¹²². The types of performers covered by ACTRA include actors, singers, dancers, hosts, stunt performers and coordinators, puppeteers, and variety performers. Members live in every region of the country and work for all of Canada's broadcasters, commercial producers, independent television and film producers, the National Film Board of Canada, the sound recording industry and developers of multimedia products.

ACTRA's mission is to negotiate, safeguard and promote the professional rights of, and increase work opportunities for, its members. Towards that end, it has negotiated 11 collective agreements with television stations, the National Film Board of Canada, and other organizations. Through its agreements, the Union has established minimum terms and conditions of engagement for its members.

¹²² Taken from ACTRA website: http://www.actra.ca/actra/control/nat_home

ACTRA has 10 branches across the country representing Newfoundland/Labrador, the Maritimes (stationed in Halifax), Montreal, Ottawa, Toronto, Winnipeg, Regina, Edmonton, Calgary, and British Columbia (stationed in Vancouver). The ACTRA branch in British Columbia is called the UBCP (Union of British Columbia Performers). French performers in Quebec are represented by the Union des artistes (UDA) (dealt with in the next section of this chapter). Professional stage performers nationally are represented by the Canadian Actors Equity Association.

a) Equity Group Representation

About two in five members (41.5 per cent) of ACTRA are women. ACTRA does not maintain information on the other equity groups. Also, as the Union represents essentially only one job category (performers), results by job category are not applicable.

b) Salaries

The majority of ACTRA members earn less than \$10,000 annually (second data column of Table 10.1).

- Almost two-thirds of the membership (65.5 per cent) have salaries of under \$10,000.
- Only 7.3 per cent have earnings over \$50,000.

While differences by salary level are not striking, women represent a somewhat higher percentage of the ACTRA membership at the lowest salary bracket than they do in other brackets (last column of Table 10.1).

- Women represent 43.2 per cent of ACTRA members earning less than \$10,000, which is slightly greater than their share of the overall membership (41.2 per cent).
- In each of the other salary brackets, women represent less than 40 per cent of members in that bracket. In particular, about one-third (32.2 per cent) of members earning \$100,000 and greater are women.

Table 10.1: Salary Distribution and Female Representation by Salary Level, ACTRA

Salary Bracket (Annual)	Number of Members	Percentage Distribution of Membership	Female Percentage of Members in Salary Bracket
< \$10,000	6,373	65.5	43.2
\$10,000 – \$24,999	1,681	17.3	39.0
\$25,000 – \$49,999	950	9.8	37.6
\$50,000 – \$69,999	257	2.6	31.9
\$70,000 – \$99,999	197	2.0	39.1
≥ \$100,000	267	2.7	32.2
Total ACTRA	9,725*	100.0	41.2

* Number of members for which data were provided in the survey.

Source: WIFT-T Survey of Unions and Guilds, 2003/04

c) Skills and Training Issues

The skills that ACTRA identified as being helpful to its members in terms of getting a job now and in the future are the following:

- business skills (for independent contractors): contracting, accounting, marketing, promotion, networking;
- performer skills: auditioning, performing; and
- industry skills: pitching a project, project management, directing, producing.

ACTRA feels that the demand for its members over the last 10 years has declined somewhat, but did not provide particulars on exactly what skills or job categories were in decline. Each union or guild was asked to indicate the extent to which, over the last decade, demand for its members has been decreasing or increasing. They were asked to respond using a 7-point scale, where 1=decreasing greatly and 7=increasing greatly. ACTRA's response was a three (3).

Over the next five years, the Union feels that new emerging skills and job categories will emerge in digital media (voice work and motion capture).

ACTRA's role in developing the skills of its members was described as being two-fold:

- through its provincial branches, holding education conferences for its members; and
- sponsoring other training activities such as "Women in the Director's Chair" and film school projects.

The skill areas in which ACTRA has organized training are the following:

- auditioning;
- contracting;
- speaking with an accent;
- pitching projects; and
- self-producing.

10.2 UNION DES ARTISTES (UDA)

The UDA represents professional actors working in French within Quebec as well as other regions of Canada. The Union also represents talent working in languages other than French with the exception of those working in a production made and executed in English and intended exclusively for the English-language venue. There are approximately 6,400 active members and more than 3,900 interns. The Union's mission is the identification, study, and representation of its members' economic, social and moral interests.

a) Equity Group Representation

Almost one-half (48.6 per cent) of the members of the Union des artistes (UDA) are women. Data on representation by other equity groups were not available. Also, as the Union represents essentially one job category (actors), results by job category are not applicable.

b) Salaries

The salary distribution of the UDA membership is skewed toward the lower salary brackets (Table 10.2). Over two-thirds of the Union's members (69.2 per cent) earn less than \$10,000. Less than five per cent earn \$70,000 and over.

Women have a greater representation in the lower salary brackets than in the higher brackets. For example, women's share of brackets under \$70,000 annually is 46.5 per cent or higher, whereas they represent 37.7 per cent or less in brackets from \$70,000 and up. Salary information for other equity groups was not available.

Table 10.2: Salary Distribution and Female Representation by Salary Level, UDA

Salary Bracket (Annual)	Number of Members	Percentage Distribution of Membership	Female Percentage of Members in Salary Bracket
< \$10,000	4,091	69.2	50.0
\$10,000 – \$24,999	853	14.4	46.5
\$25,000 – \$49,999	485	8.2	60.0
\$50,000 – \$69,999	200	3.4	48.5
\$70,000 – \$99,999	114	1.9	37.7
≥ \$100,000	174	2.9	36.7
Total UDA	5,917*	100.0	48.6

* Number of members for which data were provided in the survey.

Source: WIFT-T Survey of Unions and Guilds, 2003/04

c) Skills and Training Issues

The ability to manage one’s own career was identified by UDA as the essential skill needed for its members in terms of getting a job now and in the future.

UDA states that “comedian” is the job category that has emerged as being in high demand over the last 10 years. Over the next five years, the Union feels that working with multimedia will be the new emerging skill and comedians will continue to be in high demand.

The Union plays a role in developing skills required by the industry. It ensures that the actors have agreements that assure them of acceptable working conditions and respectable talent fees. It also organizes training for the following skill areas:

- dubbing;
- voice/track laying;
- theatre workshops; and
- career management.

The Union believes employers and the industry association should inform students of professional schools of the reality of the occupation and offer courses on career management. The Union also feels that the federal and provincial governments should collaborate with the Union to address the training needs of its members.

10.3 WRITERS GUILD OF CANADA (WGC)

The Writers Guild of Canada is a national association representing more than 1,700 screenwriters working in film, television, radio and multimedia production in Canada. Members of the Guild are professionals who write dramatic TV series, feature films, mini-series, documentaries, animation, comedy and variety series, children's and educational programming, radio drama, as well as corporate videos and multimedia productions.

On behalf of its members, the Guild negotiates, administers and enforces collective agreements setting out minimum rates, terms, and working conditions in the Guild's jurisdiction — all English-language production in Canada. The central collective agreement, the Independent Production Agreement, is negotiated between the Guild and the Canadian Film and Television Production Association, the association representing independent producers in Canada. The Guild also has agreements in place with CBC/Radio-Canada, CBC English TV, CTV, NFB and TVOntario.

The Guild maintains a core program of activities aimed at promoting and expanding opportunities for Canadian writers. These efforts encompass a range of initiatives including industry outreach and marketing, media relations and professional development. These include publishing the WGC Directory of Members and Canadian Screenwriters, partnering with the Directors Guild of Canada to produce “Script to Screen: The Writers and Directors Conference”, and holding the annual Top Ten Awards to celebrate members' creative achievements.

a) Equity Group Representation

Just under one-third (30.6 per cent) of members of the Writers Guild are women. Data on representation by other equity groups were not available. Also, as the Union represents essentially only one job category (writers), results by job category are not applicable.

b) Salaries

Salary information was not available.

c) Skills and Training Issues

“Pitching” was the only skill the WGC identified as being helpful to its members in terms of getting a job now and in the future.

The Writers Guild feels that the demand for its members over the past 10 years has declined. Each union or guild was asked to rate the extent to which, over the last decade, demand for its members has been decreasing or increasing, with responses indicated on a 7-point scale, where 1=decreasing greatly

and 7=increasing greatly. The Writers Guild's response was a two (2). No information was available on what skills or job categories have emerged as being in high demand over the last 10 years or what skills are expected to be in demand in the next five years.

With respect to the training initiatives in which the Writer's Guild has been involved, the Guild has occasionally organized one-day training workshops for its members on various subjects.

10.4 DIRECTORS GUILD OF CANADA (DGC)

The Directors Guild of Canada (DGC) is a national labour organization that represents key creative and logistical personnel in the motion picture industries. This professional organization represents directors, production managers, location managers, production designers, and their assistants and trainees nationwide.

a) Job Categories and Equity Group Representation

The Union represents 12 job categories. As would be expected, Director is the dominant category of the DGC, with 615 members, representing 43.9 per cent of the DGC membership. Other categories with large numbers of members are Production Manager (374 or 26.7 per cent of the membership) and 1st Assistant Director (222 or 15.8 per cent) (Table 10.3).

Almost two out of five members (38.4 per cent) of the Directors Guild are women (Table 10.3, last row). Data on representation by other equity groups were not available, so equity group representation in different job categories could not be considered.

Women are significantly underrepresented in two of the most prevalent three job categories, and generally better represented in production-related categories than direction-related ones:

- ▶ In all direction categories, women represent 31.6 per cent or less of the membership. They represent only 9.8 per cent of members in the highest skill job category of Director and 20.1 per cent of those in the 1st Assistant Director category, compared to their 38.4 per cent share of the total membership.
- ▶ Among Production Managers, women are only slightly underrepresented (36.8 per cent) compared to their share of the overall membership (38.4 per cent).
- ▶ Women represent a particularly large share of the Production Coordinator job category (83.0 per cent), as well as the categories of Unit Manager (51.7 per cent) and Assistant Production Manager (50.0 per cent).

Table 10.3: Occupational Distribution and Female Representation by Job Category, DGC

Job Category	Number of Members	Percentage Distribution of Membership	Female Percentage of Members in Job Category
<i>Direction</i>			
Director	615	43.9	9.8
2 nd Unit Director	38	2.7	7.9
1 st Assistant Director	222	15.8	20.1
2 nd Assistant Director	1	0.1	0.0
3 rd Assistant Director	1	0.1	0.0
Associate Director	23	1.6	8.7
Trainee Assistant Director	19	1.4	31.6
Technical Coordinator	1	0.1	0.0
<i>Production</i>			
Production Manager	374	26.7	36.8
Assistant Production Manager	26	1.9	50.0
Unit Manager	29	2.1	51.7
Production Coordinator	53	3.8	83.0
Total DGC	1,402*	100.0	38.4

* Number of members for which data were provided in the survey.

Source: WIFT-T Survey of Unions and Guilds, 2003/04

b) Salaries

The salary distribution of the DGC membership appears to be polarized, with concentrations at the lowest and highest salary brackets (Table 10.4). Thirty-seven per cent of the membership earn under \$30,000 a year, and 28 per cent earn over \$106,664 a year. Salary data were not available by any of the equity groups, so it was not possible to observe equity group representation by salary level.

Table 10.4: Salary Distribution, DGC

Salary Bracket (Annual)**	Number of Members	Percentage Distribution of Membership
< \$30,000	1,078	37.3
\$30,000 – \$41,664	176	6.1
\$41,665 – \$69,999	330	11.4
\$70,000 – \$106,664	495	17.1
≥ \$106,665	814	28.1
Total DGC	2,893*	100.0

* Number of members for which salary data were provided in the survey.

** Salary brackets are those used by the Guild.

Source: WIFT-T Survey of Unions and Guilds, 2003/04

c) Skills and Training Issues

The DGC identified three skill areas that may be helpful to its members in terms of getting a job now and in the future. The areas are the following:

- digital technologies;
- supervisory skills specific to film and television; and
- computer skills for accounting specific to the film and television industry.

The Guild feels that demand for its members over the past 10 years has increased for Directors and 1st Assistant Directors. stayed about the same for Associate Directors, and decreased slightly for 2nd and 3rd Assistant Directors. As already noted, in the survey, each union or guild was asked to indicate the extent to which, demand for its members has been decreasing or increasing over the last decade. They were asked to respond using a 7-point scale, where 1=decreasing greatly and 7=increasing greatly. The Guild's response was a five (5) for Director and 1st Assistant Director, four (4) for Associate Director and three (3) for 2nd Assistant Director and 3rd Assistant Director.

The Directors Guild offered several suggestions on skills or job categories in screen-based industries that have increased in demand over the last 10 years. Over the last decade, the job categories identified were the following:

- Director;
- 1st Assistant Director;
- Locations Manager;
- Accountant; and
- Production Assistant.

When asked to identify new emerging skills and occupations in high demand in the next five years, the Directors Guild indicated the following:

- Director;
- Locations Manager;
- Editor; and
- Production Manager.

The Directors Guild is planning to play a role in developing skills required by industry. Specifically, the Guild is looking to establish a National Training Program for its members. This project includes assessing current courses, reviewing emerging skills and knowledge necessary to function in the industry, developing new courses where required, and ensuring that there is access to these courses across

the country. The Guild is working with the District Councils and industry-related training institutions to determine the training needs.

The Guild organizes training for its members in all job categories. Currently, there are many training initiatives done through the District Councils. The Guild plans to coordinate all of this training through its national office to develop a national standard.

As for role to be played by the various parties concerned with training, the Directors Guild feels that employers should notify the Guild of their expected minimum standards of training requirements. On the other hand, the Guild also feels that unions and guilds should survey members to learn in what areas members feel there is a lack of training opportunities and then take steps to make these opportunities available by providing funding for the development of new courses.

The Guild suggests that public educational/training institutions and private trainers should offer industry specific courses in consultation with industry leaders that are reasonably priced and offered at convenient times.

10.5 NATIONAL ASSOCIATION OF BROADCAST EMPLOYEES AND TECHNICIANS (NABET)

The National Association of Broadcast Employees and Technicians - Communications Workers of America (NABET-CWA) is a union devoted to aiding workers who are employed in the broadcasting, distributing, telecasting, recording, cable, video, sound recording and related industries in North America. In 1952 Canadians joined NABET, and by 1968 Canadians achieved local autonomy and full autonomy by 1974. In 1993, NABET affiliated with the Communications Workers of America, followed in 1994 with a full merger, which resulted in the new name NABET-CWA.

NABET-CWA, the Broadcast and Cable Union, represents over 10,000 workers employed in broadcasting. Along with CWA, the largest telecommunications union in the world, NABET represents 600,000 workers in private and public sector employment in the United States and Canada. More than 1,200 chartered CWA local unions are affiliated. Members are employed in telecommunications, printing and news media, public service, health care, cable television, general manufacturing, electronics, gas and electric utilities, and other fields.

NABET-CWA holds over 100 collective bargaining agreements with broadcasting and other types of companies across North America, spelling out wages, benefits and working conditions for its members. Over the years, NABET has gained benefits and wages for its represented members in the following areas: eight-hour work days, vacations, holidays, sick leave, insurance, overtime pay, pension plans, seniority, grievance and arbitration, and safety and health.

a) Job Categories and Equity Group Representation

The Union represents 12 job categories (Table 10.5). Significant differences are highlighted in the table. About one-half of the NABET membership (51.1 per cent) is in three job categories: grip/lighting (247 members, 20.9 per cent), transportation (190, 16.1 per cent), and construction/painting (166, 14.1 per cent).

About one-quarter (24.4 per cent) of the NABET membership is made up of women. Data on representation by other equity groups were not available.

The representation of women within each job category indicates that women dominate in only two job categories, which are considered to be “traditional” female occupations.

- Women represent 90.3 and 86.9 per cent of the membership of the wardrobe and hair/make-up job categories, which is far greater than their 24.4 per cent share of the total membership (last row of Table 10.5).
- Women are underrepresented in traditional “male” occupations, such as transportation (7.8 per cent), TV technical (7.7 per cent), labourer (6.4 per cent), and construction/paint (6.0 per cent).
- In all other job categories, women are underrepresented except for props (26.8 per cent) and set decoration (22.9 per cent) where they are neither under- nor over-represented.

Table 10.5: Occupational Distribution and Female Representation by Job Category, NABET

Job Category	Number of Members	Percentage Distribution of Membership	Female Percentage of Members in Job Category
Grip/lighting	247	20.9	4.4
Transportation	190	16.1	7.8
Construction/paint	166	14.1	6.0
Wardrobe	135	11.4	90.3
Set decoration	135	11.4	22.9
Hair/makeup	84	7.1	86.9
Props	67	5.7	26.8
Sound	57	4.8	1.7
Labourer	47	4.0	6.4
Special Effects	26	2.2	7.6
TV technical	26	2.2	7.7
Total NABET	1,180*	100.0	24.4

* Number of members for which data were provided in the survey.

Source: WIFT-T Survey of Unions and Guilds, 2003/04

b) Salaries

The salary information provided indicates that NABET members are concentrated in the \$25,000-49,999 and \$50,000-69,999 salary brackets, which together contain around 73 per cent of the NABET membership (Table 10.6). Separate figures for any of the equity groups were not available, so equity group representation by salary level could not be assessed for this union.

Table 10.6: Salary Distribution, NABET

Salary Bracket (Annual)	Number of Members	Percentage Distribution of Membership
< \$10,000	5	0.5
\$10,000 – \$24,999	97	8.8
\$25,000 – \$49,999	352	31.9
\$50,000 – \$69,999	454	41.2
\$70,000 – \$99,999	126	11.4
≥ \$100,000	68	6.2
Total NABET	1,102*	100.0

* Number of members for which data were provided in the survey.

Source: WIFT-T Survey of Unions and Guilds, 2003/04

c) Skills and Training Issues

NABET feels that the demand for its members over the past 10 years has greatly increased. Using a 7-point scale, where 1=decreasing greatly and 7=increasing greatly, NABET provided an overall rating of seven (7), indicating that over the past four years the membership has increased by 40 per cent.

The Union indicated that the following new skills or job categories in screen-based industries have emerged as being in demand in recent years:

- airbrushing application techniques for make-up;
- set dressing for HD formats; and
- increased versatility in specialist positions (i.e., lighting/grip or hair/make-up specialists).

NABET enhances skills on a department-by-department basis (that is, by job category) to render members more employable and to help NABET become a more competitive film union. Organized training by NABET varies according to the department (no other information was available on this point).

The Union feels employer/industry associations should continue to contribute a levy on earnings that goes towards the training fund of the Union. NABET also feels that unions and guilds in the industry, in general, should continue to offer training to enhance the skills of industry technicians.

10.6 SYNDICAT DES TECHNICIENNES ET TECHNICIENS DU CINEMA ET DE LA VIDEO DU QUEBEC (STCVQ)

The STCVQ represents technicians who work on contract in the private sector film and television industries. With a growing membership of over 2,650, the STCVQ negotiates and administers a collective agreement on behalf of its members. The agreement covers all stages of production, including preparation, pre- and post-production, commercials, feature films, television series, documentaries and short- and medium-length films. This agreement, which is negotiated between representatives of the Union and the APFTQ (Association des producteurs des films et de television du Québec), covers all work done in the province of Québec.

The STCVQ has an Administrative Council, consisting of 16 members, elected to represent several departments (corresponding to job categories). These departments include: camera, sound, editing, art, wardrobe, technical, transportation, direction, and hair/makeup.

a) Job Categories and Equity Group Representation

The Union represents 13 broad job categories (Table 10.7). Significant differences are highlighted in the table. About one-half of STCVQ membership (55.2 per cent) is in the following three categories: art/scenery (612 members, 25.4 per cent), production (430, 17.8 per cent), and technical (e.g., electrician and key grip) (290, 12.0 per cent). Two other large job categories are camera (232 members, 9.6 per cent) and costumes (219, 9.1 per cent).

Women represent just over one-third (37.9 per cent) of the total membership of the Union (last row of Table 10.7). Data for other equity groups were not available. The results for representation of women within each job category (last column of the table) indicate wide ranging degrees of over- or under-representation in all job categories but one.

- ▶ Women dominate the traditional “female” job categories. They are significantly over-represented in costumes and make-up, of which they represent 82.2 and 83.3 per cent of the membership. They are also over-represented, but to a lesser extent, in the hair-dressing category (56.9 per cent).
- ▶ Women are also over-represented in some higher skilled categories such as production (48.1 per cent), editing (51.7 per cent), and script writing (100.0). The same is true of the Director Assistant job category (49.6 per cent).
- ▶ Women are underrepresented in traditional “male” job categories, such as technical (3.1 per cent), sound (10.1 per cent), and transportation (11.2 per cent).
- ▶ The one job category where women’s share is similar to their overall share of the membership is the largest job category, art/scenery, of which they represent 32.8 per cent (compared to their 37.9 per cent overall share).

Table 10.7: Occupational Distribution and Female Representation by Job Category, STCVQ

Job Category	Number of Members	Percentage Distribution of Membership	Female Percentage of Members in Job Category
Art/scenery	612	25.4	32.8
Production	430	17.8	48.1
Technical**	290	12.0	3.1
Camera	232	9.6	21.6
Costumes	219	9.1	82.2
Transportation	134	5.6	11.2
Director assistant	133	5.5	49.6
Make-up	84	3.5	83.3
Sound	79	3.3	10.1
Editing	60	2.5	51.7
Hair-dressing	58	2.4	56.9
Script writer	43	1.8	100.0
Special effects	37	1.5	0.0
Total STCVQ	2,411*	100.0	37.9

* Number of members for which data were provided in the survey.

** Includes electrician, gaffer, key grip.

Source: WIFT-T Survey of Unions and Guilds, 2003/04

b) Salaries

No data were available on salaries.

c) Skills and Training Issues

No data were available on these issues.

10.7 SUMMARY OF KEY RESULTS

Almost one-half of ACTRA members are females, and women also comprise nearly one-half of UDA members. More than two-thirds of ACTRA members earn less than \$10,000 annually; UDA has a similar salary distribution. Almost one-third of WGC members are women, and slightly more than one-third of DGC members are female (although women are significantly underrepresented in two of the three most prevalent job categories). DGC membership appears to be concentrated in both the lowest and highest salary brackets.

ACTRA considers business skills, performer skills and industry skills to be most helpful to its members in terms of getting a job, and feels that the key emerging skills and job categories will be related to digital media. UDA identified the ability to manage one's own career as the key essential skill, whereas

“pitching” was the only skill identified by WGC as helpful to its members in getting a job now and in the future. UDA identified “comedian” as the job category that has emerged as being in high demand over the last 10 years, and sees working with multimedia as the new emerging skill. DGC identified digital technologies, supervisory skills and computer skills for accounting as potentially helpful to its members. The Guild identified Directors, 1st Assistant Directors, Locations Managers, Accountants and Production Assistants as job categories that have increased in demand over the last 10 years. DGC considers Directors, Location Managers, Editors and Production Managers to be new emerging occupations that will be in demand over the next five years.

PART IV: SUMMARY TABLES

11. SUMMARY TABLES

To conclude the report, the following tables are provided, summarizing and comparing the results for equity group representation across screen-based industries, for working owners; for paid workers and working owners combined; for freelancers; and for teachers, students and graduates of screen-based programs.

Table 11.1: Mean Equity Group Representation*, Working Owners, by Screen-based Industry

Industry	Female	Disability	Aboriginal	Visible Minority
Television and film production	36.4	0.8	1.2	6.5
Television and film distribution	30.6	0.3	0.0	14.1
New media	22.9	1.5	1.3	10.5
National workforce	47.3	5.3	2.6	12.6

* Per-company mean of: number in equity group in firm as a percentage of total in firm.

Source: WIFT-T surveys and Statistics Canada data.

Table 11.2: Equity Group Representation*, Paid Workers plus Working Owners, by Screen-based Industry

Industry	Female	Disability	Aboriginal	Visible Minority
Television and Film Production				
Public (NFB)	59.5	1.5	1.3	6.7
Private	45.9	3.3	0.8	12.4
Television and Film Distribution				
Motion Picture and Video (incl. Exhibitors)	41.6	6.8	1.5	11.9
Television Broadcasting				
Public CBC/Radio-Canada**	43.2	1.9	1.3	4.8**
Private - Small	11.2	0.3	0.7	1.7
Private - Large	40.6	1.6	0.8	5.6
New Media				
Reported by employers	32.3	1.8	0.8	17.4
Reported by employees	52.4	3.3	5.2	23.9
Unions and Guilds				
ACTRA - Performers	41.2	N/A	N/A	N/A
UDA - Performers (French language)	48.6	N/A	N/A	N/A
WGC - Writers	30.6	N/A	N/A	N/A
DGC – Directors and Assistant Directors	38.4	N/A	N/A	N/A
NABET - Screen-based workers	24.4	N/A	N/A	N/A
STCVQ - Film and television technicians	37.9	N/A	N/A	N/A
National workforce	47.3	5.3	2.6	12.6

* Number in equity group in industry as a percentage of the total number in industry.

** Note that recent diversity data received from the CBC too late for inclusion in this report indicate that current visible minority representation at CBC English television is much higher — at 7.9 per cent.

N/A Data were not available

Source: WIFT-T surveys, HRSD (CANADA) Employment Equity data, Statistics Canada data, and CBC/Radio-Canada, NFB and CRTC data.

Table 11.3: Equity Group Representation*, Freelancers, by Screen-based Industry

Industry	Female	Disability	Aboriginal	Visible Minority
Television and film production*	57.8	0.5	2.0	11.8
Television and film distribution*	50.0	0.0	0.0	14.6
New media, as reported by employers*	33.3	0.9	1.9	12.7
New media, as reported by freelancers**	43.1	4.6	1.3	14.7
National work force	47.3	5.3	2.6	12.6

* Per-company mean of: number in equity group in firm as a percentage of total in firm.

** Number in equity group as a percentage of total number in sample.

Source: WIFT-T surveys and Statistics Canada data.

Table 11.4: Equity Group Representation*, Teachers, Students and Graduates, by Screen-based Program in Education and Training Institutions

Program	Female	Disability	Aboriginal	Visible Minority
Teachers				
Film	35.8	1.2	1.2	6.2
Television	43.8	0.7	0.5	0.4
New media	40.0	2.0	3.0	14.0
Students				
Film	51.6	0.4	0.9	5.6
Television	37.4	1.1	9.7	12.6
New media	36.3	1.4	5.1	11.6
Graduates				
Film	55.2	0.1	0.1	4.7
Television	46.5	1.4	14.8	16.1
New Media	39.2	1.1	4.9	12.8

* Number in equity group in program as a percentage of total number in program.

Source: WIFT-T Survey of Education and Training Institutions, and Statistics Canada data.

APPENDIX A
A NOTE ON COMPARISONS WITH THE
EARLIER STUDY

Appendix A: A Note on Comparisons with the Earlier Study

An objective of this study was to observe the extent to which conditions have changed over the last 15 years or so since the last study of this nature was published (*A Statistical Profile of Women in the Canadian Film and Television Industry*, released in 1990 by the Foundation for Toronto Women in Film and Video). However, there are few points of comparison between recent findings and those presented in the earlier study. The main challenges to comparing results are as follows:

- Methodologies used to collect primary survey data between the two studies differ, particularly with respect to sampling strategies and survey medium (online vs. mail).
- It is reasonable to assume organizations providing secondary data have altered their approach to data collection and/or reporting in the period between the two studies. This is most evident in the different terms of reference and occupational groupings used to frame data for the two studies.
- The 1990 report's singular focus on the female equity group does not provide any comparative data for the other equity groups, namely Aboriginal persons, persons in visible minority groups or those with a disability.
- As new media was essentially non-existent in 1990, there will be no comparative information for this industry. Comparisons are made for the production, distribution and broadcasting sectors of the industry.
- When interpreting shifts between data points spanning a decade, it is important to remain cognizant of the numerous shifts in context that may have occurred in areas as dynamic as production, distribution and broadcasting (in particular, rapid technological change, globalization, industry restructuring and vertical integration, as well as the changing ethnic diversity of the workforce and the viewing audience).

That being the case, there were a limited number of points of approximate comparison between the 1990 report and findings from the current study. These are indicated in the summary of each section of this report. These points of comparison should be considered directional and suggestive in nature, rather than grounds for substantive conclusions.

APPENDIX B
OFFICIAL EMPLOYMENT
EQUITY GROUP DEFINITIONS

**Appendix B:
Official Employment Equity Group Definitions**

Equity Group	Official Definition
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;
Aboriginal person	Persons who are Indians, Inuit or Métis;
Members of visible minorities"	Persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour;

*Source: Employment Equity Act, 1995: <http://laws.justice.gc.ca/en/E-5.401/49886.html>

APPENDIX C
SKILL LEVEL DESIGNATION
BASED ON THE NATIONAL OCCUPATION
CLASSIFICATION (NOC)

Appendix C: Skill Level Designation Based on the National Occupation Classification (NOC)

Skill Level	Level of Education Usually Required	Detailed Requirements
High-Skilled (NOC Level A, or 1)	University education	<ul style="list-style-type: none"> › University degree at the bachelor's or master's or doctorate level. › Managerial occupations.
Medium-Skilled (NOC Level B, or 2 or 3)	College education or apprenticeship training	<ul style="list-style-type: none"> › Two to three years of post-secondary education at a community college, institute of technology or CEGEP; or › Two to five years of apprenticeship training; or › Three to four years of secondary school and more than two years of on-the-job training, specialized training courses or specific work experience. › Occupations with supervisory responsibilities and occupations with significant health and safety responsibilities, such as firefighters, police officers and registered nursing assistants.
Lower-Skilled (NOC Levels C and D, or 4, 5 or 6)	Secondary school and/or occupation-specific training	<ul style="list-style-type: none"> › One to four years of secondary school education; or › Up to two years of on-the-job training, specialized training courses or specific work experience.
	On-the-job training	<ul style="list-style-type: none"> › Short work demonstration or on-the-job training; or › No formal educational requirements.

Source: National Occupational Classification system, Human Resources and Skill Development Canada,
<http://www23.hrdc-drhc.gc.ca/2001/e/tutorial/sklevel.shtml>

APPENDIX D
DESCRIPTION OF BROADCASTING
OCCUPATIONS (FROM THE NATIONAL
OCCUPATIONAL CLASSIFICATION (NOC)
SYSTEM)

Appendix D: Description of Broadcasting Occupations, From the National Occupational Classification (NOC) System

NOC Code	Job Description
5122	Editors: review, evaluate and edit manuscripts, articles, news reports and other material for publication, broadcast or interactive media and co-ordinate the activities of writers, journalists and other staff.
5123	Journalists: research, investigate, interpret and communicate news and public affairs through newspapers, television, radio and other media.
5222	Film and Video Camera Operators: operate motion picture and video cameras and related equipment to record news, live events, films, videos and television broadcasts.
5224	Broadcast Technicians: install, set up, test, operate and repair electronic equipment used to record and transmit live and taped radio and television programs and to produce audio and video streaming broadcasts for the Internet.
5225	Audio and Video Recording Technicians: operate equipment to record, mix and edit sound, music and videotape, for motion pictures, television and radio programs, videos, recordings and live events.
5231	Announcers and Other Broadcasters: read news, sports, weather, commercial and public service messages and host entertainment and information programs for broadcast on radio or television.

Source: <http://www23.hrdc-drhc.gc.ca/2001/e/groups/5.shtml>

APPENDIX E
TECHNICAL NEW MEDIA SKILLS
EXPECTED TO BE IN HIGH DEMAND
(FROM NEW MEDIA EMPLOYERS
SURVEY)

**Appendix E: Technical New Media Skills Expected to be in High Demand
(From New Media Employers Survey)**

computer specialists, communication specialists
Flash animators
asp, .net, elearning, flash technology, pda development
flash development, server-side scripting, scorm compliencey,
dynamic flash development/database -- dynamic website design
more web stuff... flash
programming, true design skills with formal design education, flash
familiarity with many programs -- flash animation -- 3D -- compositing
dynamic media, database programmers asp - php, flash design
technical/developers -- database and flash design
Tool development; Flash-based products; web-based training through PDAs
continuing demand for flash skills; digital video revolution; writer/editor for web content; knowledge of structure and information architecture
CSS, flash, .pdf
flash technology for television
macromedia flash programming
internet programming such as flash, advances in internet application
flash development and programming
programation flash et dynamique et application web multimédia,
flash and television ... motion graphics
flash programming
wireless content
wireless services, and design for wireless, interactive process conceptualizers
wireless programming skills,
wireless technology, specialists with user experience, HTML
wireless technicians
knowlege of wireless technology
wireless... flash with database... macromedia...
wireless content, programming,
wireless -- rint designers to digital
wireless networking skills, Voice (voip), mobile programming
wireless communication and 'hotspots'
flash action script with xml -- high speed video and online... interactive
DVD development and streaming different formats and moving data faster.
high stream video accessing, audio streaming and 3D animation
technical -- programming -- DVD authoring
simulation/game development in e-learning; UI design for various delivery mediums (phone, pda,)
design skills
multiple level interactive content- (i.e. PDA, phone, media and computer) - international needs
same answer as before: more senior employees on the creative and development side, XML and action scripting. Distribution and business

management-i.e. processing tax credits and understanding the industry at a contract level
well rounded development knowledge -- dhtml, xml, Marketing and messaging
Web-based film integration
animation editing, and animation and editing, anything to do with computers and website development (maintenance)
content development, web applications development
web programming, qualified creative staff
Web based programming.
anything concerning web
proficient in developing accessible websites...
web video
programming awareness, actionscripting, well-rounded skills
database programming, ASP, ASP.NET, design across platforms
skills-more programming and dealing with asp and php
developing content/ideas for new media, despite training on software; working together for programming (team effort)
programmers, e-commerce programming
instructional design, sales marketing
DVD and entertainment
3D animators; game developers
simulation and gaming programming skills
3D animation, gaming and programming
java programming
strong writing; strong technical aptitude; computer skills
Java developers
database design and security, programming
people in defence and security
3D and digital video
3D animation
3D
programmeur 3D
web strategy (marketing) -- specific programming (ASP, PHP)
good language skills, strong programming skills
management skills-business and product -- Wi-fi
64 bit processing, IPV6 and multi-threading
.net
mobile device technologies, file sharing technologies
higher programming languages - PHP, XHTML,
flash action scripting, programming (asp, asp.net, php) sql server
integration specialist ... network systems, web hosting...-- SPAM engineers... -- VOIP Experts
programming MySql database
ontology and knowledge engineering, web services (UDDI, WSDL, SOAP)
design... technical... knowing software... macromedia products... advanced knowledge
trouble shooting computer problems, storyboarding,
software developers, programmers, and experienced graphic designers

creative and programming.
multilingual programmers -- specific types of designers (graphic designer... colour, form, hierarchies, layout)
design implementation and programming skills, print production...
programming, graphic design, and sales
computer programming and animation
behavioural marketing, high volume data manipulation, web statistics
motion graphics, all inclusive designers (i.e., design/production/web)
production, creative skills ... technical - expert a range of computer software
graphic design and database development
mult-language programming, sales, marketing
digital media project management: digital media developers (creative and production)
information architecture: organizing information for new media -- more demand for video: editing and producing
animation and digital video experts
programming and qualified graphic design and business communication
programming, strategic planning
graphiste -- animateur
E-Marketing
user interface engineering
Information technology
database, web programmer analyst, product developers, technical webmaster
application development
working with streaming content, designing databases, competitive intelligence gathering, web marketing
programming,
programming
flash actionscripting, programmers,
database programming,
content management, experience with content management systems, useability,
content management, programmers
programming
traditional skills around new technology and new programs.
programmers
technical skills, i.e., coders and programmers
programming & new technology development
database
information architect.
programming
digital film ... expanding software, evolving technologies
Infographiste
electronic technicians
programmers and consultants
IT, programming
la programmation
programmeurs de base de données, indexation de site, e-commerce
information architecture, advanced code development

good sound and editing skills

HDTV

digital video

digital video, integrated experienced designers,

Video Editors, Shooters

digitally trained, producers of work in digital format, post production

film and video production

ITV... interactive television

broadcasting using IT based technology

Source: WIFT-T Survey of New Media Companies, 2003

APPENDIX F
SKILLS IN DECLINE AND EMERGING, AS
IDENTIFIED BY EDUCATIONAL TRAINING
INSTITUTIONS

**Appendix F: Skills in Decline and Emerging
(from Training and Education Institutions Survey)**

**Table F-1: Skills in Decline or that Have Become Obsolete
Over Last 10 Years, As Identified by Training and
Education Institutions***

Analog film editing (flatbeds)
Linear picture editing
Editing on a steenbeck
Editing on celluloid
Post production in film
Film editing in a television station
Film (two mentions)
35mm and 16mm film formats
Negatives cutting
Analog everything
Analog sound mixing
Analog
Linear technology
Studio camera operators
Multi-camera studio production (of non-fiction)
Master control operations
In-house development
Theatrical distribution
Telecine
Anything done manually
Information technology and web design in large firms
Certain types of programming (e.g., COBOL, VB)
Generalized interactive designers associates
Online sales
CD-ROM developers for educational market

* Multiple responses were provided to the open-ended question.
Source: WIFT-T Survey of Education and Training Institutions, 2003/4

Table F-2: Skills that have Emerged as being in High Demand over Last 10 Years (Verbatim), As Identified by Training and Education Institutions*

Digital/non-linear editing, post-production, compositing (<i>seven mentions</i>)
Digital technical skills in editing/camera/production & post-production
Editing with computers, new tape formats, video streaming, interactive design etc
Digital video, HD
Digital production
Focus on video, not just html programming
Digital/non-linear technology (<i>three mentions</i>)
Using digital technology -cameras, sound recording, post production digital visual effects.
Editors (<i>two mentions</i>)
Compositing
Combined editorial and technical skills
Computer graphics and animation
Web design and related skills
Streaming video
XHTML and CSS (designing with web standards)
Specialized online programming (i.e. integrating XML with other programs)
Effects
Innovative content developers
New media
Computer (Internet) skills, graphic programs such as Inscrber
Convergence (<i>two mentions</i>)
All manner of producing skills
HDTV (high definition television)
HDTV production
International co-production skills
Web video production
Interactive project design and production
Lifestyle/reality television producing
Multi-media technology as part of production process
TV: single camera digital production
Business affairs
Specialty broadcast executives
Agents/managers
Entertainment lawyers
Project management
Entrepreneurialism
Convergent product planning
Professional development
Computer based training
Diversity (women, physically challenged and culturally diverse) with technical skills
Awareness of different media outlets
Stereo audio
Storytellers
Sound recordists
Final cut pro (professional)
Scriptwriters
DVD designers for music industry
Working on different platforms
Robotics
Database management

* Multiple responses were provided to the open-ended question.
Source: WIFT-T Survey of Education and Training Institutions, 2003/4