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DIRECTOR:

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# BC Motion Picture Industry

BELOW-THE-LINE LABOUR MARKET STUDY

WE RESPECTFULLY ACKNOWLEDGE THE 203 FIRST NATIONS AND THEIR INDIGENOUS TERRITORIES UPON WHICH THOSE IN B.C.'S MOTION PICTURE INDUSTRY LABOUR FORCE LIVE AND WORK.

As an industry supported by the Province of British Columbia, we acknowledge the diversity of Indigenous Nations, cultures and languages in B.C., and the valuable leadership, collaboration and participation of Indigenous workers in B.C.'s motion picture industry. We would like to thank the people of Indigenous communities across the province who provide us with ongoing consultation, valuable information and insight into best practices for the relationship between physical motion picture production and Indigenous rights. We seek to advance the positive role that the motion picture industry and its labour force play in the lives of all British Columbians.

Canada 



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The views and opinions expressed in this report are those of its author(s) and not the official policy or position of the Government of British Columbia.

# Table of Contents

1. FOREWORD .....	1
Context + Contribution .....	1
Executive Summary .....	2
Introduction to the Report.....	4
2. WORKFORCE PROFILE .....	7
Diverse Jobs Within a Unified Whole.....	7
Imbalance in the Workforce.....	9
An Independent and Committed Workforce of 43,800 .....	11
3. MANAGING PRESSURE.....	19
External Pressure: Economic, Social and Technological .....	19
Addressing Pressure Internally: Stable Incentives, Workforce Experience and Locations Stewardship ...	20
Pressure on Workers: Networking, Initiative and Training .....	21
4. MEETING DEMAND .....	29
Requirements of the Industry.....	29
Motion Picture Production Needs .....	35
Requirements of the Job .....	39
5. ENSURING SUPPLY .....	44
Feeding the Labour Pipeline.....	44
Managing Labour Supply Risks: Tightness, Balance of Experience, Stability.....	49
Existing Supply and Diversity.....	54
6. PROJECTING LABOUR NEEDS .....	59
New Actuals More Accurate than Prior Sampled Datasets .....	59
Projecting Labour Replacement Needs.....	61
Projecting Labour Expansion Needs Due to Growth.....	62
Projecting Combined Supply Addition Needs to 2027 .....	64
7. CONCLUSION & RECOMMENDATIONS .....	67
ACKNOWLEDGEMENTS .....	1
GLOSSARY .....	3
CHARTS, TABLES & FIGURES .....	5
APPENDICES	
Appendix A: In-Scope Labour .....	8
Appendix B: National Occupation Codes Used to Source Statistics Canada 2016 Census data.....	11

Appendix C: Mapping Below-the-Line Job Roles to NOC Codes.....	12
Appendix D: Primary Research .....	17
Appendix E: Secondary Research Sources.....	39
Appendix F: Literature Review.....	40
Appendix G: Headcount Analysis Methodology.....	42
Appendix H: Union and Guild Pathways .....	44
Appendix I: Key Motion Picture-Related B.C. Post-Secondary Education Offerings.....	45

# 1. FOREWORD

## Context + Contribution

In 1978, industry and government strategically partnered to design and grow a new knowledge economy in BC: Motion Picture. It built its success on the competitive value proposition of “the three T’s”: a shared **Time zone** with Los Angeles, the epicentre of the industry; competitive and predictable labour-based **Tax credits** that secure bottom-line decision making and long-term planning; and **Talent** – the focus of this Labour Market Information study and the key differentiator of any creative economy: the expertise and knowledge of its people.

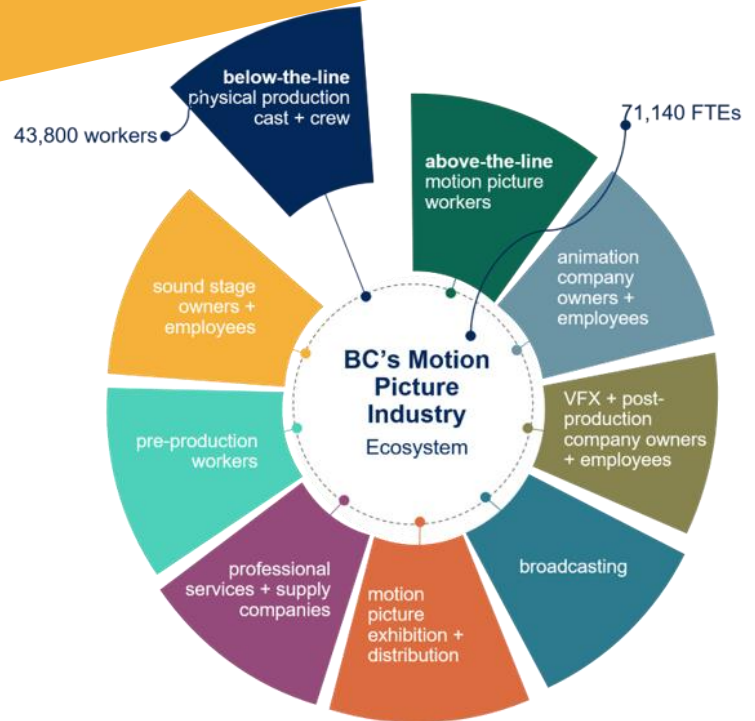


Figure 1 B.C. Motion Picture Industry Ecosystem

The provincial film commission began in 1978 and in that first year, three productions worth a total of \$12.5 million were shot in B.C.<sup>1</sup> Through sustained effort, the addition of eight regional film commissions, the collaboration of 35 municipal film offices, and a long-term vision, in FY 2017/2018 the industry delivered 452 productions with \$3.2 billion<sup>2</sup> of direct economic impact to B.C.'s economy. The total payroll for labour in B.C.'s motion picture industry (including film, TV, animation, VFX and post-production) in 2017 is valued at \$2.1 billion<sup>3</sup> and was distributed to a B.C.-based workforce estimated at over 70,000 people.<sup>4</sup>

As North America's third largest motion picture production hub, two-thirds of the 70,000 people in BC who work in this industry are described as “below-the-line workers”. These are the technicians and craftspeople, designers, background performers, drivers and managers working on location in neighbourhoods or remote parts of B.C., in large purpose-built sound stages or on urban streets. Below-the-line workers number 43,800 with 14,144 employed full- and part-time and collectively earned \$1.362B in 2017.

With robust primary data, this LMI research complements Statistics Canada Census 2016 data, which reports 15,000 workers employed part- or full-time<sup>5</sup> in B.C.'s motion picture industry and annual average employment data from BC Stats, which indicate employment of 26,800 in 2017 and 18,500 in 2018<sup>6</sup>. The report examines the 43,800<sup>7</sup> workers who represent trades, business, arts and tech and work in B.C.'s creative economy.

<sup>1</sup> [Vancouver Sun: BC Film Commission: A good 30 years](#)

<sup>2</sup> [Creative BC Tax Credit Data](#).

<sup>3</sup> [Vancouver Economic Commission Analysis](#)

<sup>4</sup> CMPA - Profile 2018 estimates 71,140 FTEs – Economic Report on the Screen-based Media Production Industry in Canada.

<sup>5</sup> Statistics Canada. 2016. Census data/5121 NAIC by 100 NOCS query. Census is collected the first week of May 2016.

<sup>6</sup> BC Stats, British Columbia Employment by Detailed Industry, Annual Averages, (includes sound recording industry). Accessed Feb 4, 2019. <https://www2.gov.bc.ca/gov/content/data/statistics/business-industry-trade/number-of-businesses-and-employment-by-industry>

<sup>7</sup> This figure is based on true numbers of individual workers in B.C.'s physical production payroll data for 2017. It represents only below-the-line workers.

## Executive Summary

Motion picture production labour spend in British Columbia stabilized in 2017 at a 4% annual growth rate. Previously, from 2012 to 2016, the industry experienced a surge in production activity, prompting growth of the labour force by one-third, and resulting in a compound annual growth rate of 21.5% for labour spend.<sup>8</sup>

Steady growth in global content creation<sup>9</sup> indicates potential continued growth in productions in B.C. To maintain its competitive advantage among other jurisdictions of choice, the motion picture production industry needs to continue to develop and grow its workforce to meet replacement and expansion demand while investing in the skill base of existing workers. This research delivers a rich baseline of data on the workforce with many insights to help industry leaders address workforce development.

### Key Findings

- 1) **Global and Competitive:** As North America's third largest production centre, B.C. must meet variable and rapid scaling needs. Labour demand is highly dependent on a script's creative needs, the location of choice, and time of year. Together, these factors can create labour tightness, particularly when sourcing highly experienced below-the-line workers.
- 2) **Strong Employment Growth:** The motion picture sector is predicted by the B.C. government to be one of the province's strongest employment sectors, at 3.3% projected growth from 2018 to 2023 vs. 1.1% average annual rate for B.C. overall employment growth.<sup>10</sup> This is validated by secondary research findings reflecting a 4% annual growth rate in 2017.
- 3) **Proportionate Regional Labour Growth:** While most motion picture activity occurs in the Lower Mainland/Southwest economic region, increased activity levels have pushed more domestic and some foreign productions into B.C.'s other economic regions with Vancouver Island emerging as a secondary hub. The Okanagan may follow as a third hub with new purpose-built infrastructure. Broad levers of demand such as value, capacity and quality intersect with a project's creative and logistical needs, creating unique labour demands in each region.
- 4) **Organized Contractors with Benefits:** The six unions and guilds that organize and supply 90% of the workforce successfully grew this labour pool by 33% to meet a surge in demand between 2014 and 2017.
- 5) **Good Paying Jobs:** Below-the-line motion picture workers in B.C. number 43,800 persons and full-time and part-time workers are paid a median annual wage of \$58,460<sup>11</sup> which is 34% higher than B.C.'s median individual income of \$43,732<sup>12</sup> for full-time and part-time workers.

<sup>8</sup> Average Labour Spend Growth in B.C. over 5 years. Based on payroll data. See Chart 40 in this report for details.

<sup>9</sup> PWC Entertainment & Media Outlook 2018-2022 <https://www.pwc.com/ca/en/industries/entertainment-media/outlook.html>

<sup>10</sup> WorkBC Industry Outlook Profile: [Motion Picture and Sound Recording Industries \(NAICS 512\)](#).

<sup>11</sup> Source: Payroll Data, 2017. All full time and part time workers, including Performers.

<sup>12</sup> Stats Canada [data table](#): 14-10-0064-01. Median individual weekly income, full time and part time workers in BC, 2017. See details in Profile section.

- 6) **Networked Career Opportunities:** Motion picture work is project-based and cyclical. Below-the-line workers are hired in units, often formed on previous projects, and rehire is based on previous success, fit, experience, and a worker's technical and soft skills. Below-the-line workers' participation levels for females and visible minorities lag behind B.C.'s overall workforce.
- 7) **Soft Skills are the Key:** Personal and interpersonal skills are critical to both enter and advance as a below-the-line worker. Workers are alumni of all of B.C.'s major educational institutions and dedicated film schools having attained education levels that exceed B.C.'s overall workforce. Below-the-line workers do not always see formal, industry-related training as critical to enter the workforce.
- 8) **Recruitment will be the Imperative:** The workforce needs to grow. Over the next 10 years, the below-the-line workforce will need to increase by between 5% to 10% each year. These figures represent the combination of expansion and replacement needs.

## Recommendations

1

Invest in quality of workforce  
through *training*

2

Focus on sustainability of workforce  
with *system enhancement*

3

Enhance data  
collection and *sharing*

4

Explore opportunities and *alliances* for  
domestic and regional productions

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"This is an amazing industry, you can achieve anything you want"

~ Production Manager

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## Introduction to the Report

B.C.'s motion picture industry has evolved over 40 years to become the number one production centre in Canada<sup>13</sup> and the third-largest physical production centre in North America.

A key challenge for both the province's motion picture industry and government has been the lack of accurate labour market information to develop effective policy in support of human resource development. B.C.'s motion picture physical production stakeholders want to understand their changing labour market demands. The current methods by which the motion picture industry is tracked, measured and understood is common to traditional industries. However, the motion picture industry structure differs from many other industries due to distinguishing characteristics that include:

- Globally competitive and highly mobile industry
- Production-based demand
- Employers are generally temporary, single-purpose entities
- Vast array of diverse roles necessary for a single production
- Non-standard working patterns
- Non-standard labour model

## Report Structure and Purpose

This report is organized into seven key sections: 1. Foreword; 2. Profile of the Workforce; 3. Managing Pressure; 4. Meeting Demand; 5. Ensuring Supply; 6. Projecting Future Labour Needs; 7. Conclusion & Recommendations.

This Labour Market Information (LMI) research project is funded by the Sector Labour Market Partnerships program administered by the Ministry of Advanced Education, Skills and Training. The resulting Labour Market Study develops a comprehensive labour market profile of B.C.'s below-the-line physical production sector to deepen understanding of the industry's unique workforce.

For a definition of terms, see the Glossary at the back of this report.



See Call-to-Action boxes throughout this study

## Research Questions

The following five questions are addressed in this Labour Market Study:

<sup>13</sup> Based on comparisons between each province's economic development agency's respective annual reports. See Ontario Media Development Corporation [Annual Report 2016/17](#) (which states contribution to economy is \$1.7B) Whereas, 16/17 production expenditures in B.C. is \$2.6B (source: [Creative BC Impact Report](#)).



## Labour Market Study Research Questions

1	<p>What are the workforce's characteristics including but not limited to age, gender, education levels, certification requirements, length of service, wages and benefits?</p> <p>See section 4. Profile of the Workforce</p>
2	<p>What are the size, nature and impact of the present and potential mismatches between the demand for labour and its supply in British Columbia, and by what occupation type(s) or subtype(s)?</p> <p>See section 5. Managing Pressure, 6. Meeting Demand and 7. Ensuring Supply</p>
3	<p>What are the relevant factors that could compound or ameliorate these imbalances, and what are the corresponding trends and trajectories?</p> <p>See section 6. Meeting Demand, 7. Ensuring Supply and section 5. Managing Pressure</p>
4	<p>How do sector-based, bottom-up data sources compare to Provincial and Federal datasets such as the B.C. Labour Market Outlook, Labour Force Survey, National Household Survey, and what are the opportunities to improve alignment?</p> <p>See section 8. Projecting Future Labour Needs</p>
5	<p>Where should priority be placed for development of strategies to help ensure the labour force can continually adjust and align to demand?</p> <p>See Call-to-Action boxes throughout and section 9. Conclusion &amp; Recommendations</p>

## Scope and Methodology

This study explores supply and demand dynamics for below-the-line physical production workers in the motion picture industry in British Columbia. The occupations considered in-scope were determined after numerous stakeholder consultations and an examination of a broad range of typologies. Representative in-scope occupations are presented in Appendix A.

A Steering Committee oversaw this study which used primary research in the form of interviews, surveys and a focus group. See Appendix D for details. Secondary and tertiary research was undertaken with specialized data and government data. A detailed explanation on methodology is found in Appendix G.

## Research Sources

Primary	Secondary	Tertiary
<ul style="list-style-type: none"> <li>• qualitative interviews</li> <li>• labour market surveys: hiring, contractor</li> <li>• one-on-one interviews and focus group: production managers/producers; department heads; crew</li> </ul>	<ul style="list-style-type: none"> <li>• specialized data: payroll data from two payroll companies who process pay for approximately 90% of the below-the-line workforce</li> <li>• union data from all six B.C.-based motion picture production industry unions</li> <li>• Creative BC aggregate tax credit data</li> </ul>	<ul style="list-style-type: none"> <li>• publicly available government data: Statistics Canada; BC Stats</li> <li>• extensive literature review</li> </ul>

When a team comes together to meet a major logistical and creative challenge - one that never has been met before - and it all goes according to our well-rehearsed plan, there really is no greater feeling of pride and accomplishment."

~ Special Effects Supervisor

Figure 2 Labour Market Information Report Activities



## 2. WORKFORCE PROFILE

Broadly, the physical production process involves above-the-line (writer, director, producer, principal talent) and below-the-line (BTL) workers. This industry term relates to a motion picture budget where above-the-line costs are variable and associated with the creative and financial control of a project and below-the-line costs are paid on an hourly basis, akin to fixed costs.

### Diverse Jobs Within a Unified Whole

Below-the-line workers are highly specialized with unique skill sets and pathways into the sector. Due to the varied nature of their work and the many departments represented, this report will segment below-the-line workers into five major job groups within which many job functions exist: Design, Operations, Services, Talent and Technicians.

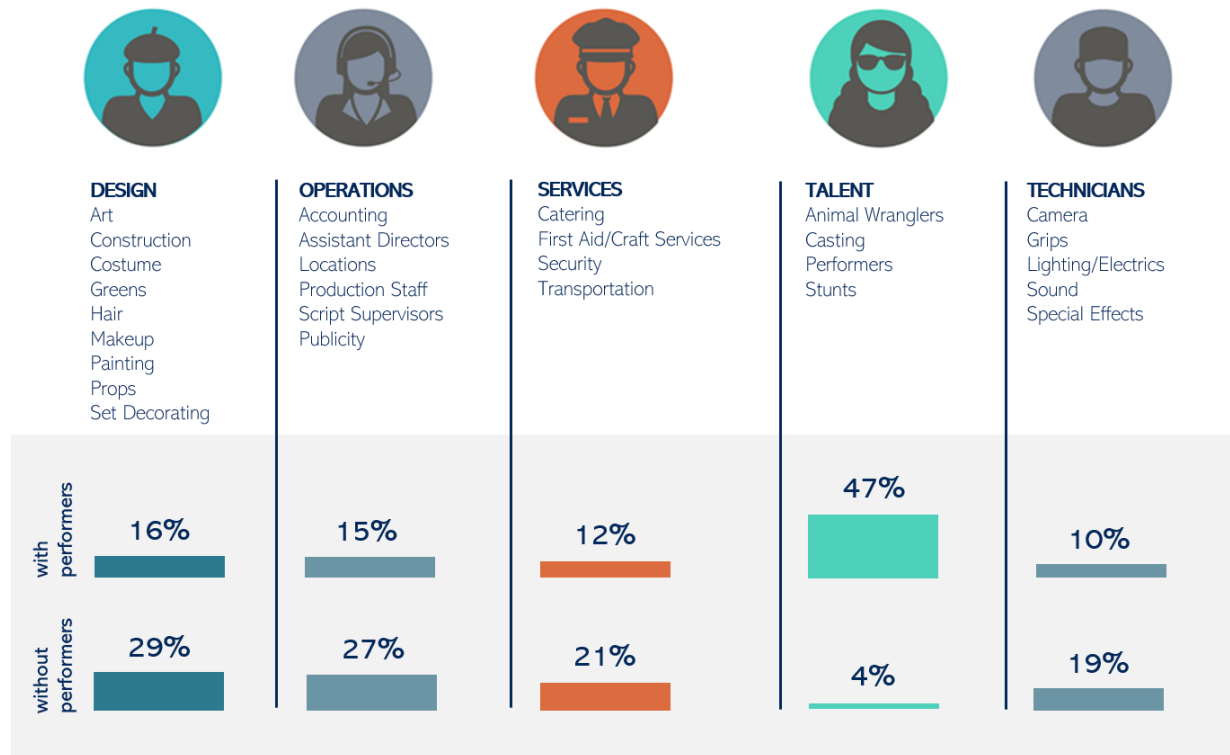


Figure 3 Workforce Distribution, Job Groups and Categories | Source: Payroll Data, 2017

A list of 170 functional job roles<sup>14</sup> that comprise in-scope labour is included in Appendix A.

<sup>14</sup> These 170 functional job roles generally represent over 1400 specific job titles, which vary by union and guild. See Appendix A for 170 job roles. For local job roles, please consult the union or guild.

Please note that some analysis resulting from both the payroll dataset and contractor survey will exclude performers<sup>15</sup> due to their infrequent work patterns and wide range of compensation levels. Note that along with performers, casting, stunts and animal wranglers are included in the Talent job group. Except where indicated, charts, tables and figures include all in-scope labour, including performers.

Motion picture production work is unique. With rapid scaling needs, work happens on-demand with very few fixed long-term employers. The work is highly mobile, with many and different locations of work throughout the project, usually requiring access to a private vehicle. Like gig economy work, the work is project based. Unlike gig economy work, there is no digital platform acting as intermediary between buyer and seller, nor is there an aggregated “ratings” system to track quality or enable trust. Work is attained through networking and personal reputation. Both the hiring managers and hirees move from project to project. The work is teams-based with “crews” forming units who, over time and many projects, build their wide range of skills and collective work experience. These entrepreneurial networks of talented experts form one of three pillars supporting B.C.’s motion picture industry competitive offering, known as the three T’s: Talent, Tax Credits and Time Zone.

The majority of in-scope labour is organized by unions and guilds with six organizations providing signatory productions with access to below-the-line workers, listed in alphabetical order they are:

1. Association of Canadian Film Craftspeople West, Local 2020 UNIFOR (ACFC West)
2. Directors Guild of Canada – BC District Council (DGC BC)
3. IATSE Local 891 (IATSE 891)
4. International Cinematographers Guild (IATSE Local 669), (ICG 669)
5. Teamsters Union Local 155 (Teamsters 155)
6. Union of BC Performers/ACTRA (UBCP/ACTRA)

Unions and guilds fulfill many of an employer's roles such as upholding standards for workplace safety and codes of conduct and providing training and/or education bursaries, among other responsibilities such as collective bargaining for compensation, benefits and workplace conditions. Regardless of this substantial support to the workforce, almost all film and television below-the-line workers are contract workers with benefits. Work is not guaranteed by any union or guild and is instead subject to market forces. Some unions and guilds provide workers for short term assignments (known as day calls) using a seniority system (IATSE 891) and only one union (Teamsters 155) uses a seniority system for hiring.



Figure 4 Unionized Workforce

“Every day is different with new challenges”  
~ Best Boy/Grip

<sup>15</sup> Performers as defined by UBCP/ACTRA are residual bearing roles. Background Performers are not residual bearing.

## Imbalance in the Workforce



Women and visible minorities participate in the below-the-line workforce at levels 14% below B.C.'s overall workforce. System enhancement is needed to address this imbalance. With over 30% of the workforce over 55, retirement risk is increasing.

### An Aging Workforce

Of the union and guild workers paid for their work in 2017,<sup>16</sup> in-scope labour is evenly distributed across all age groups and similar to B.C.'s overall workforce.<sup>17</sup> However, when analyzing this workforce without performers (who have the highest proportion of young workers) in-scope labour represents a workforce that is slightly older than B.C.'s overall workforce.

Chart 1 Below-the-Line Workforce Age Distribution by Job Group | Source: Union Data, 2017

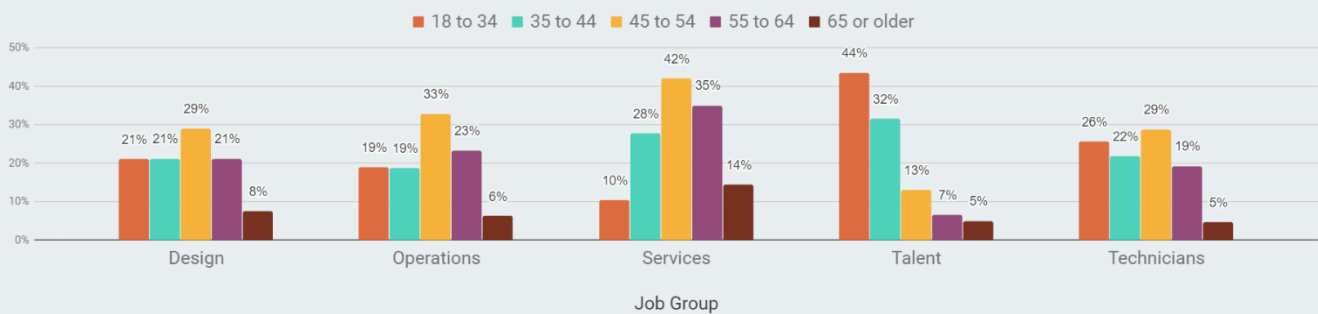
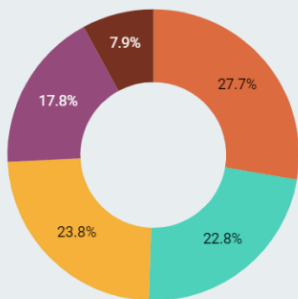


Chart 4 Age Distribution of Below-the-Line Workforce Compared With B.C. Overall | Source: Union Data, 2017

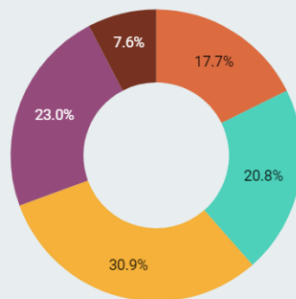
Below the Line Workforce (incl. Performers)

Source: Union Data, 2017



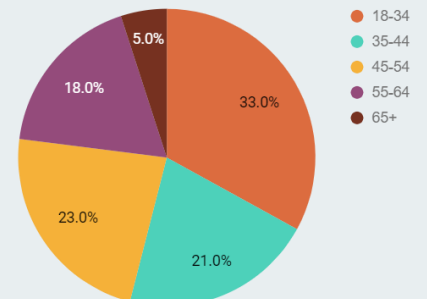
Below the Line Workforce (excl. Performers)

Source: Union Data, 2017



Age Distribution of BC Overall Workforce

Source: Stats Canada 2016 Census



<sup>16</sup> Union Data for 2017 activity

<sup>17</sup> Union Data and Statistics Canada. 2016. Catalogue no. 98-400-X2016287. Based on employed people in B.C.

## Lower Participation of Women, Visible Minorities and Indigenous Canadians

Statistics Canada reports<sup>18</sup> that 48% of B.C.'s workforce is female. In 2017, 34% of below-the-line workers are female – a 14% difference. Distinct patterns are observed within job groups and categories.

Chart 7 Gender Balance Comparison to B.C. Overall | Source: Statistics Canada, 2016

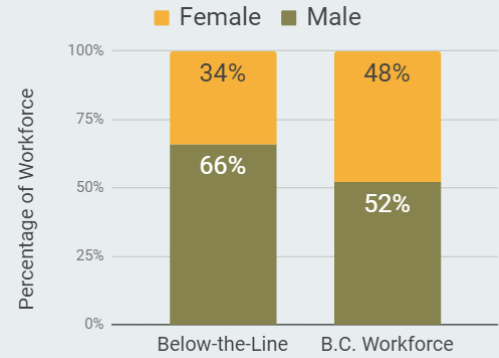
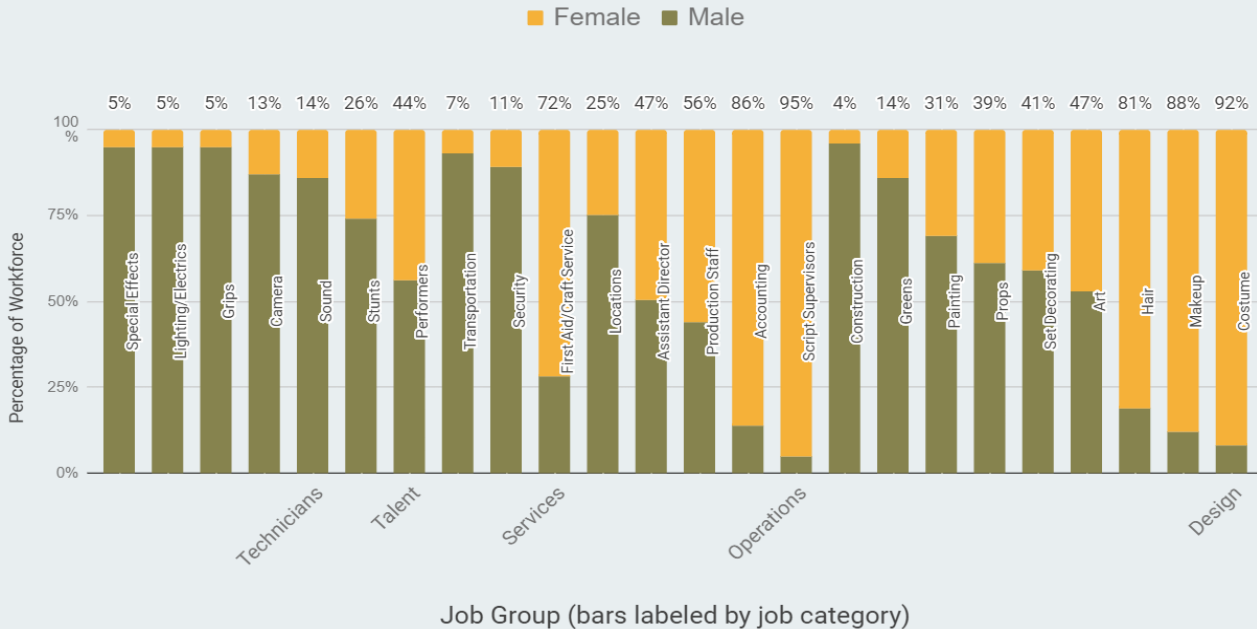


Chart 10 Gender Balance by Job Group and Category | Source: Union Data, 2017



Note: Where fewer than 20 responses were given, the job category is not displayed, as results should be interpreted with caution due to the small sample size.

The motion picture workforce has fewer visible minorities than B.C.'s overall workforce, also lagging 14% behind B.C.'s 29%<sup>19</sup> at 15% visible minority. As with gender balance, varying participation rates are observed in each job group. For those workers who identify as Indigenous in the contractor survey, an overall slightly higher than B.C. average Indigenous representation is observed in this workforce: 6% compared to B.C. overall at 5% with greater incidence of Indigenous workers in the Services job group.

"In this industry, no one cares what you look like, where you come from, if you're a man or a woman, or how old you are as long as you can do the job well."

~Production Manager

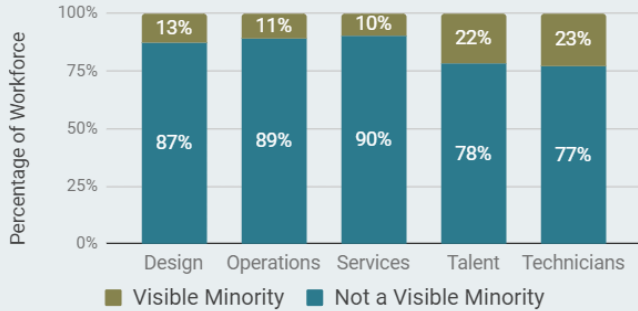
<sup>18</sup> B.C. Overall: Statistics Canada. 2016. Catalogue no. 98-316-X2016001 Based on employed people in B.C. (accessed October 11, 2018).

<sup>19</sup> B.C. Overall: Statistics Canada. 2016. Catalogue no. 98-400-X2016286. Based on employed people in B.C.

Chart 13 Visible Minority and Indigenous Participation in Below-the-Line Workforce

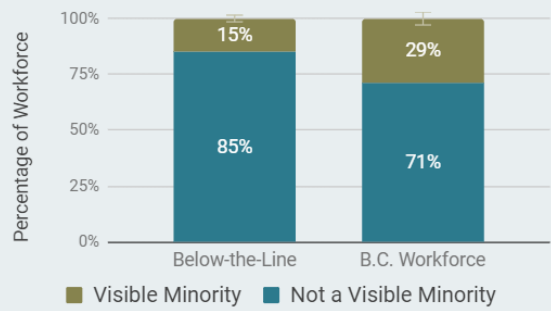
Visible Minority Participation by Job Group

Source: Contractor Survey, 2017



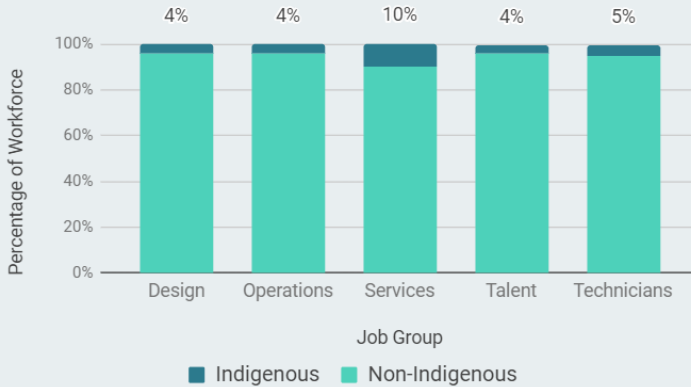
Visible Minority Comparison to B.C. Overall

Source: Statistics Canada, 2016



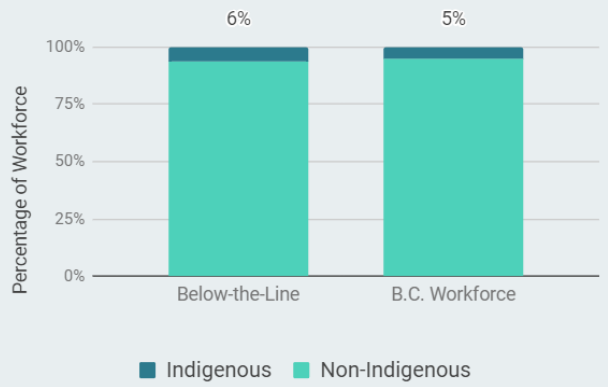
Below-the-Line Indigenous Participation by Job Group

Source: Contractor Survey, 2017



Indigenous Comparison to B.C. Overall

Source: Statistics Canada, 2016



## An Independent and Committed Workforce of 43,800

### Highly Educated Workforce with Industry Certifications on Top

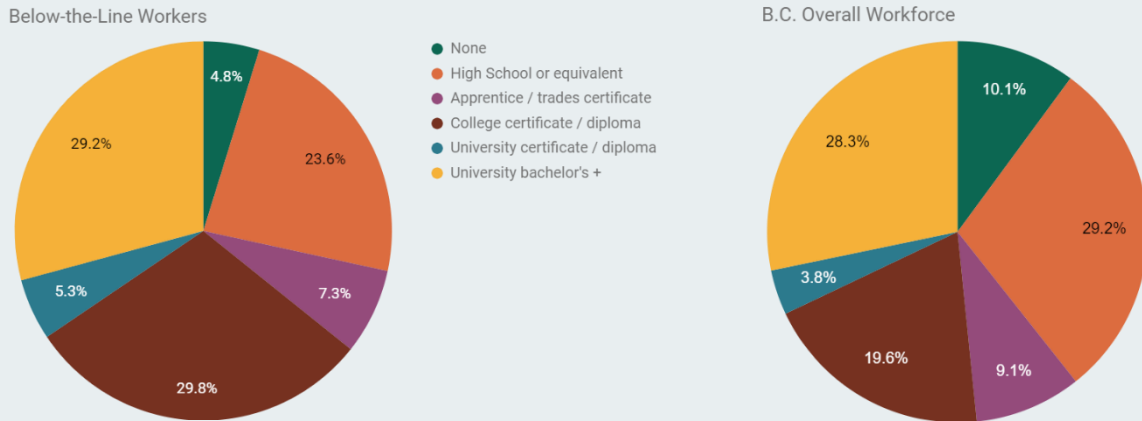
The BTL workforce is highly educated, exceeding B.C.'s workforce overall. Examining Statistics Canada 2016 Census data by National Occupation Code, in-scope labour shows high levels of education in all age groups, with 72% possessing further education (vs. 61% in B.C. overall) and 64% possessing higher education (vs. 52% in B.C. overall).<sup>20</sup> Industry-related training is discussed in more detail later this report.

The industry's baseline certification includes the Motion Picture Industry Orientation course and the Motion Picture Safety Awareness Course, both of which are required to join most unions or guilds. Certification requirements are largely dependent upon acts and regulations that may be authoritative for certain job categories. For example, all drivers in the transportation department must possess a minimum of a Class 4 license. Certification requirements vary by union and guild: some require completion of the Safety for

<sup>20</sup> Statistics Canada. 2016. Catalogue no. 98-400-X2016289 Educational Attainment data. Note: contractor survey design did not capture education levels of workers.

Supervisors course for advancement and three of the six unions and guilds require training on the Workplace Hazardous Materials Information System (WHMIS).

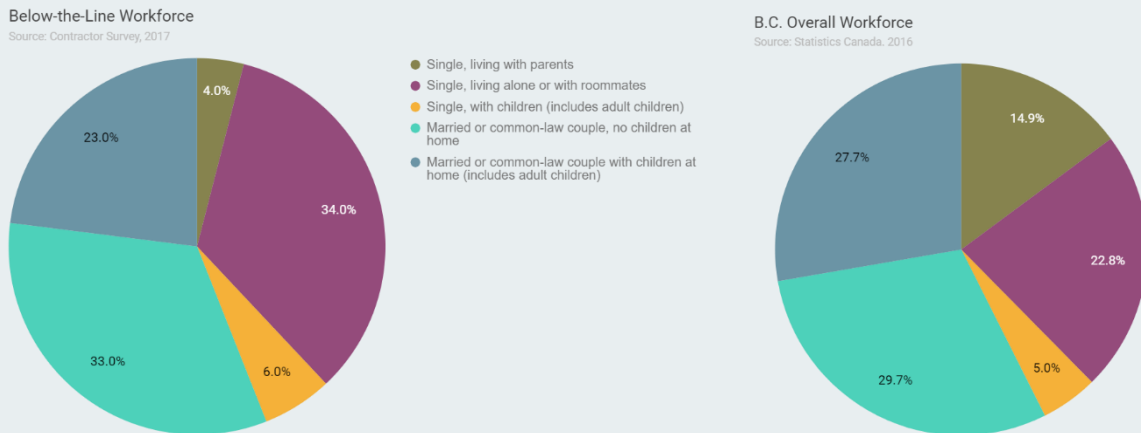
Chart 16 Educational Attainment Comparison | Source: Statistics Canada. 2016.



### Life at Home: Fewer Living with Parents

Comparing below-the-line workers to B.C.'s workforce overall, a full 11% fewer are dependent—single, living with parents—and 11% more are independent—single, living alone or with roommates. However, at 56% most in-scope labour is married or common-law, which parallels B.C.'s workforce overall at 57%.<sup>21</sup> Again, similar to B.C.'s overall workforce, 23% are married with children at home, which is 3% lower than B.C.'s overall workforce, and 6% are single with children, mirroring B.C.'s overall workforce at 5%.

Chart 7 Living Situation, Relationships and Dependents Comparison | Source: Contractor Survey, 2017



<sup>21</sup> Statistics Canada. 2016. Catalogue no. 98-400-X2016028



## Nearly Half of Workforce has More than Twenty Years' Service

In an industry that highly values work experience due to its practice of apprenticeship-style on-the-job training, length of service is an important measure. Between 2014 and 2016, increased demand prompted significant workforce expansion. By 2017, 33% of B.C.'s below-the-line workforce had less than three years industry experience. Excluding performers, 30% of the workforce had less than three years' experience.

During this recent workforce expansion most new entrants were 25-34 years old, followed by 35-44 year-olds. Regardless of this pattern of age distribution across the workforce, years of work experience naturally tend to appear in the older age demographic brackets, with the 45-54 age cohort representing both the most workers and those with the most cumulative work experience.

Chart 8 Workforce by Years of Experience Excl. Performers | Source: Contractor Survey, 2017

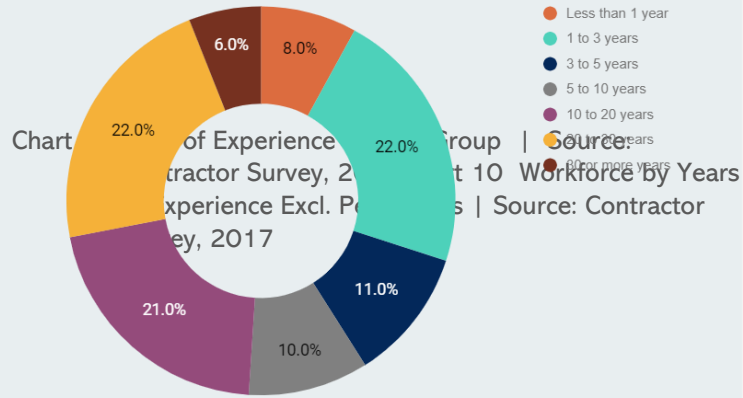
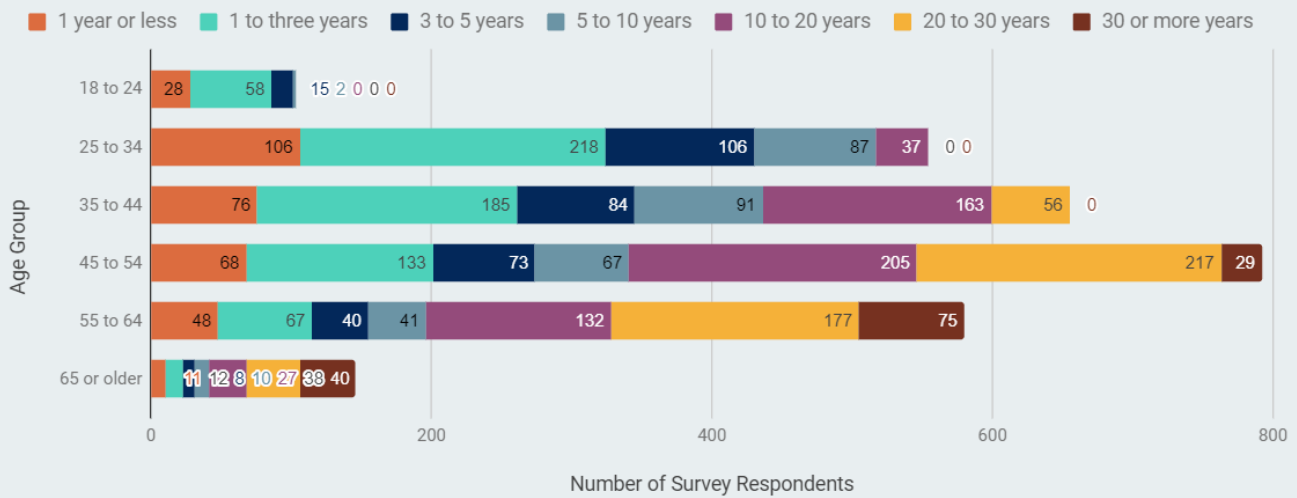


Chart 11 Years of Experience by Age Group | Source: Contractor Survey, 2017



## One-Third of the Total Below-the-Line Workforce is Full- or Part-Time

Based on extensive research<sup>22</sup> as at 2017, there are 43,800 below-the-line workers in B.C. Of these workers, 14,144 are employed at levels equivalent to full- and part-time workers.<sup>23</sup> Included in this estimate are background performers who number approximately 12,000. Almost all background performers work less than full-time and part-time, with average annual earnings of under \$2,000. The total spend on background performers in 2017 was \$27M.

<sup>22</sup> Specialized data sources include union member and permittee data and payroll data, which processes pay for an estimated 90% of the workforce.

<sup>23</sup> As measured by number of hours worked. See Appendix G for details and calculations on work patterns.

Below-the-line workers were paid \$1.362B in 2017. Below-the-line workers are part of a larger connected physical production ecosystem in B.C. that includes above-the-line workers, post-production workers and animation and visual effects workers.

### Longer Workdays, Cyclical and Seasonal

Below-the-line workers practice seasonal working patterns. They are part-year workers<sup>24</sup> due to the cyclical nature of motion picture production. Additionally, the industry practices a longer workday, with in-scope labour working sometimes in excess of 72-84 hours per week.

Motion picture production has a range of demands, dependent upon the project. Employment can be as little as one week a year in a highly specialized craft such as stunts to working full-time over many months on a television series. In this report, workers are divided into four employment types to represent total number of hours worked over a year: full-time, part-time, casual and temporary.

Below-the-line workers displayed by their employment types are detailed below. This chart excludes all performers<sup>25</sup> and totals 24,239 workers:

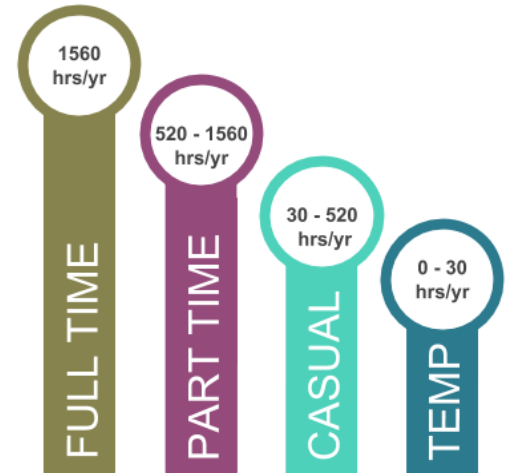
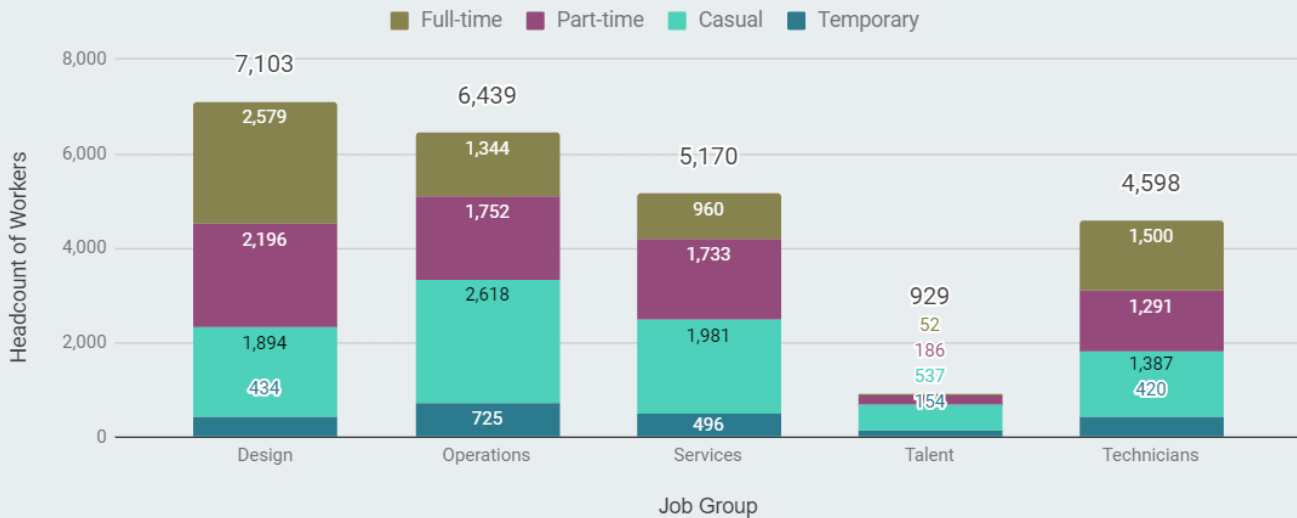


Figure 6 Below-the-Line Employment Types

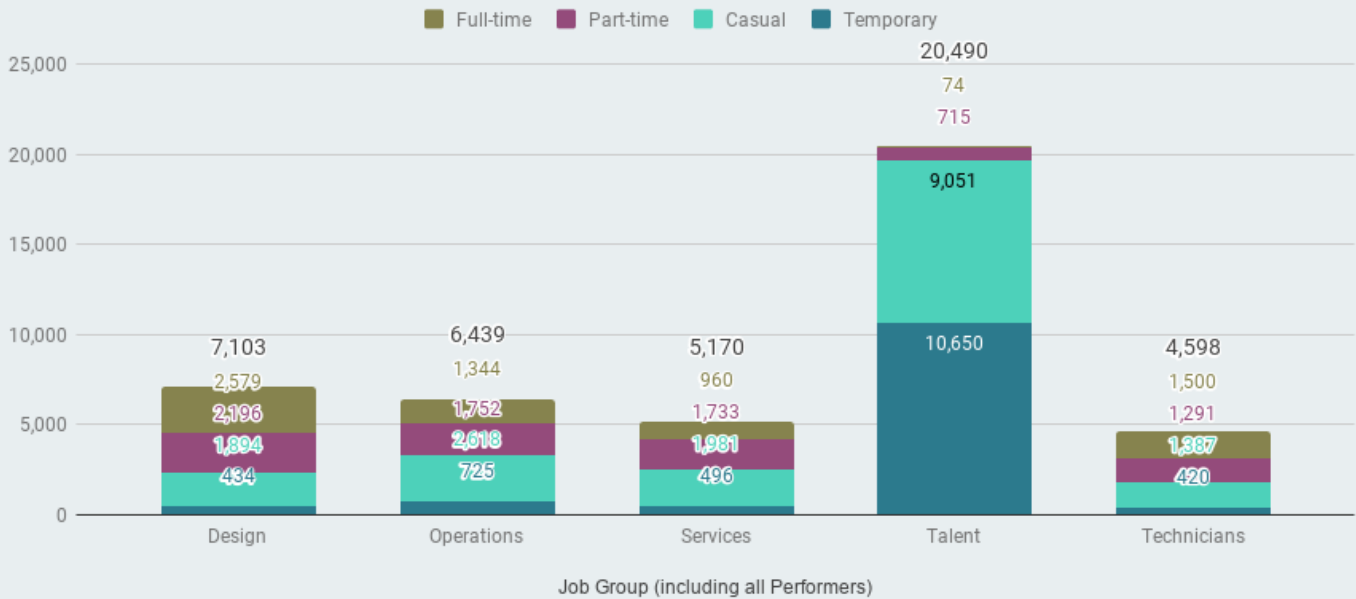
Chart 10 Below-the-Line Workers by Employment Type and Job Group Excl. Performers | Source: Payroll Data, 2017



<sup>24</sup> Part year workers, referenced by Statistics Canada as [non-standard employment](#).

<sup>25</sup> By excluding performers this chart omits actors, background performers and stand-ins and *includes* stunt actors and coordinators, casting department positions and animal wranglers in the Talent category.

Chart 11 All 43,800 Below-the-Line Workers by Employment Type, Job Category Incl. Performers | Source: Payroll Data, 2017



### Wages 34% Higher than B.C. Median; Main/Sole Income Source for 77% of Workers

Part-time and full-time BTL workers earn 34% more than the BC median individual employee<sup>26</sup>, based on 2017 payroll data.<sup>27</sup> These are good-paying jobs that are partly attributed to the inclusion of overtime pay in the motion picture sector, a common and frequent practice representing 26% of income for in-scope labour. Please note that wage differentiation is partly attributable to the fact that median individual wages for full-time and part-time workers in British Columbia in 2017 include tips and commissions but does not include overtime pay. Data source comparisons are detailed in Section 6 of this report.

Annual wages for full-time and part-time workers are reflected below with top and bottom percentiles



Figure 6 Annual Wages Comparison | Source: Payroll Data, 2017

indicated as well as median and mean (average). Note that these annual wage ranges are averages that

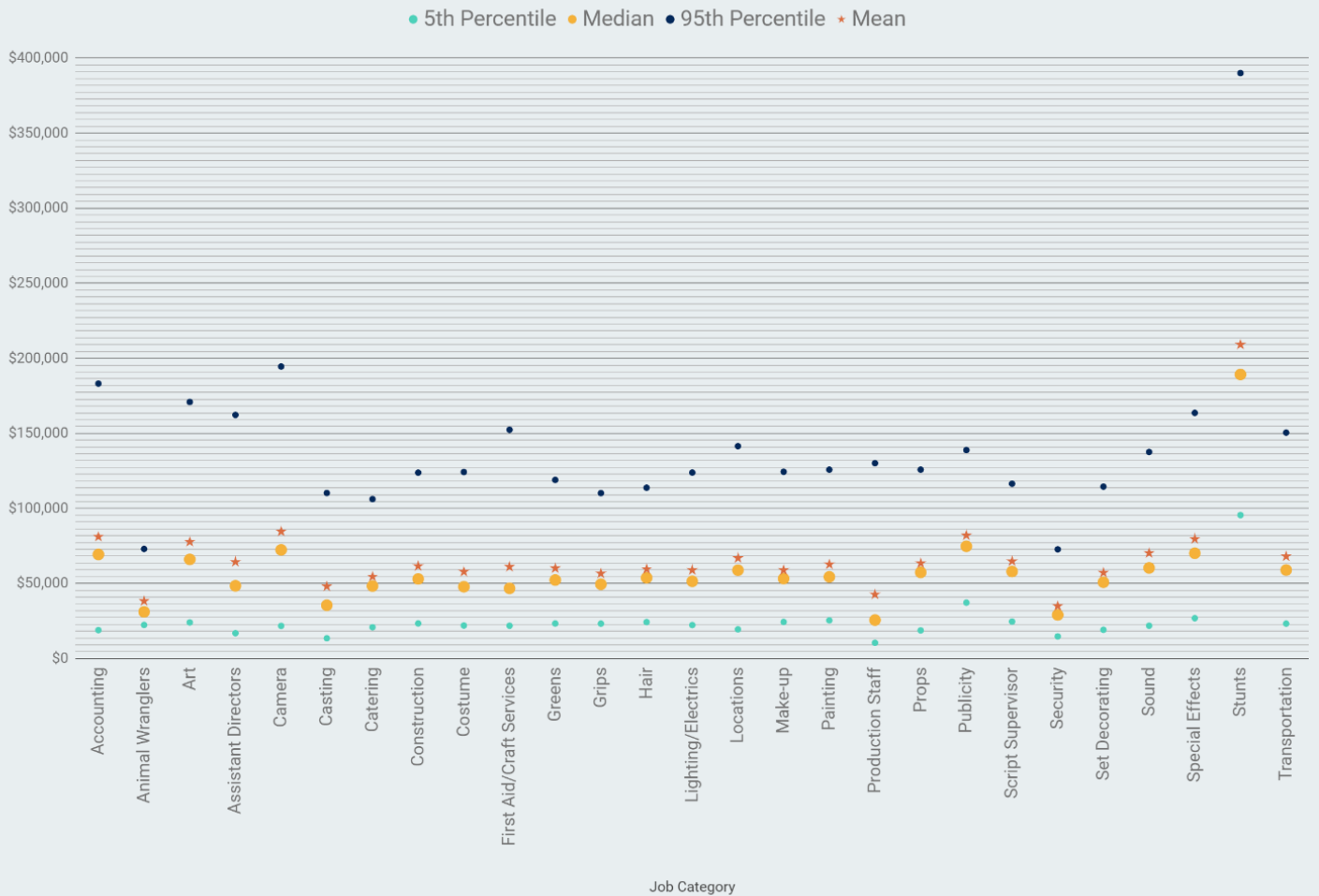
<sup>26</sup> Statistics Canada. 2017. Table 14-10-0064-01 Employee wages by industry, annual. Full and part-time employees in B.C., all industries, 2017. Weekly wage data includes tips and commissions and represents "usual hours worked, not counting overtime". Note: the annual wages were calculated by taking median weekly wage rate \*52 for result of \$43,732.

<sup>27</sup> Payees in the payroll dataset include individuals and loan-out companies

combine all levels of seniority within a job category, are inclusive of straight time and overtime and include those workers who are employed full-time and part-time.

All wage data for BTL workers in this study is exclusive of any applicable penalties, premiums, fringe benefits, rentals, allowances and reimbursements.

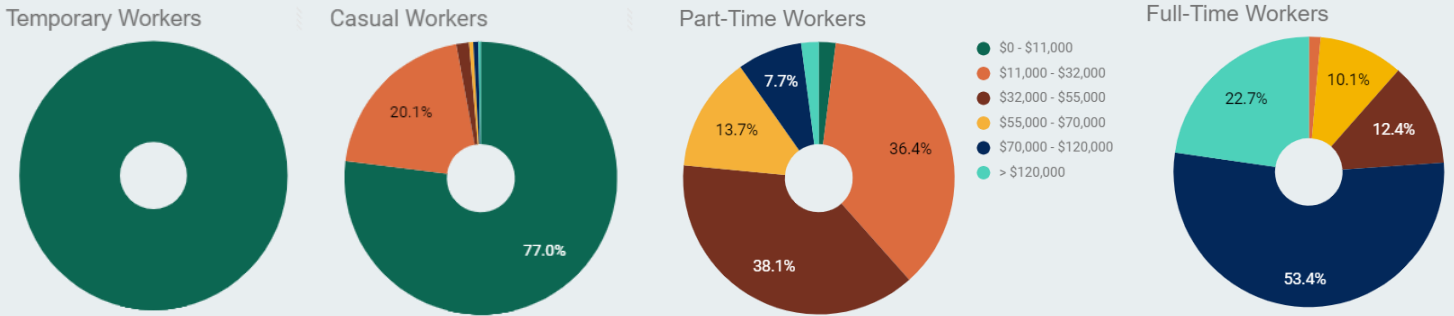
Chart 12 Full-Time and Part-Time Annual Wages Excl. Performers | Source: Payroll Data, 2017



Based on 2017 payroll data, workers are grouped by their employment type and annual wages, divided by five scales for comparison purposes. The numbers below show that 23.5% of part-time workers meet or exceed B.C.'s median individual income for full-time workers of \$50,398.<sup>28</sup>

<sup>28</sup> Statistics Canada. 2017. Table 14-10-0064-01. Employee wages by industry, annual. Full-time employees in B.C., all industries, 2017. Note: annual wages for full time employees were calculated by taking median weekly wage rate \*52 for result of \$50,398.

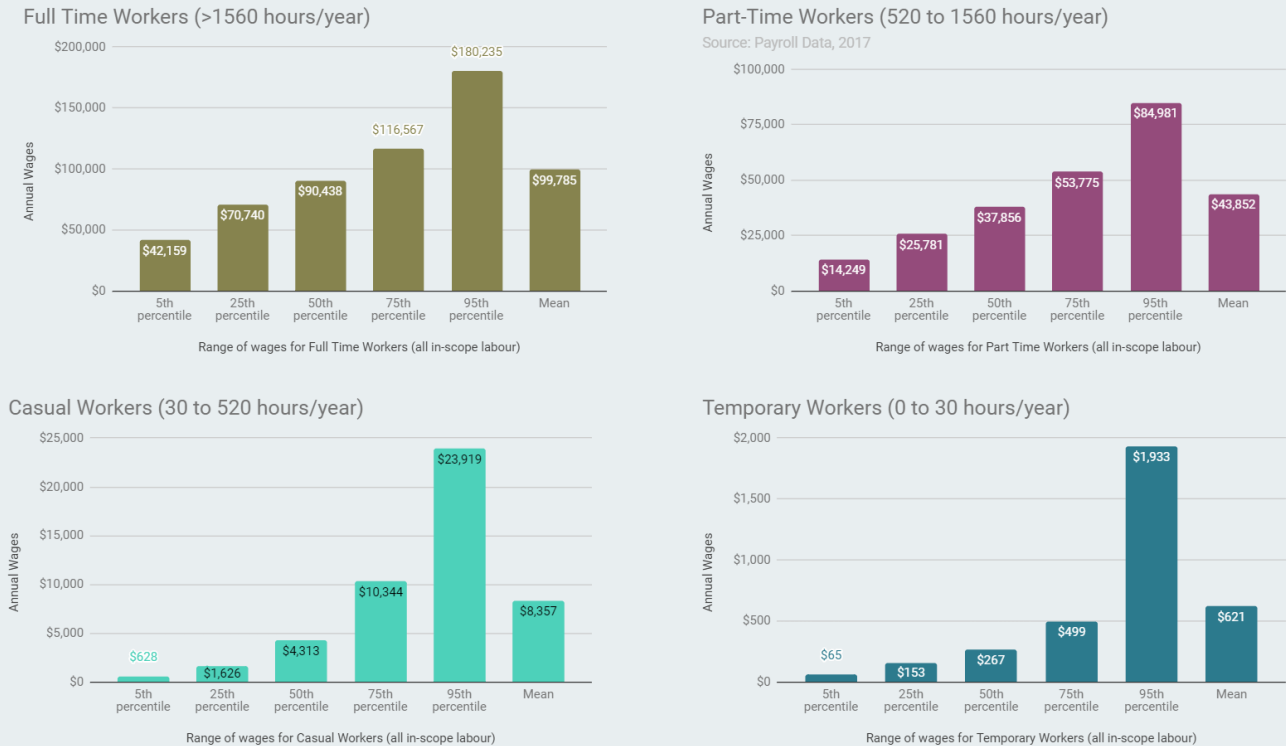
Chart 13 Below-the-Line Worker Average Wages By Employment Type Incl. Performers | Source: Payroll Data, 2017



Looking at 2017 annual wages by employment type, 88.5% of BTL full-time workers' annual wages exceed B.C.'s median individual income of \$50,398<sup>29</sup> and 76% meet or exceed B.C.'s household median income<sup>30</sup> of \$70,000 per year.

Finally, looking at annual wages by employment type, the average BTL full-time worker earns in excess of \$99,000 per year.

Chart 14 Below-the-Line Worker Wage Ranges By Employment Type | Source: Payroll Data, 2017



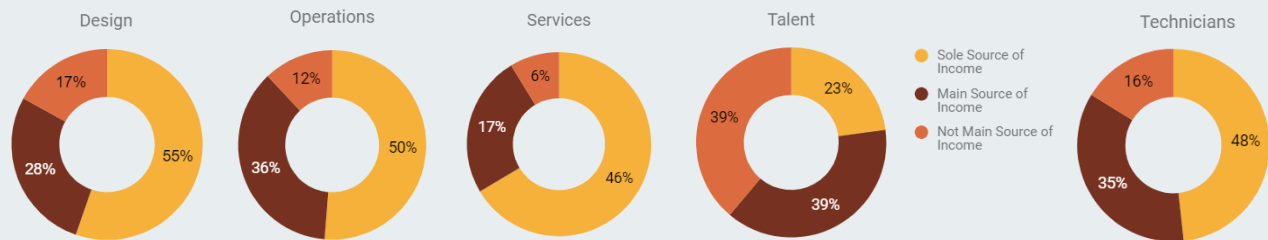
<sup>29</sup> Statistics Canada. Table 14-10-0064-01 Employee wages by industry, annual. See footnote 29 for calculation.

<sup>30</sup> Statistics Canada: [B.C. household median income, 2015](#)

Motion picture workers have access to health, wellness and retirement benefits via their unions and guilds, depending on their membership and in most cases, the number of hours worked over a year. Retirement benefits vary by union, guild and number of hours worked. Not all workers are entitled to retirement benefits.

Most (75%) of the workforce depends on the industry as a sole or main source of income. By job group, Talent (performers) rely the least on motion picture production for income.

Chart 15 Role of Income by Job Group | Source: Contractor Survey, 2017



## Profile: Performers

**51%**

**balanced by gender**  
job category is relatively gender-balanced with 46% female and 3% not reporting



**fewer married with kids**  
only 20% in this job category have families, 3% less than this labour force overall

**44%**

**between 18 and 34 years**  
a young job category based on union data



**one union: UBCP/ACTRA**  
a dedicated union; highest participation in the survey at 17.5%; includes 12,000 background performers



**high representation**  
5% Indigenous and visible minorities form 24% of this category, second highest to stunts

**56%**

**do NOT rely on this income**  
performers are the lowest job category overall to depend on motion picture income

**28%**

**highest discrimination**  
above 13% workforce average, though casting process is highly subjective and it is a competitive job category

**11%**

**on Vancouver Island/Coast**  
highest incidence of non-lower mainland workers as a job category (above workforce average of 6%)

**35%**

**highest professional dev.**  
above workforce average at 18%, though 26% see training as critical to entry (lower than workforce average of 28%)



**fewer new entrants**  
job category shows 5% with less than one year and 11% at one to three years experience: half the workforce average of 22%

**89%**

**want to take on more work**  
job category has the highest surplus labour, 8% work full-time and 54% work part-time

**Top 3**

**with increased hours per payee**  
between 2013 and 2017, performers' hours have increased by 4.7% just behind casting (7.9%) and stunts (7.5%)

Figure 7 Profile: Performers | Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada.2016.

# 3. MANAGING PRESSURE

## CHART 16 BARRIERS TO ENTRY

### External Pressure: Economic, Social and Technological

B.C.'s motion picture industry experienced rapid growth between 2014-2016, increasing pressure for more highly skilled labour while concurrently managing an aging workforce. Industry managed this growth and although labour tightness is reported, there is no labour shortage. Meanwhile, the external forces of social, economic and technological change are impacting workplace policy and practice. Internally, tax credit stability, reducing barriers, and improvements in training delivery can support labour quality and potentially reduce attrition.

#### Economic Factors are Industry Growth, Affordability, Competition for Labour and Exchange Rates

Steady growth in global content production has resulted in a 33% increase of B.C.'s motion picture workforce between 2014 and 2016. With most production activity occurring in the Lower Mainland, the labour force is impacted by housing affordability<sup>31</sup> and the high cost of living. Competition for labour supply with similar skills requirements such as accounting (NOC 1431), hair stylists (NOC 6341) and construction labour (NOC 7611) will impact talent attraction and retention.<sup>32</sup> B.C. has a projected dip of new workers entering the labour force, as evidenced by population data available from BC Stats and labour force participation forecasts.<sup>33</sup> Finally, the exchange rate of the Canadian dollar against US currency and its correlated competition for global physical production business plays a role – although not a decisive one - in the motion picture industry in B.C.

#### Social Change Factors are Respectful Workplace, Diversity Policy and Alignment of Values

Social change is impacting how employees perform their work and the motion picture industry is no exception. Accounts of workplace harassment and sexual misconduct in the motion picture industry have brought attention to issues of discrimination, gender balance, and minority representation both on screen and behind the scenes. Accordingly, new policy and practices are being implemented to address social change. California lawmakers recently passed legislation to increase conditions on state film tax credits to encourage better sexual harassment reporting and diverse hiring. The legislation would require feature film and television projects that apply for the credits, which are assigned based on jobs created, to report diversity statistics to the state and designate people to handle misconduct claims.<sup>34</sup>

<sup>31</sup> RBC Housing Affordability [Report](#)

<sup>32</sup> See NOCs in Appendix C for a full list of relevant occupations mapped to job roles.

<sup>33</sup> BC Stats, Population Projections (May 2017) [Accessed January 2018]. BC Stats, B.C. Labour Force Participation Rate Projection: 2013 Edition, Labour Market Statistics, March 2013

<sup>34</sup> Bollag, Sophia "California lawmakers push diversity through film tax credit" Washington Post | AP, June 2018

Initiatives to increase representation throughout the motion picture ecosystem will impact in-scope labour. Workplace standards set by US studios can be expected when production occurs in other jurisdictions, as much as local requirements allow. For example, Warner Brothers' has pledged that all of their divisions would use their "best efforts to ensure that diverse actors and crew members are considered for film, television and other projects, and to work with directors and producers who also seek to promote greater diversity and inclusion." WarnerMedia said it would issue an annual public report on its progress, which it said would also take into account the L.G.B.T. community and those with disabilities.<sup>35</sup> This is noteworthy for the below-the-line workforce as WarnerMedia has numerous television series in production in British Columbia.

Demographic trends in Canada include younger workers entering the workforce later, often due to more education attainment<sup>36</sup> and younger workers seeking work that is aligned to their values and exploring the meaning of work.<sup>37</sup>

## Technological Factors are Audience Behaviour, Work Processes and New Roles

Technology has impacted the entire creative chain<sup>38</sup> transforming content creation into a global business, opening up new markets and changing audience behavior.<sup>39</sup>

Digital technology in physical production has many impacts on work processes from new office communications tools to new positions such as the digital image technician - a specialized role resulting from the introduction of digital cameras into the work process. While work processes now incorporate technology, work process productivity gains as a result of technology are not yet observed perhaps due to the distributed nature of systems and platforms amongst the workforce (no single shared enterprise tools). Less than 3% of contractor survey respondents believe their job will become obsolete as a result of technology. Motion picture production involves creative problem solving of unique issues, which change daily if not hourly and these complex tasks are not easily replaced with automation.

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"Technology is impacting all our work processes. We need to run an IT department for many of our practical special effects elements."

~ Special Effects Supervisor

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## Addressing Pressure Internally: Stable Incentives, Workforce Experience and Locations Stewardship

Numerous factors are considered when choosing where to locate a motion picture production. Internally controlled factors within B.C.'s industry ecosystem include a combination of tax credit predictability, stability and competitiveness, an experienced labour pool and a robust and varied location supply. Against many creative and financial variables, these are reported by interviewees as the three critical factors determining a location choice amongst other competitive jurisdictions.

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<sup>35</sup> Barnes, Brooke "Warner Media Unveils Diversity Protocols for Movies and TV Shows" New York Times, September 5, 2018 <https://www.nytimes.com/2018/09/05/business/media/warnermedia-diversity-movies-tv.html>

<sup>36</sup> Statistics Canada. 2016. Canadian youth and full-time work: A slower transition <https://www150.statcan.gc.ca/n1/pub/11-630-x/11-630-x2017004-eng.htm>

<sup>37</sup> British Columbia Labour Market Outlook: 2018 Edition, Page 31

<sup>38</sup> Statistics Canada: [The Creative Chain](#)

<sup>39</sup> Canadian Radio-Telecommunications Commission: Future of Distribution/[Market Insights](#)




Despite reported labour tightness, there is not a shortage. Unions and guilds have successfully expanded the workforce by 33%, onboarding new entrants almost exclusively from B.C. residents. With the recent influx of new entrants into the workforce, improving trends on hiring more women and visible minorities into the workforce is observed.

Physical locations are a fixed resource that requires careful management to avoid “location burnout” (defined as the overuse of both the physical look and the limits of communities to accommodate the potentially disruptive nature of physical production filming). The provincial film commission at Creative BC, together with municipal partners, actively steward this resource.

### B.C. Responding to External Factors through Internal Collaboration and Sustainability

Industry stewardship through collaborative partnerships within B.C.’s film industry leadership has led to a robust environmental sustainability program that proactively addresses motion picture production’s environmental footprint. The [Reel Green™ Initiative](#) is the world’s first industry collaboration backed by a multi-party five-year strategic plan and is cited as one of many strategic advantages that B.C. can offer to foreign studio clients.<sup>40</sup>

With social change and its corresponding policy implementation underway throughout the motion picture sector, increasing gender and visible minority representation among all levels of the workforce is strategically sound. Further, as examined by McKinsey & Company, increasing diversity hires and practicing inclusivity strongly co-relate to a company’s improved financial performance and failure to do so comes at a cost.<sup>41</sup>

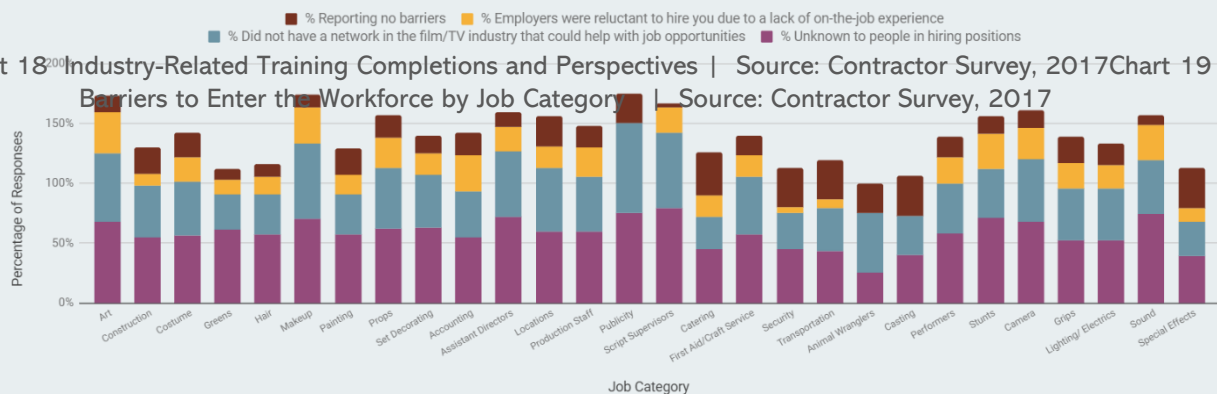


Proactively recruiting to increase diversity in the below-the-line workforce will meet client expectations and support industry's supply addition needs, which will be drawn from B.C.'s workforce.

## Pressure on Workers: Networking, Initiative and Training

### Network In, Start at the Bottom and Meet High Expectations from Day One

Chart 17 Barriers to Enter the Workforce by Job Category | Source: Contractor Survey, 2017



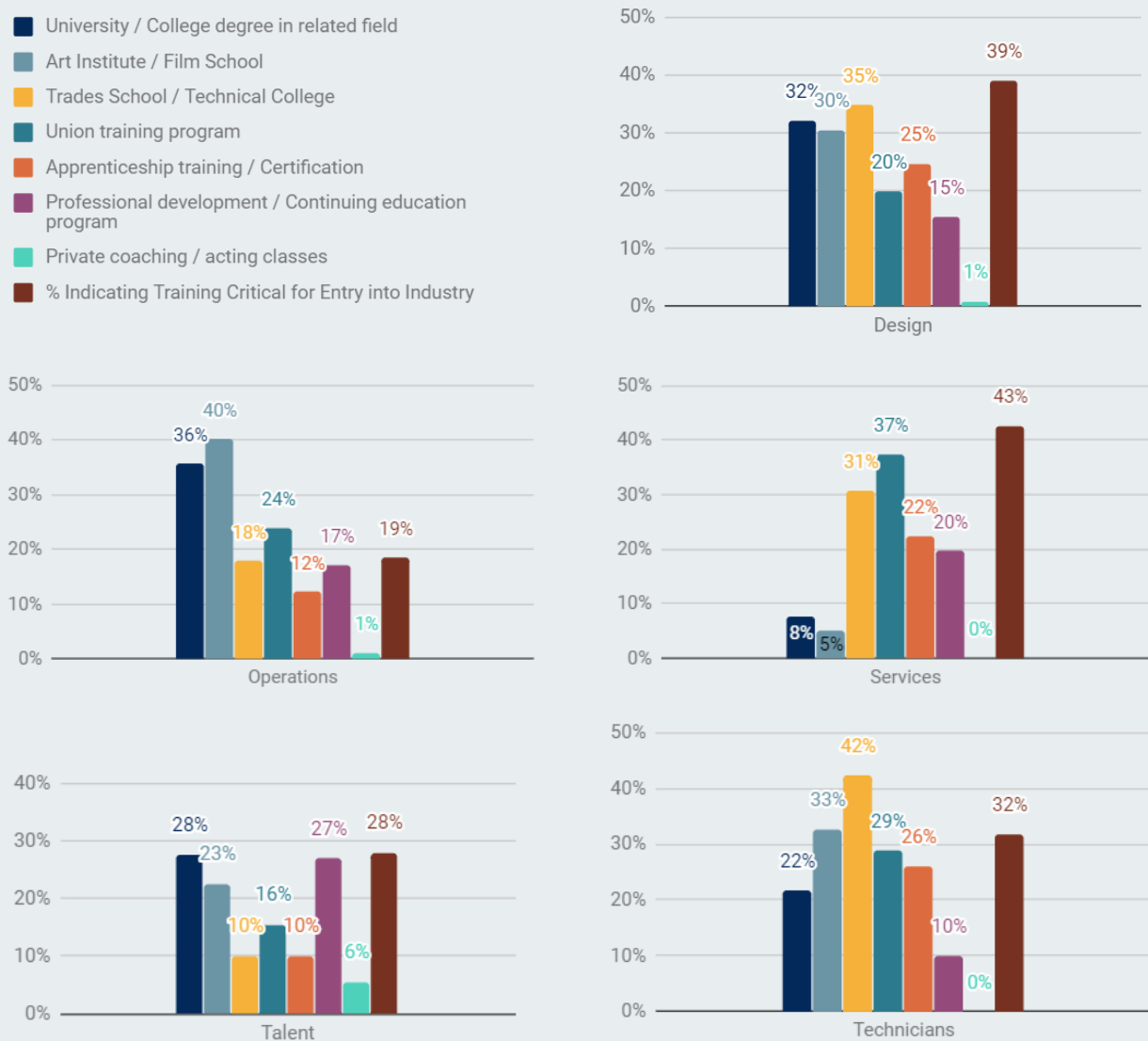
<sup>40</sup> Motion Picture Association - Canada. What We Do/Going Green: <https://www.mpa-canada.org/what-we-do/going-green/>

<sup>41</sup> McKinsey & Company: [Delivering Through Diversity](#), 2018

The most common barrier to enter the workforce, as reported by in-scope labour reports is “being unknown to people in hiring positions”. In a highly networked workforce, that first job can be difficult to get without connections. Interestingly, this points to the importance of having strong people skills to get into the film industry. With interviews from hiring managers indicating that approximately 50% of new entrants are not suitable for below-the-line work, the barrier to enter the workforce may be perceived as somewhat low, but the expectations on that first day of work are high.

Most in-scope labour enters the workforce bringing a combination of further or higher education with 72% of in-scope labour attaining some post-secondary education,<sup>42</sup> and many bring work experience from other industries but begin at entry-level, typically as a production assistant. The entry-level production assistant position provides workers with exposure to the various departments within a production and as such, provides both hiring manager and hiree with an opportunity to match interest and aptitude to a specific department. Skilled and experienced workers (such as Red Seal certified carpenters) may go directly to the construction department for example, but typically begin on the junior position in that department.

Chart 20 Industry-Related Training Completions and Perspectives | Source: Contractor Survey, 2017



<sup>42</sup> Statistics Canada. 2016. Catalogue no. 98-400-X2016289 Educational Attainment data

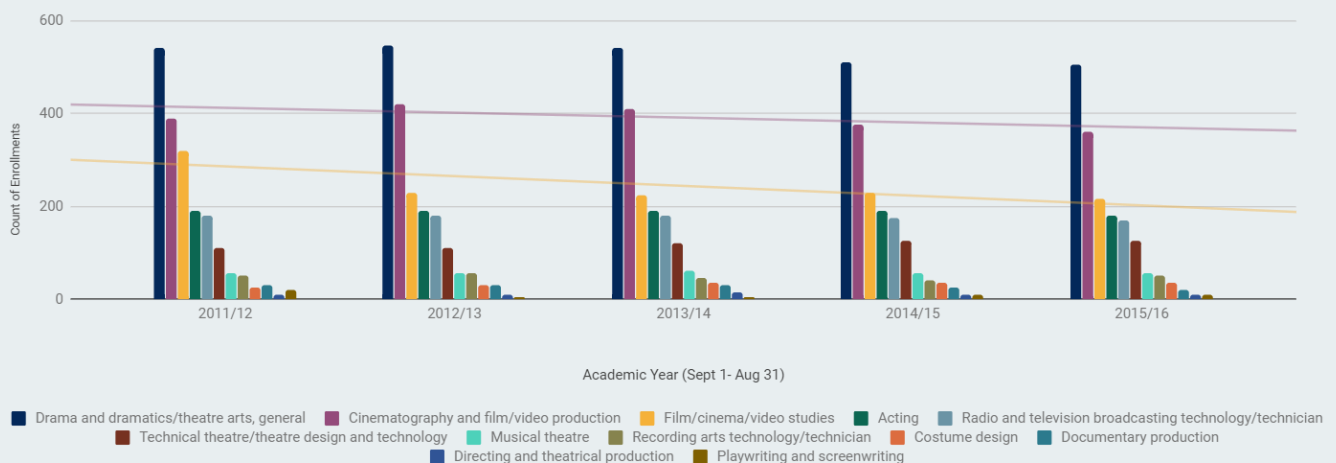
## Workforce Perspectives on Training

Contractor survey respondents were asked a series of questions about pre-entry training, beginning with the question: did you complete any formal industry-related education or training? If the respondent answered yes, they then detailed the types of training they completed. Respondents were also asked to rank the importance of their “formal industry-related training” to establish themselves in the industry. Note that contractor survey design did not capture education levels of the workforce as a demographic question (see the Workforce Profile section of this report) however, this line of questioning does provide important insight on in-scope labour attitudes towards industry training.

As the contractor survey results indicate, Chart 17 shows attitudes towards industry-related training vary. Despite the workforce having a higher than average educational attainment, postsecondary film-related training is not always considered a match for the job role and not considered a requirement to enter the below-the-line workforce.

In fact, despite the workforce expanding by over 33% between 2014 and 2016, enrollment to post-secondary film-related education that represents 65% of in-scope labour (by NOC code) has decreased during the academic year period from 2011/12 through to 2015/16.<sup>43</sup>

**Chart 23 Post-secondary education enrollments by academic year** | Source: Student Transitions Project, Ministry of Advanced Education, Skills and Training



Given the rapid expansion of the industry during the survey period, the relatively high unemployment rate reported for recent graduates under government educational outcomes<sup>44</sup> and the fact that a large percentage of students do not wind up in a related job<sup>45</sup> may indicate that post-secondary film-focused training in this industry does not create “set-ready” graduates.

Further, tracking former diploma and baccalaureate graduates over a two-year period via government educational outcomes’ quantitative data<sup>46</sup> shows 465 baccalaureate graduates and 405 diploma graduates from CIP-classified film-related training. This is a very small output of overall new entrants as supplied by post-secondary institutions.

A survey of B.C. Post-Secondary Education Offerings detailed in Appendix I could indicate that much of the postsecondary film-related education is designed for those students who are developing an above-the-line

<sup>43</sup> Student Transitions Project, Fall 2016 submission (Ministry of Advance Education, Skills and Training)

<sup>44</sup> Student Outcomes Survey for Diploma, Associate Degree, Certificate and Baccalaureate Graduates, for years 2015-17 & 2014-16

<sup>45</sup> *ibid*

<sup>46</sup> *ibid*

career, where they will develop intellectual property as writers, directors and producers and graduate with skills that are not necessarily fit for purpose as a below-the-line worker.

## Job Readiness is a Collective Effort

In the absence of a long-term employer, below-the-line workers are responsible for managing their career development and progression. However, as unions and guilds are the primary supplier of labour, they are, by association, considered the party most responsible for the quality of the workforce they represent and clearly accept that responsibility as evidenced by the range of training and further education that unions and guild present and/or make available to their members at no cost or a subsidized cost.

Reflecting the complex workforce and varied pathways to enter the motion picture industry, training is delivered by a variety of providers: from post-secondary film schools to union training departments to training provider Actsafe Safety Association and many private trainers such as acting coaches and stunt trainers who provide specific skills training on demand. Additionally, the newly formed B.C. Motion Picture Training Society<sup>47</sup> has been established to deliver training for the benefit of the three film unions under British Columbia Council of Film Unions.

Finally, unions and guilds report member-led initiatives to pass on their craft to their less experienced colleagues and have initiated “train the trainer” workshops to cultivate this approach. Based on structured interviews, in addition to baseline training, knowledge transfer is often ad hoc, on-demand and reliant on more experienced workers passing on knowledge to less experienced workers.

## Training for the Workforce: Coaching and Mentoring are Key

Contractor survey results indicate that most of the training available for the workforce is through their union or guild (61%) and third parties (39%). Survey respondents report acquiring training ranked in this order of frequency: union-sponsored workshops at 35%, informal coaching and mentoring at 30%, and workshops offered by third parties at 27%. Most courses are subsidized, bursaries are offered to union and guild members and some courses such as Reel Green and the Motion Picture General Safety Awareness Course are offered free of charge.

Fully 78% of surveyed contractors report that they participate in training when training is available. The job categories with the highest incidence of training are Locations (91%), Script Supervisors and Hair at 90%, followed by Assistant Directors (86%) and Lighting/Electrics at 81%. Interestingly, of those respondents who participated in training programs (a subset of the workforce), only 18% thought training was a critical factor in helping them advance in the industry. More respondents (31%) felt that training was an important factor and “has made it easier to progress within the industry but you still could have progressed without it” and 15% felt it was not an important factor.



Figure 8 Workforce participation in available training. Source: Contractor Survey

<sup>47</sup> Motion Picture Training Society. [Master Agreement 2015-2018](#). British Columbia and Yukon Council of Film Unions

# Below-the-Line Job Readiness and Skills Development

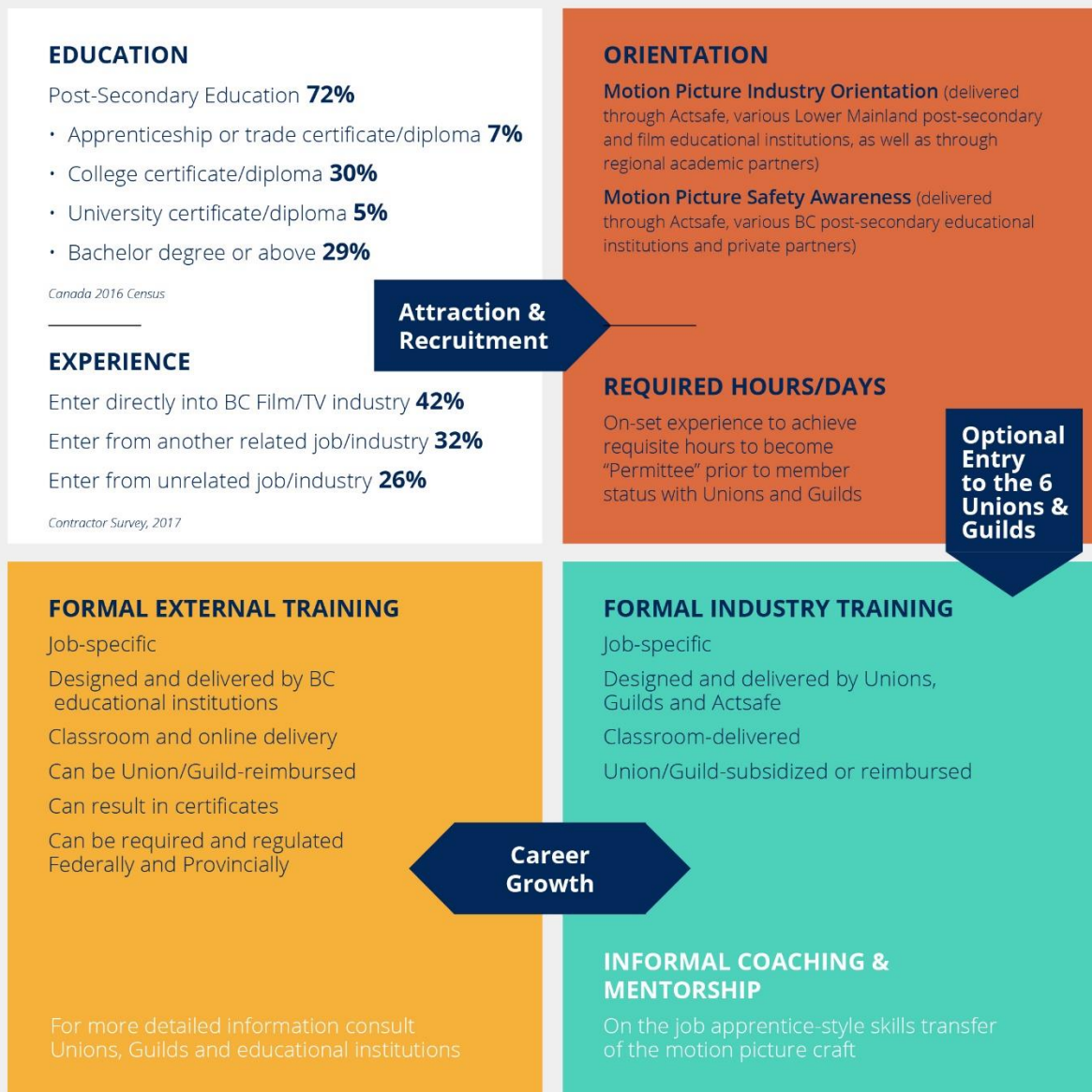
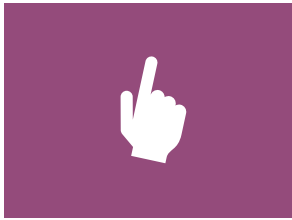


Figure 9 Below-the-Line Job Readiness and Skills Development



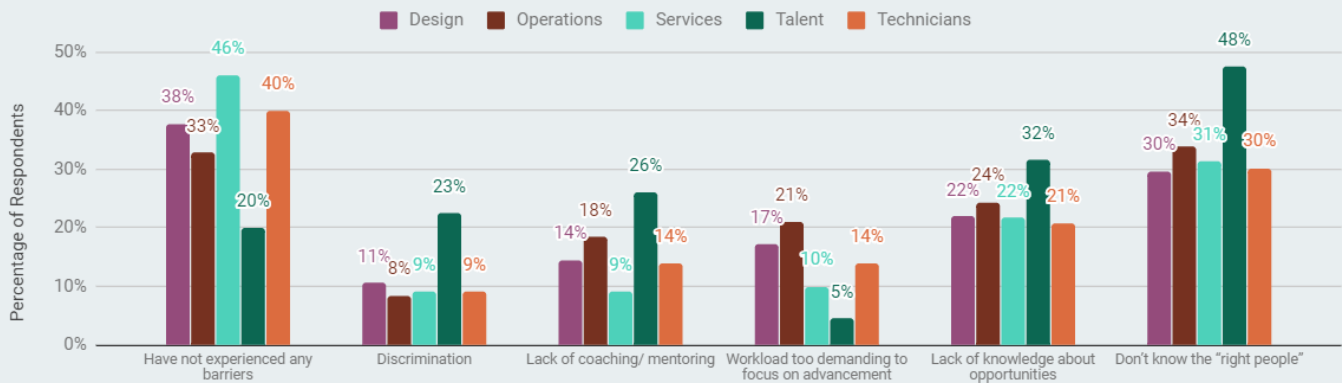
Required training is well-attended but not seen as crucial to career advancement. With apprentice-style learning as the preferred training method, formalizing this tradition will improve workforce quality.

"It's people within the industry that train everyone else."  
 -Lead Dresser/Set Decorator

### Not Knowing the Right People is the Main Barrier to Advance

In-scope labour were asked which barriers they faced to progress or advance in their careers. While the majority overall reported that they have not experienced any barriers to progress in their career, many reported that “they don't know the right people”. In this highly networked sector, reputation and access to hiring managers (and to some degree, mentors) is critical to advance one's self-directed career.

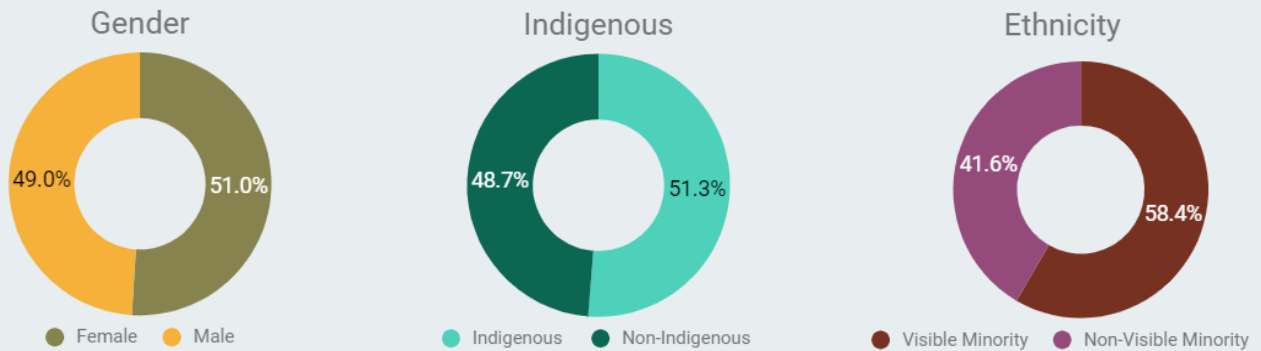
Chart 26 Barriers to Advancement | Source: Contractor Survey, 2017



"This is a very social industry. It's very important that you learn how to network and develop long lasting relationships" ~ Stunt Coordinator

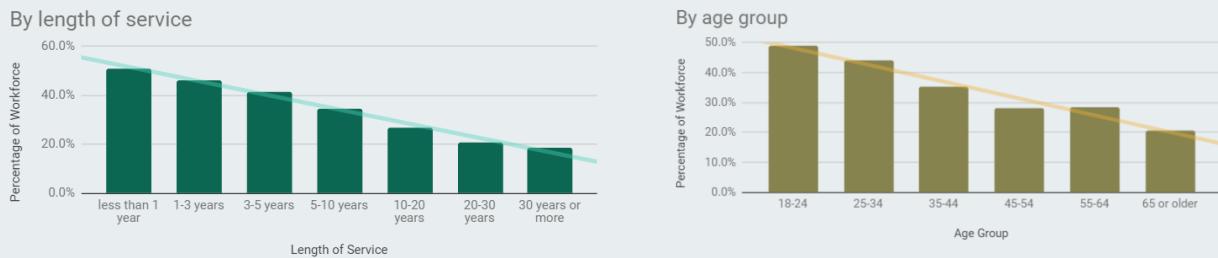
Looking further at the response “Don't Know the Right People” this barrier appears to impact visible minority workers more than it does female and indigenous workers who report a very similar degree of barrier to their counterparts.

Chart 29 Barriers to Advance for Diverse Parts of the Workforce | Source: Contractor Survey, 2017



Looking at corresponding age of the workforce and years of experience, barriers to advance decline over time, as expected.

Chart 32 Barriers to Advance | Source: Contractor Survey, 2017



A Production Assistant can become a Producer by showing up to do hard work. The opportunities for advancement are immense.

~ Production Manager



## Profile: Security

**13%**

**highest Indigenous representation**  
in this role vs. 6% below-the-line overall and 5% in B.C. overall labour force



**low further education**  
least further/higher education in below the line workforce overall

**89%**

**males in this job category**  
along with camera, sound, and greens, this department is over 80% male



this role is covered by the teamsters 155 and ACFC West unions



**highly union-trained**  
highest rate in below-the-line workforce overall; one of top four categories saying training critical for entry

**68%**

**work full-time**  
this job role is either full-time or temporary/casual with no part-timers based on survey data

**76%**

**over 45 years of age**  
highest supply/demand pressure due to retirement as 18% are 65+ years old

**55%**

**main income source**  
security contractors often have multiple clients outside motion picture

**48%**

**more than 3 yrs. experience**  
close to half the workers in this category are new to the industry



**4% longer hours**  
above average annual hours worked over past five years, 4% higher than workforce overall

**85%**

**transfer into the industry**  
85% come to below-the-line security roles after the age of 45 from another profession

**Top 4**

**professional development: 26%**  
hair, performers, accounting and security are the job categories with highest incidence of continuing education / professional development

Figure 12 Profile: Security | Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada. 2016.



# 4. MEETING DEMAND

Cyclical labour demands have been met by unions and guilds who successfully scaled up the workforce. Labour needs are unique to each project and driven by many levers; additionally, tax credit policy has shaped domestic and regional production practices in B.C. A key attribute demanded of labour is the presence of soft skills.

## Requirements of the Industry

### Demand for Entertainment is Growing

Global demand for filmed entertainment is increasing. Technological change has opened access to new markets via new platforms and delivery methods. Alongside traditional studios, technology companies Facebook, Apple, Google, Netflix and Amazon have entered a competitive and lucrative screen-based media market.<sup>48</sup> Streaming companies are making significant investments in original video content to stream to their global consumers. The Economist reports “Netflix will spend \$12-13B USD on original content in 2018...commissioning or partnering on an output that exceeds all other studios and television companies...releasing 82 feature films and over 700 new shows (as producer or procurer).<sup>49</sup> Studio and network executives interviewed in this study predict continued production at double-digit growth.

### Workforce is Increasing

B.C.'s long-standing position as Canada's largest and North America's third largest motion picture production hub is earned by its international reputation for excellence in screen production from end to end. B.C.'s physical production workers are world class in their technical capacity and collaborative approach to delivering quality and value. Internationally recognized awards and nominations attest to the skill of the many craftspeople in the workforce.

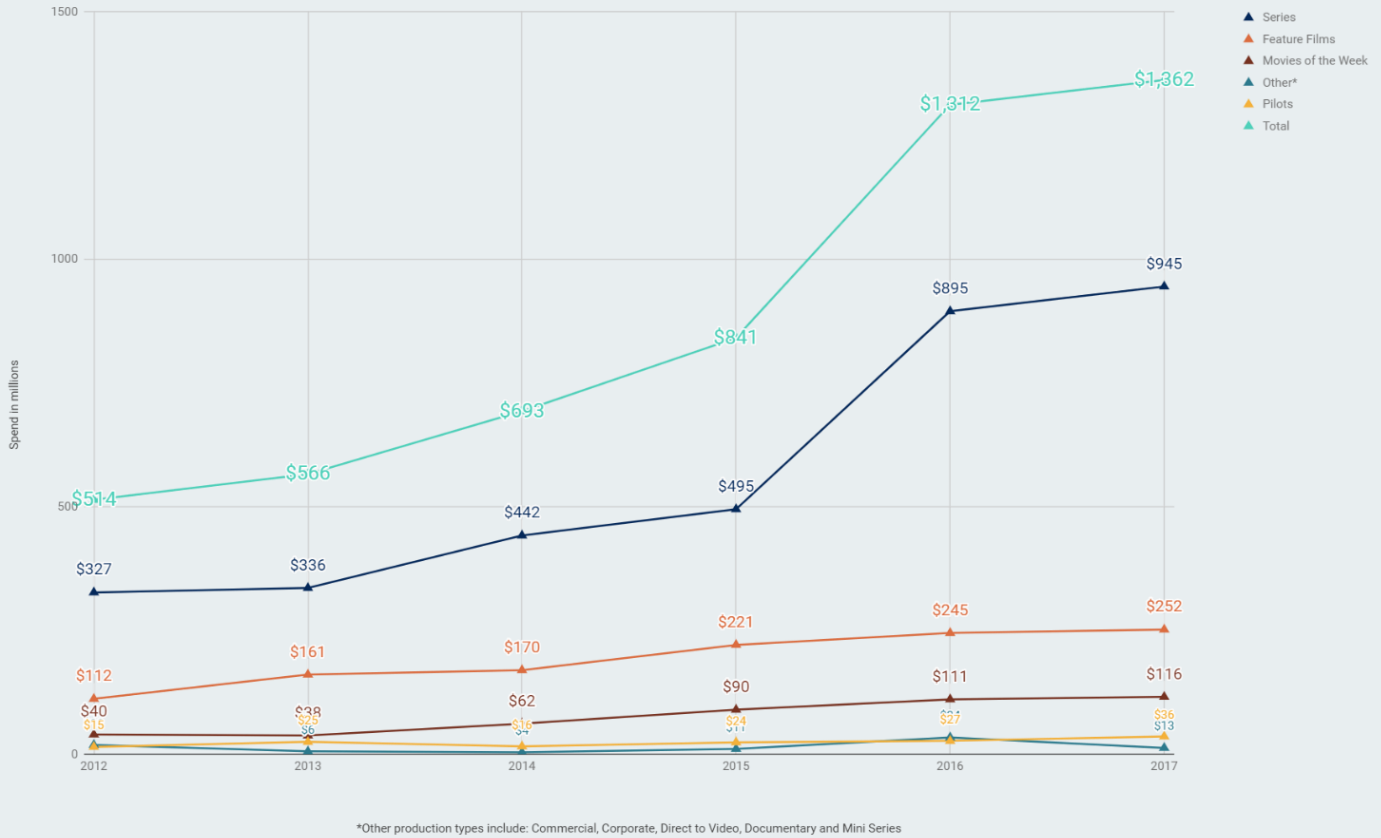
B.C. has maintained its globally competitive position and managed significant labour and infrastructure growth over during the period of 2012-2017. The demand for labour has increased as evidenced in the rising overall labour spend which is attributed to more workforce.

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<sup>48</sup> World Economic Forum: Why is the Creative Economy Growing so Strongly? <https://www.weforum.org/agenda/2015/01/why-is-the-creative-economy-growing-so-strongly/>

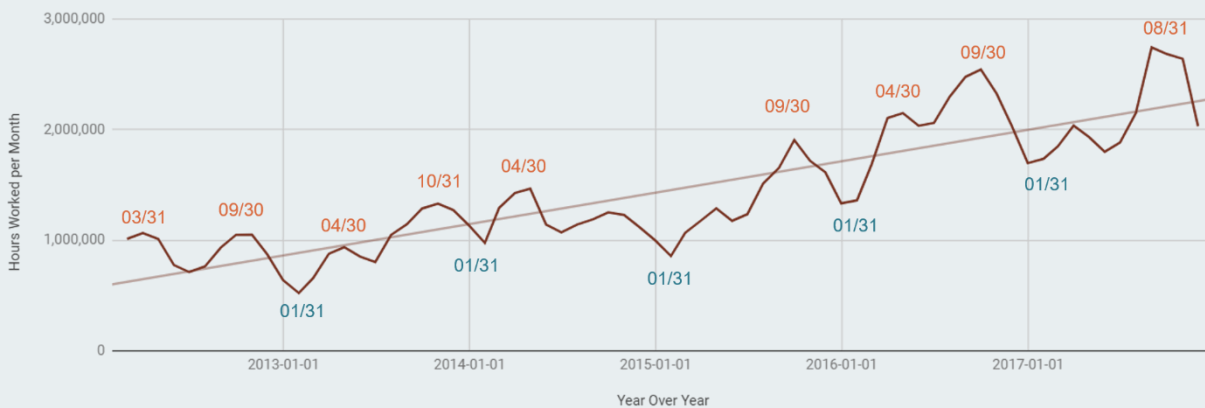
<sup>49</sup> The Economist, “The Television will be Revolutionized”, June 30- July 6, 2018.

Chart 34 In-Scope Labour Spend Over Time by Production Type | Source: Payroll Data, 2017



Motion picture production has rapid scaling requirements, following an established cyclical pattern. Annual activity spikes in early spring and late summer. Due to their unique business model, streaming companies' projects could work outside this predictable cycle, but there is not yet substantive evidence suggesting they do.

Chart 37 Total Monthly Hours Worked (2012 to 2017) | Source: Payroll Data, 2017



## A Combination of Levers Drives Demand

Demand for motion picture production labour in B.C. intersects with various levers. Domestic production tends to originate from local above-the-line creators (although not exclusively) and often operates within smaller budgets making union-scale wages difficult, while foreign service productions have a wider array of choices (and some budget flexibility) to locate their production. Structured interviews with studio and network representatives indicate competitive, predictable tax credits and production capacity (labour, studio facilities, locations) within a jurisdiction are the most significant factors to choosing where to establish production activity. Maintaining high quality in-scope labour continues to be an important contributor to B.C.'s competitive value proposition.



Figure 15 Below-the-Line Labour Levers of Demand

The levers of demand for B.C. labour are also sensitive to competitive jurisdictions. Competition to attract motion picture production continues within North America (with California and Georgia as key competitors) and globally with Australia, United Kingdom, South Africa and Hungary competing for the economic development and foreign investment potential of this industry as evidenced by ongoing government support

of these initiatives and the presence of robust online tools to compare jurisdictions.<sup>50</sup> While a favourable exchange rate between US and Canadian currency is a factor, interviews with studio representatives report they are not held accountable for changes in the exchange rate (due to a studio’s ability to use other financial instruments to hedge potential losses arising from currency exchange rates). Finally, the levers of demand vary from project to project and location to location.

### Production Demand Creates Distinct Labour Pressure Points

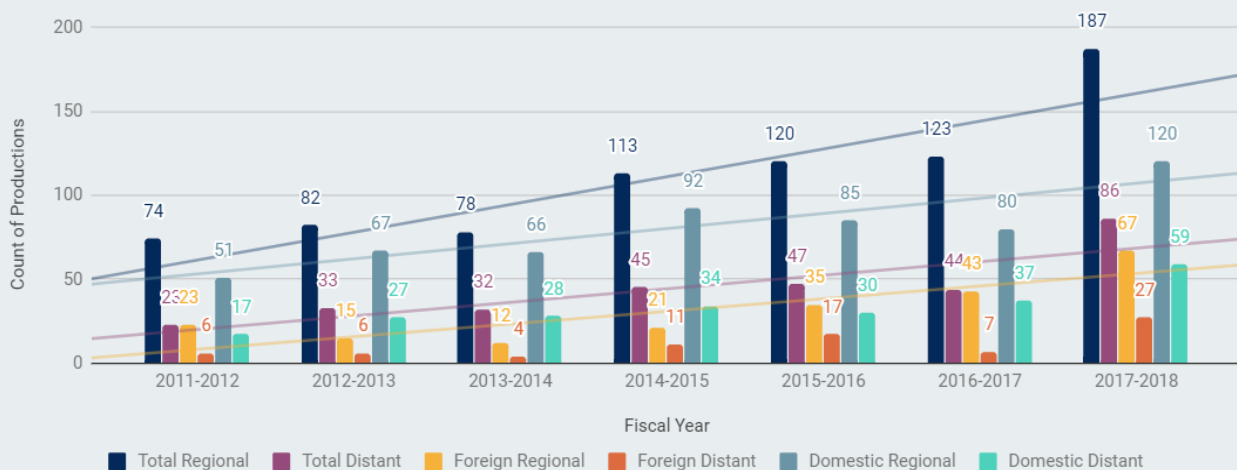
A review of Creative BC’s motion picture tax credit program<sup>51</sup> data provides a strong indication of B.C. labour expenditures by foreign and domestic ownership and control. Tax credit data also gives insight into the physical location of motion picture production activity throughout B.C. All of these distinctions impact labour supply and demand.

Domestic ownership and control of copyright is important to develop long term sustainability of the sector. Domestic projects have unique properties, tending toward lower-budget projects that may not use payroll services for their crew, may or may not be able to afford union rates for labour, but are key to developing a diversified sector and often provide an important training experience for in-scope labour.

Tax credit data has known measurement limitations: activity is tracked over fiscal years, not calendar years and reporting on production activity in a given fiscal year can lag due to processing times. The delineation between tax credits for domestic producers and foreign producers is not a foolproof determinant of copyright ownership of a project. Finally, not all motion picture productions in B.C. are eligible for tax credits. Significant production activity such as commercials are not eligible. Conversely, the primary data sources for this project have inherent limitations on tracking spend in B.C.’s economic regions (outside the Lower Mainland). Payroll data shows where pay is sent (presumably the payee’s residence) not the location of work. Contractor survey data asked respondents to summarize primary work location over a year, which does not effectively capture all instances of shooting outside the Lower Mainland. As such, tax credit data is used here as a contextual framework when looking at domestic and regional production.

### Lower Mainland and Regional Production Demand

Chart 40 Count of Productions Over Time | Source: Creative BC



<sup>50</sup> Entertainment Partners Financial Solutions: [Production Incentives Jurisdiction Comparison](#) and Mazars: Comparative [Study](#) of tax incentives and the location of television and film production and PWC’s annual [Big Table](#)

<sup>51</sup> British Columbia’s motion picture tax credit program <https://www.creativebc.com/programs/tax-credits/index>

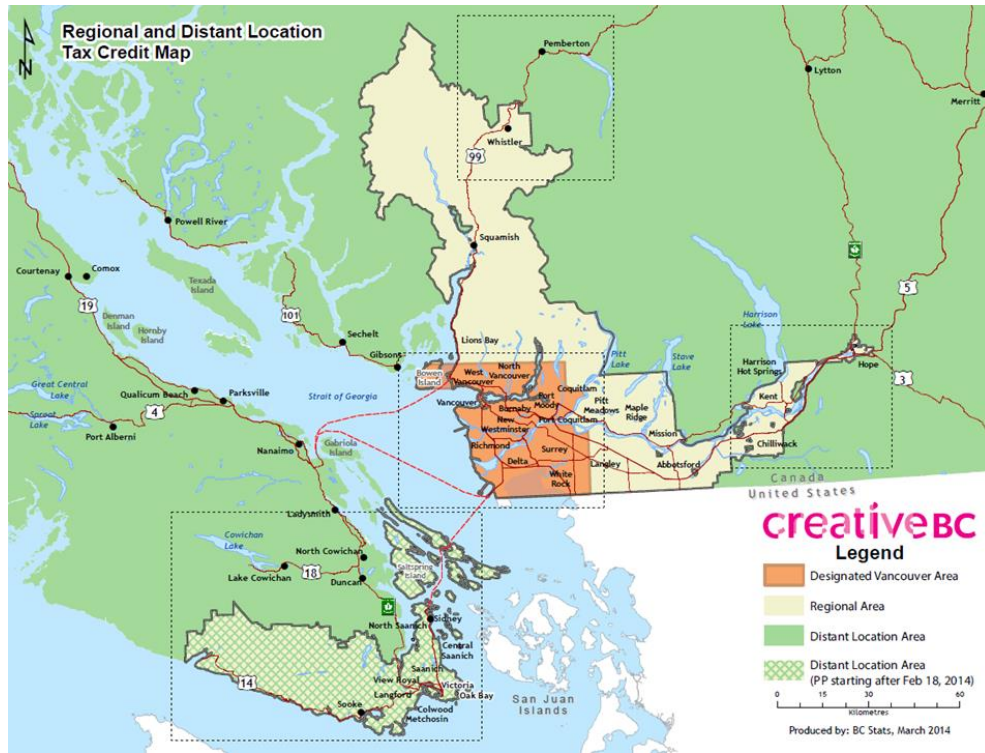
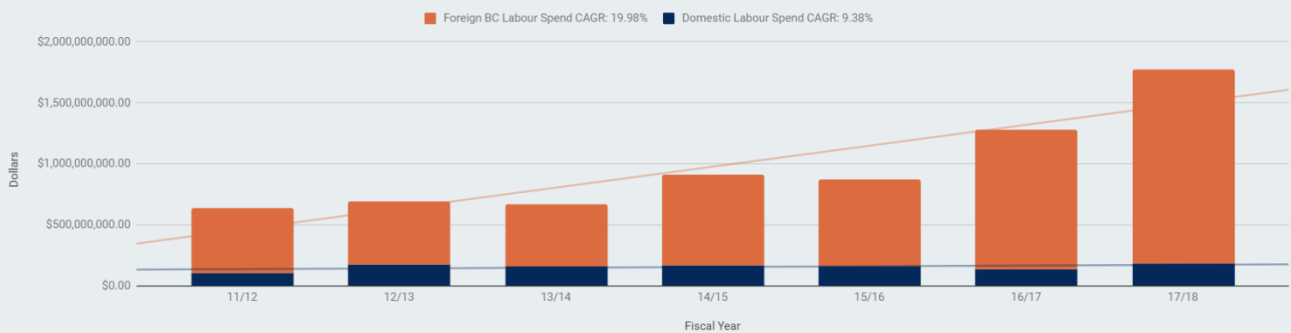


Figure 17 Vancouver Area, Regional Area, Distant Location Area: Labour-Based Motion Picture Tax Credit Map

### Domestic and Foreign Production Demand

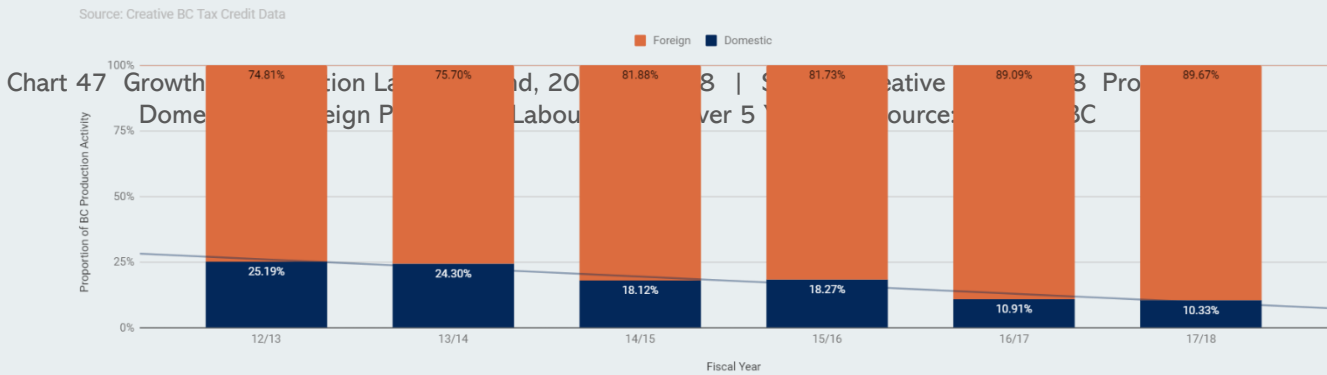
Motion picture production in B.C. is largely driven by foreign-owned (primarily US) productions. Foreign-owned production labour spend shows a 19.98% compound annual growth rate over the period of 2011/12 to 2017/18, per tax credit data. In that same time period, domestic production labour spend indicates a 9.38% CAGR.

Chart 43 Combined Foreign and Domestic Production B.C. Labour Spend CAGR: 18.51% | Source: Creative BC



Foreign production activity has increased between 2012/13 and 2017/18. Domestic production activity has also increased over the same time period, but not at the same rate and when compared against the high volume of foreign production, domestic production labour spend has declined.

Chart 46 Proportion of Domestic to Foreign Production Labour Spend Over 5 Years | Source: Creative BC



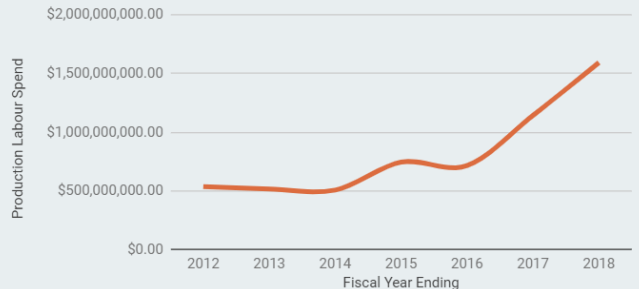
However, while the volume and scale of production budgets for the foreign sector is much larger than the domestic sector, both foreign and domestic-owned productions show positive growth in labour spend, as seen below.

Chart 49 Growth in Production Labour Spend, 2012 to 2018 | Source: Creative BC

74% Domestic Growth



198% Foreign Growth



Domestic productions with lower budgets also compete for below-the-line labour, especially at peak production periods when labour is tightest. When in-demand labour is tight, wages become competitive and domestic productions often must source labour with fewer years of work experience. Contractor survey data shows that domestic productions have 25% of in-scope labour with less than three years' experience, whereas foreign productions have 15% of in-scope labour with less than three years' work experience. Workers on domestic productions work fewer hours overall and while the workers are less likely to be union members, they report getting work through unions.

Domestic productions are able to access regional and distant location tax credits incentives at a rate higher than foreign producers (see Appendix D, Regional Film Commissions section). In addition to these incentives, only domestic productions are able to access training tax credits<sup>52</sup> for approved training programs in conjunction with the domestic labour tax credits. Contractor survey results for in-scope labour report that 9% of their work on domestic productions takes place outside the Lower Mainland as compared to 5% of foreign productions. An opportunity exists for domestic production to play a significant role in the further

<sup>52</sup> Creative BC: Summary of domestic (FIBC) tax credits [https://www.creativebc.com/database/files/library/FIBC\\_Summary\\_v01\(2\).pdf](https://www.creativebc.com/database/files/library/FIBC_Summary_v01(2).pdf)

development of British Columbia's economic regions, utilizing existing worker capacity and building work experience for new entrants.

## Motion Picture Production Needs

Motion picture production is highly mobile. While productions establish a short term fixed "home" for the production office and other departments such as construction, props and set decoration, much of the daily work of shooting film and television productions is done with a combination of location shooting (in private residences or on city-owned streets or provincial parks, for example) and/or in a soundstage/converted warehouse where sets are built to shoot scenes in a controlled environment. Many productions in B.C. utilize a combination of location and studio shoots; some use location shooting only. As reported by foreign studio and network executives, where a production chooses to situate itself is a major influence on labour demand in that geographical location and vice versa.

### Seasonal Production Needs

Weather, available daylight, and broadcast television cycles, talent availability and other factors set annual cycles of motion picture production activity with summer highs and winter lows. As streaming content providers such as Netflix and Apple drive a surge in original content creation, their direct-to-consumer subscription business models allow them to release content unconstrained by a broadcaster-advertiser calendar. This capability to produce outside the annual production cycle (which could ease labour pressure during peak production periods) must be observed over time to determine long-term impacts on labour demand.

An overarching labour pressure point is work seasonality, exacerbated by concurrent productions in the same region and large budget feature films requiring large and experienced crews, while TV series production attracts labour supply for their longer-running productions.

### Complete Production Crew Base Needs

Decisions on where a production chooses to establish its "home base" for the production are dependent upon the availability of skilled labour, physical shooting locations, rental services and infrastructure such as transportation and high-speed broadband. Decisions are also influenced by proximity to an international airport for above-the-line personnel such as international star talent.

#### One urban labour pressure point is labour quantity

Over 90% of production activity occurs in the Mainland/ Southwest economic region of B.C. Demand for labour during peak season is concentrated with extreme pressure in recent years.

#### Another urban labour pressure point is labour quality

In 2017, B.C. accommodated up to an estimated 50+ complete motion picture productions concurrently (based on B.C. tax credit data). When all crew are working, the balance of less experienced crew vs. experienced crew can increase pressure to deliver on-set training while upholding safety requirements.

#### Another urban labour pressure point is labour cost

In large centres, higher labour costs can be triggered when "feature [film] rates" are paid by larger budget productions during busy times. This places pressure on both smaller and domestic productions who cannot afford to compete for the same labour.

## Creative Needs

A script may call for a remote icy mountaintop or dense Victorian-era architecture that is not close to the production’s home base. These creative needs of the script are called “location specific” and inform decisions on where to film some portions of the script for a finite time period. These location- or creative-based decisions often require productions to relocate for a period of time outside the Lower Mainland/Southwest, [generally representing both the Designated Vancouver Area and the (Vancouver) Regional Area Tax Credits], and into the seven other provincial economic regions, generally representing and benefiting from B.C.’s Distant Location Regional Tax Credit.<sup>53</sup>

A regional labour pressure point for experienced BTL workers emerges in these cases. Local below-the-line talent could be hired to service the location-specific needs of a portion of a production, if it was trained and available to do so. However, some regions lack experienced crews or those that do live in the regions may be working in the Lower Mainland where volume is consistent and opportunity is greater especially at peak times.

## Smaller Production and Budget Needs

Co-existing among large budget productions (features) and longer-running productions (TV series) are smaller productions (such as Movies of the Week) and lower budget domestic productions and commercials that compete for crew and location availability and to a lesser degree, cost of labour. The outcome of this pressure is that smaller budget productions routinely seek to film outside the Lower Mainland/Southwest<sup>54</sup> as their budget and schedule parameters cannot be met with scarce resources. All parties are competing for the same resources at the same time of year, creating scarcity.

Regional Increase in Labour Spend	B.C. Economic Region	Growth
2012 to 2017		
	1. Northcoast Region and Nechako Region (combined)	↑ 149%
	2. Northeast	
	3. Cariboo	↑ 135%
	4. Vancouver Island & Coast	↑ 194%
	5. Lower Mainland/Southwest	↑ 161%
	6. Thompson-Okanagan	↑ 143%
	7. Kootenay	↑ 74%

Table 1 Regional increase in labour spend by economic region, 2012 to 2017. Source: Payroll data

<sup>53</sup> As defined by the Creative BC’s motion picture tax credit program.

<sup>54</sup> As evidenced by year over year increases in regional production labour spend tracked in payroll data from 2012 to 2017.



The labour pressure point is cost and the result is that complete productions are moving and establishing themselves in locations outside the Lower Mainland/Southwest economic region not solely for creative reasons but for affordability. Productions move to where higher regional and distant location tax incentives can offset the cost of moving and housing the core of their production unit, and where crew and locations may be more available and locations more affordable. The labour pressure point is experienced labour available to work locally in a regional location.

While all economic regions have experienced growth, Vancouver Island/Coast, represented by two Regional Film Commissions, has experienced the highest increase in regional labour spend over the 2012-2017 period and is emerging as a secondary film hub. High volume location filming is observed in the southern region of Vancouver Island and studio infrastructure is in place in the North/Central area of Vancouver Island.<sup>55</sup> The Vancouver Island/Coast economic region has a pilot training program at North Island College in Courtenay to increase training of local labour to service growing demand. The TV and Film Crew Training program at North Island College is a one-month course that readies production assistants, grips, construction and lighting crew to work on set. Recently, labour union ACFC West approved North Island College graduates from the grips, lighting and set construction programs as automatic permittees to their union. In addition to this pilot training program at North Island College, 2017 saw the establishment of the Vancouver Island Film Studios, a conversion stage<sup>56</sup> with over 20,000 square feet.

The Thompson-Okanagan region, represented by three Regional Film Commissions, may follow as a third hub. Eagle Creek Studios of Burnaby recently opened a purpose-built stage<sup>57</sup> in Kelowna, measuring 15,000 square feet. This expansion could attract consistent foreign and domestic business to the new infrastructure. Okanagan College recently announced it will now offer industry-specific baseline training courses (Motion Picture Industry Orientation, Set Etiquette for Background Performers), WHMIS and first aid courses that are relevant for in-scope labour.

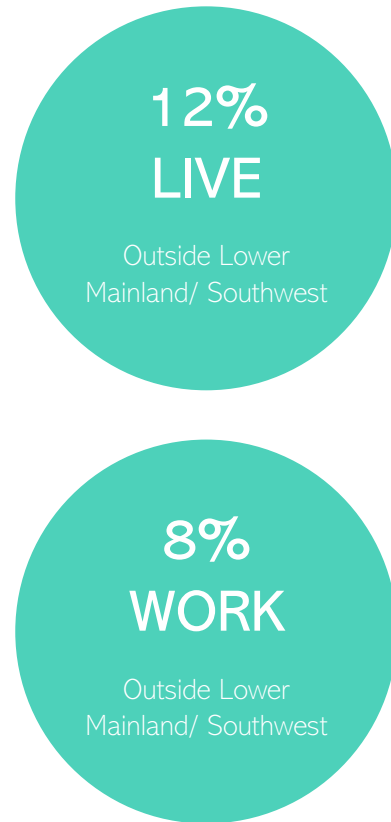


Figure 20 Where the workforce lives and works | Source: Contractor Survey, 2017

### Labour needs at different stages of demand in B.C.: pioneering, growth, maturing



Figure 22 Labour needs at Different Stages of Demand

<sup>55</sup> Based on annual Regional Film Commission reporting submitted to Creative BC

<sup>56</sup> Conversion stage is defined by the industry as an existing space that has been modified to suit motion picture production. Source: Creative BC

<sup>57</sup> A purpose-built stage is defined by the industry as new construction intended for the sole use of motion picture production. Ibid.

In summary, the nature of demand for labour is different throughout the province and three distinct types of labour demand are observed in B.C., each with unique local needs.



To seize distinct regional opportunities resulting from increased demand in the Lower Mainland/Southwest, a regional economic study determining the relationship between workforce and infrastructure could serve more targeted strategies for regional success and improve service to foreign and domestic productions.



## Profile: Locations

**75%**

**males in this role**  
also represents 13% visual minorities and within that, 4% Indigenous



**low barriers to enter**  
workers reported the third lowest, with 25% of respondents reporting no barriers to enter

**95%**

**sole/main income source**  
workers are the highest job category reporting sole/main as role of income



**covered by a single guild**  
this role is covered by the DGC BC



**high use of guild training**  
88% of locations department workers take courses offered by their guild

**97%**

**work in the Lower Mainland**  
only 6% live outside the Lower Mainland, the lowest rate next to security workers

**62%**

**are over 45 years of age**  
this job category shows only 12% in the 18 to 34 age range, one of the lowest scores for younger workers

**24%**

**growth in hours over 3 yrs**  
from 2015 to 2017 demand for this job category was at the midpoint of all categories for additional demand for service hours

**77%**

**work full time**  
29% have less than three years' experience and this job category is in the top four for full-time workers

**50/50**

**leadership equality**  
although the job category is predominantly male, at the leadership level it's 50/50 male and female.



**creative meets logistics**  
locations help set the creative tone of a production amidst a complex set of ever-changing logistics.

**Top 3**

**most severe hiring challenge**  
hiring survey indicates locations is the third most difficult to recruit (next to assistant directors and accountants) and hirers report extreme labour tightness for location managers..

Figure 25 Profile: Locations | Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada. 2016.

## Requirements of the Job

### Leadership Skills Essential for Entry

Indicators collected through qualitative interviews pointed to a hypothesis that soft skills, particularly leadership skills more often associated with seniority and managing people, are critical for entry – more so than technical skills by job function.

Required soft skills for BTL workers were defined as characteristics and attributes which include: attitude, communication, creative thinking, work ethic, teamwork, networking, decision-making, positivity, time management, motivation, flexibility, problem-solving, critical thinking and conflict resolution.

Similarly, the 2018 British Columbia Labour Market Outlook reveals a strong demand for people skills, especially those in communication areas such as active listening, speaking and reading comprehension as well as critical thinking. Active listening is identified as a “very important” skill for 73 percent of total projected job openings in B.C. Social perceptiveness, judgement and decision making are also deemed as “very important” competencies for almost 40 percent of total projected job openings by 2028”.<sup>58</sup>

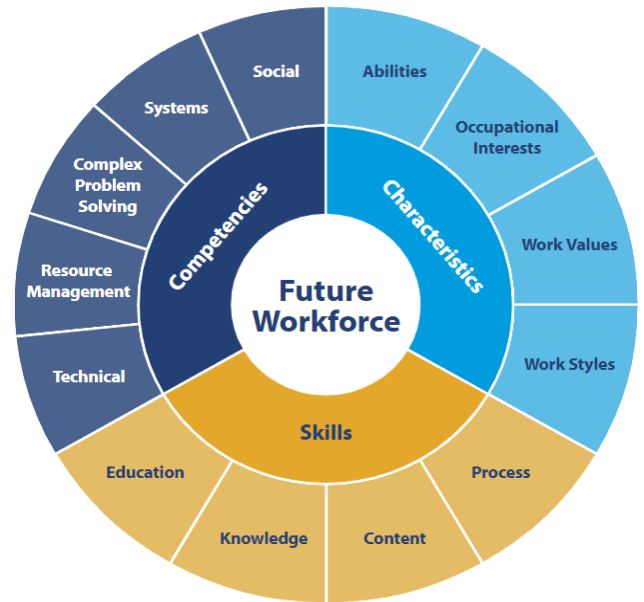


Figure 26 WorkBC Skills for the Future Workforce Skills, Competencies and Characteristics Map, 2017

“An inexperienced person with a great attitude on set  
can go a long way in this business.”  
~Production Manager

The hypothesis that soft skills are critical skills for entry and advancement was tested by reviewing the Top Ten Competencies 2015 and 2020 - World Economic Forum,<sup>59</sup> referencing the British Columbia Labour Market Information Office’s Success in the Future Workforce framework<sup>60</sup> (see Figure 16) and adapting industry leader Korn Ferry’s The Art and Science of Talent<sup>61</sup> instrument (which concentrates on leadership skills), to research what workers need to enter and advance at all career levels in the sector.

Mapping these latter two elements together into 23 conceptual clusters supported a common framework that allowed hirers (producers, production managers, department heads) and hirees (contractors/hires) in individual one-on-one sessions to prioritize the clusters as essential, important and less important. Looking at skills that are cross-cutting (and not job role or department-specific skills), helped to validate whether soft/personal skills are more critical than technical/functional skills when entering and advancing in the BTL

<sup>58</sup> British Columbia Labour Market Outlook, 2018 Edition. Page 4

<sup>59</sup> [The Future of Jobs Report, World Economic Forum, January 2016](#)

<sup>60</sup> [WorkBC: Future Workforce](#) : Skills, Competencies and Characteristics. Source: Adapted from the U.S. Department of Labor/Employment and Training Administration, the O\*NET Content Model, available in the British Columbia Labour Market Outlook: 2017 Edition.

<sup>61</sup> The Art and Science of Talent, Korn/Ferry International (now Korn Ferry) and Lominger International. All rights reserved. For research purposes, this page includes information from the WorkBC: Skills for the Future Workforce webpage and Korn Ferry legacy tools. Korn Ferry has not approved, endorsed or tested these modifications.

workforce. The soft skills research exercise was performed with a total of 29 individuals (23 in structured interviews and 6 in a focus group). Please see Appendix E for details on methodology.

“Skills are teachable, but attitude is paramount.”

~ Special Effects Supervisor

## Hiring Managers Agree on Soft Skills

The research results indicate that the same soft skills are required at both career entry and advancement, with little distinction between the two phases. There is considerable overlap (90%) between the skills that hiring managers consider to be essential for entry and those they consider essential for below-the-line career advancement. Specifically, from the perspective of hiring managers, there is overlap between nine of the top 10 skills that are considered essential for entry and advancement. The essential skills identified by hiring managers tend to be focused on personal characteristics, interpersonal skills or attributes, and personal control and resilience (i.e. Acting with Honour and Character, Communicating Effectively and Keeping on Point). They tend not to be tactical or focused on inspiring or managing others. Those skills that do not overlap (i.e. are required for entry but not advancement or vice versa) are highlighted.

HIRER PERSPECTIVES: TOP 10 ESSENTIAL SKILLS	
For Entry	For Advancement
1. BEING OPEN AND RECEPTIVE	1. BEING OPEN AND RECEPTIVE
2. RELATING SKILLS	2. RELATING SKILLS
3. ACTING WITH HONOUR AND CHARACTER	3. COMMUNICATING EFFECTIVELY
4. COMMUNICATING EFFECTIVELY	4. ACTING WITH HONOUR AND CHARACTER
5. CARING ABOUT OTHERS	5. CARING ABOUT OTHERS
6. MANAGING STRESS AND FATIGUE	6. DEMONSTRATING COMPREHENSION
7. KEEPING ON POINT	7. KEEPING ON POINT
8. DEMONSTRATING COMPREHENSION	8. DEMONSTRATING PERSONAL FLEXIBILITY
9. GETTING ORGANIZED	9. MANAGING DIVERSE RELATIONSHIPS
10. MANAGING DIVERSE RELATIONSHIPS	10. MANAGING STRESS AND FATIGUE

**Table 2 Hiring Managers: Top 10 Skills for Entry and Advancement, Research Exercise**  
Adapted from Skills for the Future Workforce, WorkBC, and The Art and Science of Talent, Korn Ferry

## Crew Identify Differences Between Skills to Enter vs. Advance

There is overlap between seven of the 10 skills that crew believe are essential to enter as a below-the-line workers and those to advance in the industry. The essential skills identified by crew tend to be fairly tactical (i.e. focused on getting the job done). Crew also tend to focus on interpersonal skills. The top 10 essential skills to enter and advance from a crew perspective are below while those that do not overlap are highlighted.

CREW PERSPECTIVES: TOP 10 ESSENTIAL SKILLS	
For Entry	For Advancement
1. ACTING WITH HONOUR AND CHARACTER	1. ACTING WITH HONOUR AND CHARACTER
2. MAKING COMPLEX DECISIONS	2. MAKING COMPLEX DECISIONS
3. DEMONSTRATING PERSONAL FLEXIBILITY	3. DEMONSTRATING PERSONAL FLEXIBILITY
4. MANAGING DIVERSE RELATIONSHIPS	4. MANAGING DIVERSE RELATIONSHIPS
5. COMMUNICATING EFFECTIVELY	5. COMMUNICATING EFFECTIVELY
6. FOCUSING ON THE BOTTOM LINE	6. GETTING ORGANIZED
7. GETTING ORGANIZED	7. KEEPING ON POINT
8. KEEPING ON POINT	8. MANAGING WORK PROCESSES
9. MANAGING UP	9. MANAGING STRESS AND FATIGUE
10. MAKING TOUGH PEOPLE CALLS	10. DEALING WITH TROUBLE

**Table 3 Crew: Top 10 Critical Skills for Entry and Advancement, Adapted from Skills for the Future Workforce, WorkBC, and The Art and Science of Talent, Korn Ferry**

"Soft skills are missing. Nobody is offering training on that."  
~ Production Manager

## Less Agreement Between Hiring Managers and Crew Regarding Essential Skills

There is 50% overlap between the skills that crew and hiring managers consider to be essential for entry and those that they feel are essential to advance. Specifically, there is overlap in five of the top 10 essential skills for entry and six of those essential for advancement. Those essential skills to enter and to advance as agreed by both hiring managers and crew interviewed are listed below.

ESSENTIAL SKILLS AGREED BY HIRING MANAGERS AND CREW	
Five for Entry	Six for Advancement
<ol style="list-style-type: none"> <li>1. ACTING WITH HONOUR AND CHARACTER</li> <li>2. COMMUNICATING EFFECTIVELY</li> <li>3. KEEPING ON POINT</li> <li>4. GETTING ORGANIZED</li> <li>5. MANAGING DIVERSE RELATIONSHIPS</li> </ol>	<ol style="list-style-type: none"> <li>1. COMMUNICATING EFFECTIVELY</li> <li>2. ACTING WITH HONOUR AND CHARACTER</li> <li>3. KEEPING ON POINT</li> <li>4. DEMONSTRATING PERSONAL FLEXIBILITY</li> <li>5. MANAGING DIVERSE RELATIONSHIPS</li> <li>6. MANAGING STRESS AND FATIGUE</li> </ol>

**Table 4 Hiring Managers and Crew: Essential Skills to Enter and Advance, Adapted from Skills for the Future Workforce, WorkBC and The Art and Science of Talent, Korn Ferry**

Crew are more likely to identify managerial and leadership skills as essential for both entry and advancement. Hiring managers are less likely to identify these types of skills as critical for entry and advancement and are more likely to identify personal characteristics or interpersonal skills as critical.

Specifically, skills that are prioritized in the top ten essential skills by crew, but not by hiring managers, include:

- |                                |                             |
|--------------------------------|-----------------------------|
| 1. Making Tough People Calls   | 4. Making Complex Decisions |
| 2. Managing Up                 | 5. Dealing with Trouble     |
| 3. Focusing on the Bottom Line | 6. Managing Work Processes  |

There are a number of possible interpretations of these discrepancies. One interpretation relates to levels or layers of management. In other words, to perform well at their jobs, crew need to manage themselves and others within their teams. However, this kind of management is horizontal (i.e. peer-to-peer) rather than vertical (i.e. upward or downward management). Hiring managers may not be aware of these dynamics or they may understand management in the vertical sense.

The skills that hiring managers prioritized in the top ten essentials, but were not prioritized by crew, include:

- |                             |                                |
|-----------------------------|--------------------------------|
| 1. Being Open and Receptive | 3. Caring about Others         |
| 2. Relating Skills          | 4. Demonstrating Comprehension |

These are personal characteristics and interpersonal skills that a hiring manager may see as very valuable, possibly due to their exposure to a broad and diverse number of crew employees.

Clearly, in-scope labour requires soft skills to enter the workforce. Qualitative interviews repeatedly pointed to an “appropriate attitude” for new entrants in the workforce. With varied and challenging work and often very long working hours, having strong personal and interpersonal skills is mandatory for success.



**Soft skills are demanded on day one, but the gap between hiring manager and crew perceptions may be contributing to pressures felt by hiring managers. Developing an industry-approved, soft skills matrix and assessment tool could bridge gaps in understanding and also support recruitment.**



## Profile: Accounting

**86%**

**females in this role**  
this job category is in the top four for female representation



**low discrimination**  
accountants cite the lowest experience of discrimination across job categories at 3%

**87%**

**sole/main income source**  
accountants are at the midpoint of all job categories relevant to the role motion picture income plays as an income source



**both unionized and exempt**  
covered by IATSE 891 and ACFC West; department head level not covered, (above-the-line, reports to producers)



**many from outside film**  
37% surveyed report having worked in an unrelated industry prior to motion picture

**61%**

**have < 5 yrs experience**  
many accountants have been recruited recently: 20% have less than one year and 30% less than three years' experience

**27%**

**pursue professional dev.**  
next to performers, motion picture accountants are most likely to undertake continuing education training

**23%**

**report a lack of coaching**  
while this job category is in high demand, they are second only to stunts in the lack of access to mentoring/coaching

**29%**

**say training is critical**  
65% have relevant education and/or apprenticeship/certification



**high demand profession**  
the [US Bureau of Labour Statistics](#) projects demand to grow ten percent from 2016 to 2026, faster than the average for all occupations

**76 in**

**B.C. production accountants**  
compared with 89 script supervisors and 439 locations managers self-identifying through the networking tool

**Top 2**

**labour tightness**  
this job category is the most difficult to recruit and hirers report extreme labour tightness for this role

Figure 29 Profile: Accounting | Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada. 2016.

5. ENSURING SUPPLY Figure 30 Profile: Accounting | Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada. 2016.

# 5. ENSURING SUPPLY

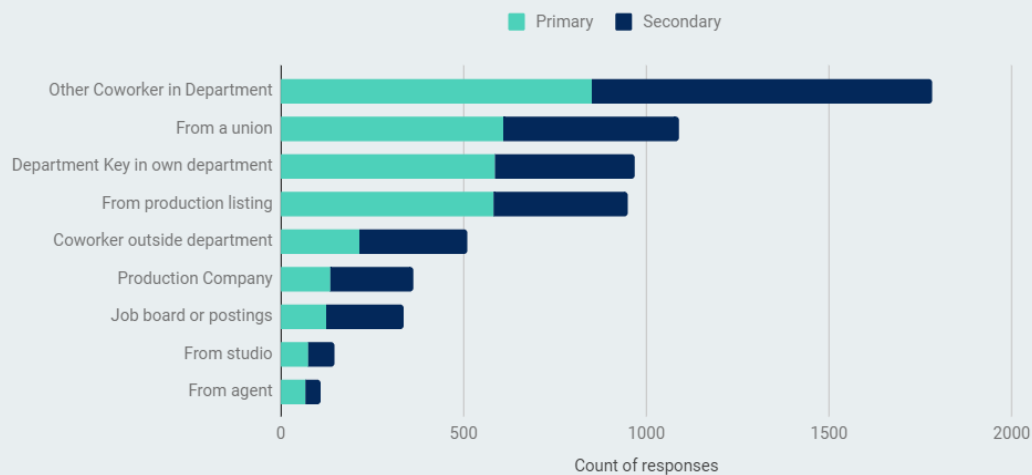
In the B.C. motion picture industry, 97% of below-the-line labour is supplied by British Columbians. In addition to entering the workforce directly, 58% of labour comes from other industries, reflecting the transferability of functional skills into the industry and its 170 distinctive job roles. Despite pathways to advance being self-evident once a specialty job role has been determined, labour tightness and some issues with labour quality are reported by hiring managers.

## Feeding the Labour Pipeline

### Coworkers are Primary Sources of a Worker's Next Contract

Unions and guilds are the primary suppliers of in-scope labour representing approximately 90% of the below-the-line workforce. Labour is supplied almost exclusively by B.C. residents. Despite the surge in new entrants to the below-the-line workforce between 2014 and 2016, the out-of-province labour spend (excluding bankable principal talent) has remained at 3% for the total workforce and in fact declined in 2017.<sup>62</sup>

Chart 52 Primary And Secondary Sources for Securing Next Production Contract | Source: Contractor Survey



In-scope labour is hired as contract workers with benefits on a project-by-project basis, using a hierarchical structure. Networking and a worker's reputation drive the hiring process, with a seniority system practiced by only two of the six unions. IATSE 891 uses a seniority system to supply day labourers (known as day call workers) and Teamsters 155 uses a seniority system for hiring all BTL positions whether short term or

<sup>62</sup> Based on payroll data.



longer term. Workers source their next gig through their co-workers, their union and Department Heads/Keys. Job boards appear to be less effective.

With some exceptions, most in-scope labour enters the workforce at an entry-level position, regardless of education level or previous work experience outside the motion picture industry. As an example, the production assistant role provides workers with exposure to the various departments in physical motion picture production. Starting at entry level provides networking opportunities and for most in-scope labour, this entry-level role leads to rapid career progression either within the production office or to other departments such as locations, grips or set decorating, to name a few.

## Production Hiring is Networked and Distributed

Below-the-line roles follow an established hierarchy and many units are responsible for hiring. The figure below provides a general illustration of the hierarchy, which can vary on each production. Broadly speaking, the producer hires the director (who is above-the-line), and additional management roles (line producer and/or production manager). The producer, often with input from the director, hires the production designer and the director of photography. The producer or producer's delegate, often with input from the director of photography and the production designer, hire additional design and technical department heads. The production manager typically hires the remainder of the below-the-line department heads.

Each department generally has a single department head (whose title is often "coordinator" or "key"), who then hires their lead assistants (whose titles are often "best" or "lead") who, in turn, hire additional crew members to complete the department's crewing needs.

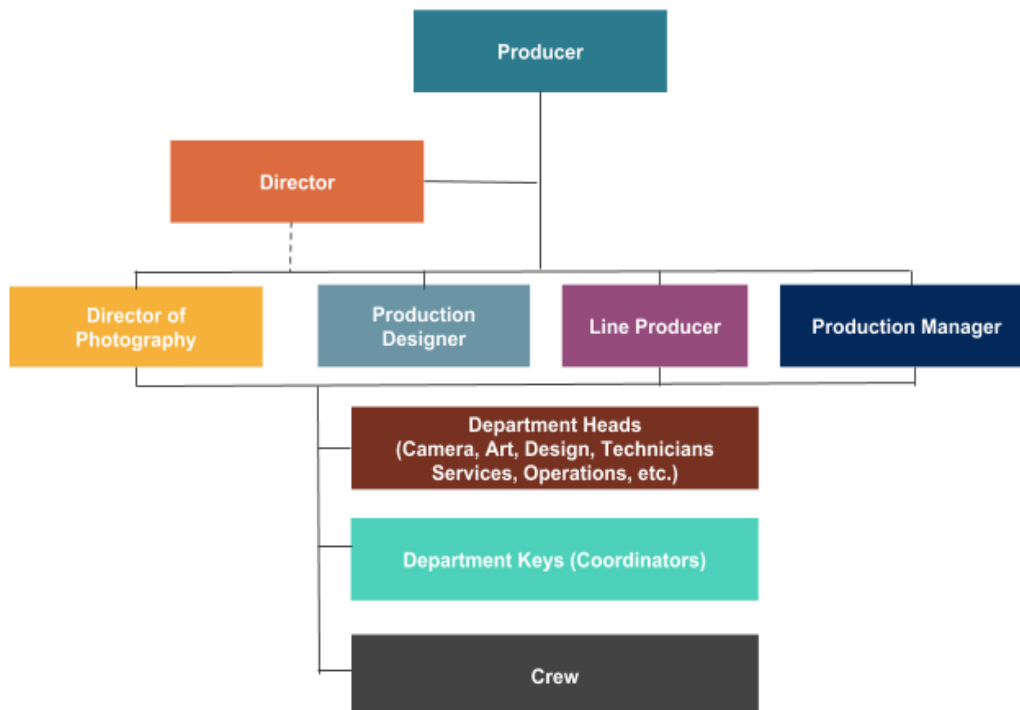
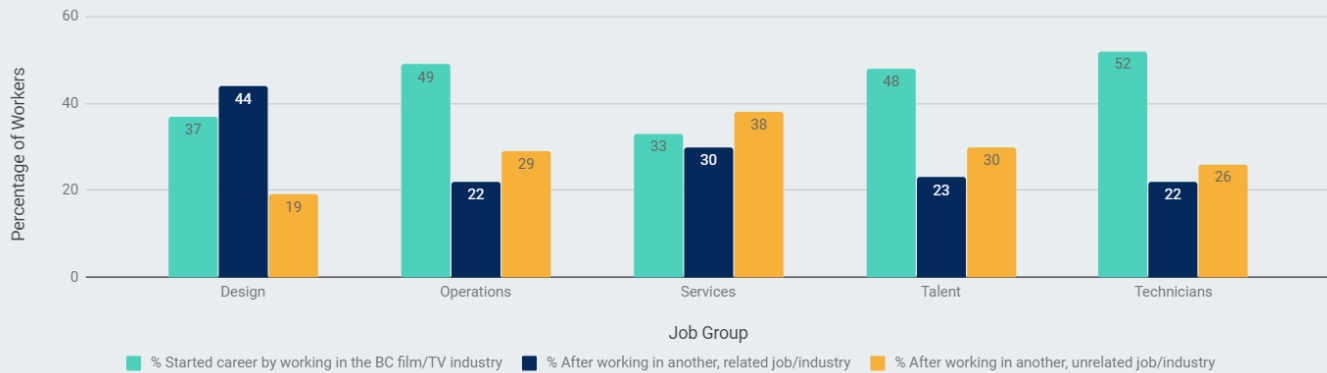


Figure 32 How a Production Generally Crews Up

## Welcoming Workers from Many Other Industries

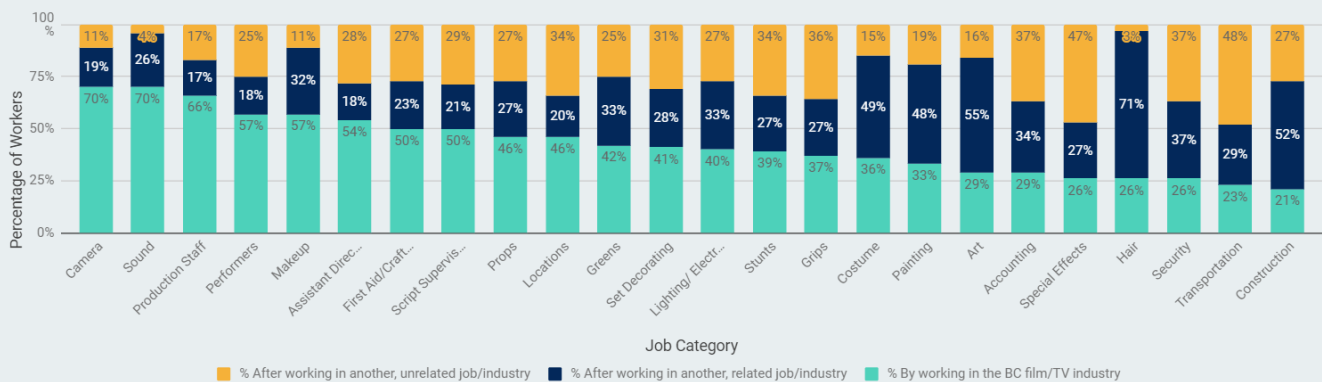
In-scope labour comes from three sources. In B.C., 32% of in-scope labour transferred into their motion picture career after working in a related industry (such as retail or design), 26% transferred into motion picture after working in an unrelated industry (such as resources or military) and the majority - or 42% - began their careers directly in the sector. Some below-the-line labour roles compete directly with other industries such as "theatre, fashion and exhibit and other creative designers" (NOC 5243) whose skills are applicable in the costume department.

Chart 55 Pathways of Entry to the Industry by Job Group | Source: Contractor Survey, 2017



At the job group level, Design stands out as the only job group that sees the majority of their workforce coming from another related job or industry.

Chart 58 Pathways of Entry to the Industry by Job Category | Source: Contractor Survey, 2017

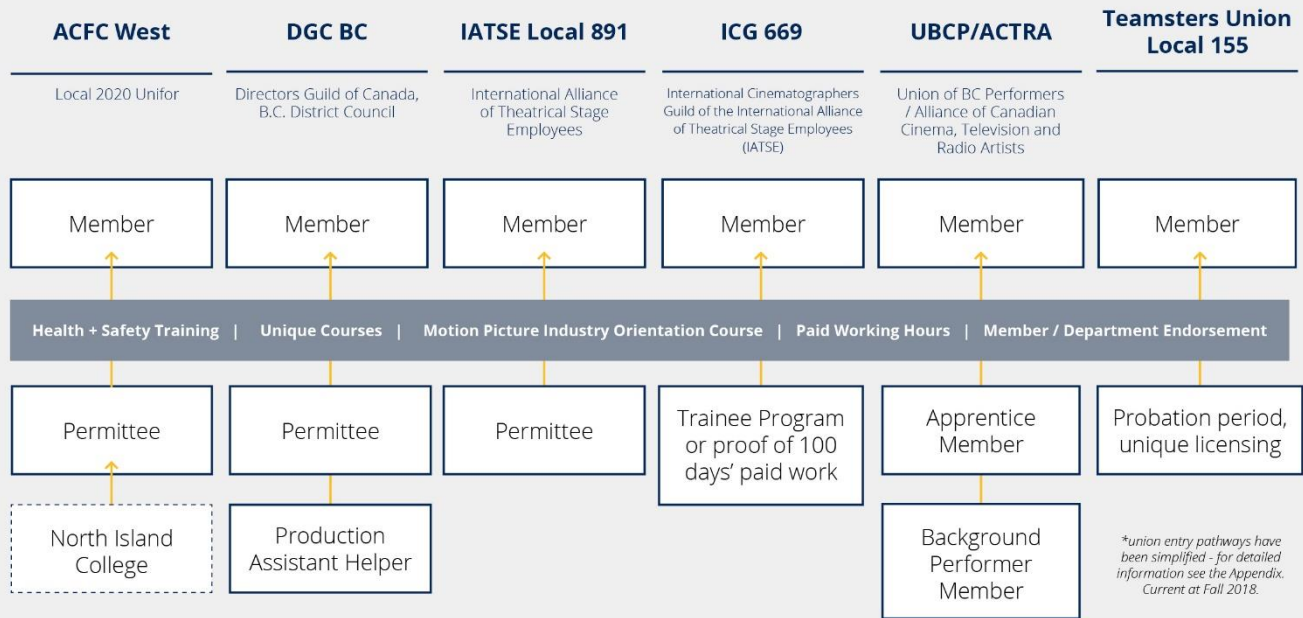


With 90% of labour supplied by the six unions and guilds, entry to this system is based on a series of steps including accrual of days on set, training, and letters of reference support from departments after a set number of hours have been achieved on set, The pathways into this industry are as diverse as the members within its unions.

# Below-the-Line Industry Pathways



## Unions and Guilds



## New Entrants



Figure 35 Below-the-Line Industry Pathways: New Entrants > Unions and Guilds > Careers

Figure 36 Below-the-Line Industry Pathways: Every Worker's Pathway is Unique  
 Figure 37 Below-the-Line Industry Pathways: New Entrants > Unions and Guilds > Careers

# Every Below-the-Line Worker's Pathway is Unique

**72%**  
**ATTAIN**  
**POST-**  
**SECONDARY**

Canada 2016 Census

**SELF-REPORTED FORMAL EDUCATION OR TRAINING**

- 30%** art institute/film school
- 30%** university/college degree in related field
- 29%** trades school/technical college
- 21%** apprenticeship training/certification

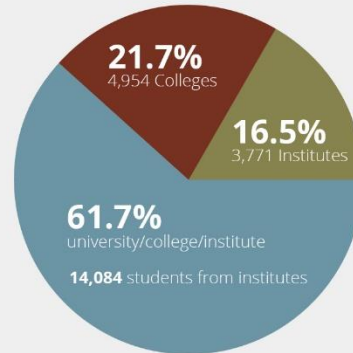
Contractor Survey, 2017; workers may have multiple credentials

**COLLEGES:** CAMOSUN COLLEGE, COLLEGE OF NEW CALEDONIA, COLLEGE OF THE ROCKIES, DOUGLAS COLLEGE, LANGARA COLLEGE, NORTH ISLAND COLLEGE, NORTHERN LIGHTS COLLEGE, NORTHWEST COMMUNITY COLLEGE, OKANAGAN COLLEGE, SELKIRK COLLEGE, VANCOUVER COMMUNITY COLLEGE

**INSTITUTES:** BRITISH COLUMBIA INSTITUTE OF TECHNOLOGY, JUSTICE INSTITUTE OF BRITISH COLUMBIA, NICOLA VALLEY INSTITUTE OF TECHNOLOGY

**UNIVERSITIES:** CAPILANO UNIVERSITY, EMILY CARR UNIVERSITY OF ART AND DESIGN, KWANTLEN POLYTECHNIC UNIVERSITY, ROYAL ROADS UNIVERSITY, SIMON FRASER UNIVERSITY, THOMPSON RIVERS UNIVERSITY, UNIVERSITY OF BRITISH COLUMBIA, UNIVERSITY OF NORTHERN BRITISH COLUMBIA, UNIVERSITY OF THE FRASER VALLEY, UNIVERSITY OF VICTORIA, VANCOUVER ISLAND UNIVERSITY

**SELF-IDENTIFIED ALUMNI OF BC INSTITUTIONS ON LINKEDIN**  
"Film" or "Motion Picture" key word search



**SURVEY OF 25 BC POST-SECONDARY INSTITUTIONS**  
11 Colleges, 3 Institutes, 11 Universities

**58% TRANSFER**

- **26%** come from an unrelated industry
- **32%** come from a related industry such as retail or design

Contractor Survey, 2017

**42% DIRECT**

- **24%** high school diploma or equivalency
- **5%** no high school diploma, certificate, degree

Contractor Survey, 2017

Figure 38 Below-the-Line Industry Pathways: Every Worker's Pathway is Unique

## Meeting Supply Through Increased Work Hours

Addressing peak demand, labour is often supplied by increased work effort, which is evenly distributed across all age groups. Looking at hours worked by age group and employment type, full-time equivalent workers are working in excess of 22-36% of full-time equivalent hours.

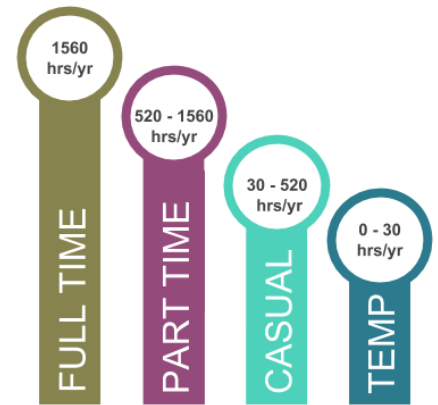
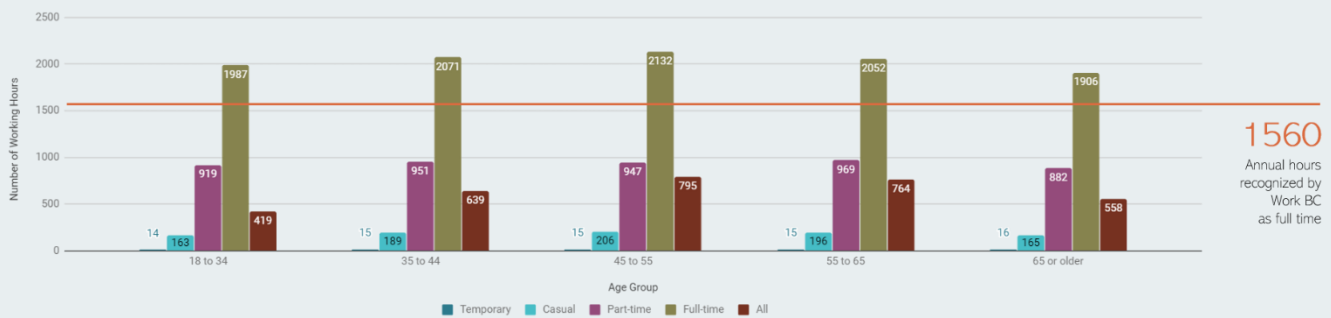


Chart 61 Average Annual Hours per Person by Employment Type and Age Group | Source: Payroll Data, 2017



## Managing Labour Supply Risks: Tightness, Balance of Experience, Stability

### Labour Tightness, Not Shortage

With increased volume of productions and a persistent pattern of peak production periods, a tightness of experienced crew is identified as an issue in both a survey and interviews with hiring managers. Typical indicators of labour tightness such as increases to wages paid to out-of-province labour or increased hours or wages were examined in the secondary data sources. No clear pattern emerged that pointed to labour tightness in specific roles. However, hiring survey results and interviews provided indications that, for certain roles, there is indeed labour tightness.

Further qualitative inquiry through a hiring survey collected input on labour supply and demand from production managers, producers, line producers and others responsible for hiring motion picture labour. Respondents, totaling 59, included commercial producers and hiring managers for both foreign and domestic productions. Respondents were asked to reflect on challenges experienced in the last 12 months (2017).

Sixty-nine percent of respondents reported that their biggest challenge with labour was “preferred crew not available” and 41% of hiring survey respondents reported that “the crew that was used lacked experience”. Overall, 85% of respondents indicated a production had been compromised because of labour challenges experienced over the past 12 months. Turning down production opportunities, budget constraints impacting crew choice, and needing to move productions outside B.C. were the most common issues/problems cited.



Figure 41 Hiring Challenges Cited by Hiring Managers. Source: Hiring Manager Survey

Chart 63 Below-the-Line Worker Length of Experience by Job Category |

Source: Contractor Survey, 2017  
 Figure 42 Hiring Challenges Cited by Hiring Managers. Source: Hiring Manager Survey

Can the industry workforce continue to grow to accommodate demand?	%
No, I believe it will shrink	3%
No. It will not grow any further	8%
Yes, but there are isolated pain points in key positions that must be addressed to continue to grow	31%
Yes, but there are challenges across many/most departments and growth will depend on a coordinated approach across stakeholder groups	46%
Yes. Conditions are right for workforce to grow (e.g. wage flexibility, compelling employee value proposition, strong and available training programs, etc.).	12%

Most survey participants (89%) indicated that the workforce can continue to grow to meet future demand. That said, only 12% indicated that the current workforce conditions (or the “status quo”) will accommodate future demand. The majority (77%) believe that some work must be done to address challenges. Almost half (46%) of respondents reported many challenges and noted growth will depend on a coordinated approach (while still believing that the sector will grow to accommodate demand). This one data point is not totally consistent with the other data points relied on in this study. It is difficult to tell what is meant by this response. Other data show labour tightness at certain times of the year, so the “coordinated approach” may only be applicable at those times. Moreover, a “coordinated approach” may mean different things to different respondents, including continuing current industry practice.

The job roles that hiring managers reported as difficult to source in 2017 were: assistant directors, accountants, location managers and production managers.

“We don't have enough people and many of the people we have are not qualified.”

~Production Manager

## Experienced Workers are Critical

Through additional qualitative inquiry with crew and hiring managers,<sup>63</sup> the presence of less experienced in-scope labour was observed, presenting a risk for the sector's ability to deliver to client needs. An experienced workforce supports one of the three T's (talent) and continues to secure B.C.'s position as a key production centre in North America.

Less experienced labour has many impacts on the work itself, including:

- the number of workers required on a production;
- overall efficiency to meet daily output targets;
- increased pressure to train new entrants while meeting daily output targets;
- increased loss and damage insurance claims, as reported in structured interviews; and
- increased vigilance to maintain quality and safety of workforce.

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“Because people aren't as well trained/qualified, we need to hire more of them to do the job of a single experienced person.”

~ Production Manager

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Over the period of B.C.'s most significant below-the-line motion picture labour surge, 2015 to 2017, WorkSafeBC data<sup>64</sup> shows injury rates per 100 workers fluctuated in motion picture (2.6, 2.4 and 2.7 in 2015, 2016 and 2017 respectively), tracking against a steady B.C. average rate of 2.2 over the same period. For serious injury rates, motion picture production was 0.5, 0.4 and 0.5 in 2015, 2016 and 2017 respectively against a consistent 0.3 serious injury rate for B.C.'s workforce average overall.

Industry has taken a proactive approach to mitigate these risks including:

- increased training efforts through the adoption of the Motion Picture Safety Awareness Course as mandatory baseline training for the workforce (required to become a permittee with four of the six unions and guilds: ICG 669, DGC BC, IATSE 891 and Teamsters 155);
- free workshops on Joint Health and Safety Committee Fundamentals (delivered by Act Safe), resulting from a 2017 WorkSafeBC mandate that all joint health and safety committee members have a minimum of 8 hours of related safety training;
- increased collaboration with WorkSafeBC for more enforcement on set resulting in increased overall reporting – which may be contributing to the statistical increase; and

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<sup>63</sup> See Appendix E for details.

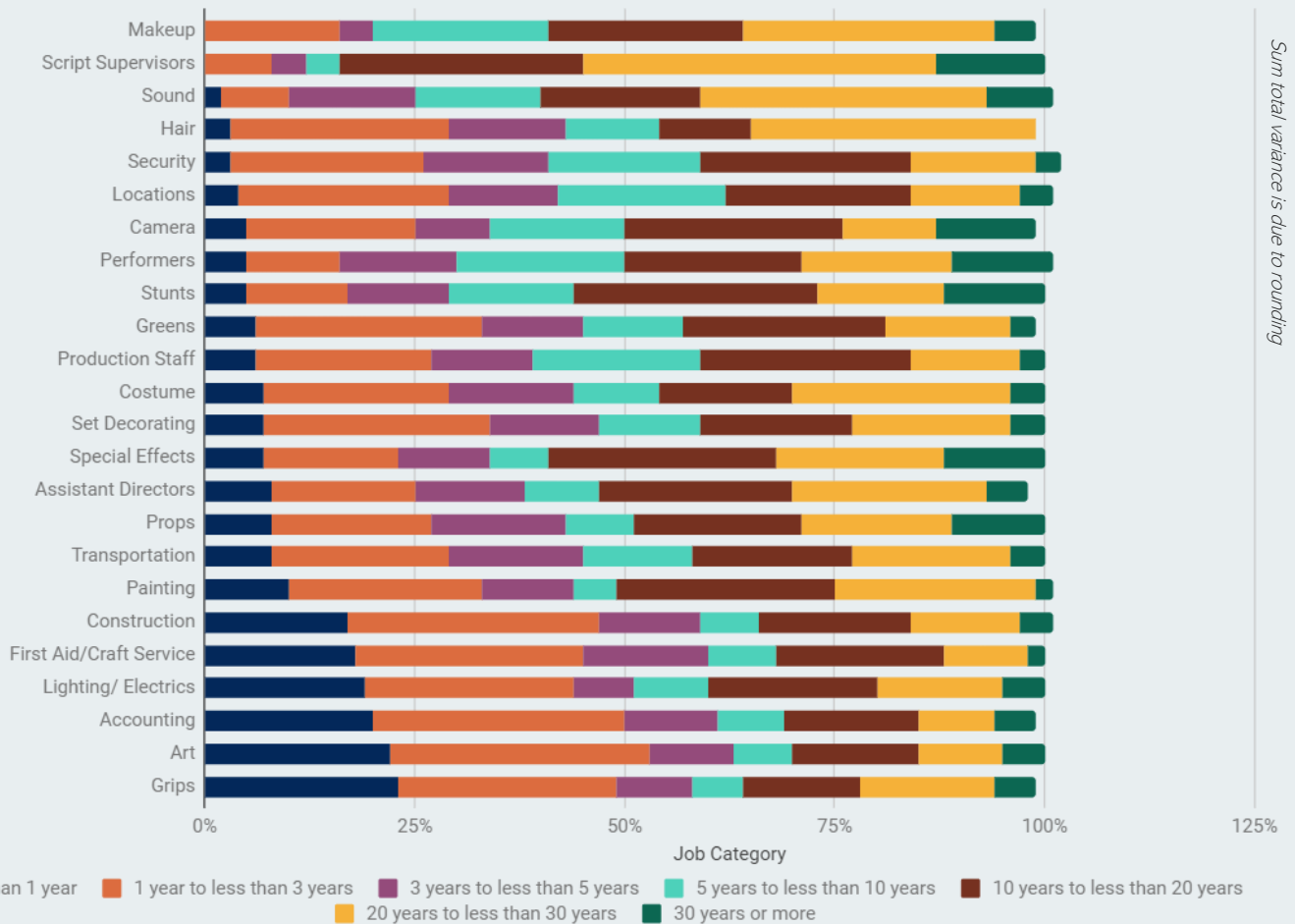
<sup>64</sup> Source: WorkSafeBC, Insurance for Industry Selection: 763025 Motion Picture, Commercial, or Television Production <https://online.worksafebc.com/Anonymous/wcb.ISR.web/IndustryStatsPortal.aspx?c=2>

- some productions have established daily safety meetings on set to raise overall awareness and outline risks particular to the day of work. One studio has established a floating set safety position to act as a knowledge resource to below-the-line workers for some productions.

Labour tightness is reported for roles that require significant work experience and leadership capabilities. Hirers report challenges with sourcing the right crew at the right time. Hiring managers and hirees all report that labour tightness and labour shortcomings (in term of quality) are impacting work.

Tracking years of work experience by job category, those departments with higher presence of less experienced workers will require targeted support to successfully train their newer entrants.

Chart 65 Below-the-Line Worker Length of Experience by Job Category | Source: Contractor Survey, 2017

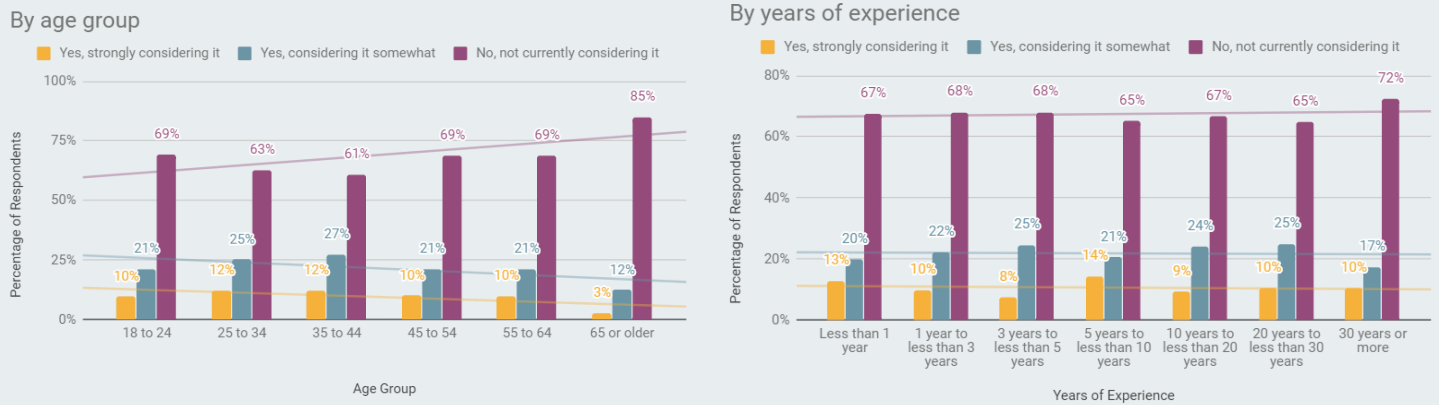




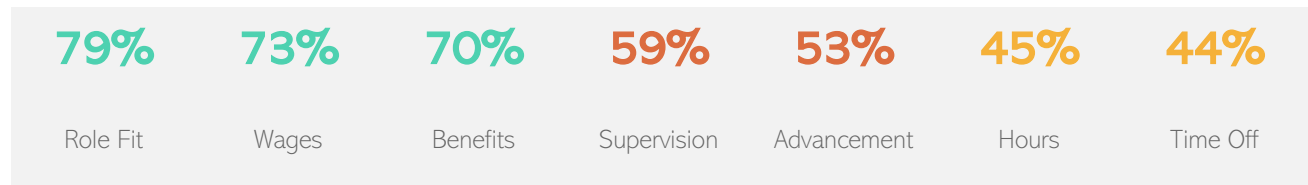
## Labour Force Mostly Satisfied

Contractor survey results measuring a worker’s intent to leave the workforce<sup>65</sup> indicate a higher risk of losing workers who are starting to build valuable experience after 3 to 5 years in the workforce. This potential loss of workers will eventually impact the supply of workers with higher levels of work experience. Additionally, while workers over the age of 65 intend to stay working, retaining an aging workforce in a physically challenging environment may not be sustainable.

Chart 67 Intent to Leave the Workforce | Source: Contractor Survey, 2017



While retention levels of in-scope labour are not tracked, the contractor survey measured satisfaction levels for the following factors:



Looking at job satisfaction by job group and job category, a relationship is observed between job satisfaction, employment status, willingness to increase work and intent to leave the workforce.

Chart 70 Job Satisfaction and Intent by Job Category | Source: Contractor Survey, 2017

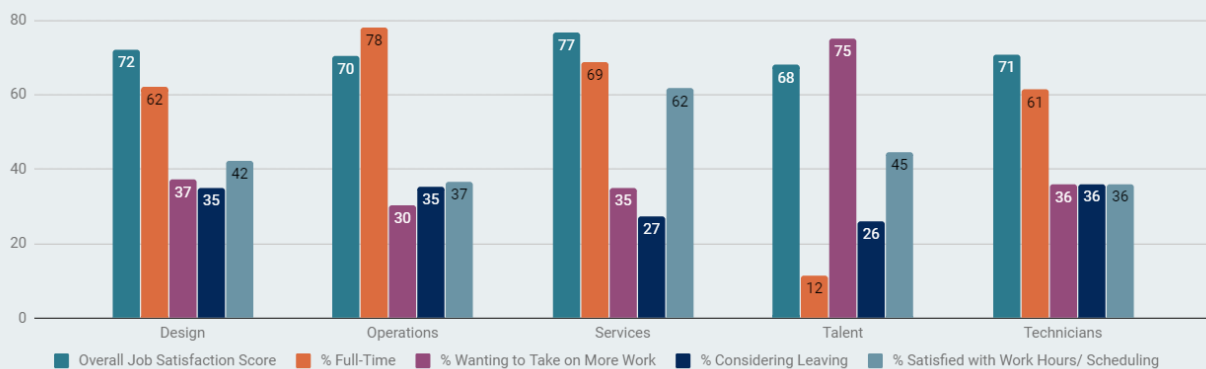


<sup>65</sup> See Appendix E for details regarding the scoring methodology on Likelihood of Exit.

“I couldn't be happier working in the job that I have”  
 ~ Digital Imaging Technician

Finally, at the job category level, the relationship between job satisfaction, employment status and willingness to work more is detailed below and demonstrates highest satisfaction rates among full-time workers with largely consistent overall satisfaction rates across all job groups and marginally fewer considering leaving the services and talent job groups.

Chart 73 Job Satisfaction and Intent by Job Group | Source: Contractor Survey, 2017



## Existing Supply and Diversity

Increased volume of motion picture production in B.C. has attracted many new entrants. While many workers are educated through post-secondary institutions, formal education is not considered a clear path into the sector, in part due to the wide range of skills that the sector requires and the preference for on-the-job training. With reported labour tightness and labour shortcomings, industry could better utilize existing supply with targeted tactics.

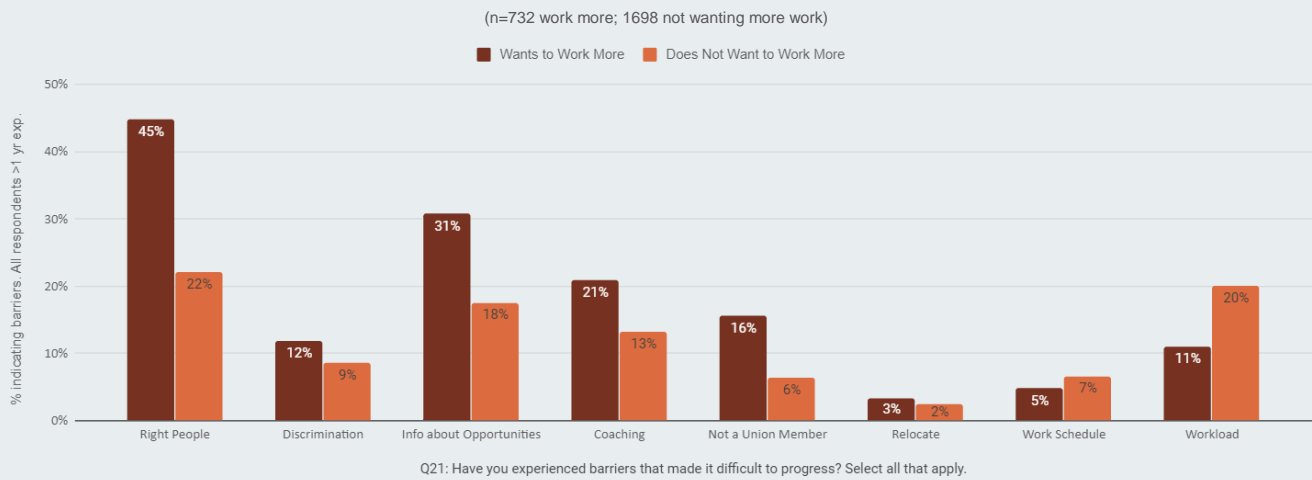
### Some Existing Labour Supply Wants to Work More

Contractor survey responses show there is a prevalence of workers who demonstrate a commitment to working in film and television and want to work more. A potential untapped capacity to address unmet labour demand exists as a near term, one-time solution.

Of the total BTL workforce, 29% (excluding performers) indicate a willingness to work more. This group is qualified by their minimum of one year of industry experience and minimum hours worked of at least 337.5 hours per year (or roughly 20% of full-time standard minimum of 1,560 hours per year). This represents a potential work effort of 485,000 additional hours, assuming this cohort is willing to increase their working hours to 1,991 per year.

Total hours worked across all contractor survey respondents (not including performers) is 4,639,000. Assuming, for example, that demand for hours increased by 10%, this group of qualified workers could absorb some (or perhaps all) of this demand by working more hours, assuming any barriers they face are addressed. This would be a one-time benefit as once they are working at full capacity (1,991 hours/year), this group is not able to increase their capacity beyond that one-time lift. It is evident that spare capacity within the existing workforce can be considered as a supply of labour within existing growth projections. The most prevalent barriers for this qualified labour group are a lack of network connections and lack of information about opportunities.

Chart 76 Barriers to Advancement for Those Wanting to Work More | Source: Contractor Survey, 2017



## Positive Diversity Trends Can Be Accelerated

Qualified female and ethnically diverse workers who want to work more were examined for reported barriers to gaining more work. There is no evidence of barriers due to gender. There is evidence of barriers due to ethnicity, which seem to be dissipating over time and may be associated with the practice of networked recruitment.

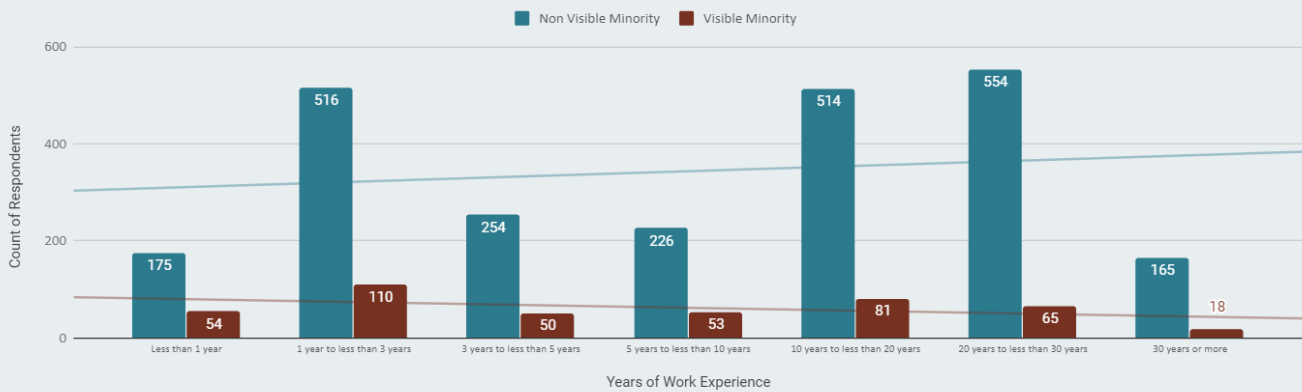
Looking at workers who want to work more, there is a more noticeable difference between men and women in their desire to 'work more, less, or the same amount' at lower experience levels. At higher experience levels, men and women have more similar preferences in this regard. Particularly, 63% of men with one to three years of experience want to work more, whereas only 43% of women at this experience level want to work more.

At five to ten years of experience, 26% of men want to work more, and 29% of women want to work more. This is also similar for 10 to 20 years of experience, where 25% of each gender wants to work more. Looking at ethnicity, at lower experience levels, all in-scope labour wants to work more regardless of ethnicity. And at higher experience levels, some divergence is observed, where visible minorities are more likely to want to work more.

For example, at one to three years of experience, 56% of visible minorities want more work, and 54% of non-minorities want more work. At five to ten years and 10 to 20 years, roughly 35% of visible minorities want more work, as compared with 27% and 24% of non-minorities that want more work (respectively).

Notably, the sample size of visible minorities at higher experience levels is relatively small (only 164 survey respondents that are also visible minorities have over 10 years' experience in the industry, as compared with 1,233 non-visible minorities at this level). This supports the hypothesis that visible minorities faced more barriers 10 to 20 years ago (which are still felt today as "want to work more" compared with their non-visible minority counterparts), and any barriers faced by the more inexperienced cohorts have less to do with discrimination, and more to do with inexperience and/or lack of connections and network. Work experience by ethnicity is a factor for consideration, as evidenced in the chart below.

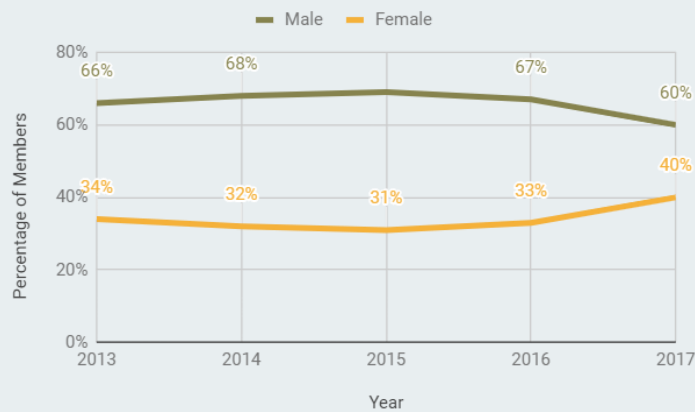
Chart 79 Distribution of Work Experience for Visible Minority Workers | Source: Contractor Survey, 2017



While the workforce lags 14% behind B.C. overall in gender balance, trends for new entrants into IATSE 891 (the union that represents the largest share of in-scope labour) indicate increasing numbers of females joining the workforce and correspondingly fewer males joining the workforce.

Additionally, a higher level of gender balance is observed within the department heads cohort at overall 46% female to 51% male.<sup>66</sup> Below are gender balance ratios at the leadership level within job groups.

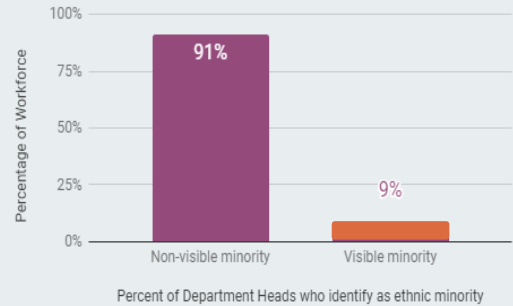
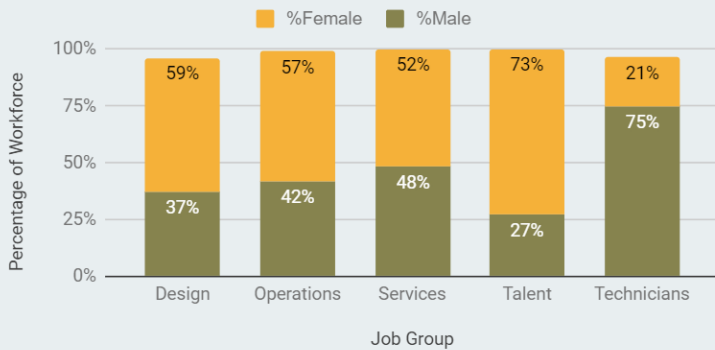
Chart 82 Gender Distribution for IATSE 891 New Entrants | Source: IATSE 891



<sup>66</sup> Source: Contractor Survey (Q2B) (Survey respondents =299)

However, looking at department heads, visible minority representation drops significantly with 91% non-visible minority and 9% visible minority. A diversity shortfall at the leadership level is observed.

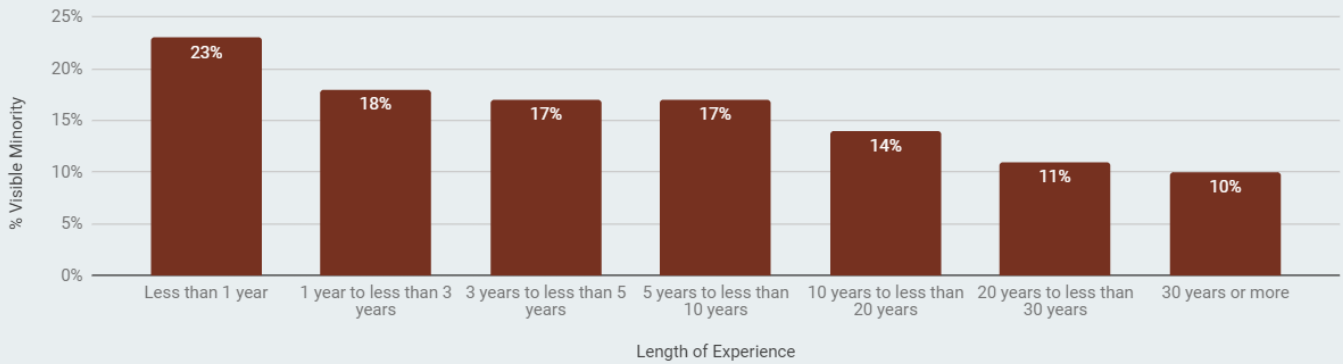
Chart 86 Department Head Gender Balance by Job Group | Source: Contractor Survey



Note: (n=367) Talent category has small sample size (n=11)

While visible minority representation lags in total, the motion picture industry has progressed over time, with newer workforce entrants (excluding performers and stunts) now comprising 23% visible minority, up from 10% visible minorities.

Chart 88 Percentage of Visible Minorities Based on Length of Service Excl. Performers and Stunts | Source: Contractor Survey, 2017



Targeting existing qualified labour (and particularly diverse workers) by providing increased networking opportunities and visibility can address labour tightness.



## Profile: Camera

**87%**

camera people are male with 13% female and 12% visible minority



highest % married with kids highest incidence in all job categories with children at home; 61% under 45 years old

**42%**

college/university degree 42% completed a union training program (exceeded only by Security category)



covered by single guild: International Cinematographers Guild 669



higher experience 16% have 5-10 years' experience (ind. avg. is 12%); 26% have 10-20 years' exp. (industry avg. is 20%)

**89%**

sole/main source of income report their work in the film and television industry is either their sole or main source of income

**43%**

severe hiring challenge hirers report camera people are the only technicians in the top 4 most difficult to hire positions

**65%**

full time majority of workers in the camera department have more than 1520 hours of work/year.

**40%**

Would work more those in Camera Department indicate a willingness to take on more work



**New Digital Image Tech Role** new position in Camera Department resulting from technological change in work processes

**42%**

complete union training second highest cohort to participate, based on contractor survey results

**70%**

enter workforce directly along with the Sound Department, this is the highest incidence of entering the workforce directly.

Figure 44 Profile: Camera | Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada, 2016

6. PROJECTING LABOUR NEEDS Figure 45 Profile: Camera | Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada, 2016

## 6. PROJECTING LABOUR NEEDS

Future labour needs can be understood using proprietary data from industry. Supporting targeted training could assist in meeting quality standards and knowledge transfer from experienced retiring workers to new entrants. The range of potential supply addition needs over the next ten years – considering reasonable assumptions with respect to retirement age, turnover, and various growth scenarios – are based on an accurate measurement of the below-the-line workforce in 2017.

### New Actuals More Accurate than Prior Sampled Datasets

The motion picture labour force is challenging to measure – as acknowledged in BC Stats study *Measuring Economic Impact of Film and Television Production in 2012*, BC Stats, March 2016 <sup>67</sup> which notes that inconsistencies in both federal and provincial data sources persist, due to methodology. Provincial and federal datasets provide valuable insight on long term trends and average annual employment of full-time and part-time workers but are not suited to accurately capture the unique nature of work in the sector.

### Proprietary Industry Datasets Present Actuals

Sector-based, bottom-up data sources provide a more accurate picture of the industry. Through access to proprietary datasets from payroll companies (who process pay for 90% of the B.C. workforce) and unions and guilds (who provide 90% of B.C.'s motion picture labour), a count of the actual number of people who were paid for work in B.C.'s motion picture industry in 2017 is determined: 43,800. Of those, 14,144 (or 32%) would be classified as full-time and part-time workers, based on a minimum number of hours worked in 2017.

The custom payroll data gathered for labour spend in 2017 provides a more accurate count of workers and a benchmark for the industry to manage supply additions. Payroll data also provides accurate insight on work patterns, clarifying the number of workers who are full time, part-time, casual and temporary, all of whom are important contributors to the industry.

However, there are some limitations with payroll data. The two major payroll companies do not capture 100% of B.C.'s physical production activity (such as some domestic and commercial productions). Residence and work location addresses for regionally-based labour may not be accurately captured, meaning that measuring labour and production activity in the regions will require a different approach.

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<sup>67</sup> BC Stats: *Measuring the Economic Impact of Film and Television Production Activity in British Columbia in 2012*, published 2016, accessed July 2018

## Government Datasets Use Sampling

As a comparison, using an average annual employment measure similar to other statistical approaches,<sup>68</sup> results in 12,361 people as the average annual employment for 2017. This number is 12% lower than even the 14,144 total full-time and part-time workers identified using the payroll dataset. Furthermore, the 12,361 represents just 28% of the 43,800 total British Columbians who worked in the motion picture industry in 2017. It is important to note, that 75%, or 33,011, of below-the-line workers indicate their jobs in motion picture are their main or sole source of income.

Provincial and federal datasets capture full-time and part-time employees only. The data use a taxonomy that combines an industry classification system (NAICS) with a national occupation classification (NOC). The codes provide standards for collecting, analyzing and disseminating occupational data for labour market information. Over 100 NOC codes were examined in order to capture the many occupation types that fall under NAICS 5121. See the list of codes in Appendix B.

Further, employment and headcount are distinct concepts, and headcount cannot be determined by combining work effort to form annual average employment numbers. Fractional work effort (part-time work patterns) added together results in incorrect employment figures. Finally, with accurate pay data established, higher compensation is noted for many BTL workers, meaning part-time and even casual work can provide significant earnings.

Data Source	What it measures	Results
Statistics Canada Census 2016	National household survey of population in 2016; captures full time and part time employment activity during survey period (can impact results for seasonal workers).	2016 employment is estimated at 12,250 <sup>69</sup>
BC Labour Market Outlook (WorkBC)	Employment forecast by industry and occupation in B.C. Informed by applying Census occupational shares to the Labour Market Offices industry share	2017 employment is estimated at 21,849 <sup>70</sup>
BC Stats Average Annual Employment	Historical employment estimates by industry	2017 employment is estimated at 26,800 <sup>71</sup>

## Opportunities to Improve Accuracy, Relevance and Alignment

Continued collaboration between industry and government to improve the national statistical measurement of the motion picture sector and comparisons between data sources will:

- expand definition of employment to become relevant to new and increasingly prevalent modes of employment such as contract work with benefits, capturing those casual and temporary workers and consider both compensation levels and hours worked when measuring the workforce; and

<sup>68</sup> B.C. examples include the BC Labour Market Outlook and BC Stats Labour Market Statistics Annual Averages ([link](#)).

<sup>69</sup> Special data request from LMIO. Accessed August 2018

<sup>70</sup> WorkBC Industry Outlook Profile: <https://www.workbc.ca/getmedia/05534b78-616d-4d36-8dfa-9e3c807db0b2/Profile-512-Motion-Picture-and-Sound-Recording-Industries.pdf.aspx> Note this figure captures 5121 industry group which includes motion picture and sound recording and out of scope labour such as post-production and video exhibition. Note: 2018 WorkBC Industry Outlook Profile estimates employment at 26,823.

<sup>71</sup> BC Stats: British Columbia Employment by Detailed Industry, Annual Averages ([link](#)) Note: 2018 Average Annual Employment figures for NAICS 512 are 18,500 (data accessed February 4, 2019)



- consider using proprietary data sets on a regular basis to track sector trends in employment and work patterns to inform strategy.



As the below-the-line workforce is the first labour market to put forward actual payroll data for 90% of its total workforce, sampled government data sources may be informed by industry's continued collaborative approach.

## Projecting Labour Replacement Needs

### Close to One-Fifth of the Current Workforce Will Retire by 2027

The number of retirements of existing workers over the next ten years is estimated based on the age distribution of existing workers, by job role, and assumed probabilities of retirement for given ages starting at age 60. These probabilities were selected to ensure that the age distribution of those estimated to retire had a median age of retirement of 68, Statistics Canada<sup>72</sup> median retirement age for self-employed workers

The analysis considers only full-time and part-time workers as determined by payroll data analysis. The age distribution of current workers is based on union data. This model assumes that full-time and part-time workers for a given role in the payroll data, whether they are union or non-union, have the same age distribution as in the union data. Based on the analysis, 17% of current workers will retire within the next 10 years.

17%

of workforce  
retiring in next  
10 years

5%

annual  
replacement  
demand

### Retirement + Attrition = Annual Replacement Needs of 5%

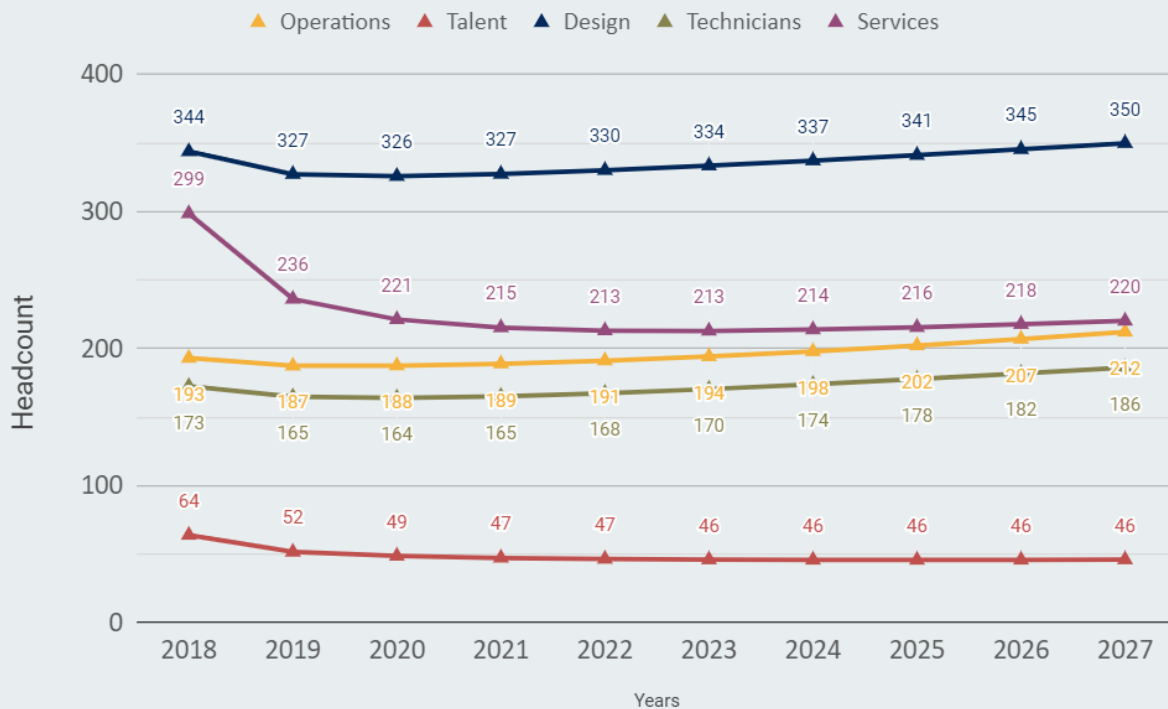
Contractors were asked to indicate their intent to leave the workforce through a survey which indicates that workforce turnover is estimated at 4% per year, where workers have indicated a strong risk of leaving within the next year. The estimated annual turnover rate is 3% and will be variable over time, dependent on number of new entrants.

Taken together, these estimates point to an annual replacement demand of roughly 5% of the workforce. Below are the baseline replacement needs for both full- and part-time workers, by job group, over a ten-year period. The retirement is estimated at 3% per year applied against the current and future age of the workforce. The 2% attrition rate is applied against current and any new workers. This model assumes that no new additions are ready to retire upon entering the workforce.

Figure 47 Retirement and Annual Replacement Needs

<sup>72</sup> Statistics Canada. Table 14-10-0060-01 Retirement age by class of worker, annual

Chart 91 Workforce Replacement Needs (2018-27) , 5% MODEL | Source: Payroll Data, 2017; Union Data, 2017



## Projecting Labour Expansion Needs Due to Growth

Taking into account the various levers of demand and acknowledging that foreign-owned studios drive much of the production activity in British Columbia, the three tiers of growth make the following assumptions (which assume no productivity factors):

- steady and predictable B.C. motion picture labour-based tax credits;
- continued access to in-scope labour;
- continued availability of physical shooting locations;
- continued access to infrastructure (equipment and sound stages); and
- steady US-Canada currency exchange rates.

### Three Growth Scenarios

1%

The 1% low growth scenario is based on the annual population growth rate for the period of 2018 through 2027 as calculated using data from British Columbia-level population projections from September 2018.<sup>73</sup>

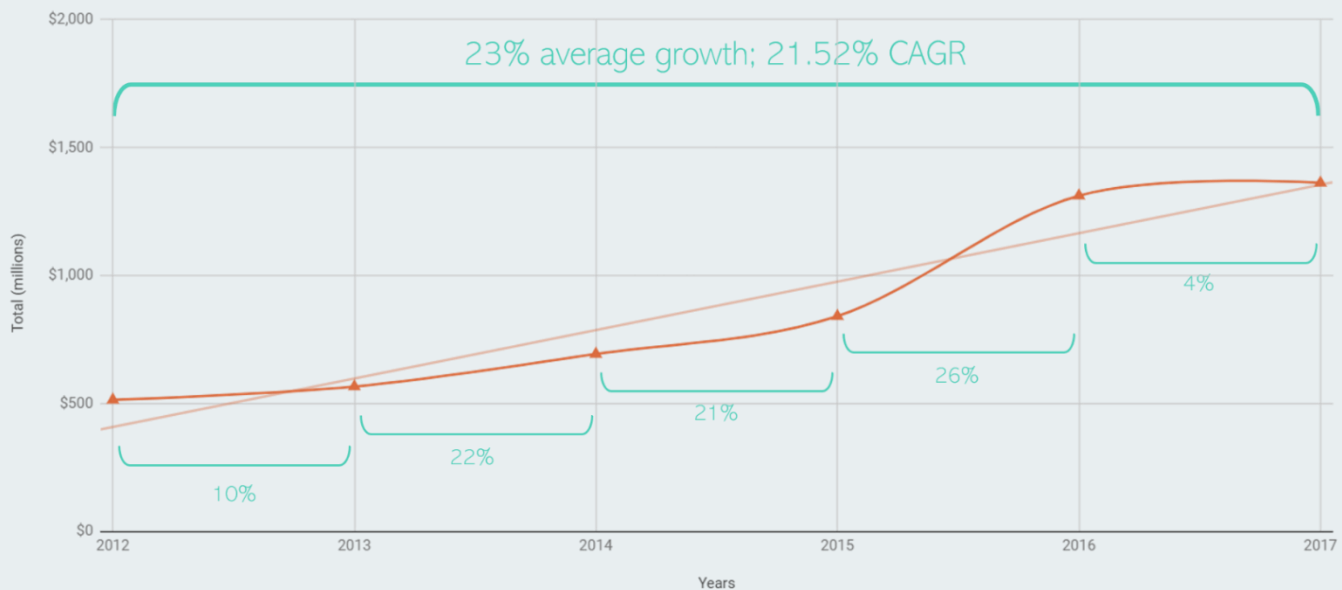
<sup>73</sup> The compound annual growth rate for the 2018 to 2027 period is 1.2%, calculated using data from the 'Summary Statistics' datafile available on the British Columbia-Level Population Projections (Sept 2018) webpage accessed October 2018

<b>3%</b>	The 3% medium growth scenario is based on the 2017 Labour Market Office's WorkBC Industry Outlook Profile <sup>74</sup> which estimated employment growth at 3% for 2017 to 2022 time and 3.2% from 2022 to 2027. Of this employment growth, the Labour Market Office estimates that 37.8% of this growth is due to replacement demand. This growth scenario acknowledges demographic constraints of the labour market.
<b>5%</b>	The 5% high growth scenario is based on qualitative interviews with studio and network executives, global growth projections from PWC <sup>75</sup> and production activity levels observed in 2017, as evidenced by payroll data and Creative BC motion picture tax credit certification data.* This scenario also acknowledges the existence of structural barriers to growth, exchange rate uncertainty and competitive stance of our tax credit regime vis-a-vis other jurisdictions. This scenario also acknowledges some spare capacity in the existing workforce.

*\*Since finalizing this report, preliminary data from Creative BC tax credit certification data for Q1 and Q2 FY2018/19<sup>76</sup> indicates similar patterns to FY2017/18 and does not indicate the surge in production volumes seen previously in 2014-2016.*

Every studio and network representative interviewed for this study indicated double-digit year-over-year increases in their production activity. This increase in production demand is attributed to the demand for original programming by traditional networks, studios and independents as well as streaming companies such as Netflix and Apple. In the period of 2012 to 2017, the compound annual growth rate for annual in-scope labour spend in B.C. is 21.52%. Given B.C.'s competitive position as a North American production

**Chart 94 Average Labour Spend Growth in British Columbia Over Five Years | Source: Payroll Data**



<sup>74</sup> WorkBC Industry Outlook Profile: <https://www.workbc.ca/getmedia/05534b78-616d-4d36-8dfa-9e3c807db0b2/Profile-512-Motion-Picture-and-Sound-Recording-Industries.pdf.aspx> Note that the 2018 WorkBC Industry Outlook Profile for NAICS 512 indicates a 3.3% average annual rate of employment growth.

<sup>75</sup> PWC Entertainment & Media Outlook, 2018-2022. <https://www.pwc.com/ca/en/industries/entertainment-media/outlook.html>

<sup>76</sup> Creative BC.

hub, it is reasonable to assume that with tax credit stability and continued capacity in labour and locations, B.C. will secure a portion of the projected growth.

## Projecting Combined Supply Addition Needs to 2027

Assuming a baseline rate of 5% workforce replacement needs over ten years, three scenarios were modelled, adding 5% to the three growth scenarios resulting in 6%, 8% and 10% growth. The following is a summary of combined supply addition needs over ten years:

B.C. BELOW-THE-LINE MOTION PICTURE LABOUR SUPPLY ADDITION NEEDS OVER THE NEXT TEN YEARS TO 2027						
	Design	Operations	Services	Talent	Technicians	TOTAL
5% Replacement Needs	3,362	1,962	2,265	488	1,725	9,802
6% +1% annual growth	4,019	2,379	2,647	592	2,098	11,735
8% +3% annual growth	5,502	3,322	3,509	827	2,943	16,102
10% +5% annual growth	7,241	4,428	4,518	1,103	3,935	21,226

Chart 45 Workforce Replacement Needs, 2018-2027, 6% Model | Source: Payroll Data, 2017; Union Data, 2017




Chart 47 Workforce Replacement Needs, 2018-2027, 8% Model | Source: Payroll Data, 2017; Union Data, 2017



Chart 46 Workforce Replacement Needs, 2018-2027, 10% Model | Source: Payroll Data, 2017; Union Data, 2017





Careers in film require different functional skills and recruitment may be expanded beyond formal film programs. With a highly educated workforce, increased formal touchpoints between industry and schools could improve career visibility and support supply addition needs.



## Profile: Script Supervisor

**96%**

**females in this role**  
highest representation of female workers within this job category



this role is covered by IATSE 891 and by ACFC West

**84%**

**have 10+ years' experience**  
longest-serving below-the-line workers with only 12% having less than 5 years' experience



**low risk of leaving**  
above average annual hours worked over past 5 years: 4% higher than workforce overall



**low diversity**  
no Indigenous workers represented in this position and only 4% are non-white

**96%**

**report barriers to enter**  
highest incidence of barriers to enter and highest incidence of being unknown to hirers



**severe hiring challenges**  
script supervisor have been identified as a job role in short supply

**38%**

**satisfied with opp's to advance**  
cohort is well educated and least satisfied (excl. performers) with growth opportunities

**75%**

**single marital status**  
highest incidence across all job categories at 54% single plus 21% single with children for total 75%

**67%**

**sole source of income**  
script supervisors have seen a 3% average annual wage increase over 5 years

**83%**

**over the age of 45**  
this job category is the most mature cohort of all

**Top 3**

**with film/art institute training**  
one of the highest rates of industry-related training: 52% attended film/art school; 33% have apprenticeship training/certification

Figure 49 Profile: Script Supervisor | Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada, 2016

# 7. CONCLUSION & RECOMMENDATIONS

## Supporting a Sustainable Workforce

Steady growth in global content creation indicates potential continued growth of production activity in B.C. To maintain its competitive advantage among other locations of choice for productions, the sector needs to continue to grow its workforce and invest in its skill base. The project has built a rich baseline on the workforce, with some insightful findings including work patterns, education levels, the importance of soft skills and existing capacity within the workforce.

### Four Recommendations for Next Steps and Industry Labour Strategies

#### 1. INVEST IN WORKFORCE QUALITY AND EFFICIENCY THROUGH **TRAINING** STRATEGIES

Labour supply must maintain quality levels to ensure workplace safety and sustainability. By formalizing apprentice-style training, increasing leadership training and making pathways more transparent, the workforce can better meet the workforce supply additions needs to replace the projected 17% of workforce that will retire in next 10 years.

- Formalize and invest in **knowledge transfer** from retiring workforce to new entrants by continuing apprenticeship-based on-set training to honour the craft and to maintain workforce quality and safety standards during physical production
- Leverage existing **programs** to support increased training such as the B.C. Employer Training Grant<sup>77</sup>, the Motion Picture Training Society, and the training tax credit available to domestic productions through the provincial Film Incentive B.C. (FIBC) motion picture tax credit program.

#### 2. CONTINUE FOCUS ON WORKFORCE SUSTAINABILITY WITH **SYSTEM ENHANCEMENT** STRATEGIES

With high supply addition needs and a client-driven focus on diversity and inclusion, recruitment needs to be reimaged. Female and ethnically diverse workers in the BTL workforce lag behind B.C.'s overall workforce. The major barrier to getting hired on their next project for all workers is a lack of visibility to hirers. Agreement is lacking on soft skills requirements between hirers and hirees. Qualitative interviews indicate 50% of new entrants are considered not suitable for work.

- **Diversify** the workforce by complementing current networked recruitment with targeted careers marketing, visible pathways in, and clearly mapped and defined job profiles that include accessibility ratings

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<sup>77</sup> <https://www.workbc.ca/Employer-Resources/BC-Employer-Training-Grant.aspx>

- Improve labour “fit”, quality and onboarding success rates by defining a simple, tailored **soft skills assessment tool** for applicants and managers – to qualify new entrants and provide a common language for aligning performance expectations
- **Map courses and programs** within B.C.’s educational system and unions and guilds for all relevant training and pathways in order to improve visibility of options for recruits and thereby increase below-the-line workforce capacity and flexibility
- Meet near-term labour demands by identifying and engaging **qualified underutilized labour**

### 3. INCREASE AND FORMALIZE TOTAL WORKFORCE MONITORING WITH **DATA SHARING** STRATEGIES

With known gaps between government data and industry’s proprietary data, there is an opportunity to build upon benchmarks and analysis established in this study for the benefit of stakeholders.

- Explore possibilities for **study repeatability** and expansion; evaluate further research potential of data collaboration and its applications
- Ensure quantitative data is balanced with **integrated qualitative data** from the workforce, including voluntary demographics disclosure and hiring manager surveys
- Continue to **align government and proprietary datasets** toward exploration of a new measurement framework for this workforce of contractors with benefits

### 4. DESIGN FORMAL **DOMESTIC AND REGIONAL PRODUCTION ALLIANCE** STRATEGIES

Production levels in the Lower Mainland/Southwest have expanded B.C.’s physical production footprint into the distant regions. This growth in the province’s economic regions has generated demand for qualified labour and motion picture production infrastructure. A comprehensive regional motion picture strategy will address meeting increased production demand while building the key resource (labour) that secures more economic activity in the distant regions.

- Measure and identify distant and regionally-based residents to **understand actual labour supply in B.C.’s economic regions**, while assessing distinctive geographic production demands to build matching capacity through customized crew training
- Leverage existing province-wide motion picture supports to help **sustain production labour for small to large budget, domestic and foreign production needs**
- Support continued growth of domestic production sector – which builds intellectual property owned and made in B.C. – by exploring **innovative alliances for mutual growth** between regional economic development interests and domestic producers, given the observed increase of domestic activity in the distant regions





## Profile: Production Assistant

**68%**

**females in this role**  
this is double the industry average of 34%



**low barriers to enter**  
production assistant (PA) positions are the entry level position in the below-the-line workforce

**26%**

**visible minorities**  
this job category has high participation rates for visible minorities, higher than industry average levels of 15%



**covered by a single guild**  
this role is covered by the Directors Guild of Canada - BC District Council



**training requirements**  
DGC Permittee Program requires: Traffic Control, Motion Picture Industry Orientation, Safety Awareness and WHMIS

**88%**

**live in the Lower Mainland**  
with Vancouver Island being the second most popular location to live

**55%**

**are over 34 years**  
this job role is filled by younger workers, with 50% in the 25-34 age bracket; only 5% are in the 18-24 age group

**321**

**PA members in 2017**  
DGC BC had a total of 321 PA Members and 286 Permittees as of 12/13/2017

**30%**

**less than 3 yrs' experience**  
PAs parallel the rest of the below-the-line workforce with 30% of their cohort relatively new to the job

**68%**

**have prior industry training**  
PAs indicate having completed related education or training before they began in the industry

**11%**

**indicate intent to leave**  
PA's indicate that they are strongly considering leaving the workforce in the next year

**50%**

**want to work more**  
half of PA's indicate that they want to take on more work while 43% would like to work the same amount

Figure 50 Profile: Production Assistant | Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada. 2016.

# ACKNOWLEDGEMENTS

This Labour Market Information (LMI) project would not be possible without the dedicated support of many stakeholders. It relied on an unprecedented level of cooperation and openness between Creative BC, labour unions, industry associations, regional film commissions, studios, vendors, government and other industry stakeholders, including thousands of survey participants. The LMI Partner Committee (detailed in this section) thanks everyone who contributed to make this project possible. The LMI Partners would especially like to acknowledge the following organizations for their help on this project:

- Association of Canadian Film Craftspeople West, Local 2020 UNIFOR (ACFC West)
- Brightlight Pictures
- British Columbia Council of Film Unions
- Cast & Crew Entertainment Services
- Columbia Shuswap Film Commission
- Commercial Production Association of Western Canada
- Custom Consulting
- Creative BC
- Canadian Media Producers' Association – British Columbia
- Cariboo Chilcotin Coast Tourism
- The Deetken Group
- Directors Guild of Canada – British Columbia
- Entertainment Partners, Canada
- International Alliance of Theatrical Stage Employees, Moving Picture Technicians, Artists and Allied Crafts (IATSE 891)
- International Cinematographers Guild (ICG 669)
- Kootenay Columbia Film
- Ministry of Advanced Education, Skills and Training
- Ministry of Tourism, Arts and Culture
- Motion Picture Production Industry Association of British Columbia (MPPIA)
- Motion Picture Association - Canada
- Northern BC Tourism
- Okanagan Film
- Sentis Market Research
- Teamsters 155
- Thompson-Nicola Film Commission
- Union of British Columbia Performers/ British Columbia Branch of the Alliance of Canadian Cinema, Television and Radio Artists (UBCP/ACTRA)
- Vancouver Island North Film Commission
- Vancouver Island South Film & Media Commission

## LMI Partner Committee, Project Delivery & Oversight

The LMI Partner Committee provided oversight and input to the entire project. The Committee's role included:

- Personnel decisions (research, survey company).
- Project methodology and research tool creation (e.g. survey design, interviewee questions).
- Broader stakeholder group engagement.
- Review of and input on all interim and final deliverables.

At various stages of the project, the LMI Partner Committee was engaged through:

- One-on-one discussions, regular conference calls, meetings and updates.
- Regular, open "office hours" for inquiries and insights.
- Ad hoc meetings and communications to garner insights or answer questions or concerns from LMI Partner Committee members and their stakeholders.
- Regular and ad hoc meetings with the Project Sponsor.

The Final LMI Partner Committee was comprised of:

1. Prem Gill, CEO, Creative BC - Project Sponsor
2. Joel Guralnick, COO & General Counsel, BRON Studios
3. Paul Klassen, Executive Director, British Columbia Council of Film Unions
4. Pascale Knoglinger, Program Manager, Sector Labour Market Partnership Program Manager, Ministry of Advanced Education, Skills and Training (ex officio)
5. Peter Leitch, Chair, Motion Picture Production Industry Association
6. Cheryl Nex, CEO, Entertainment Partners, Canada
7. Liz Shorten, Senior Vice-President, Canadian Media Producers Association – BC Producers Branch
8. Geoff Teoli, Former Executive Director, Actsafe Safety Association (ex-officio)
9. Kendrie Upton, Executive Director, Directors Guild of Canada, BC District Council

The Final LMI Report Project Team was comprised of:

1. Pascale Knoglinger, Senior Program Manager, Sector Partnerships, Strategic Policy & Initiatives Branch, Ministry of Advanced Education, Skills and Training – Project Guide, Process Validation and Insight
2. Prem Gill, CEO, Creative BC - Sponsor/Contract Holder
3. Lisa Purdy, Principal, Notio Media - Strategy and Writing
4. Julian White, Principal, The Deetken Group - Research Lead
5. Karin Watson, Director of Business Operations, Creative BC - Project Management and Support
6. Kristiana Powell, Senior Associate, The Deetken Group - Project Research
7. Tom Reimer, Associate, The Deetken Group - Project Research
8. Becca Zalmanowitz, Associate, The Deetken Group - Project Research

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3. Erik Finkel, Custom Consulting - Phase 1 Project Management

# GLOSSARY

**above-the-line:** Writers, Directors and high-level Producers and lead Performers who are generally paid a set negotiated fee, not an hourly rate.

**bankable talent:** name actors that major distributors and buyers know hold value and will bring fans to view content. "Name talent" are actors whose names are readily known nationwide and/or globally.

**below-the-line:** Below-the-line workers are responsible for the technical and physical aspects of the filmmaking craft. They transform the vision and script developed by above-the-line creators into material reality, creating and capturing a visual representation of that story as a digital asset. Also referred to as BTL in this report

**characteristics:** Personal characteristics that may influence both performance and capacity to acquire knowledge and skills required for effective work performance

**competencies:** ability to apply knowledge, skills and abilities to successfully perform tasks

**crew:** a group of people hired to produce a film or motion picture

**domestic production:** motion picture productions that are controlled by British Columbians, and more broadly Canadians, generating intellectual property that results in copyright ownership of the finished motion picture product, generating ongoing revenue for the individual or corporation controlling the intellectual property.

**employment:** (as measured in this study) is average annual estimates which capture employment each month, measuring labour effort within a representative sample

**foreign production:** the manufacture of creative content for a copyright owner located outside Canada.

**headcount:** total number of people employed in an organization

**labour tightness:** reported difficulties in hiring certain positions within a labour market sector

**location(s):** a place where some or all of a film or television series is produced, in addition to or instead of using sets constructed on a movie studio backlot or soundstage. In filmmaking, a location is any place where a film crew will be filming actors and recording their dialog.

**movie of the week:** feature length film produced for television broadcast, not for theatrical release (into movie theatres).

**new entrants:** for the purposes of this report, new entrants are those workers who have recently joined the below-the-line motion picture physical production workforce, typically (although not exclusively) within the period of 2014 to 2016, where they possessed fewer than three years work experience at the time of study. This is not to be confused with the LMIO term New Entrants (British Columbia Labour Market Outlook 2017 Edition, page 25)

**part year workers:** workers who work part-time, temporary or as self-employed individuals, also referred to as non-standard employment by [Statistics Canada](#)

**pilot:** a television program made to test audience reaction with a view to the production of a series

**physical production:** work for the actual filming and excludes other phases in the value chain such as development and post-production

**principal talent:** performer who has six lines or more in a production

**production:** the conversion of the creative ideas of the screenwriter and director into a finished film, space scheduling) and filming.

**purpose-built stages:** custom space for film and television production that is built from the ground up which is different from a conversion stage whose structure served a previous purpose. [See](#) a map of British Columbia's studios and stages.

**set-ready:** an industry term that is a proxy for familiarity of the operating principles of a motion picture production (whether location or studio-based). Familiarity would encompass an awareness of set etiquette (ie: complete silence when camera is rolling; maintaining distance from the camera and Performers and respecting the hierarchy of roles on set) and set safety (awareness of cables, equipment, moving vehicles and practical effects)

**skills:** ability to perform tasks

**sound stage:** a soundproof, hangar-like structure, building, or room, used for the production of theatrical film-making and television productions

**studio:** entertainment conglomerates who create a sell content to global audiences: Warner Brothers, Disney, NBC Universal, Sony, Netflix

# CHARTS, TABLES & FIGURES

## CHARTS

Chart 1	Below-the-Line Workforce Age Distribution by Job Group   Source: Union Data, 2017 .....	9
Chart 2	Age Distribution of Below-the-Line Workforce Compared With B.C. Overall   Source: Union Data, 2017 .....	9
Chart 3	Gender Balance Comparison to B.C. Overall   Source: Statistics Canada, 2016 .....	10
Chart 4	Gender Balance by Job Group and Category   Source: Union Data, 2017.....	10
Chart 5	Visible Minority and Indigenous Participation in Below-the-Line Workforce.....	11
Chart 6	Educational Attainment Comparison   Source: Statistics Canada, 2016. ....	12
Chart 7	Living Situation, Relationships and Dependents Comparison   Source: Contractor Survey, 2017 .....	12
Chart 8	Workforce by Years of Experience Excl. Performers   Source: Contractor Survey, 2017 .....	12
Chart 9	Years of Experience by Age Group   Source: Contractor Survey, 2017 .....	13
Chart 10	Below-the-Line Workers by Employment Type and Job Group Excl. Performers   Source: Payroll Data, 2017 .....	14
Chart 11	All 43,800 Below-the-Line Workers by Employment Type, Job Category Incl. Performers   Source: Payroll Data, 2017 .....	15
Chart 12	Full-Time and Part-Time Annual Wages Excl. Performers   Source: Payroll Data, 2017 .....	16
Chart 13	Below-the-Line Worker Average Wages By Employment Type Incl. Performers   Source: Payroll Data, 2017 .....	17
Chart 14	Below-the-Line Worker Wage Ranges By Employment Type   Source: Payroll Data, 2017 .....	17
Chart 15	Role of Income by Job Group   Source: Contractor Survey, 2017 .....	18
Chart 16	Barriers to Enter the Workforce by Job Category   Source: Contractor Survey, 2017 .....	21
Chart 17	Industry-Related Training Completions and Perspectives   Source: Contractor Survey, 2017 .....	22
Chart 18	Post-secondary education enrollments by academic year   Source: Student Transitions Project, Ministry of Advanced Education, Skills and Training .....	23
Chart 19	Barriers to Advancement   Source: Contractor Survey, 2017 .....	26
Chart 20	Barriers to Advance for Diverse Parts of the Workforce   Source: Contractor Survey, 2017 .....	27
Chart 21	Barriers to Advance   Source: Contractor Survey, 2017.....	27
Chart 22	In-Scope Labour Spend Over Time by Production Type   Source: Payroll Data, 2017 .....	30
Chart 23	Total Monthly Hours Worked (2012 to 2017)   Source: Payroll Data, 2017 .....	30
Chart 24	Count of Productions Over Time   Source: Creative BC .....	32
Chart 25	Combined Foreign and Domestic Production B.C. Labour Spend CAGR: 18.51%   Source: Creative BC.....	33
Chart 26	Proportion of Domestic to Foreign Production Labour Spend Over 5 Years   Source: Creative BC.....	34
Chart 27	Growth in Production Labour Spend, 2012 to 2018   Source: Creative BC .....	34
Chart 28	Primary And Secondary Sources for Securing Next Production Contract   Source: Contractor Survey .....	44
Chart 29	Pathways of Entry to the Industry by Job Group   Source: Contractor Survey, 2017 .....	46

Chart 30 Pathways of Entry to the Industry by Job Category | Source: Contractor Survey, 2017 ..... 46

Chart 31 Average Annual Hours per Person by Employment Type and Age Group | Source: Payroll Data, 2017 ..... 49

Chart 32 Below-the-Line Worker Length of Experience by Job Category | Source: Contractor Survey, 2017 ..... 52

Chart 33 Intent to Leave the Workforce | Source: Contractor Survey, 2017 ..... 53

Chart 34 Job Satisfaction and Intent by Job Category | Source: Contractor Survey, 2017 ..... 53

Chart 35 Job Satisfaction and Intent by Job Group | Source: Contractor Survey, 2017 ..... 54

Chart 36 Barriers to Advancement for Those Wanting to Work More | Source: Contractor Survey, 2017 ..... 55

Chart 37 Distribution of Work Experience for Visible Minority Workers | Source: Contractor Survey, 2017..... 56

Chart 38 Gender Distribution for IATSE 891 New Entrants | Source: IATSE 891 ..... 56

Chart 39 Department Head Gender Balance by Job Group | Source: Contractor Survey ..... 57

Chart 40 Percentage of Visible Minorities Based on Length of Service Excl. Performers and Stunts | Source: Contractor Survey, 2017 ..... 57

Chart 41 Workforce Replacement Needs (2018-27) , 5% MODEL | Source: Payroll Data, 2017; Union Data, 2017 ..... 62

Chart 42 Average Labour Spend Growth in British Columbia Over Five Years | Source: Payroll Data ..... 63

Chart 43 Workforce Replacement Needs, 2018-2027, 6% Model | Source: Payroll Data, 2017; Union Data, 2017 ..... 64

Chart 45 Workforce Replacement Needs, 2018-2027,10% Model | Source: Payroll Data, 2017; Union Data, 2017 ..... 65

Chart 46 Workforce Replacement Needs, 2018-2027, 8% Model | Source: Payroll Data, 2017; Union Data, 2017..... 65

## TABLES

Table 1	Regional increase in labour spend by economic region, 2012 to 2017   Source: Payroll Data	36
Table 2	Hiring Managers: Top 10 Skills for Entry and Advancement, Research Exercise Adapted from Skills for the Future Workforce, WorkBC, and The Art and Science of Talent, Korn Ferry	40
Table 3	Crew: Top 10 Critical Skills for Entry and Advancement, Adapted from Skills for the Future Workforce, WorkBC, and The Art and Science of Talent, Korn Ferry	41
Table 4	Hiring Managers and Crew: Essential Skills to Enter and Advance, Adapted from Skills for the Future Workforce, WorkBC and The Art and Science of Talent, Korn Ferry	42

## FIGURES

Figure 1	B.C. Motion Picture Industry Ecosystem	1
Figure 2	Labour Market Information Report Activities	6
Figure 3	Workforce Distribution, Job Groups and Categories   Source: Payroll Data, 2017	7
Figure 4	Unionized Workforce	8
Figure 5	Below-the-Line Employment Types	14
Figure 6	Annual wages comparison   Source: Payroll Data, 2017; WorkBC	15
Figure 7	Profile: Performers   Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada. 2016	18
Figure 8	Workforce participation in available training   Source: Contractor Survey	24
Figure 9	Below-the-Line Job Readiness and Skills Development	25
Figure 10	Profile: Security   Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada. 2016	28
Figure 11	Below-the-Line Labour Levers of Demand	31
Figure 12	Vancouver Area, Regional Area, Distant Location Area: Labour-Based Motion Picture Tax Credit Map	33
Figure 13	Where the workforce lives and works   Source: Contractor Survey, 2017	37
Figure 14	Labour needs at Different Stages of Demand	37
Figure 15	Profile: Locations   Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada. 2016	38
Figure 16	WorkBC Skills for the Future Workforce Skills, Competencies and Characteristics Map, 2017	39
Figure 17	Profile: Accounting   Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada. 2016	43
Figure 18	How a Production Generally Crews Up	45
Figure 19	Below-the-Line Industry Pathways: New Entrants > Unions and Guilds > Careers	47
Figure 20	Below-the-Line Industry Pathways: Every Worker's Pathway is Unique	48
Figure 21	Hiring Challenges Cited by Hiring Managers   Source: Hiring Manager Survey	50
Figure 22	Profile: Camera   Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada, 2016	58
Figure 23	Retirement and Annual Replacement Needs	61
Figure 24	Profile: Script Supervisor   Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada, 2016	66
Figure 25	Profile: Production Assistant   Sources: Contractor Survey, 2017; Payroll Data, 2017; Statistics Canada. 2016	69



## Appendix A: In-Scope Labour

Physical production workers represent a wide range of specialty occupations with job titles that vary by union and guild and by production type. This study tracks 28 job categories that are similar to departments in motion picture production. All categories (with the exception of script supervisor) have multiple in-scope labour positions that fall under a job category.

Due to the volume of individual job titles within motion picture, the various unions and guilds and the unique job titles within those systems and job titles in common usage, analysis was undertaken to distill approximately 1400 diverse job titles to a list of 170 job roles. These 170 job roles were mapped back to the payroll dataset and clustered into 28 job categories. The 28 categories were then further simplified into five job groups making analysis clearer and more concise.

Role descriptions in the payroll datasets (which may not be reflective of the various collectively bargained employee classifications) were assigned to one of the Job roles listed below. The 170 job roles listed below were mapped to the appropriate job category and job group. For local job roles, please consult the applicable union or guild.

### Detailed Job Groups, Categories and Roles

Design	Operations	Services	Talent	Technicians
ART	ACCOUNTING	CATERING	ANIMAL WRANGLER	CAMERA
Art Department Assistant	Accountant	Chef	Trainer/Handler	Aerial
Art Department Coordinator	Accountant Clerk	Chef Assistant	Wrangler	Camera Loader
Art Director	Accountant Trainee	FIRST AID/CRAFT	CASTING	Camera Operator
Assistant Art Director	Assistant Accountant	Craft Service	Bkgrd. Casting Asst.	Camera Trainee
Automotive Sprayer	Controller	First Aid	Background Casting	Camera Utility Person
Draftsperson	ASSISTANT DIRECTOR	First Aid/Craft Service	PERFORMERS	Digital Technician
Illustrator/Graphics	Background Coordinator	SECURITY	Actor	Digital Utility Person
Production Designer	First Assistant Director	Security	Background Performer	Director of Photography
Set Designer	Second Asst. Director	Security Captain	Choreographer	First Assistant Camera
Story Board Artist	Third Assistant Director	Security Coordinator	Coach/Instructor	Second Asst. Camera
CONSTRUCTION	Trainee Asst. Director	TRANSPORTATION	Dancer	Special Equipment
Assistant Carpenter	LOCATIONS	Automotive Mechanic	Musician	Video Assistant
Carpenter	Asst. Location Manager / Location Scout	Automotive Service	Photo Double	Video Coordinator
Carpenter Helper	Location Manager	Automotive Wrangler	Puppeteer	GRIPS
Construction Buyer	Trainee Asst. Loc. Mgr.	Boat Operator	Special Ability Extra	Best Boy
Construction Coordinator	PRODUCTION STAFF	Bus Driver	Stand In	Crane Operator
Construction Foreman	Assistant	Camera Car Driver	Tutor	Dolly Operator
Labourer	Asst. Production Coord'tr	Construction Driver	STUNTS	Grip
Lead Carpenter	Line Producer	Dispatcher	Stunt Actor	Key Grip
Lead Labourer	Office Manager	Diver	Stunt Coordinator	Leadman/Setup
Lead Metal Fabricator	Production Assistant	Driver		Rigging Grip

Maintenance Person	Production Coordinator	Driver Captain		Second Grip
Metal Fabricator	Production Manager	Marine Coordinator		LIGHTING/ELECTRICS
Model Maker	Production Supervisor	Mini Bus Driver		Gaffer
Sculptor	Unit Production Manager	Special Equip. Driver		Gaffer Best Boy
COSTUME	PUBLICITY	Tractor Trailer Driver	Design	Generator Operator
Assistant Costume Designer	Publicist	Transport'n Coord'tr	PROPS	Lamp Operator
Costume Breakdown	Stills Photographer	Truck Driver	Armourer	Lighting Board Operator
Costume Buyer	SCRIPT SUPERVISOR		Assistant Foreman	Lighting Technician
Costume Coordinator	Script Supervisor		Assistant Props Master	Rigging Gaffer
Costume Designer		Design	Lead Props	Set Wireman
Costume Supervisor		MAKE-UP	Props	SOUND
Costumer	Design	Assistant Make-up	Props Buyer	Boom Operator
Cutter	HAIR	Key Make-up	Props Master	Playback Operator
Dresser	Assistant Hair Stylist	Special Effects Make-up	SET DECORATING	Sound Assistant
Seamster/Seamstress	Hair Stylist	PAINTING	Asst. Set Decorator	Sound Mixer
GREENS	Second Assistant Hair Stylist	Lead Painter	Assistant Set Dresser	SPECIAL EFFECTS
Greens Helper		Paint Coordinator	Draper/Upholsterer	Special Effects Asst.
Greensperson		Paint Foreman	Lead Dresser	Special Effects Coord'tr
Head Greensperson		Painter	Set Buyer	Special Effects Labour
Lead Greensperson		Plasterer	Set Decorator	
		Scenic Artist	Set Dresser	
		Scenic Painter		
		Sign Writer		
		Wallpaper Hanger		

## Scope Considerations

The roles covered by this project are below-the-line physical production jobs in British Columbia. These limitations in scope reflect the fact that other film-related work may not have similar supply and demand dynamics. Below is additional clarification for certain roles and departments:

**Production Staff:** Traditionally, production managers and all roles below them are considered below-the-line. This delineation is preserved in this study.

**Directors:** assistant directors are technically considered part of the director grouping, but, they are extensions of the production staff, not the directorial staff. So, while most directors would be considered above-the-line, First Assistant Directors and all roles below them are considered below-the-line and are their own job category.

**Performers:** Determining which Performers are above- or below-the-line is not an exact science as some principle actors are considered above-the-line talent. These actors tend to be recognizable or “bankable” stars that are not paid hourly and may be paid directly thorough through their representatives (agents and managers). As a rule, if an actor was paid through a payroll company, they were included in the project’s below-the-line calculations.

Editing: editors generally are not considered physical production workers. This distinction is made, in part, because editing is considered a post-production task that in theory could be done in almost any location where there is a computer.

Digital Media: Digital media can describe work that includes pre-production, production and post-production as well as projects that are created in a manner that does not require physical production. A broadly applied term, Digital Media is not included as it is not considered physical production. Similar to post-production editing, digital media can be practiced in any location.

Effects: Practical visual effects and special effects can be created on set, in a computer or as a combination of both. Effects work completed on set was considered in scope.

Broadcast Television and Radio: Broadcast work mainly relates to news and special events. There are elements of broadcast television and radio that overlap the scope of this project. However, broadcast workers were kept out-of-scope for a variety of reasons:

- Most broadcast work in Canada is done in Ontario, not British Columbia. Below-the-line physical production workers in British Columbia is measured in the thousands; Broadcast workers in British Columbia are measured in the low hundreds.
- Workers already captured: Broadcasters have shifted most of their original programming to external companies. As such, those contract workers are measured in the project's other data, such as surveys and specialized databases (unions and payroll companies).
- Different market: As previously noted, below-the-line physical production work is gig-based both on the contractor and hiring side. Broadcast work tends to be regular and long-term on both the employer and employee sides. It is a labour market more akin to health-care workers than to other content-creators.

## Appendix B: National Occupation Codes Used to Source Statistics Canada 2016 Census data

The following list of National Occupation Classification (NOC) Codes was used to request access to Canada 2016 Census data through the B.C. Labour Market Information Office (LMIO). This list was large in order to take a very broad approach for requesting Census data and larger than the list of NOC codes identified in BC Stats' report entitled *Measuring the Economic Impact of Film and Television Production Activities in B.C., During 2012* (Page 18 - 20). BC Stats has established a Working Group with industry stakeholders to investigate updating the NOC Codes relating to the motion picture industry.

1. 5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
2. 5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
3. 5131 Producers, directors, choreographers and related occupations
4. 5225 Audio and video recording technicians
5. 5135 Actors and comedians
6. 5222 Film and video camera operators
7. 5136 Painters, sculptors and other visual artists
8. 6742 Other service support occupations, n.e.c.
9. 1523 Production logistics co-ordinators
10. 5243 Theatre, fashion, exhibit and other creative designers
11. 7511 Transport truck drivers
12. 0015 Senior managers - trade, broadcasting and other services, n.e.c.
13. 7271 Carpenters
14. 0651 Managers in customer and personal services, n.e.c.
15. 1123 Professional occupations in advertising, marketing and public relations
16. 1111 Financial auditors and accountants
17. 6541 Security guards and related security service occupations
18. 5232 Other performers, n.e.c.
19. 1431 Accounting and related clerks
20. 6341 Hairstylists and barbers
21. 7513 Taxi and limousine drivers and chauffeurs
22. 1221 Administrative officers
23. 1411 General office support workers
24. 7611 Construction trades helpers and labourers
25. 6552 Other customer and information services representatives
26. 0124 Advertising, marketing and public relations managers
27. 1215 Supervisors, supply chain, tracking and scheduling co-ordination occupations
28. 5221 Photographers
29. 6733 Janitors, caretakers and building superintendents
30. 7241 Electricians (except industrial and power system)
31. 0714 Facility operation and maintenance managers
32. 3413 Nurse aides, orderlies and patient service associates
33. 6316 Other services supervisors
34. 1212 Supervisors, finance and insurance office workers
35. 1241 Administrative assistants
36. 1311 Accounting technicians and bookkeepers
37. 6322 Cooks
38. 6731 Light duty cleaners
39. 7452 Material handlers
40. 1122 Professional occupations in business Operations consulting
41. 2242 Electronic service technicians (household and business equipment)
42. 6321 Chefs
43. 1222 Executive assistants
44. 1225 Purchasing agents and officers
45. 6222 Retail and wholesale buyers
46. 0114 Other administrative services managers
47. 6342 Tailors, dressmakers, furriers and milliners
48. 9474 Photographic and film processors
49. 0111 Financial managers
50. 0112 Human resources managers
51. 1121 Human resources professionals
52. 1251 Court reporters, medical transcriptionists and related occupations
53. 1414 Receptionists
54. 2171 Information systems analysts and consultants
55. 7294 Painters and decorators (except interior decorators)
56. 2282 User support technicians
57. 7204 Contractors and supervisors, carpentry trades
- 58.
59. 7237 Welders and related machine operators
60. 7242 Industrial electricians
61. 0125 Other business services managers
62. 0421 Administrators - post-secondary education and vocational training
63. 0711 Construction managers
64. 1415 Personnel clerks
65. 2133 Electrical and electronics engineers
66. 5242 Interior designers and interior decorators
67. 6563 Pet groomers and animal care workers
68. 7321 Automotive service technicians, truck and bus mechanics and mechanical repairers
69. 7384 Other trades and related occupations, n.e.c.
70. 0211 Engineering managers
71. 0212 Architecture and science managers
72. 0712 Home building and renovation managers
73. 0731 Managers in transportation
74. 0911 Manufacturing managers
75. 0912 Utilities managers
76. 1211 Supervisors, general office and administrative support workers
77. 1224 Property administrators
78. 1524 Purchasing and inventory control workers
79. 1526 Transportation route and crew schedulers
80. 2241 Electrical and electronics engineering technologists and technicians
81. 4169 Other professional occupations in social science, n.e.c.
82. 4216 Other instructors
83. 5244 Artisans and craftspersons
84. 5252 Coaches
85. 6343 Shoe repairers and shoemakers
86. 6532 Outdoor sport and recreational guides
87. 7205 Contractors and supervisors, other construction trades, installers, repairers and servicers
88. 7231 Machinists and machining and tooling inspectors
89. 7235 Structural metal and platework fabricators and fitters
90. 7291 Roofers and shinglers
91. 7302 Contractors and supervisors, heavy equipment operator crews
92. 7303 Supervisors, printing and related occupations
93. 7305 Supervisors, motor transport and other ground transit operators
94. 7381 Printing press operators
95. 7445 Other repairers and servicers
96. 7514 Delivery and courier service drivers
97. 8612 Landscaping and grounds maintenance labourers
98. 9445 Fabric, fur and leather cutters
99. 9472 Camera, platemaking and other prepress occupations
100. 9523 Electronics assemblers, fabricators, inspectors and testers
101. 9619 Other labourers in processing, manufacturing and utilities

## Appendix C: Mapping Below-the-Line Job Roles to NOC Codes

Role descriptions in the payroll datasets (which may not be reflective of collectively bargained employee classifications) were assigned to one of the role values below. These roles are mapped to job categories and to an appropriate NOC code.

Job Category	Role	National Occupation Code
Accounting	Accountant	1431 Accounting and related clerks
Accounting	Accountant Clerk	1431 Accounting and related clerks
Accounting	Accountant Trainee	1431 Accounting and related clerks
Accounting	Assistant Accountant	1431 Accounting and related clerks
Accounting	Controller	1431 Accounting and related clerks
Accounting	Production Accountant	1431 Accounting and related clerks
Animal Wranglers	Trainer/Handler	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Animal Wranglers	Wrangler	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Art	Art Department Assistant	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Art	Art Department Coordinator	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Art	Art Director	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Art	Assistant Art Director	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Art	Automotive Sprayer	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Art	Draftsperson	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Art	Illustrator/Graphics	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Art	Production Designer	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Art	Set Designer	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Art	Story Board Artist	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Assistant Directors	Background Coordinator	5131 Producers, directors, choreographers and related occupations
Assistant Directors	First Assistant Director	5131 Producers, directors, choreographers and related occupations
Assistant Directors	Second Assistant Director	5131 Producers, directors, choreographers and related occupations
Assistant Directors	Third Assistant Director	5131 Producers, directors, choreographers and related occupations
Assistant Directors	Trainee Assistant Director	5131 Producers, directors, choreographers and related occupations
Camera	Aerial	5222 Film and video camera operators
Camera	Camera Crane	5222 Film and video camera operators
Camera	Camera Loader	5222 Film and video camera operators
Camera	Camera Operator	5222 Film and video camera operators
Camera	Camera Trainee	5222 Film and video camera operators
Camera	Camera Utility Person	5222 Film and video camera operators
Camera	Digital Technician	5222 Film and video camera operators
Camera	Digital Utility Person	5222 Film and video camera operators
Camera	Director of Photography	5222 Film and video camera operators
Camera	First Assistant Camera	5222 Film and video camera operators
Camera	Second Assistant Camera	5222 Film and video camera operators

Camera	Special Equipment	5222 Film and video camera operators
Camera	Video Assistant	5222 Film and video camera operators
Camera	Video Coordinator	5222 Film and video camera operators
Casting	Background Casting Assistant	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Casting	Background Casting Director	5131 Producers, directors, choreographers and related occupations
Catering	Chef	6321 Chefs
Catering	Chef Assistant	6321 Chefs
Construction	Assistant Carpenter	7271 Carpenters
Construction	Carpenter	7271 Carpenters
Construction	Carpenter Helper	7271 Carpenters
Construction	Construction Buyer	7271 Carpenters
Construction	Construction Coordinator	7271 Carpenters
Construction	Construction Foreman	7271 Carpenters
Construction	Labourer	7271 Carpenters
Construction	Lead Carpenter	7271 Carpenters
Construction	Lead Labourer	7271 Carpenters
Construction	Lead Metal Fabricator	7271 Carpenters
Construction	Maintenance Person	7271 Carpenters
Construction	Metal Fabricator	7271 Carpenters
Construction	Model Maker	7271 Carpenters
Construction	Sculptor	7271 Carpenters
Costume	Assistant Costume Designer	5243 Theatre, fashion, exhibit and other creative designers
Costume	Costume Breakdown	5243 Theatre, fashion, exhibit and other creative designers
Costume	Costume Buyer	5243 Theatre, fashion, exhibit and other creative designers
Costume	Costume Coordinator	5243 Theatre, fashion, exhibit and other creative designers
Costume	Costume Designer	5243 Theatre, fashion, exhibit and other creative designers
Costume	Costume Supervisor	5243 Theatre, fashion, exhibit and other creative designers
Costume	Costumer	5243 Theatre, fashion, exhibit and other creative designers
Costume	Cutter	5243 Theatre, fashion, exhibit and other creative designers
Costume	Dresser	5243 Theatre, fashion, exhibit and other creative designers
Costume	Seamster/Seamstress	5243 Theatre, fashion, exhibit and other creative designers
First Aid/Craft Service	Craft Service	3413 Nurse aides, orderlies and patient service associates
First Aid/Craft Service	First Aid	3413 Nurse aides, orderlies and patient service associates
First Aid/Craft Service	First Aid/Craft Service	3413 Nurse aides, orderlies and patient service associates
Greens	Greens Helper	8612 Landscaping and grounds maintenance labourers
Greens	Greensperson	8612 Landscaping and grounds maintenance labourers
Greens	Head Greensperson	8612 Landscaping and grounds maintenance labourers
Greens	Lead Greensperson	8612 Landscaping and grounds maintenance labourers
Grips	Best Boy	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Grips	Crane Operator	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Grips	Dolly Operator	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Grips	Grip	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts

Grips	Key Grip	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Grips	Leadman/Setup	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Grips	Rigging Grip	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Grips	Second Grip	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Hair	Assistant Hair Stylist	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Hair	Hair Stylist	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Hair	Second Assistant Hair Stylist	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Lighting/Electrics	Gaffer	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Lighting/Electrics	Best Boy Lighting	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Lighting/Electrics	Generator Operator	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Lighting/Electrics	Lamp Operator	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Lighting/Electrics	Lighting Board Operator	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Lighting/Electrics	Lighting Technician	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Lighting/Electrics	Rigging Gaffer	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Lighting/Electrics	Set Wireman	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Locations	Assistant Location Manager	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Locations	Location Manager	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Locations	Location Scout	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Locations	Trainee Asst. Location Mgr.	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Makeup	Assistant Makeup	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Makeup	Key Makeup	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Makeup	Special Effects Makeup	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Painting	Lead Painter	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Painting	Paint Coordinator	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Painting	Paint Foreman	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Painting	Painter	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Painting	Plasterer	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Painting	Scenic Artist	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Painting	Scenic Painter	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Painting	Sign Writer	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Painting	Wallpaper Hanger	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Performers	Actor	5135 Actors and comedians
Performers	Background Performer	5135 Actors and comedians
Performers	Choreographer	5135 Actors and comedians
Performers	Coach/Instructor	5135 Actors and comedians
Performers	Dancer	5135 Actors and comedians
Performers	Musician	5135 Actors and comedians
Performers	Photo Double	5135 Actors and comedians
Performers	Puppeteer	5135 Actors and comedians
Performers	Special Ability Extra	5135 Actors and comedians
Performers	Stand In	5135 Actors and comedians
Performers	Tutor	5135 Actors and comedians

Production Staff	Assistant	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Production Staff	Asst. Production Coordinator	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Production Staff	Line Producer	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Production Staff	Office Manager	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Production Staff	Production Assistant	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Production Staff	Production Coordinator	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Production Staff	Production Manager	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Production Staff	Production Supervisor	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Production Staff	Unit Production Manager	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Props	Armourer	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Props	Assistant Foreman	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Props	Assistant Props Master	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Props	Lead Props	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Props	Props	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Props	Props Buyer	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Props	Props Master	5227 Support occupations in motion pictures, broadcasting, photography and the performing arts
Publicity	Publicist	1123 Professional occupations in advertising, marketing and public relations
Publicity	Stills Photographer	1123 Professional occupations in advertising, marketing and public relations
Script Supervisor	Script Supervisor	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Security	Security	6541 Security guards and related security service occupations
Security	Security Captain	6541 Security guards and related security service occupations
Security	Security Coordinator	6541 Security guards and related security service occupations
Set Decorating	Assistant Set Decorator	5243 Theatre, fashion, exhibit and other creative designers
Set Decorating	Assistant Set Dresser	5243 Theatre, fashion, exhibit and other creative designers
Set Decorating	Draper/Upholsterer	5243 Theatre, fashion, exhibit and other creative designers
Set Decorating	Lead Dresser	5243 Theatre, fashion, exhibit and other creative designers
Set Decorating	Set Buyer	5243 Theatre, fashion, exhibit and other creative designers
Set Decorating	Set Decorator	5243 Theatre, fashion, exhibit and other creative designers
Set Decorating	Set Dresser	5243 Theatre, fashion, exhibit and other creative designers
Set Safety	Set Safety	2263 Inspectors in public and environmental health and occupational health and safety
Sound	Boom Operator	5225 Audio and video recording technicians
Sound	Playback Operator	5225 Audio and video recording technicians
Sound	Sound Assistant	5225 Audio and video recording technicians
Sound	Sound Mixer	5225 Audio and video recording technicians
Special Effects	Special Effects Assistant	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Special Effects	Special Effects Coordinator	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Special Effects	Special Effects Labour	5226 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
Stunts	Stunt Actor	5232 Other performers, n.e.c.
Stunts	Stunt Coordinator	5232 Other performers, n.e.c.
Transportation	Automotive Mechanic	7511 Transport truck drivers
Transportation	Automotive Service	7511 Transport truck drivers
Transportation	Automotive Wrangler	7511 Transport truck drivers



Transportation	Boat Operator	7511 Transport truck drivers
Transportation	Bus Driver	7511 Transport truck drivers
Transportation	Camera Car Driver	7511 Transport truck drivers
Transportation	Construction Driver	7511 Transport truck drivers
Transportation	Dispatcher	7511 Transport truck drivers
Transportation	Diver	7511 Transport truck drivers
Transportation	Driver	7511 Transport truck drivers
Transportation	Driver Captain	7511 Transport truck drivers
Transportation	Marine Coordinator	7511 Transport truck drivers
Transportation	Mini Bus Driver	7511 Transport truck drivers
Transportation	Special Equipment Driver	7511 Transport truck drivers
Transportation	Tractor Trailer Driver	7511 Transport truck drivers
Transportation	Transportation Coordinator	7511 Transport truck drivers
Transportation	Truck Driver	7511 Transport truck drivers

## Appendix D: Primary Research

### Qualitative Interviews

A variety of stakeholders in different categories were approached for in-depth interviews. These stakeholders were chosen because either their constituencies make up a large part of the industry or because it was believed that their unique perspective would be difficult to assess with other research means (i.e. surveys). Representatives from unions and high-level outputs from interviews are below.

This project involved both general interviews and structured interviews for data-gathering purposes.

General interviews were conducted with a variety of stakeholders for background information and to vet and validate underlying assumptions and approach. General interviews were conducted with the following people:

- |  |   |
|--|---|
| 1. Christian Allan, CPAWC  | 21. Andrea Moore, DGC BC  |
| 2. Paul Altilia, Teamsters 155   | 22. Nan Morales, Producer   |
| 3. Louise Baker-Griffiths, International Cinematographers Guild-Western Canada | 23. Cheryl Nex, Entertainment Partners, Canada                              |
| 4. Angele Beausoleil, UBC Sauder, now with University of Toronto               | 24. Wendy Noss, MPA Canada  |
| 5. Julie Bernard, Creative BC  | 25. Marlie Orr, Creative BC   |
| 6. Sue Brouse, UBCP/ACTRA  | 26. Don Parman, Actsafe Safety Association                                  |
| 7. Susan Butler-Gray, IATSE 891  | 27. Matthew Parry, Creative BC  |
| 8. Bill Caywood, Cast & Crew   | 28. Katharine Pavoni, Creative BC   |
| 9. Sandi Richter Cooper, Creative BC   | 29. Jill Reilly, Creative BC  |
| 10. Sean Cummings, Creative BC   | 30. Liz Shorten, Canadian Media Producers Association – BC Producers Branch |
| 11. Matt Drake, Producer, Chesapeake Shores                                    | 31. Julie Stangeland, Creative BC   |
| 12. Patty Ducharme, Canadian Media Guild                                       | 32. Geoff Teoli, Actsafe Safety Association (ex officio)                    |
| 13. Cynde Harmon, Producer   | 33. Kendrie Upton, DGC BC   |
| 14. Shawn Henter, Teamsters 155  | 34. Richard Walker, Entertainment Partners, Canada                          |
| 15. Prem Gill, Creative BC   | 35. Karin Watson, Creative BC   |
| 16. Heather Gross, Camosun College   | 36. Susan Wheeler, Rogers Communications, Inc.                              |
| 17. Mike Jamont, Creative BC   | 37. Shawn Williamson, Brightlight Pictures                                  |
| 18. Phil Klapwyk, IATSE 891  | 38. Robert Wong, Creative BC  |
| 19. Karen Lamare, Ministry of Tourism, Arts and Culture (ex officio)           | 39. Michelle Yearley, ICG 669   |
| 20. Daryl Litke, ACFC West   | 40. Kat Yee, ICG 669  |

Note that some of these stakeholders were re-interviewed as part of the structured interview process, discussed below.

Structured Interviews (or standardized interviews) were employed as a quantitative research method with the aim of ensuring that each interview was presented with exactly the same questions in the same order. The objective was to procure answers that could be reliably aggregated for comparisons with confidence between sample subgroups or individuals.

U.S. Studio Structured Interviews: U.S. studios were approached with the purpose of understanding what drives the decision to locate productions in B.C. and potential demand going forward. Five studios participated. These interviews were thirty-minute phone interviews. The studios and their staff that participated were:

1. Mark Binke, NBCUniversal, Executive VP Productions

2. Antoinette Cadena, Warner Brothers, Vice President, Production
3. Karen Fouts, Warner Brothers, SVP Production Planning
4. Jake Guswa, Warner Brothers, Production Executive
5. Jason Hariton, Netflix, Head of Worldwide Studio Operations
6. Carlos Healy, Warner Brothers, Entertainment Finance
7. MaryAnn Hughes, Disney, Vice President Film/TV planning
8. Brian O'Leary, NBC Universal, Tax Counsel
9. Ric Morelli, Sony, VP Motion Production Finance
10. Sue Palladino, Warner Brothers, Executive Vice President of Production
11. Nicholas A. Velasquez, Sony, Vice President, Government Affairs
12. Michael Walbrecht, Warner Brothers, Vice President, Public Affairs
13. KC Warnke, Netflix, Director, Original Series Production
14. Corie Wright, Netflix, Public Policy

## Synthesis of US Studio Structured Interviews

Studios pick their locations in a highly competitive environment; they are heavily influenced by costs and are extremely price-sensitive. The affordability and predictability of tax credits are the most-compelling reasons for studios to shoot in British Columbia. The affordability created by the favourable exchange rate was also a compelling factor as it goes to overall cost, but it was less important to executives than tax credits because while executives are expected to maximize tax credit benefits, they are not held accountable for changes in the exchange rate. Moreover, exchange-rate variability can be partially hedged through financial instruments.

Crew and locations availability were also cited as important factors. Several observed that locations availability seemed to be a limiting factor during certain times of the year. Potentially insufficient crews were considered in terms of costs: inexperienced crews can cost a production time and money. (They also pointed out that overall crew quality was high, and B.C. quality issues were less than in competing jurisdictions.) Crew from outside the Province prevents the production from taking full advantage of the labour tax credit. None of the respondents were certain whether locations availability or crews had become the primary limiting factor. Respondents noted that B.C. was “maxed out” on both locations and crews for portions of the year.

Additional US Studio production in the regions is unlikely. Regional shooting is largely done only when necessary for creative considerations. Lack of sufficient crew was a concern and was couched in terms of higher costs: insufficient local crew lead to additional lodging and travel expenses. The additional regional tax incentives may not make up for these additional costs. Studios also voiced concerns about lack of equipment and associated increased costs and lack of compelling deals from other local vendors. US Studios were also concerned about lack of sufficient studio space. Even if there were additional financial incentives and sufficient crew, equipment and studio space, above-the-line talent’s preferences were cited as an additional barrier to shooting regionally. Above-the-line talent prefers Vancouver’s amenities over other areas. Talent will even push back on shooting in Greater Vancouver “outside the zone” because it is too far from downtown Vancouver. If Vancouver is unavailable, studios would more likely shoot in other major production centres rather than B.C.’s regions.

There are a variety of other locations that compete for studios’ business. The number one alternative to B.C. is Georgia followed by California. Other compelling U.S. locations were New York, Louisiana, New Mexico, Massachusetts and Hawaii. Other competitive international locations are New Zealand, Australia, UK, South Africa and Hungary. The primary Canadian competitor location is Ontario. Quebec and Alberta were also options.

US Studio respondents believed that growth in the sector over the next 2-4 years would be double-digits annually, and all attributed the growth to proliferation and dominance of streaming services, all of which want original content. TV series are likely to have the greatest increase in demand.

Aside from tax credit policy, B.C. might be able to gain additional business by: investing in and improving ease-of-access to additional locations (this factor was noted by all respondents) and secondarily, B.C. could invest more in the training of production crews. Current post-secondary educational programs were not seen as effective in creating set-ready crew and some studios suggested reviewing a model similar to the Georgia Film Academy.

Commercial Producers Structured Interviews: It is estimated that the four largest commercial production companies account for eighty percent of the total B.C. commercial market. Three of the four largest commercial production company owners and one commercial production manager were approached to discuss the B.C. commercial industry. The purpose of these interviews was to understand the growth trajectories for commercial production activities (which are non-union in British Columbia), the high-level labour requirements for the commercial sector, how they may differ from other unionized production activities, and what, if any, labour-related constraints are present that might inhibit growth. These interviews were one-hour, in-person interviews. The producers that participated were:

1. Christian Allen, Capital Media
2. Rod Bailey, Chairman, Commercial Production Association of Western Canada
3. Chris Bowell, Circle Productions
4. David Bouck, Means of Production

## Synthesis of Commercial Producer Structured Interviews

Commercial production in British Columbia is largely non-union and almost exclusively service production work (where creative elements have already been selected). The service producer is trying to complete the commercial in B.C. at a competitive cost compared to other worldwide jurisdictions.

The size of the industry is not measured, but current estimates indicate commercial production comprises about 5-10% of total production in the Province. The four largest commercial production companies cumulatively service about 80% of the total market.

Commercial production activity is extremely sensitive to exchange rates, especially the Canadian dollar's strength relative to the U.S. dollar. Since it is not possible to predict exchange rates, growth (or shrinkage) in the sector is not possible to predict. The strength of the worldwide economy (especially U.S. economy) also impacts the growth rate of the sector, and this trend is also difficult to predict.

Relating to labour tightness, there is a perception that at times of the year, there is just barely enough labour to meet demand. There is also a perception that physical locations are a limitation. Respondents were unable to determine whether locations or crew availability were the primary limiting factor during busy times. When there is tightness in labour, it is generally evenly distributed across occupational profiles. Some exceptionally tight occupations reported are: location managers, assistant cameras, production managers. There is also occasional tightness with production designers, hair, makeup, wardrobe and caterers.

As commercial productions do not rely on tax credits, they are more willing to fill labour gaps with non-residents, lessening the impact of tightness. Location Managers require a high degree of local knowledge, and therefore, it is hard to substitute non-B.C. residents for that role.

Labour enters the sector through networking. There has not been a need to expand recruitment (further implying that labour tightness is not severe). One issue with networking as the means to entry is that it might lead to crews without much diversity as people traditionally have tended to associate with their own ethnic group.

Relating to competition with other film and television work, labour can and sometime does go back and forth between commercials and other film and television work, depending on supply and demand. The nature of commercials work is more short-term and lacking benefits but is performed by both union and non-union workers. While commercial producers choose not to use unionized labour, the workforce supply is often unionized.

Another area consistently noted as being competitive with other film and television work was physical locations (both in studio and on location). There is a general perception of insufficient locations availability and that non-commercial work (because of money and time advantages) have the first pick, making finding locations for commercials especially difficult.

Future challenges with supply meeting demand include the fact that labour supply has grown and shrunk to meet demand in the past, and (except for locations managers) that situation is expected to continue.

Off-set training is not seen as required or helpful to meet labour demand. Even coming from a film school, all workers start at entry-level positions, and every position is a learning or training position.

Hiring Manager, Department Head and Crew structured interviews: In addition to the hiring survey, structured interviews were conducted to understand labour issues from the perspectives of both hirers and crew. There are two layers of hirers. As detailed in the Figure titled "How a Production Crews Up", typically a producer, line producer or production manager will hire department heads who will, in turn, hire all the required keys and crew to complete their team. The structured interviews were conducted with 16 producers/production managers, 8 department heads and 8 crew members with a combined 825 years of experience.

## Synthesis of Hiring Manager Structured Interviews

All three groups note a general lack of experience with new entrants, challenges with sourcing the right crew at the right time and the importance of soft skills. Detailed comments are below.

Producer and Production Manager Perspectives on Labour:

- producers and production managers report a general lack of experience with new entrants
- production managers noted that in the absence of new entrant workers being "set-ready" on their first day of the job, they often undertake to train new entrants themselves and some even allow them to attend training during production.
- most production managers point to tightness in the following job roles in declining order of severity: assistant directors, production accountants, location managers and production managers, and a host of art and technical positions. Notably, labour tightness is observed in roles that require significant work experience

Department Head Perspectives on Labour:

This cohort, which does the most hiring of in-scope labour report increased pressures:

- There are increased safety concerns and higher loss and damage costs
- They are under additional pressure to train new staff while simultaneously managing more complex projects
- There is a need to compromise on quality of crew
- They spend a lot of time and energy to try to find the right people
- Productions are increasingly poaching each other's crews by offering better pay and working conditions

They attribute these pressures to the following:

- The volume of productions has increased so quickly in the past few years
- Productions are now larger and more complex with tighter budgets and schedules
- Expectations are high due to past performance
- There are basic gaps in knowledge around roles and responsibilities in the industry that "we weren't seeing in previously"
- New crew aren't set ready and are being promoted too quickly

When asked what challenges they currently face when looking to hire appropriately skilled crew for their Department, interviewees noted the following:

- Access to skilled crew when they are needed (i.e. access to the right crew at the right time)

- Requirements vary according to Department. One interviewee noted that the unions have limited access to qualified people
- Access to crew who have an interest in the process and product, not just the paycheque. Real passion is required to stay motivated during long, difficult workdays.
- Access to crew with well-rounded experience, an ability to work in a team and an ability/willingness to learn.

When Department Heads were asked what entry level skills (i.e. the skills needed to get through their first production) are required by their crew, Department Head interviewees identified the following:

- Soft skills such as the ability to work together over long hours over the long-term under high pressure, a willingness to work hard; passion, curiosity, the ability to pay attention, strong communication skills, problem solving skills, and attitude.
- Practical functional/technical skills that are tailored to each Department and computer literacy skills.

Crew Perspectives on Labour: Crew members report that they have difficulty retaining skilled workers during peaks and valleys of work and have seen very high turnover on some productions.

- Speaking to the quality of the workforce, crew report that some dispatch-call workers are of such low value they are often sent home straight away. "Supply is low and skills are weak."
- Some new entrants have a good attitude but no skills and several crew expressed a desire for their union or guild to test or certify new entrants to pass a minimum threshold to determine set-readiness and basic familiarity with the work they will be performing.
- Role modelling behaviour is important. Crew take their cues from their peers and their supervisors
  - While formal training is perceived as important for some positions, all crew interviewees stressed the value of developing skills on set.
  - Crew also pointed to the importance of having a coach, mentor or role model.

In summary, crew felt that the most effective way of developing the soft skills required to advance in below-the-line work is on-set experience combined with one-on-one support or guidance from a mentor, coach or role model.

## Regional Film Commissions Structured Interviews

Regional Film Commissioner Structured Interviews: Eight B.C. regional film commissioners were approached with the purpose of understanding region-specific opportunities and challenges with respect to workforce development. These interviews were one-hour phone interviews.

The regions and their staff that participated were:

1. David Barritt, Columbia Shuswap Film Commission
2. Clint Fraser, Northern BC Tourism
3. Kathleen Gilbert, Vancouver Island South Film & Media Commission
4. Joanna Maratta, Kootenay Columbia Film
5. Joan Miller, Vancouver Island North Film Commission
6. Geoff Moore, Cariboo Chilcotin Coast Tourism
7. Jon Summerland, Okanagan Film
8. Victoria Weller, Thompson-Nicola Film Commission

A synthesis of regional film commissioners' inputs has been directly included in this study's section 4 Meeting Demand.

Relevant to the regional film commissioners' input and responsibility, the following is a contextual summary of provincial economic development infrastructure for B.C.'s motion picture industry:

[British Columbia's Motion Picture tax credits for physical production](#) are designed to compete with global and particularly North American incentives. They enhance the business case for productions to do business in B.C. and furthermore, to move beyond the Designated Vancouver Area's limits. The structure of the program encourages economic opportunity for productions, which in turn drives labour demand beyond this area's limits and into the [Vancouver Regional Area and the Distant Location Area](#).

The physical production tax credit program for international productions is called the Production Services Tax Credit (PSTC) Program. The physical production tax credit program for British Columbia productions is called the Film Incentive British Columbia (FIBC) program. Both programs offer three types of credits based on proximity to Vancouver: Basic, Regional and Distant Location tax credits for physical production. Both programs offer a Digital Animation, Visual Effects or Post-Production (DAVE) Tax Credit for that aspect of production. Only FIBC offers the additional Script Writing Tax Credit and Training Tax Credit components, the latter of which is under-utilized at present.

These provincial supports map to and serve the [8 economic regions of British Columbia](#), which possess varying and emerging types of sound stage and studio infrastructure for production activity.

[Three geographical zones are designated by the Province's tax credit program:](#)

- a. Designated Vancouver Area (Basic tax credit)
- b. Vancouver Regional (Regional tax credit)
- c. Distant Location (Distant Location Regional tax credit)

Combining with the provincial motion picture tax credit strategy (administered by Creative BC) is a provincial film commission strategy that funds:

- one overarching provincial film commission at Creative BC to sustain industry activity, to promote B.C. locations around the world, and to provide film commission services to productions in the Lower Mainland/Southwest region; and
- eight regional film commissions, either independent or integrated to municipal/provincial bodies to provide liaison and location scouting services to incoming and established commercial, film and TV productions.

## Industry Surveys

### Surveys

Two different industry surveys were conducted:

1. Contractors (to reach in-scope labour)
2. Hiring manager (distributed to producers and production managers)

Work was undertaken with the LMI Partner Committee and the Ministry for input on question wording and survey design for both surveys. The surveys were "live" for responses from December 4 to December 31, 2017.

1. Contractor survey:
  - a. Designed to reach workers in below-the-line physical production roles.
  - b. Target number of responses was 1,000.
  - c. Actual number of completed responses was 3,525.
  - d. 3,438 remained after eliminating out-of-scope and duplicate responses.
2. Hiring survey:
  - a. Designed to reach people in roles that are responsible for sourcing below-the-line physical production labour and have a high-level view of the workforce challenges across multiple occupational clusters.

- b. There are between 200-300 people in these roles in B.C.
- c. Target number of responses was 50.
- d. The actual number of completed responses was 59.

## Objectives

### Contractor Survey Objectives

- Measure employment characteristics of those working in the industry (e.g. current position, years working in the industry, number of hours worked, types of productions worked on).
- Determine how contractors find out about the productions they work on.
- Measure contractor “workload capacity” (i.e. preferences for taking on work in the future).
- Measure current training opportunities, participation in training, and the perceived importance of training.
- Identify the pathways by which contractors enter the industry in B.C.
- Identify barriers to entry and progression in the industry.
- Measure job satisfaction and intentions to stay in the industry.
- Collect demographic information (e.g. age, gender, ethnicity).

### Hiring Survey Objectives

- Determine the types of workforce challenges those in hiring positions are facing.
- Determine the job categories that are posing the biggest challenges.
- Assess what is being done to address these challenges.
- Measure the outlook those in hiring positions have regarding the ability for the B.C. motion picture industry to meet future demand.

## Survey Distribution

Two different industry surveys were conducted, one for contractors and one for people that typically hire. The surveys were “live” for responses from December 4 to December 31, 2017. The contractor survey was designed to reach workers in below-the-line physical production roles. 3,438 surveys were ultimately used for the contractor survey analysis. The hiring survey was designed to reach people in roles that are responsible for sourcing below-the-line physical production labour and have a high-level view of the workforce challenges across multiple occupational clusters. 59 of hiring surveys were used in the analysis. To encourage participation, the following steps were taken:

- The survey link was distributed through multiple channels including emails and newsletters.
- The survey remained open for 27 days and, where possible, reminders were sent to prospective participants.
- A prize draw incentive was offered – participants were given the chance to win one of five \$100 gift cards.

Contractor Survey Distribution Methodology: The following union representatives liaised with stakeholders at their respective unions to give input on question types and wording for the contractor survey:

- Paul Altilia, Human Resources/Labour Relations Consultant, Teamsters 155
- Sue Brouse, Director of Member Services and Human Resources, UBCP/ACTRA
- Louise Baker Griffiths, Professional Development, International Cinematographers Guild-Western Canada



- Phil Klapwyk, Business Representative, IATSE 891
- Daryl Litke, Chief Steward, ACFC West
- Andrea Moore, Director of Operations, DGC BC

Additionally, each union helped distribute the surveys to their respective membership through multiple channels (such as emails and newsletters) on multiple dates.

Responses were sought from workers that were not covered by the unions (commercial production workers, Casting Directors and Production Accountants). For commercial production, the survey links were distributed in the Commercial Production Association of Western Canada's (CPAWC) newsletter and sent to an additional, more-targeted list of producers and production managers for their distribution to other workers. The two commercial production principals that helped with distribution were:

- Christian Allen, Capital Media
- Rod Bailey, Chairman, Commercial Production Association of Western Canada

Production Accountants are not unionized, but a list of production accountants was provided by one of the unions and contacted directly.

To reach Casting Directors, two online casting services that make up the bulk of the online casting service market in B.C. were contacted. These companies distributed to their list of B.C.-based Casting Directors. The two principals at casting services that assisted were:

- Gary Marsh, Breakdown Services
- Graham Wickstrom, Casting Workbook

Hiring Survey Distribution Methodology: Coordination was undertaken with the Directors Guild of Canada (whose members include production managers and unit production managers), the Canadian Media Producer's Association (which represents B.C.-based producers) and commercial production personnel (with the help local of a local commercial producer and CPAWC) to distribute the survey and drive responses. Potential respondents were contacted through multiple channels on multiple dates with the help of the following people:

- Christian Allen, Capital Media
- Rod Bailey, Chairman, Commercial Production Association of Western Canada
- Andrea Moore, DGC BC
- Liz Shorten, Canadian Media Producers Association – BC Producers Branch
- Kendrie Upton, DGC BC

## Labour Market Survey Outputs

### Participation

#### Contractor Survey Participation

Summary of response statistics

Disposition	#
Total who clicked on the survey link	5,779
Clicked on link only (did not answer any	1,357
Abandoned survey part-way	897
Total who completed the survey	3,525
Number of surveys removed for being out-of-	185
Total Usable Surveys for Analysis	3,438

Summary of # of responses from each union:

Union & Guilds	# of
IATSE – Local 891	1,967
UBCP/ACTRA	703
ACFC West	346
DGC BC	303
Teamsters 155	223
International Cinematographers Guild/ ICG 669	102

#### Contractor Survey Participation (completed surveys)

Job Category	# of Surveys	% of Total
Performers	603	17.5%
Construction	362	10.5%
Lighting/Electrics	264	7.7%
Set Decorating	203	5.9%
Grips	202	5.9%
Costume	196	5.7%
Art	165	4.8%
Production Staff	163	4.7%
Transportation	152	4.4%

Accounting	148	4.3%
Painting	113	3.3%
Locations	104	3.0%
Props	101	2.9%
Assistant Directors	98	2.9%
Camera	91	2.6%
Special Effects	85	2.5%
First Aid/Craft Service	60	1.7%
Makeup	56	1.6%
Sound	53	1.5%
Stunts	41	1.2%
Security	40	1.2%

Hair	35	1.0%
Greens	33	1.0%
Script Supervisors	24	0.7%
Casting	15	0.4%
Catering	11	0.3%

Visual Effects (Production)	7	0.2%
Set Safety	5	0.1%
Animal Wranglers	4	0.1%
Publicity	4	0.1%
<b>Total</b>	<b>3,438</b>	<b>100.0%</b>

HIRING SURVEY PARTICIPATION (COMPLETED SURVEYS)

Role	#
Producer	16
Executive Producer	3
Line Producer	8
Production Manager	30
Other	2
<b>Total</b>	<b>59</b>

Canadian documentary	7%
Canadian feature films	10%
Canadian pilot	7%
Canadian series	8%
Canadian movie of the week	7%
All Canadian Non-Commercial	29%
U.S. and other foreign lifestyle	0%
U.S. and other foreign documentary	2%
U.S. and other foreign feature films	31%
U.S. and other foreign pilot	14%
U.S. and other foreign series	36%
U.S. and other foreign movie of the week	15%
All U.S./Foreign Non-Commercial	63%
Canadian commercials	20%
U.S. and other foreign commercials	32%

Types of productions for which survey participants needed to recruit crew members for in the 12 months prior to survey:

Types of Productions Needing Crew Members for	%
Short film	8%
Direct to video	3%
Canadian lifestyle	2%

While this table represents respondent answers, it does not represent the distribution of types of productions in the province. This nuance is because hiring respondents were asked to list *any* hiring work. So, for example, a respondent that hires for 9 U.S. series and 1 Canadian lifestyle series would report both equally even though 90% of their hiring related to U.S. series.

Labour Market Survey: Hiring Survey Questions

LANDING PAGE INTRODUCTION

Thank you for taking the time to assist us with this research. By completing this survey you'll be helping the B.C. Film Industry understand current market challenges for physical, below-the-line labour and how to address them.

The survey takes about 10 minutes and can be completed on a computer, tablet or smart phone.

The survey is being administered by Sentsis Research, an independent research company commissioned by Creative BC. All of your feedback is strictly confidential and will be used for research purposes only.

If you have any problems accessing the survey, please call Sentis toll-free at 1-855-463-4025 or email us: creativebc@sentis.ca

ROLE AND PRODUCTION CHARACTERISTICS

Q1. Which of the following best describes your primary role over the past 12 months?

- |                       |                       |                 |
|-----------------------|-----------------------|-----------------|
| 1. Producer           | 4. Executive Producer | 7. Other _____. |
| 2. Associate Producer | 5. Line Producer      |                 |
| 3. Co-Producer        | 6. Production Manager |                 |

Q2. How long have you been working in this role?

- |                                 |                                   |                     |
|---------------------------------|-----------------------------------|---------------------|
| 1. Less than 1 year             | 4. 5 years to less than 10 years  | 7. 30 years or more |
| 2. 1 year to less than 3 years  | 5. 10 years to less than 20 years |                     |
| 3. 3 years to less than 5 years | 6. 20 years to less than 30 years |                     |

Q3. Thinking about the past 12 months, for what types of productions in B.C. did you need to recruit crew members? Please select all that apply.

Type of Production	Productions in Past 12 months
Short film	
Direct to video	
Canadian commercials	
U.S. and other foreign commercials	
Canadian lifestyle	
U.S. and other foreign lifestyle	
Canadian documentary	
U.S. and other foreign documentary	
Canadian feature films	
U.S. and other foreign feature films	
Canadian pilot	
U.S. and other foreign pilot	
Canadian series	
U.S. and other foreign series	
Canadian movie of the week	
U.S. and other foreign movie of the week	

Q4. Which of the following departments are you responsible for recruiting?

- |                             |                        |                                 |
|-----------------------------|------------------------|---------------------------------|
| 1. Accounting               | 13. Greens             | 25. Script Supervisors          |
| 2. Animal Wranglers         | 14. Grips              | 26. Security                    |
| 3. Art                      | 15. Hair               | 27. Set Decorating              |
| 4. Assistant Directors      | 16. Lighting/Electrics | 28. Set Safety                  |
| 5. Camera                   | 17. Locations          | 29. Sound                       |
| 6. Casting                  | 18. Makeup             | 30. Special Effects             |
| 7. Catering                 | 19. Painting           | 31. Stunts                      |
| 8. Construction             | 20. Performers         | 32. Sustainability              |
| 9. Costume                  | 21. Publicity          | 33. Transportation              |
| 10. Directors               | 22. Post Production    | 34. Visual Effects (Production) |
| 11. Editing                 | 23. Production Staff   |                                 |
| 12. First Aid/Craft Service | 24. Props              |                                 |

WORKFORCE CHALLENGES

Q5. Thinking about the past 12 months, have any of the following occurred because of workforce challenges? Please select all that have occurred. You can also provide a response in "Other".

- a. Start of production has been delayed waiting for crew availability
- b. Production forced to pay more overtime than expected to complete the shoot
- c. Budget constraints impacted the quality or quantity of crew choice
- d. Production that could shoot in B.C. shot in another jurisdiction, instead
- e. An opportunity to take on a production had to be turned down
- f. There was a drop in production quality
- g. Other: \_\_\_\_\_

Q6. Of the following occupational groups, did any pose severe workforce challenges over the past 12 months. *Please select up to five occupational groups.* INSERT GROUPINGS SELECTED FROM Q4

Q7A. For [INSERT EACH OCCUPATIONAL GROUP SELECTED IN Q6] what has been the biggest challenge? *Please select from the list below or enter your response in Other.*

- a. The preferred keys were not available
- b. The preferred crew was not fully available
- c. The production required a specialized skillset that was difficult to find
- d. The crew used lacked experience
- e. The preferred crew was unwilling to travel to the production location
- f. Other: \_\_\_\_\_

Q7B. What actions have you taken to address the challenges posed by [INSERT EACH OCCUPATIONAL GROUP SELECTED IN Q6]? RECORD VERBATIM

Q8. Please rank what you think is necessary to address these challenges posed by [INSERT EACH OCCUPATIONAL GROUP SELECTED IN Q6]? (Rank with 1 = most important)

- A. Increase recruitment of new entrants or qualified workers from other locations
- B. Increase education/training and skill-development for new entrants or existing workforce
- C. Increase current workforce retention by improving pay and/or working conditions or reducing barriers to mobility between departments

Q9. From your perspective, can the B.C. film and TV industry workforce continue to grow to accommodate more demand:

- A. No, I believe it will shrink
- B. No. It will not grow any further
- C. Yes, but it will require a coordinated approach across stakeholder groups
- D. Yes, but there are some pain points in key positions that must be addressed to continue to grow
- E. Yes. Conditions are right for workforce to grow (e.g. wage flexibility, compelling employee value proposition, strong & available training programs, etc.)

FOCUS GROUP INTEREST. Would you be interested in participating in a focus group to provide further information related to the questions in this survey? COLLECT CONTACT INFORMATION IF INTERESTED

- End -

## LABOUR MARKET SURVEY: CONTRACTOR SURVEY QUESTIONS

LANDING PAGE INTRODUCTION: Thank you for taking the time to assist us with this research. By completing this survey about your experience working in B.C.'s film and TV industry, you'll be helping the B.C. Film industry identify potential below-the-line physical production labour issues. If you have already participated in this survey, please do not complete it multiple times.

- The survey takes about 10 minutes and can be completed on a computer, tablet or smart phone.
- The survey is being administered by Sentis Research, an independent research company commissioned by Creative BC. Your feedback is strictly confidential and will be used for research purposes only.
- If you have any problems accessing the survey, please call Sentis toll-free at 1-855-463-4025 or email us: [creativebc@sentis.ca](mailto:creativebc@sentis.ca)

### BASIC EMPLOYEE CHARACTERISTICS

Q1. How long have you been working in B.C.'s film and TV industry?

- |                                 |                                   |                     |
|---------------------------------|-----------------------------------|---------------------|
| 1. Less than 1 year             | 4. 5 years to less than 10 years  | 7. 30 years or more |
| 2. 1 year to less than 3 years  | 5. 10 years to less than 20 years |                     |
| 3. 3 years to less than 5 years | 6. 20 years to less than 30 years |                     |

Q2A. Which of the following best describes the department of your primary, current position?

- |                             |                        |                                 |
|-----------------------------|------------------------|---------------------------------|
| 1. Accounting               | 13. Greens             | 25. Script Supervisors          |
| 2. Animal Wranglers         | 14. Grips              | 26. Security                    |
| 3. Art                      | 15. Hair               | 27. Set Decorating              |
| 4. Assistant Directors      | 16. Lighting/Electrics | 28. Set Safety                  |
| 5. Camera                   | 17. Locations          | 29. Sound                       |
| 6. Casting                  | 18. Makeup             | 30. Special Effects             |
| 7. Catering                 | 19. Painting           | 31. Stunts                      |
| 8. Construction             | 20. Performers         | 32. Sustainability              |
| 9. Costume                  | 21. Publicity          | 33. Transportation              |
| 10. Directors               | 22. Post Production    | 34. Visual Effects (Production) |
| 11. Editing                 | 23. Production Staff   |                                 |
| 12. First Aid/Craft Service | 24. Props              |                                 |

Q2B. Within that department, what is your current position? (RECORD VERBATIM)

Q3. How long have you been working in your current department?

- |                                 |                                   |                                   |
|---------------------------------|-----------------------------------|-----------------------------------|
| 1. Less than 1 year             | 4. 5 years to less than 10 years  | 6. 20 years to less than 30 years |
| 2. 1 year to less than 3 years  | 5. 10 years to less than 20 years | 7. 30 years or more               |
| 3. 3 years to less than 5 years |                                   |                                   |

Q4. We'd like to understand the different work patterns among those who work in the industry. Using the table below, please indicate the category of hours you worked during each month in the past 12 months, starting with the most recent month.

Month in 2017	On average, worked more than	On average, worked about	On average, worked less	Did not work during
December				
November				
October				
September				
August				
July				
June				
May				
April				
March				
February				
January				

Q5. And during the past 12 months, has this position been...

1. Your sole source of personal income,
2. Your main source of personal income, or
3. Not your main source of personal income

Q6. Which of the following types of productions did you work on during the past 12 months?

- |                                       |  |  |
|---------------------------------------|--|--|
| 1. Short film                         | 7. Canadian documentary                  | 13. Canadian series                          |
| 2. Direct to video                    | 8. U.S. and other foreign documentary    | 14. U.S. and other foreign series            |
| 3. Canadian commercials               | 9. Canadian feature films                | 15. Canadian movie of the week               |
| 4. U.S. and other foreign commercials | 10. U.S. and other foreign feature films | 16. U.S. and other foreign movie of the week |
| 5. Canadian lifestyle                 | 11. Canadian pilot                       |  |
| 6. U.S. and other foreign lifestyle   | 12. U.S. and other foreign pilot         |  |

IF DID NOT WORK ON COMMERCIALS IN Q6 GOTO Q9

Q7. Approximately what percentage of your time was spent working on commercials? 0 – did not work on any commercials, Enter percentage:

Q8. And approximately what percentage of your income from production work came from working on commercials? Enter percentage:

Q9A. What is the most common way you find out about the production jobs you work on? *Please select one only*

- |                                       |                                      |                         |
|---------------------------------------|--------------------------------------|-------------------------|
| 1. From a production company          | 4. Co-worker outside your department | 8. From a studio        |
| 2. Department key in your department  | 5. From a union                      | 9. Job boards/ postings |
| 3. Other co-worker in your department | 6. From an agent                     | 10. Other: _____        |
|                                       | 7. From a production listing         |                         |

Q9B. What is the next most common way you find out about the production jobs you work on? *Please select one only*. REMOVE RESPONSE FROM Q9A

Q10. Thinking about the upcoming year, would you like to take on more work, about the same, or less work than you did in the past year?

- |                                      |                   |                                      |
|--------------------------------------|-------------------|--------------------------------------|
| 1. I would like to take on more work | 2. About the same | 3. I would like to take on less work |
|--------------------------------------|-------------------|--------------------------------------|

**PRE-ENTRY TRAINING**

Q11. Before you began working in the industry, did you complete any formal industry-related education or training?

1. Yes
2. No | SKIP TO Q14

Q12. What kind of formal education or training did you complete before you began working in the industry? *Please select all that apply.*

- |   |  |                                    |
|---|--|------------------------------------|
| 1. High School                                | 5. University/College degree in an unrelated field.      | 8. Union training program          |
| 2. Art Institute/Film School                  | 6. Professional development/Continuing education program | 9. No formal education or training |
| 3. Trades School/Technical College            | 7. Apprenticeship training/Certification                 | 10. Other: _____                   |
| 4. University/College degree in related field |  |                                    |

Q13. And would you say that this formal education/training was...

- A. A critical factor for your entry to the industry – you would not have been able to establish yourself in the industry without it
- B. An important factor – it made entering the industry easier for you, but you could have established yourself in the industry without it
- C. Not an important factor

Q14. And would you say not having this formal education/training...

- A. Was a very significant barrier for you to get work in the industry
- B. Was somewhat of a barrier for you to get work in the industry
- C. Was not a barrier for you to get work in the industry

**PATHWAYS AND BARRIERS**

The next few questions are about the different ways people begin working in B.C.'s film and TV industry.

Q15A. Which of the following best describes your pathway into the industry in B.C.?

1. You started your career by working in the B.C. film/TV industry
2. You started in the film/TV after working in another, related job/industry
3. You started in the film/TV after working in another, unrelated job/industry

IF SELECT ANSWER 1, SKIP TO Q15C

Q15B You started in the film/TV industry after working in another industry. Which one?

- |   |                         |                       |
|---|-------------------------|-----------------------|
| 1. Agriculture                          | 5. Financial Services   | 9. Sports/ Recreation |
| 2. Construction                         | 6. Forestry             | 10. Transportation    |
| 3. Education                            | 7. Healthcare           | 11. Other: _____      |
| 4. Energy/ Resources/ Utilities/ Mining | 8. Hospitality/ Tourism |                       |

Q15C Which of the following best describes your work location?

1. You started working in B.C. and have remained here
2. You relocated to B.C. after working in another province
3. You immigrated to B.C. after working in another country

Q15D. [ASK ONLY IF Q15C=3] What country did you immigrate from? COULD POSSIBLY PROGRAM SO ONCE THEY BEGIN TYPING A COUNTRY THE PROGRAM WOULD COMPLETE THE ANSWER

Q16A. When you first began working in B.C.'s film/TV industry, which, if any, of the following barriers did you experience. *Please select all that apply and/or enter a response in other.* RANDOMIZE OPTIONS

1. Employers were reluctant to hire you due to a lack of experience
2. You did not have a network in the film/TV industry that could help with job opportunities
3. Your formal education/training/credentials were not recognized in B.C.
4. There was a lack of job opportunities for the kind of skills/training/characteristics that you had
5. Discrimination based on personal characteristics
6. Opportunities were in locations that were difficult to travel to/from
7. Opportunities required work hours/scheduling that did not fit with other obligations you had— e.g., taking care of family
8. You were not part of a union
9. You were unknown to people in hiring positions
10. Other: \_\_\_\_\_
11. Did not experience any of these challenges/barriers

Q16B. If you were beginning work in the B.C. film/TV industry today, which, if any, of the following barriers do you think you would experience? *Please select all that apply and/or enter a response in other.* KEEP SAME ORDER OF OPTIONS AS IN Q16A

1. Employers would be reluctant to hire you due to a lack of on-the-job experience
2. You would not have a network in the film/TV industry that could help with job opportunities
3. Your formal education/training/credentials would not be recognized in B.C.
4. There would be a lack of job opportunities for the kind of skills/training you have
5. Discrimination based on personal characteristics
6. Opportunities would be in locations that were difficult to travel to/from
7. Opportunities would require work hours/scheduling that would not fit with other obligations you have – e.g., taking care of family
8. You are not part of a union
9. Other: \_\_\_\_\_
10. I would not experience any of these challenges/barriers

TRAINING OPPORTUNITIES DURING CAREER

Q17. Which of the following types of training and development opportunities are currently available to you?

1. Formal/organized on-the-job training program with goals/benchmarks
2. Formal mentorship/coaching program in which you receive ongoing advice/support from senior colleague
3. Workshops, education, training sponsored/supported by your employer
4. Workshops, education, training sponsored/supported by your union
5. Workshops, education, training sponsored/supported by third-party industry associations (e.g. Actsafe)
6. Informal coaching and mentoring
7. None of these are currently available to me | SKIP TO Q20

Q18. And which of the following training and development opportunities have you participated in? INSERT ONLY THOSE SELECTED IN Q17

ASK Q19 ONLY AMONG THOSE WHO HAVE PARTICIPATED IN ONE OPPORTUNITY

Q19. And would you say that participating in these training and development opportunities has...

- A. Been a critical factor in helping you progress within the industry – you would not have been able to progress without it
- B. Been an important factor – has made it easier to progress within the industry but you still could have progressed without it
- C. Not been an important factor

Q20. [ASK OF THOSE WHO DO NOT HAVE ANY OPPORTUNITIES AVAILABLE TO THEM IN Q17 OR HAVE NOT PARTICIPATED IN ANY IN Q18] And would you say not participating in these opportunities has

- A. Been a very significant barrier for you to progress within the industry
- B. Been somewhat of a barrier for you to progress within the industry
- C. Not been a barrier for you to progress within the industry



ASK ALL Q21

Q21A. Have you experienced any other barriers that have made it difficult for you to progress/advance in the industry? *Please select all that apply and/or enter a response in other.*

- |   |   |
|---|---|
| 1. Don't know the "right people"; don't have the industry connections | 6. Not able or willing to relocate  |
| 2. Discrimination based on personal characteristics                   | 7. Not able or willing to change work schedule                            |
| 3. Lack of information/knowledge about opportunities                  | 8. Workload is too demanding to be able to focus on progressing/advancing |
| 4. Lack of coaching and mentoring                                     | 9. Other: _____   |
| 5. Not a member of a union  | 10. Have not experienced any barriers                                     |

IF SELECTED 2, IN Q21A ABOVE, THEN:

Q21B. If you experienced discrimination based on personal characteristics, please select the types of discrimination you experienced:

- |                              |                                  |                         |
|------------------------------|----------------------------------|-------------------------|
| 1. Age                       | 5. Family status                 | 9. Religion             |
| 2. Sex                       | 6. Mental or physical disability | 10. Sexual orientation  |
| 3. National or ethnic origin | 7. Colour                        | 11. Pardoned conviction |
| 4. Race                      | 8. Marital status                |                         |

**WORK SATISFACTION, LIKELIHOOD TO RECOMMEND, TRIGGERS TO EXIT**

Q22. Thinking about your work in the B.C. film/TV industry, how would you rate your satisfaction with the following?

- |   |   |  |
|---|---|--|
| A. Your wages/salary                          | D. Work hours/scheduling                | G. Role fit – the match between your current skills and the requirements of the position |
| B. Access to extended health benefits/package | E. Management/Supervision               |  |
| C. Amount of time off                         | F. Opportunities for career advancement |  |

Very satisfied; Somewhat satisfied; Neither satisfied or dissatisfied; Somewhat dissatisfied; Very dissatisfied

Q23. How likely would you be to recommend the film and TV industry to a friend or family member who was considering pursuing work in the industry? USE 0 TO 10 SCALE WHERE 0 MEANS "DEFINITELY WOULD NOT RECOMMEND" AND 10 MEANS "DEFINITELY WOULD RECOMMEND"

Q24. Are you currently considering leaving the film/TV industry?

- |                                     |                      |
|-------------------------------------|----------------------|
| 1. Yes, strongly considering it     |                      |
| 2. Yes, considering it somewhat     |                      |
| 3. No, not currently considering it | SKIP TO DEMOGRAPHICS |

Q25. [ASK ONLY IF YES IN Q24]. When do you expect to leave the industry?

- |                         |                               |                         |
|-------------------------|-------------------------------|-------------------------|
| 1. Within the next year | 3. Within 2 to 3 years        | 5. Don't know/ Not sure |
| 2. Within 1 to 2 years  | 4. More than 3 years from now |                         |

Q26. Is there a specific industry that you are thinking of transitioning to?

- |   |                         |  |
|---|-------------------------|--|
| 1. Agriculture                          | 6. Forestry             | 11. Other: _____                                   |
| 2. Construction                         | 7. Healthcare           | 12. Have not thought about a specific industry yet |
| 3. Education                            | 8. Hospitality/ Tourism | 13. Plan to retire.                                |
| 4. Energy/ Resources/ Utilities/ Mining | 9. Sports/ Recreation   |  |
| 5. Financial Services                   | 10. Transportation      |  |

Q27. Which of the following, if any, are reasons that you are considering leaving the film/TV industry?

- |  |   |
|--|---|
| 1. Upcoming change in family circumstances – e.g., need to take care of children/elderly parents | 7. Lack of career advancement                                     |
| 2. Work hours are too long/demanding   | 8. Compensation has not kept pace with cost of living             |
| 3. Want more work/life balance   | 9. Have too much on-the-job stress                                |
| 4. Am burnt out/at risk for burnout  | 10. Can get better pay for same type of work outside the industry |
| 5. Technological changes may make my job obsolete  | 11. Other _____   |
| 6. At risk for physical injury in current job  |   |

**DEMOGRAPHICS:** And just a few final questions for statistical purposes.

Q28A. Are you a member of a union that represents workers in B.C.'s film and TV industry?

1. Yes
2. No | SKIP TO Q29

Q28B. Which union(s) are you a member of? *Please select all that apply.*

- |   |                        |
|---|------------------------|
| 1. ACFC   | 4. IATSE – Local 891   |
| 2. DGC BC                                       | 5. Teamsters Local 155 |
| 3. International Cinematographers Guild ICG 669 | 6. UBCP/ACTRA          |

SKIP TO Q30

Q29. Do you intend to become a member of a union in the future?

- |        |       |                        |
|--------|-------|------------------------|
| 1. Yes | 2. No | 3. Don't know/Not sure |
|--------|-------|------------------------|

Q30. Where was your primary work location this past year?

- |                             |                          |                           |
|-----------------------------|--------------------------|---------------------------|
| 1. Cariboo                  | 4. North Coast & Nechako | 7. Vancouver Island/Coast |
| 2. Kootenay                 | 5. Northeast             |                           |
| 3. Lower Mainland/Southwest | 6. Thompson-Okanagan     |                           |

Q31. Where do you currently live?

- |                             |                          |                           |
|-----------------------------|--------------------------|---------------------------|
| 1. Cariboo                  | 4. North Coast & Nechako | 7. Vancouver Island/Coast |
| 2. Kootenay                 | 5. Northeast             |                           |
| 3. Lower Mainland/Southwest | 6. Thompson-Okanagan     |                           |

Q32. Into which age group do you fall?

- |          |          |             |
|----------|----------|-------------|
| 18 to 24 | 35 to 44 | 55 to 64    |
| 25 to 34 | 45 to 54 | 65 or older |

Q33. Which of the following best describes your living situation?

- |  |   |
|--|---|
| 1. Single, living with parents                     | 4. Married or common-law couple, no children at home                            |
| 2. Single, living alone or with roommates          | 5. Married or common-law couple with children at home (includes adult children) |
| 3. Single, with children (includes adult children) |   |

Q34. What is your sex?

- |           |                      |
|-----------|----------------------|
| 1. Male   | 3. Other             |
| 2. Female | 4. Prefer not to say |

Q35. To ensure we represent the views of B.C.'s diverse population, in addition to being Canadian, which of the following do you identify as your ethnic or cultural background? (Please select all that apply.)

- |   |   |   |
|---|---|---|
| 1. White  | 6. Latin American   | 9. West Asian (including Iranian, Afghan)           |
| 2. South Asian (including East Indian, Pakistani, Sri Lankan) | 7. Arab   | 10. Korean  |
| 3. Chinese  | 8. Southeast Asian (including Vietnamese, Cambodian, Laotian, Thai, Indonesian) | 11. Japanese  |
| 4. Black  |   | 12. Another ethnic or cultural background (specify) |
| 5. Filipino   |   |   |

Q36. Do you self-identify as an indigenous person?

1. Yes
2. No

## Likelihood to Exit Methodology

The Contractor survey included three questions that were used to assign a retention risk score to each response:

Are you currently considering leaving the film/TV industry?

1. Yes, strongly considering it
2. Yes, considering it somewhat
3. No, not currently considering it

If Yes, when do you expect to leave the industry?

1. Within the next year
2. Within 1 to 2 years
3. Within 2 to 3 years
4. More than 3 years from now
5. Don't know/ Not sure

Is there a specific industry that you are thinking of transitioning to?

[various industries listed]

Have not thought about a specific industry yet

Plan to retire.

Depending on how these questions were answered, a score of 1 (High risk), 2 (Medium risk), or 3 (Low risk) was assigned. The following scoring logic was used to assign a score of 1 or 2 or 3 to indicate the contractor survey respondent's risk of leaving the sector.

Q24, Q25 - Assignment of Retention Risk Score					Questions
Risk Score	Category	Q24 Val	Q25 Val	Q26 Val	
1	High Risk of Leave	1	1	Any	Q24. Are you currently considering leaving the film/TV industry?
					1. Yes, strongly considering it
1	High Risk of Leave	1	2	Not 23	2. Yes, considering it somewhat
1	High Risk of Leave	1	3	Not 23	3. No, not currently considering it
1	High Risk of Leave	2	1	Not 23	
2	Medium Risk of Leave	1	2	23	Q25. [ASK ONLY IF YES IN Q24]. When do you expect to leave the industry?
2	Medium Risk of Leave	1	3	23	1. Within the next year
2	Medium Risk of Leave	1	4	Any	2. Within 1 to 2 years
2	Medium Risk of Leave	1	5	Any	3. Within 2 to 3 years

2	Medium Risk of Leave	2	2, 3, 4, 5	Any	4. More than 3 years from now
3	Low Risk of Leaving	3	n/a	n/a	5. Don't know/ Not sure
Q26. Is there a specific industry that you are thinking of transitioning to?					
12. [various industries listed]					
23. Have not thought about a specific industry yet					
24. Plan to retire.					

## Interview and Focus Group Methodology

### ONE-ON-ONE INTERVIEWS AND FOCUS GROUP

The research phase built a rich baseline of data on the workforce. However, additional data was required to help pinpoint where to focus workforce development efforts going forward. Focus groups and/or structured interviews with three levels of worker were identified as a primary means to address this objective. As part of the interview process, a soft skills research exercise was conducted.

The purpose of the interviews was to gain insight into several issues/questions related to soft skills development in the below-the-line workforce that required further exploration through qualitative research. The research engaged participants at three levels, from crew, to the department heads that hire them, to the producers and production managers that hire the department heads.

The purpose was to provide an opportunity to determine if crew/contractor expectations around skills requirements align with expectations of department heads and production managers/producers. It was also used to help determine if there were common skills requirements across departments or if skills requirements were more specific to each role.

Specifically, the contractor/crew focus group provided an opportunity to drill down on:

- Skills required to enter the industry with a focus on soft skills
- Skills required to advance in the industry with a focus on soft skills
- Opportunities for performance evaluation/feedback
- Availability of and access to opportunities to develop these soft skills

Production managers qualitative research focused on drilling down on three topics/issues:

- Validate or nuance the findings from the Hiring Survey
- Gather more details around the nature of and reasons for tightness
- Discuss opportunities for addressing tightness

Department heads qualitative research focused on drilling down on three topics/issues:

- Nature, severity and impact of labour tightness
- Soft skills required to perform well as a “crew/contractor” in the industry
- Availability and quality of opportunities to develop soft skills

Contractor/crew qualitative research focused on drilling down on four topics/issues:

- Skills required to enter the industry with a focus on soft skills
- Skills required to advance in the industry with a focus on soft skills
- Opportunities for performance evaluation/feedback
- Availability of and access to opportunities to develop these soft skills

Interviews were conducted with 32 individuals using a mix of one on one confidential interviews (23 people) and one focus group (9 people).

- Twenty-three structured interviews were conducted with the following representation of workers: 11 producers and production managers; five department heads representing the special effects, set decorating, stunts, grips, and accounting departments; and seven crew representing the set decoration, camera, grips, accounting, transportation, special effects and production staff departments.
- additionally, a focus group was conducted, which included perspectives from three producers, two production managers, three department heads representing assistant directors (a first assistant director), transportation (a transportation coordinator), and locations (a location manager) and one crew (a production coordinator).

In addition, a career pathways worksheet was used to map each individual’s unique pathway into the industry to validate the assumption that pathways into industry are as varied as the individuals within it, that there is no pattern or single route.

#### SOFT SKILLS RESEARCH EXERCISE

As part of the confidential interview and focus group process, a qualitative research exercise was completed to determine the importance of soft skills, defined as: characteristics and attributes that enable an individual to interact and work well with others and include communication and interpersonal skills, emotional intelligence and critical thinking. Soft skills include: attitude, communication, creative thinking, work ethic, teamwork, networking, decision-making, positivity, time management, motivation, flexibility, problem-solving, critical thinking and conflict resolution.

The rationale for choosing interviews and focus groups as a method to measure how soft skills are key to workforce development was based on the proven approach of in-person interviews and focus groups for gathering both qualitative and quantitative data. Focus groups and/or structured interviews allowed for multiple perspectives from different levels of workers, allowed for gathering qualitative data via observation and captured quantitative information through the physical act of the soft skills card sorting exercise.

This exercise was designed using the British Columbia Labour Market Information Office’s Success in the Future Workforce framework<sup>78</sup> and the adaptation of an instrument used in Korn/Ferry International/Lominger International Art and Science of Talent legacy tools<sup>79</sup>. The research was conducted with 29 below-the-line workers representing hiring managers and hirees to gather perspectives on the importance of soft skills for career entry and progression.

Stakeholder interviews indicated that many leadership skills are required to enter the BTL workforce. In addition, the team was interested in exploring skills that are cross-cutting and not only role- or Department-specific. The leadership skill set as articulated by the Korn/Ferry International/Lominger International Art and Science of Talent

<sup>78</sup> <https://www.workbc.ca/labour-market-industry/skills-for-the-future-workforce.aspx>

<sup>79</sup> [Korn Ferry International](#)

legacy tools is relevant for all Departments and positions. This was confirmed during the roll-out of the exercise which resonated with individuals working in various Departments and positions.

Qualified candidates were recruited through referrals from the Steering Committee. Specific selection criteria were used, where possible, to identify interviewees from each target group (i.e. crew, department heads and producers/production managers).

Selection criteria for Crew included the following:

- have been in the industry for 3 to 5 years
- have worked steadily in the industry during the period of 2015-2017 with film being their sole or main source of income
- intend to work in the industry for the foreseeable future
- represent a number of different roles/departments

Selection criteria for Department Heads included the following:

- have between 5 to 20 years of experience in the industry
- have direct responsibility for hiring below-the-line positions
- intend on continuing to work in the industry

Selection criteria for production managers and producers included the following:

- have between 10 to 20 years of experience in the industry
- intend on continuing to work in the industry
- have worked on major projects (i.e. US and other foreign feature films, Canadian pilot, US and other foreign pilot, Canadian series, US and other foreign series, Canadian movie of the week, Canadian feature film, and/or US and other foreign movie of the week)
- are experiencing shortages
- are responsible for hiring different roles/for different departments

The sample size was determined, in part, by working with available candidates within existing constraints such as production schedules and research team resources. While the sample size for the crew was small at only 6 participants, the crew members represented 5 unique departments/job categories (Accounting, Transport, Special Effects, Grips, Production Office) and each individual averaged over 20 years of work experience in the industry.

The methodology includes three components:

#### 1. Developing the soft skills cards and accompanying worksheet:

- Soft skills cards and an accompanying worksheet were created by drawing on two main tools: 1) the British Columbia Labour Market Information Office's Success in the Future Workforce framework; and 2) the Korn/Ferry International/Lominger International Art and Science of Talent legacy tools.
- A review of the Future Workforce tool identified those skills, competencies and characteristics that are relevant to the BTL workforce. Mapping these attributes against the skills, characteristics and attributes used in the Korn/Ferry International/Lominger International Art and Science of Talent legacy tools resulted in the identification of 23 skills, characteristics and attributes. In most cases, there was a close overlap. In others, skills were re-defined or adjusted to ensure they were relevant for the BTL workforce.
- On the basis of this mapping, a worksheet was created and sort cards developed to execute the soft skills research exercise with interview and focus group participants.

#### 2. Executing the soft skills exercise:

- During interviews and focus groups, participants were asked to complete the soft skills exercise, once for those skills required to enter the industry and then again for those skills required to advance in the industry.

- Specifically, participants were asked to organize the 23 characteristics, skills or attributes into three groups: 1) Mission Critical for this job (8 cards); 2) Important for this job (8 cards); and 3) Less Important for this job (7) focusing on entry level skills.
- Participants were asked to repeat this exercise, this time focusing on those skills required to advance in the industry.

3. Analyzing the results from the soft skills exercise:

- The top 10 Mission Critical skills for entry and the top 10 Mission Critical for advancement from the perspectives of Hiring Managers were identified. These were then compared to one another in order to identify overlaps and divergences.
- The top 10 mission critical skills for entry and the top 10 mission critical skills for advancement were identified from the perspective of crew. These were then compared one another to identify overlaps and divergences.
- Finally, the Mission Critical skills for both entry and advancement for both groups were compared to each other, again to identify overlaps and divergences.

## Appendix E: Secondary Research Sources

The project was greatly aided with public data collection and analysis by the following people:

- Greg Awai, Ministry of Advanced Education, Skills and Training
- Angele Beausoleil, UBC Sauder, now with University of Toronto
- Philip Evans, Ministry of Advanced Education, Skills and Training
- Chris Holling, Labour Market Information Office
- Tricia Johnson, Ministry of Advanced Education, Skills and Training
- Pascale Knoglinger, Ministry of Advanced Education, Skills and Training
- Karen Lamare, Ministry of Tourism, Arts and Culture (ex-officio)
- Shruti Maken, Ministry of Advanced Education, Skills and Training
- Sandra Pitroff, BC Labour Market Information Office
- Naomi Pope, Labour Market Information Office
- MartiLea Thib, Ministry of Jobs, Trade and Technology

Payroll companies and unions had private datasets specific to the film industry. Data accessibility, delivery and logistics required ongoing consultations. Data also underwent processing to ensure compatibility. Some access required the negotiation and execution of a Data Sharing and Confidentiality Agreement. To negotiate access to these various datasets, the project consulted with the following people:

- |                                      |   |
|--------------------------------------|---|
| 1. Ross Agre, Cast & Crew            | 11. Phil Klapwyk, IATSE 891   |
| 2. Paul Altilia, Teamsters 155       | 12. Sharon Love, ICG 669  |
| 3. Gayle Antoshchuk, Teamsters 155   | 13. Cheryl Nex, Entertainment Partners, Canada                      |
| 4. Eric Belcher, Cast & Crew         | 14. Andrea Moore, DGC BC  |
| 5. Sue Brouse, UBCP/ACTRA            | 15. Louise Baker Griffiths, International<br>Cinematographers Guild |
| 6. Connie Brown, UBCP/ACTRA          | 16. Juli Totta, Cast & Crew   |
| 7. Susan Butler-Gray, IATSE 891      | 17. Richard Walker, Entertainment Partners,<br>Canada               |
| 8. Bill Caywood, Cast & Crew         | 18. Shirley White, Cast & Crew                                      |
| 9. Neal Clarence, N.G. Clarence Inc. |   |
| 10. Kathi Fischer, Cast & Crew       |   |

The depth and breadth of the specialized datasets are large. As such, special data processing protocols were initiated to store, manage and manipulate the data. The specialized data also contains proprietary and personal information. Special precautions were taken to make sure that confidentiality was maintained: Names and Social Insurance Numbers were stripped from all data. Only Deetken had access to the anonymized raw data, and only certain employees were approved to handle raw data.



## Appendix F: Literature Review

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# Appendix G: Headcount Analysis Methodology

## Introduction

There are two film payroll companies operating in B.C. (Cast & Crew Entertainment Services and Entertainment Partners, Canada). Both have robust, searchable data that is specific to the film industry. Both companies graciously participated in this project. Unions also collect demographic and other data on their members. Six local unions participated in this project and provided data used to evaluate headcount and work patterns.

Given the unusual characteristics of the motion picture industry and the breadth and quality of structured data available from the specialized datasets, the study relied more heavily on these specialized data sources than the publicly-available data. The payroll data in particular was used to answer with a high degree of accuracy questions such as:

1. How many different individuals work in a role and department?
2. What is the distribution of full-time / part-time / other based on:
  - a. number of work days
  - b. number of hours
3. What is the distribution of annual pay by relevant breakpoints?
4. What is the distribution of pay by type between straight pay, overtime and other benefits included in taxable income?

Both payroll companies provided five years of data, from January 1, 2013 through December 31, 2017.

## Determining Headcount

Depending upon the productions they work on, below-the-line workers may be paid via one or the other payroll company. The probability that a given below-the-line worker has been paid by both companies increases over time. Therefore, in order to use the payroll data to determine headcount and do cohort analysis, a methodology was required to combine datasets based on unique individuals. The approach taken was to first evaluate payees by their department and six-digit postal code of residence. Unique combinations of department and postal code were assumed to be unique individuals. Duplicate combinations were then evaluated to determine instances where payees were paid by different payroll companies during the same two-week pay period. At this point of the analysis, roughly 85% of total payees across the datasets were assumed proven to be individual workers. The remainder were also assumed to be unique individuals. Individuals were associated to a given department based on the department for which they worked the most hours. Headcount was determined for 2017 only, as the payroll companies provided six-digit postal code for only 2017.

## Determining Work Patterns

Once headcount was determined, work patterns were evaluated based on the following assumptions:

	# of hours per year	# of days per year
Temporary	0-30 hours	0-4 days
Casual	30-520 hours	4-69 days
Part-time	520-1560 hours	69-208 days
Full-time	> 1560 hours	> 208 days

Sources used for determining these assumptions include:

- 1,560 hours – From WorkBC website description: full-time work has a usual work week of 30 hours or more at a main/only job (30 hours \* 52 weeks). (see [link](#))
- 520 hours – From Government of Canada Public Service Part-time Regulations: these are individuals “who are ordinarily required to work more than one-third of the normal scheduled daily and weekly hours of work established for persons doing similar work”. If 1560 is full time, then  $1560/3 = 520$  is taken as the lower bound for part-time. (see [link](#))
- 30 hours – Was selected to investigate the extent of very short-term work by many individuals in the sector
- A worker needed to have recorded any amount of time to be determined as having worked that day

## Limitations

The roughly 15% of payees that could not be proven to include duplicates and were assumed to be unique individuals may overinflate the number of individuals paid through the payroll companies in 2017. However, the large majority of these payees (individuals) likely were temporary or casual workers and therefore account for a disproportionately small number of hours worked and compensation.

Anecdotal evidence suggests that payroll companies’ data covers the vast majority of productions in the Province. However, neither payroll nor union datasets covers all production activity. Payroll companies generally handle all productions that access tax credit programs and/or utilize unionized labour and a large percentage of other productions. That said, it is likely that non-payroll company productions may skew more-heavily toward smaller productions and commercial productions. Anecdotal evidence suggests total annual commercial production expenditures, for example, are in the neighbourhood of \$100 to \$400 million. The majority of the labour component of these expenditures is not handled through the payroll companies.

The methodology does not include a method for identifying individuals who may have been represented as multiple payees in the datasets, for example, someone who was paid as an individual and also via a loan-out corporation (and with the same postal code of residence).

Effort was made to validate headcount and work pattern analysis by comparing results to data provided by the unions. However, what was provided by the unions was inconsistent, with some providing days rather than hours worked, and some providing data on all members and others excluding permittees. The payroll data has an advantage over union data is it allows for controlling for dual-card memberships (the process of belonging to two unions or guild simultaneously) across unions.

## Appendix H: Union and Guild Pathways

Unions and Guilds: All six relevant B.C. unions and guild were approached with the purpose of understanding their role in growing and/or evolving the below-the-line production workforce and align to demand. Five of the unions participated in two-hour, in-person interviews, and one union participated through the submission of written answers to structured questions. The unions and their staff that participated were:

- Sue Brouse, Director of Member Services and Human Resources, UBCP/ACTRA
- Louise Baker Griffiths, Professional Development, International Cinematographers Guild (ICG 669);
- Peter Hayman, Executive Director, International Cinematographers Guild (ICG 669)
- Shawn Henter, Teamsters 155
- Phil Klapwyk, Business Representative, IATSE 891
- Daryl Litke, Business Agent, ACFC West
- Andrea Moore, Director of Operations, DGC BC
- Wendy Newton, Production Services, International Cinematographers Guild (ICG 669)
- Lorrie Ward, Secretary-Treasurer/Principal Officer, Teamsters 155
- Michelle Yeardeley, Training, International Cinematographers Guild (ICG 669)
- Kat Yee, Membership, International Cinematographers Guild (ICG 669)

There are different methods to enter each respective union with different requirements and timeframes for different levels of membership. However, it is unlikely that these various requirements pose any substantial barrier to entry for labour. Unions have been rapidly growing to meet recent increased labour demand. Moreover, when union-affiliated labour is at capacity, producers are often permitted to hire non-union workers.

Union affiliation methods likely pose no substantial barrier to entry. This study reports high-level pathways into unions and guilds, as reported by the unions. Each of the unions have websites with more-detailed information. To the extent that there is a discrepancy between this document and the union's website, the information on the union's website should be considered determinative. In addition to the costs listed below, all unions charge a small percentage of workers' income.

# Appendix I: Key Motion Picture-Related B.C. Post-Secondary Education Offerings

BCIT: Television & Video two-year diploma program:

- Program covers full-spectrum of TV and video production
- Learn about industry standard digital and HD equipment and workflows
- Learn how to produce content in creative, high-energy teams on a weekly basis
- Receive support for entering projects into film festivals or other competitions

Capilano University: School of Motion Picture Arts includes:

- Bachelor of Motion Picture Arts
- Motion Picture Arts Diploma
- Motion Picture Arts Certificate
- Cinematography for Film and Video Certificate
- Indigenous Independent Digital Filmmaking
- Costuming for Stage and Screen Diploma
- Digital Visual Effects Diploma
- Documentary Certificate
- Fundamental Grip work for Digital Imaging and Film
- Fundamental Lighting for Digital Imaging and Film

UBC: Department of Theatre and Film includes:

- Acting
- Design production
- Film production
- Film studies
- Theatre studies

Emily Carr Institute of Art and Design: Offers a Film, Video and Integrated major as part of a Bachelor of Fine Arts Degree which includes:

- Film and video production
- Sound art
- Communications
- News media
- Advertising
- Entertainment
- Set design
- Performance

Gulf Islands Film and Media School: Courses available in the following areas:

- Dramatic film production
- Documentary
- Visual effects and animation
- Directing
- Acting on camera
- Advanced acting on camera
- Game Design
- YouTube production
- 3D computer animation
- Film photography
- Soundtrack for film and TV
- Let's make a feature
- First Nations

Langara College: Offers three certificate programs and other related programs:

- Acting for the Screen
- Writing for the Screen
- Directing for the Screen
- Digital Film Production
- Documentary Film Production
- Art of Camera and Lighting

Infocus Film School: Offers programs in the following areas:

- Film Production
- Visual Effects
- Writing for Film and TV
- Compositing for Visual Effects
- Foundation Film

SFU: Offers major in Film as part of a Bachelor of Fine Arts Degree. Students can also choose minors:

- Extended Minor in Film
- Minor in Film and Video Studies

Vancouver Film School: One-year certificate programs in:

- 3D animation and Visual Effects
- Animation Concept Art
- Classical Animation
- Acting Essentials
- Acting for Film and Television
- Digital Design
- Film Production
- Game Design
- Makeup Design for Film and Television
- Programming for Games, Web and Mobile
- Sound Design for Visual Media
- Writing for Film and Television
- Foundation Visual Art and Design

Centre for Arts and Technology, Kelowna B.C.: Offers an 18-month Digital Filmmaking program with courses in:

- Visual Storytelling
- Screenwriting
- Location Audio for Film and TV
- Media Studies – Film
- Digital Film Editing
- Production Operations
- Documentary
- Audio for Video Production
- Casting and Directing Talent
- Cinematography
- Production Design
- Film Screening
- Narrative Film
- Visual Effects
- Internet Programming
- Emerging Technologies

Selkirk College: International Digital Film Program:

- Screenwriting
- Systems and Logistics
- Global Film Studies
- Beginning Editing
- Advanced Editing
- Sound for Film
- Technical Fundamentals
- After Effects
- Directing and Cinematography
- Business for Film

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