

## **Frame Work II: Canada's Screen-Based Workforce**

### **Executive Summary**

#### **Background and mandate**

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

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

#### **The screen-based industries and designated groups**

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

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

#### **Rationale and objectives for this study**

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

WIFT-T's intent for *Frame Work II* is that its study's findings i) enlighten key industry decision-makers by providing them with a snapshot of the current workforce, including the

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

<sup>2</sup> Note that an individual worker may at any time identify with none, one or several of these groups.

<sup>3</sup> "persons who are Indians, Inuit or Métis" *Employment Equity Act*.

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

<sup>5</sup> "persons, other than aboriginal peoples, who are non-Caucasian in race or non-white in colour." *Employment Equity Act*.

challenges and opportunities it faces and ii) drive policy and promote educational programs on national and provincial levels.

### **Frame Work II key findings**

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

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

### **Workforce participation and recruitment**

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

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

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<sup>6</sup> HRSDC *Employment Equity Act Annual Report*, 2008, 2009.

<sup>7</sup> *Employment Equity Data Report* 2001, 2006.

<sup>8</sup> NAICS 5121: motion picture and video industries "comprises establishments primarily engaged in producing and/or distributing motion pictures, videos, television programs or commercials; exhibiting motion pictures or providing post-production and related services." Source: Statistics Canada Industry Classifications, NAICS 2007.

<sup>9</sup> HRSDC *Employment Equity Act Annual Report*, 2008, 2009.

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

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

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

<sup>10</sup> 2006 Census, Statistics Canada.

<sup>11</sup> *HRSDC Employment Equity Act: Annual Report 2009*.

<sup>12</sup> *HRSDC Employment Equity Act: Annual Report 2009*.

<sup>13</sup> Of the survey respondents, the participation of designated groups in the key creative positions was: Aboriginal people (1.8%), visible minorities (7.9%) and persons with disabilities (1.2%).

<sup>14</sup> *Boxed In: Employment of Behind-the-Scenes and On-Screen Women in the 2010-11 Prime-time Television Season*, Center for the Study of Women in Television & Film, 2011.

- Conversely, women were significantly under-represented in occupation categories such as Broadcast Engineering and other Technical (13.2%) and IT (25.4%) and *somewhat* under-represented as Interactive and Digital Media Producers (41.8%), Original Production and Development (45.1%) and On-air Talent (48.6%).

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

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

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

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

## **Earnings**

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

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

## **Training**

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

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

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<sup>15</sup> Census 2006, Statistics Canada.

<sup>16</sup> Census 2006, Statistics Canada.

<sup>17</sup> Census 2006, Statistics Canada.

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

### **Career path progression**

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

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

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<sup>18</sup> *Full-time employment by occupation unit NAICS 5121 - motion picture and video industries, Census 2006, Statistics Canada.*

## Workplace Issues

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

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

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

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

## Conclusions

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

### **Demonstrate the market’s buying power to influence change**

Early on, certain organizations may have instituted diversity policies for employment because they were required to do so; now many are beginning to recognize the tangible business rewards of encouraging a more diverse culture.

Demonstrating how women and other designated groups are both important buyers of smart phones, apps and casual games, as well as vital team-members in the production and distribution of content, is a compelling business case for decision-makers, business owners and industry leaders. As they recognize the growing diversity of their audience, these leaders may, in turn, be more likely to actively promote change in their organizations.

This message is particularly relevant in an era where vertical integration means there is management interested in a wider view of communications, not just the silos of broadcasting, distribution and production.

### Change requires leadership, not just more training

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

One road to measurable change requires industry and business leaders to shift from simply being “open” to a more diverse workforce, to demonstrating an active determination to change the status quo. Evidence of this shift could come, for example, in the form of hiring, nurturing and promoting strong candidates from designated groups and commitment to increasing on-screen diversity. Whether a leadership shift comes in response to the business case for stronger representation or in reaction to public pressure, diversity in the workplace stands a stronger chance if it is a priority vocalized and acted on at the apex of organizations.

### Public momentum may influence change

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

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

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

- 1) Certain factors, such as diversity among university graduates, the advancement of women to more senior roles as well as more visible designated group representation in potential role models for younger generations, have led to some progress in the screen-based industries. As firms face increasing pressure and workplaces become more competitive, however, issues such as lack of work-life balance and hidden, negative perceptions become a greater challenge and barrier to the advancement of designated groups;
- 2) While training for the digital transition continues to be a high priority across all the screen-based industries, designated groups in the main centres of screen-based activity are not disadvantaged more than the total workforce in terms of access to training; and
- 3) The more the consumer market becomes diverse, the more pressure there is to make the workforce diverse in a competitive environment.

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