

Eco-Awareness Survey

*Interest and Implementation of Sustainable/Green
Production Practices*

Survey among workers of the audio-visual industry



September 2022



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A woman with dark hair is shown in profile, looking towards a television monitor in a dimly lit room. She has her hand near her chin in a thoughtful pose. In the foreground, a stack of papers is visible. To the left, a professional video camera is mounted on a tripod, with its LCD screen displaying a scene. Another monitor in the background also shows a similar scene. The overall atmosphere is that of a professional production environment.

CONTEXT, OBJECTIVES AND METHODOLOGY

CONTEXT, OBJECTIVES AND METHODOLOGY



CONTEXT

Telefilm Canada commissioned Leger to survey workers in the audio-visual/production industry to assess their interest and awareness towards Sustainable/Green production practices (SGPP) in the workplace. The survey was conducted as part of Telefilm's Action Plan on Eco-responsibility 2022.



HOW

A **Web survey** was conducted among stakeholders working in the audio-visual industry. A total of **407 respondents completed the survey**. An open link was sent by email to respondents via various partners in the industry: AQPM, BSO, CBC, CMF, CMPA, ISO, NFB and Radio-Canada. Profile of respondents is provided in detail at the end of the document.



WHEN

The survey was carried out between **June 5 and July 28, 2022** with the average interaction lasting 10 minutes. The survey was available in English and French, based on each respondent's preference.

NOTES TO READERS

ROUNDING OF NUMBERS

The numbers presented in this report have been rounded out. However, the numbers before rounding were used to calculate the sums presented. Therefore, these sums might not correspond to the manual addition of the numbers presented.

GEOGRAPHIC DISTRIBUTION OF RESPONDENTS

It should be noted that for some provinces, the number of respondents is too small to draw statistical conclusions. These results are presented with asterisks in the detailed tables and should be taken as indicative only. Only one respondent was from the Northwest Territories, so results for this region are not presented.

SIGNIFICANT DIFFERENCES

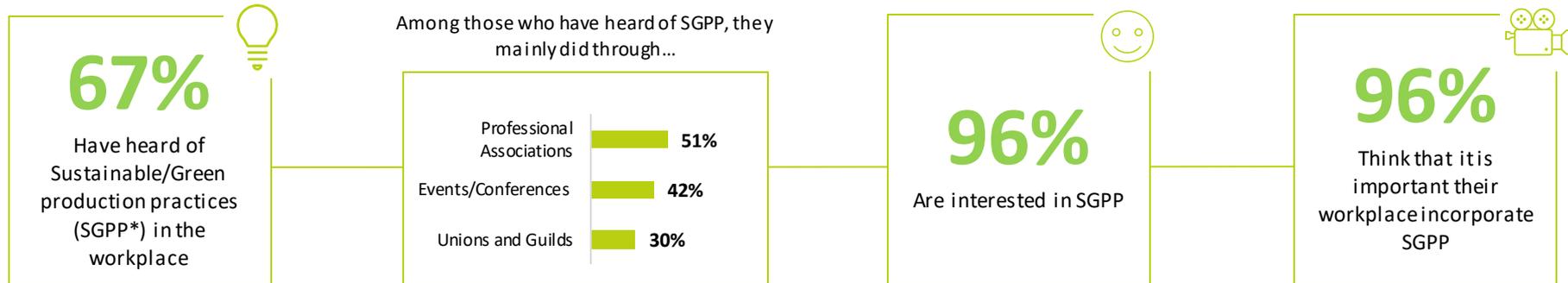
Results presenting significant and relevant differences are indicated in a text box next to the presentation of overall results.

*Numbers in **bold red** characters indicate statistically significant differences that are lower than the complement, while numbers in **bold green** indicate statistically significant differences that are higher than the complement.*



KEY FINDINGS

KEY RESULTS (1/2)



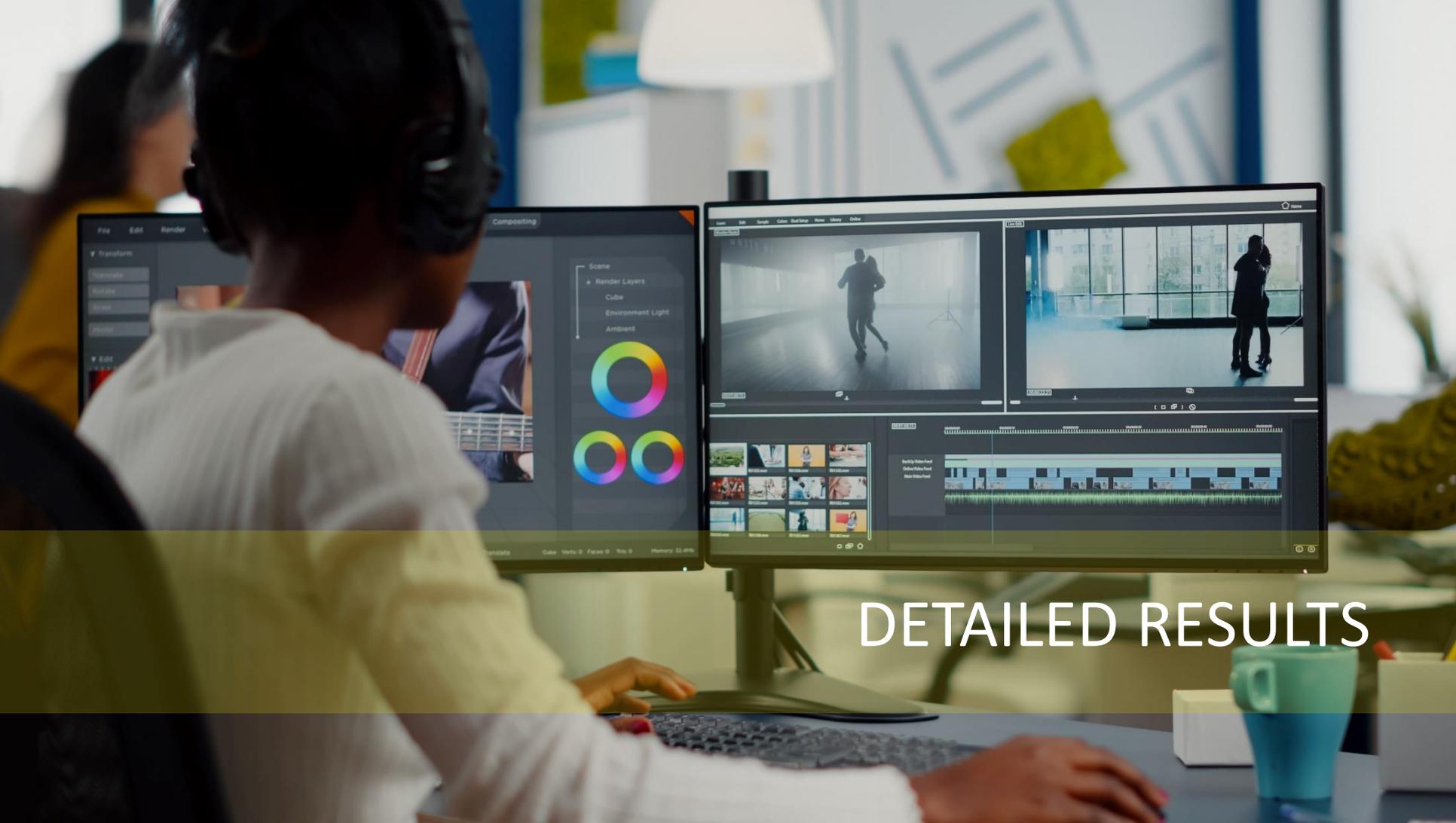
*SGPP = Sustainable/Green Production Practices

KEY RESULTS (2/2)

Workers in the audio-visual industry know and understand the importance of SGPP. In fact, spontaneously, more than a quarter (28%) define SGPP as: *Decisions/production practices that create minimal impact on the environment*. Virtually all the respondents (96%) are interested in SGPP and think that it is important their workplace incorporate them. Overall, almost the same proportion (97%) are aware of at least one practice. Workers in Quebec, on the other hand, are significantly less likely (93%) to admit to knowing at least one SGPP. In addition, nearly nine out of ten workers (89%) believe that the implementation of SGPP will have an important impact on the environment and almost the same proportion (86%) believe that it will have an important impact on their workplace.

The SGPP best known by respondents are: *Recycling and Compost Programs* (91%), *Repurposing, Donating and Upcycling* (82%) and *Greener Transportation Options* (81%). Among those SGPP that are most implemented in the workplace, we find in the first two positions: *Recycling and Compost Programs* (82%) and *Repurposing, Donating and Upcycling* (64%). As for other SGPP, only a third or less of respondents have implemented them in their workplaces. Although some SGPP are less popular, there is some interest in them among industry workers. Roughly one quarter of respondents said that their workplace had not yet implemented the practice, but that they were thinking about: *Green Vendors/Suppliers* (28%), *Greener transportation options* (28%), *Use of Carbon Calculators* (26%), *Battery Powered/Clean(er) Tech* (23%) and *Alternatives-Biofuels* (22%).

Regarding tools and support, in order of importance, three quarters of respondents (72%) mention wanting **Knowledge of Best Practices**, followed by **Financial Incentives** (70%) and **Directory of Green vendors/Suppliers** (67%). The results show a great opportunity to increase the implementation of SGPP in the workplace. By providing support to workers who already have an interest in the practices, the implementation of SGPP will encounter fewer barriers in the workplace. On the other hand, some respondents spontaneously mentioned in the open-ended questions the importance of adapting SGPP to the reality of each filming location/industry. For example, documentary filming and the gaming industry both have specific needs that must be addressed to ensure success. Therefore, adaptability and flexibility are important factors to take into consideration when implementing SGPP.

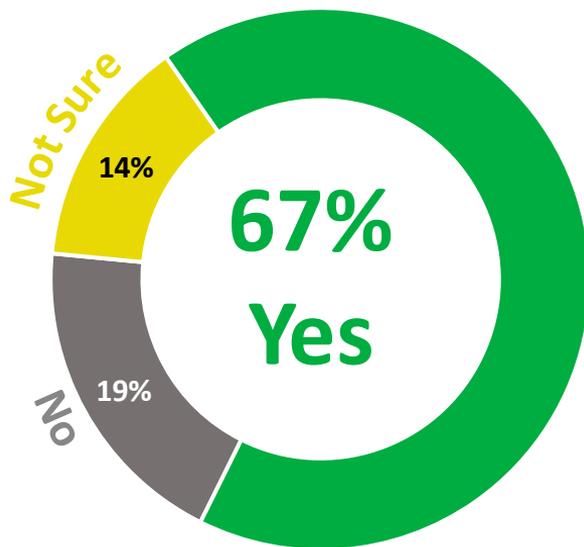


DETAILED RESULTS

AWARENESS OF SGPP

Q4. Have you heard of any sustainable/green production practices that help reduce the carbon footprint of productions, whether it is on set, in offices, in studio, in post-production?

Base: All respondents (n=407)

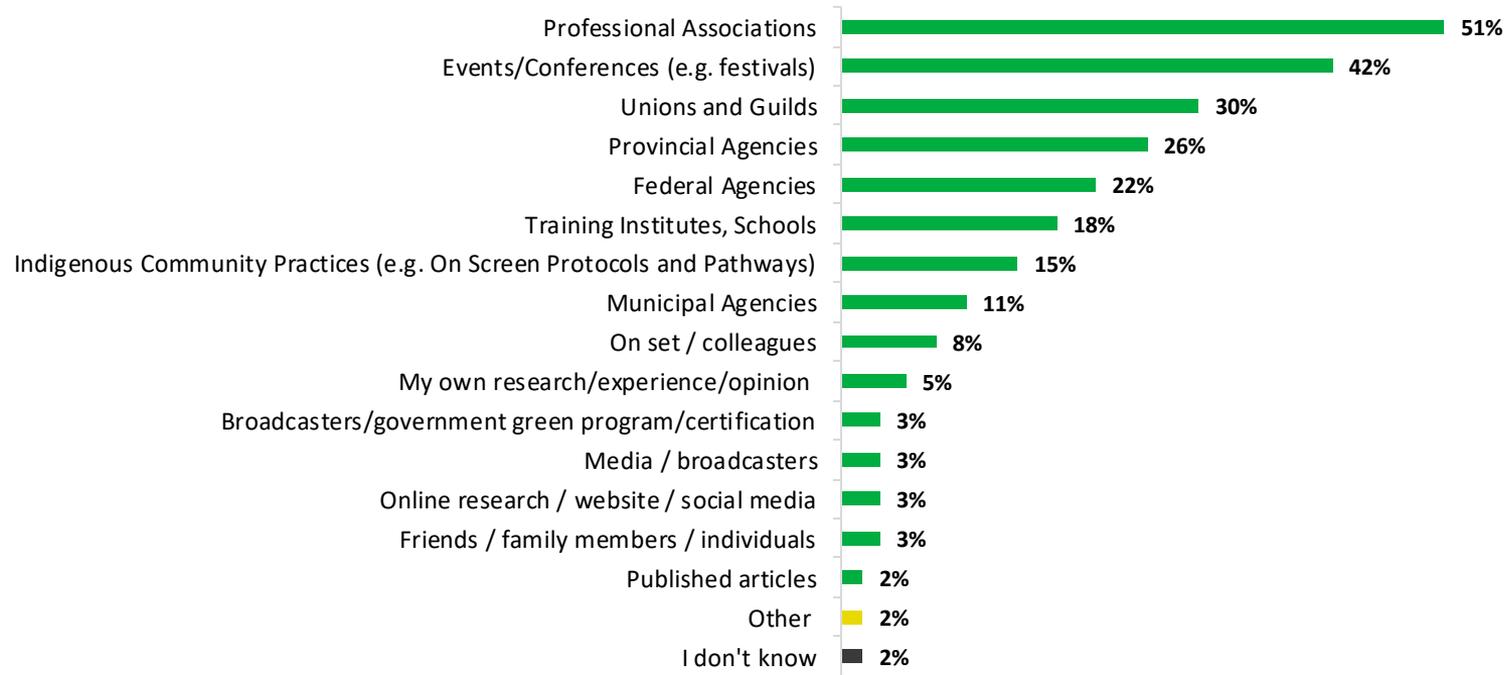


Higher proportion of YES among:
- Respondents who mostly work in feature films (75%)

SOURCE OF AWARENESS OF SGPP

Q5. Where have you heard about sustainable/green production practices? *Select all that apply**

Base: Respondents who have heard of sustainable/green production practices (n=273)



*As respondents could give more than one answer, total may exceed 100%.

SOURCE OF AWARENESS OF SGPP - Detailed results (top answers)

Q5. Where have you heard about sustainable/green production practices? Select all that apply*

Base: Respondents who have heard of sustainable/green production practices

	Total	AGE			PROVINCE						TYPE OF CONTENT				
		18-34	35-54	55+	BC	AB	MB/SK	ON	QC	ATL	Feature film	Television	Interactive Digital Media	Short Form Screen Content	Animation
N=	273	41	154	71	38	14**	15**	117	78	11**	150	177	41	60	33
Professional Associations	51%	49%	55%	46%	55%	36%	53%	48%	58%	45%	54%	56%	54%	50%	64%
Events/Conferences (e.g. festivals)	42%	29%	45%	39%	42%	36%	53%	42%	41%	36%	45%	38%	41%	40%	42%
Unions and Guilds	30%	37%	28%	34%	34%	14%	7%	35%	31%	18%	35%	34%	29%	33%	36%
Provincial Agencies	26%	17%	26%	27%	37%	14%	40%	31%	14%	18%	30%	28%	24%	28%	33%
Federal Agencies	22%	7%	21%	28%	24%	14%	20%	23%	21%	18%	25%	20%	24%	18%	27%
Training Institutes, Schools	18%	20%	20%	15%	16%	14%	20%	18%	23%	0%	23%	16%	29%	23%	30%
Indigenous Community Practices (e.g. On Screen Protocols and Pathways)	15%	2%	16%	18%	16%	14%	7%	21%	8%	18%	19%	14%	20%	17%	24%
Municipal Agencies	11%	5%	8%	15%	8%	7%	13%	14%	6%	18%	14%	11%	10%	10%	15%
On set / colleagues	8%	17%	6%	7%	16%	0%	0%	9%	5%	9%	7%	8%	2%	12%	6%
My own research/experience/opinion	5%	5%	5%	6%	5%	7%	7%	5%	5%	9%	5%	6%	2%	8%	3%

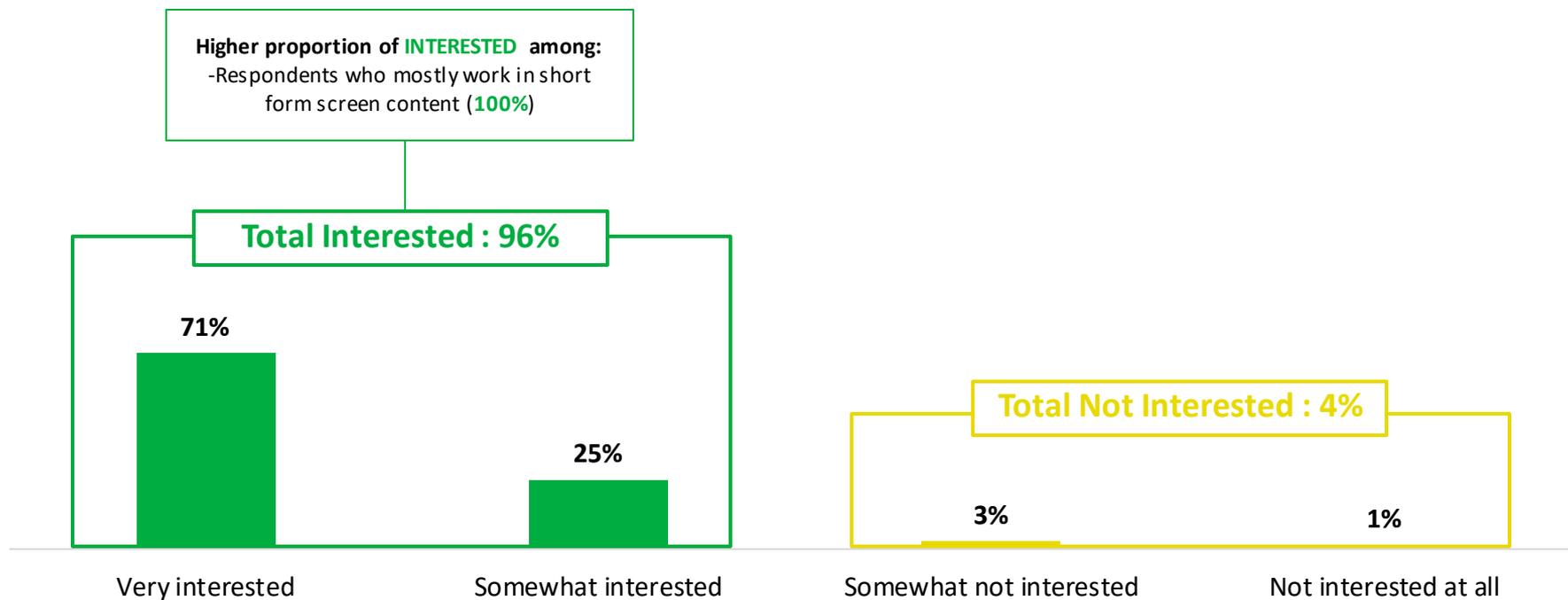
*As respondents could give more than one answer, total may exceed 100%.

**Given the small number of respondents (n<30) data are presented for illustrative purposes only.

INTEREST IN SGPP

Q6. How interested are you in sustainable/green production practices?

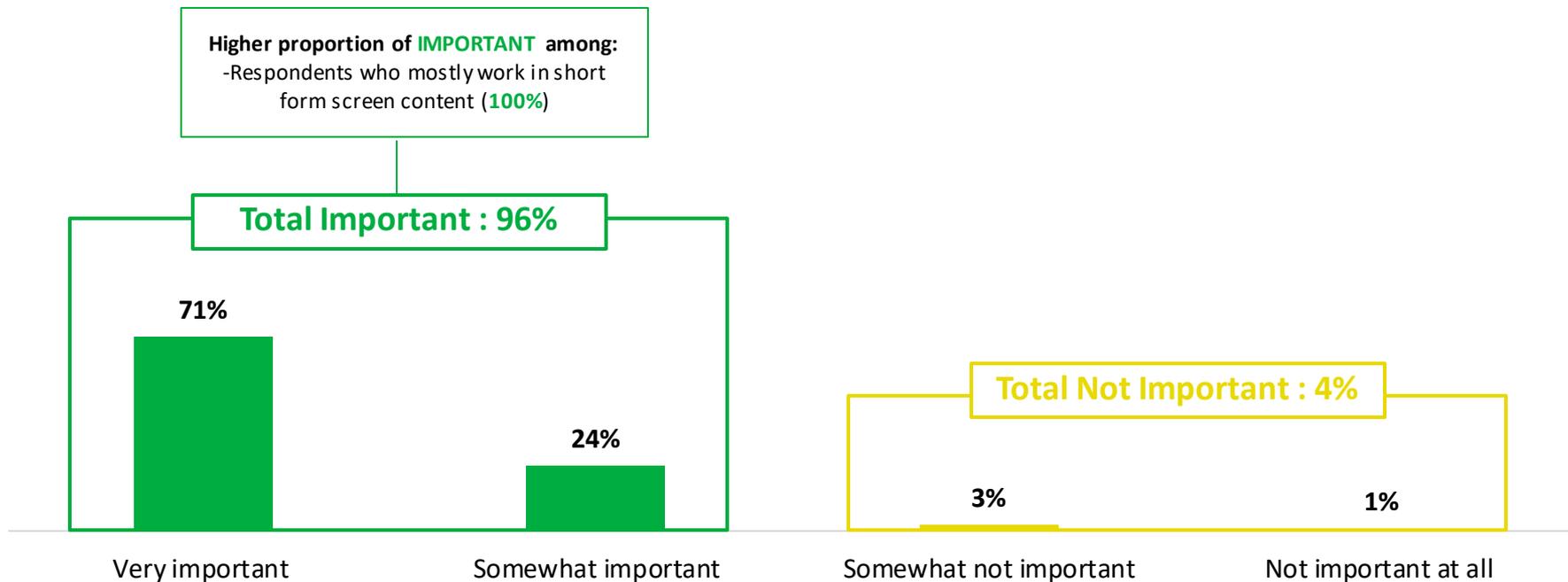
Base: All respondents (n=407)



IMPORTANCE OF IMPLEMENTING SGPP IN THE WORKPLACE

Q7. How important is it for you that your workplace incorporates sustainable/green production practices, whether it is on set, in offices, in studio, in post-production?

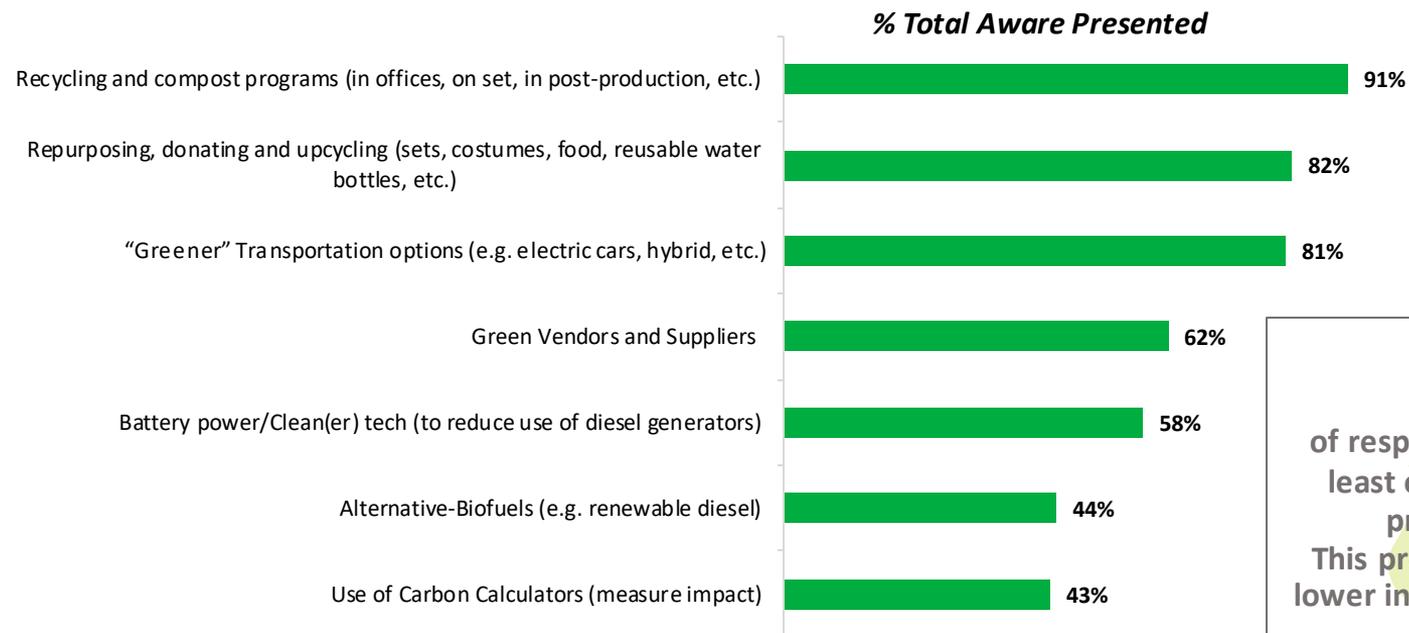
Base: All respondents (n=407)



AWARENESS OF SPECIFIC SGPP IN THE WORKPLACE

Q8. Before today, were you aware of any of the following sustainable/green production practices, whether it is on set, in offices , in studio, in post-production?

Base: All respondents (n=407)



97%
of respondents are aware of at least one sustainable/green production practice
This proportion is significantly lower in the province of Quebec
(93%)

AWARENESS OF SPECIFIC SGPP IN THE WORKPLACE – Detailed results

Q8. Before today, were you aware of any of the following sustainable/green production practices, whether it is on set, in offices , in studio, in post-production?

Base: All respondents

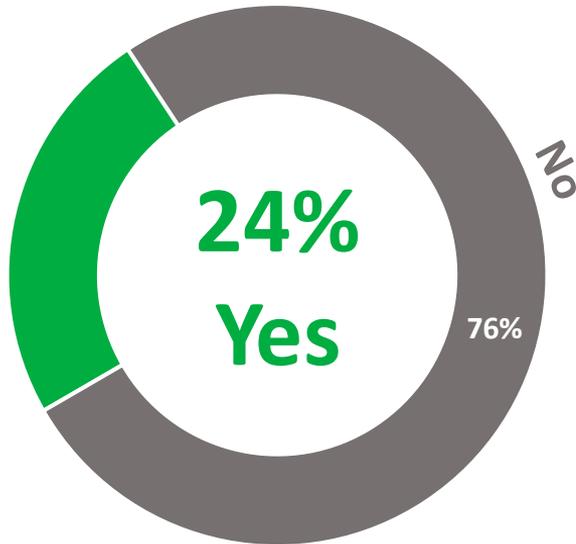
	Total	AGE			PROVINCE						DECISION MAKER		Training in the past 3 years	
		18-34	35-54	55+	BC	AB	MB/SK	ON	QC	ATL	Yes	No	Yes	No
% Total Aware Presented	N= 407	57	232	109	51	20*	20*	178	121	16*	365	42	98	309
Recycling and compost programs (in offices, on set, in post-production, etc.)	91%	88%	92%	92%	100%	95%	95%	93%	85%	81%	93%	79%	98%	89%
Repurposing, donating and upcycling (sets, costumes, food, reusable water bottles, etc.)	82%	70%	84%	83%	88%	80%	90%	86%	73%	81%	83%	71%	94%	78%
“Greener” Transportation options (e.g. electric cars, hybrid, etc.)	81%	84%	79%	83%	86%	85%	90%	83%	77%	69%	82%	71%	94%	77%
Green Vendors and Suppliers	62%	54%	60%	69%	82%	60%	55%	67%	47%	56%	63%	50%	82%	56%
Battery power/Clean(er) tech (to reduce use of diesel generators)	58%	56%	56%	63%	73%	55%	75%	61%	49%	38%	60%	45%	73%	53%
Alternative-Biofuels (e.g. renewable diesel)	44%	37%	40%	56%	69%	50%	55%	46%	30%	31%	46%	26%	63%	38%
Use of Carbon Calculators (measure impact)	43%	35%	44%	43%	57%	35%	60%	44%	35%	38%	46%	19%	74%	33%

*Given the small number of respondents (n<30) data are presented for illustrative purposes only.

TRAINING ON SGPP

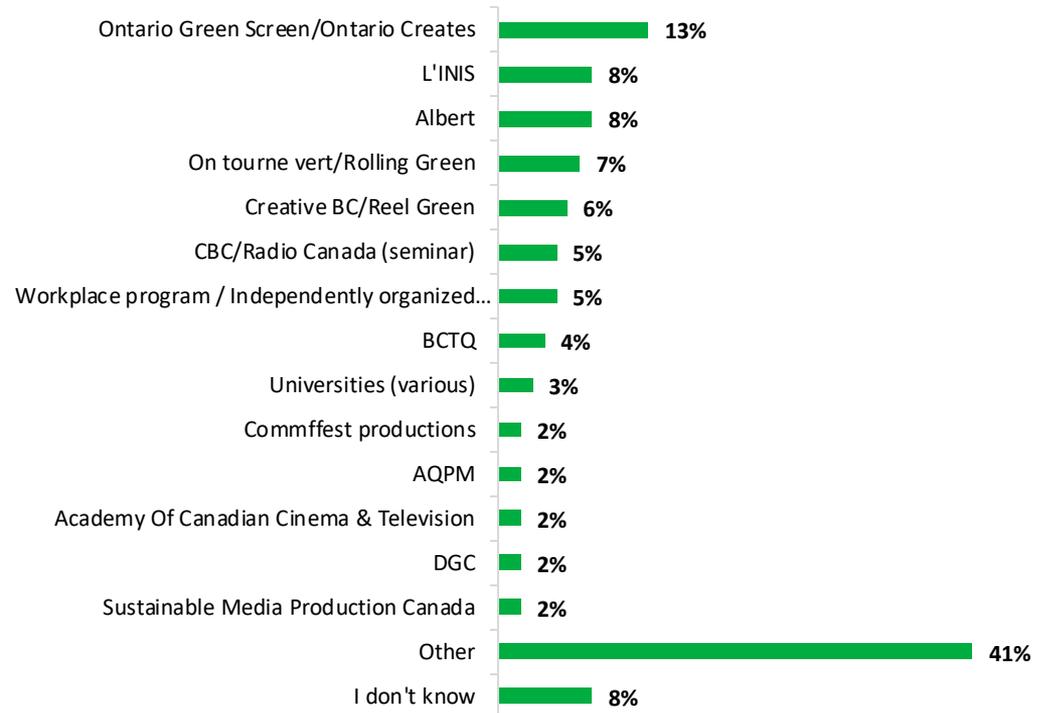
Q9. In the last three years, have you attended training on sustainable/green production practices?

Base: All respondents (n=407)



Q9B. What was the training (name of the training, name of the organization, location, etc.)?

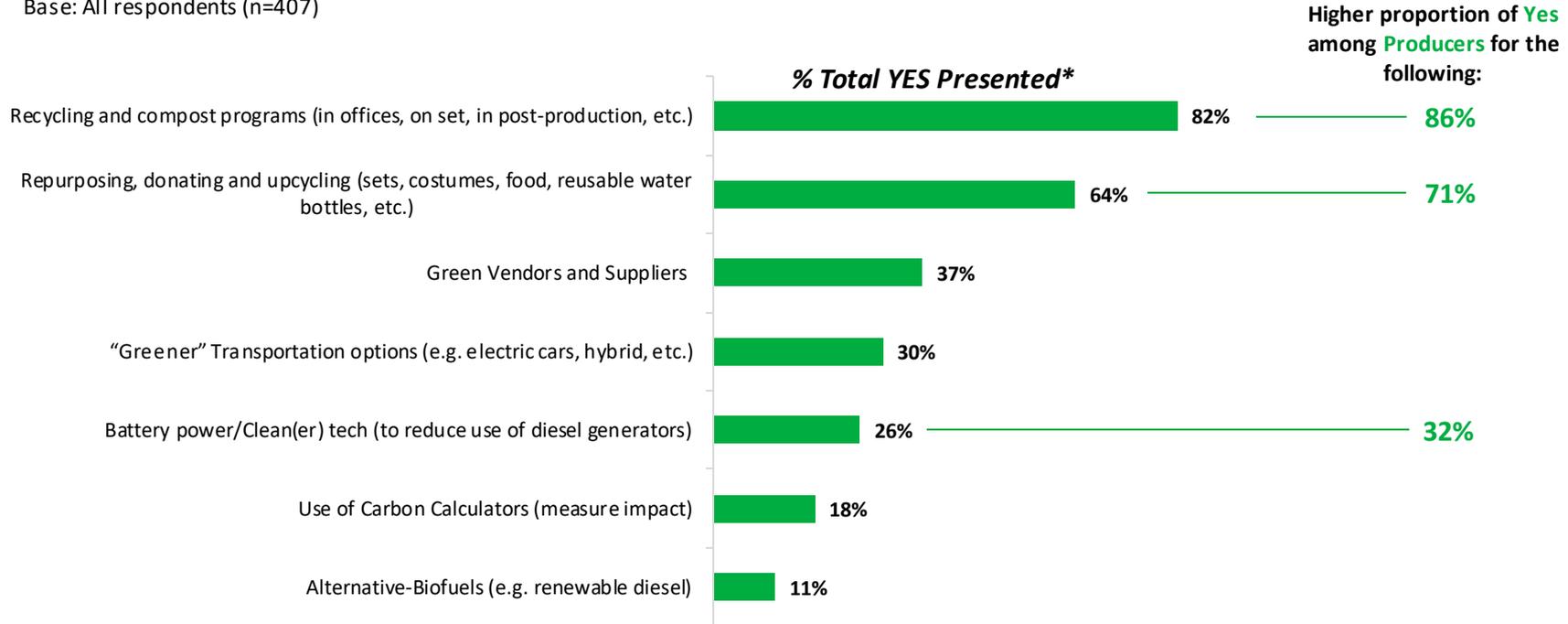
Base: Respondents who have had training on SGPP (n=98)



IMPLEMENTATION OF SGPP IN THE WORKPLACE (1/2)

Q10. Please indicate whether your workplace has implemented the following sustainable/green production practices, whether it is on set, in offices, in studio, in post-production?

Base: All respondents (n=407)



* % TOTAL YES is the sum of : Yes, it is implemented and Yes, we have started/are starting the process to implement it

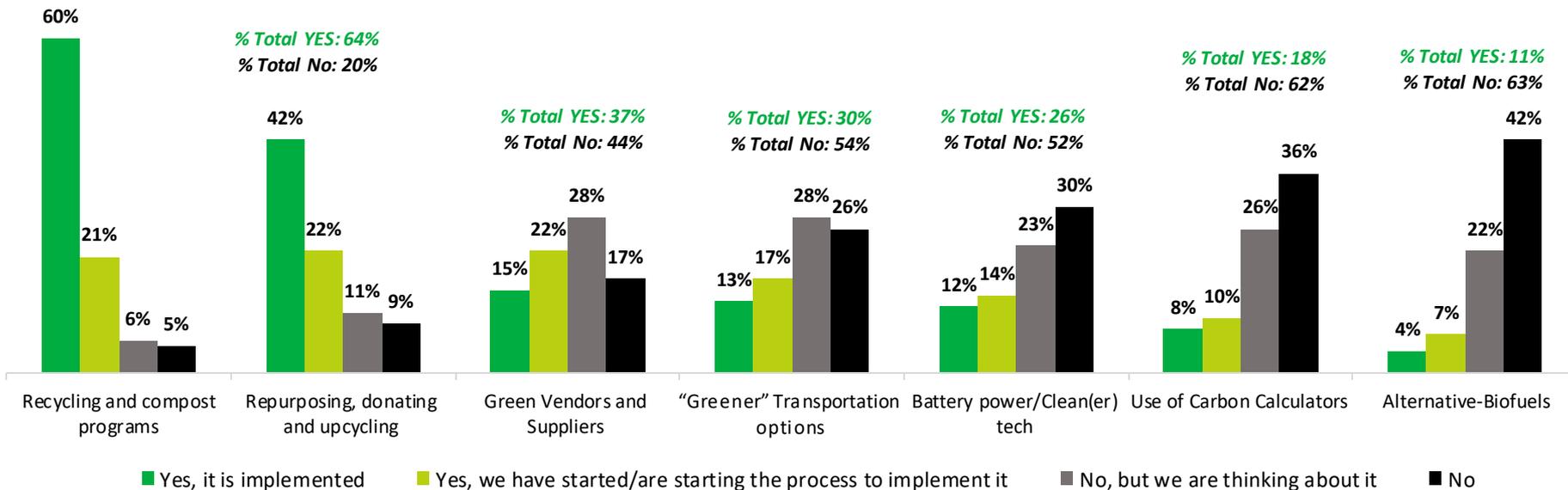
IMPLEMENTATION OF SGPP IN THE WORKPLACE (2/2)

Q10. Please indicate whether your workplace has implemented the following sustainable/green production practices, whether it is on set, in offices, in studio, in post-production?

Base: All respondents (n=407)

% Total YES: 82%

% Total No: 11%



IMPLEMENTATION OF SGPP IN THE WORKPLACE – Detailed results

Q10. Please indicate whether your workplace has implemented the following sustainable/green production practices, whether it is on set, in offices, in studio, in post-production?

Base: All respondents

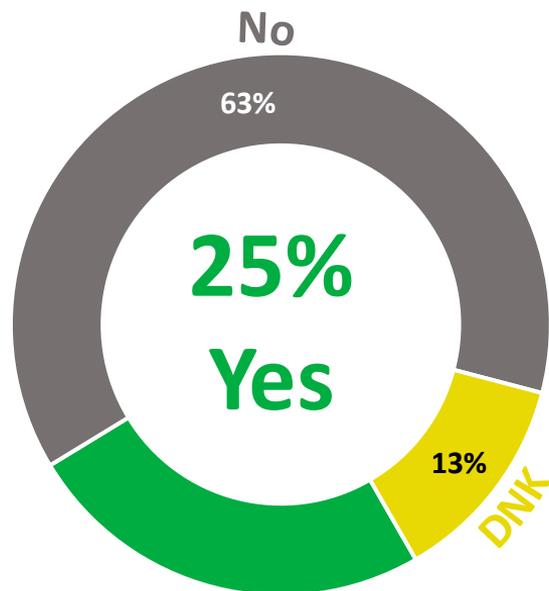
	Total	AGE			PROVINCE						DECISION MAKER		Heard of any SGPP		Training in the past 3 years	
		18-34	35-54	55+	BC	AB	MB/SK	ON	QC	ATL	Yes	No	Yes	No	Yes	No
% Total YES Presented	N= 407	57	232	109	51	20*	20*	178	121	16*	365	42	98	309	57	232
Recycling and compost programs (in offices, on set, in post-production, etc.)	82%	77%	83%	80%	90%	90%	90%	79%	79%	94%	84%	62%	85%	74%	88%	80%
Repurposing, donating and upcycling (sets, costumes, food, reusable water bottles, etc.)	64%	58%	63%	71%	67%	75%	60%	66%	58%	75%	68%	36%	73%	46%	80%	60%
Green Vendors and Suppliers	37%	26%	36%	42%	51%	55%	35%	33%	35%	31%	39%	17%	43%	23%	52%	32%
“Greener” Transportation options (e.g. electric cars, hybrid, etc.)	30%	25%	27%	40%	39%	40%	45%	24%	31%	31%	32%	10%	32%	22%	38%	28%
Battery power/Clean(er) tech (to reduce use of diesel generators)	26%	16%	23%	36%	31%	25%	25%	25%	24%	31%	28%	5%	30%	14%	32%	24%
Use of Carbon Calculators (measure impact)	18%	14%	19%	19%	24%	30%	35%	17%	12%	19%	20%	2%	23%	6%	38%	12%
Alternative-Biofuels (e.g. renewable diesel)	11%	4%	8%	21%	4%	15%	5%	11%	13%	19%	12%	0%	13%	4%	15%	9%

*Given the small number of respondents (n<30) data are presented for illustrative purposes only.

HELP/SUPPORT FOR THE IMPLEMENTATION OF SGPP

Q11. Did you receive help/information from an association, union/guild, public agency, organization, or eco-consultant on implementing the sustainable/green production practice(s)?

Base: Respondents who have implemented atleastone SGPP (n=357)

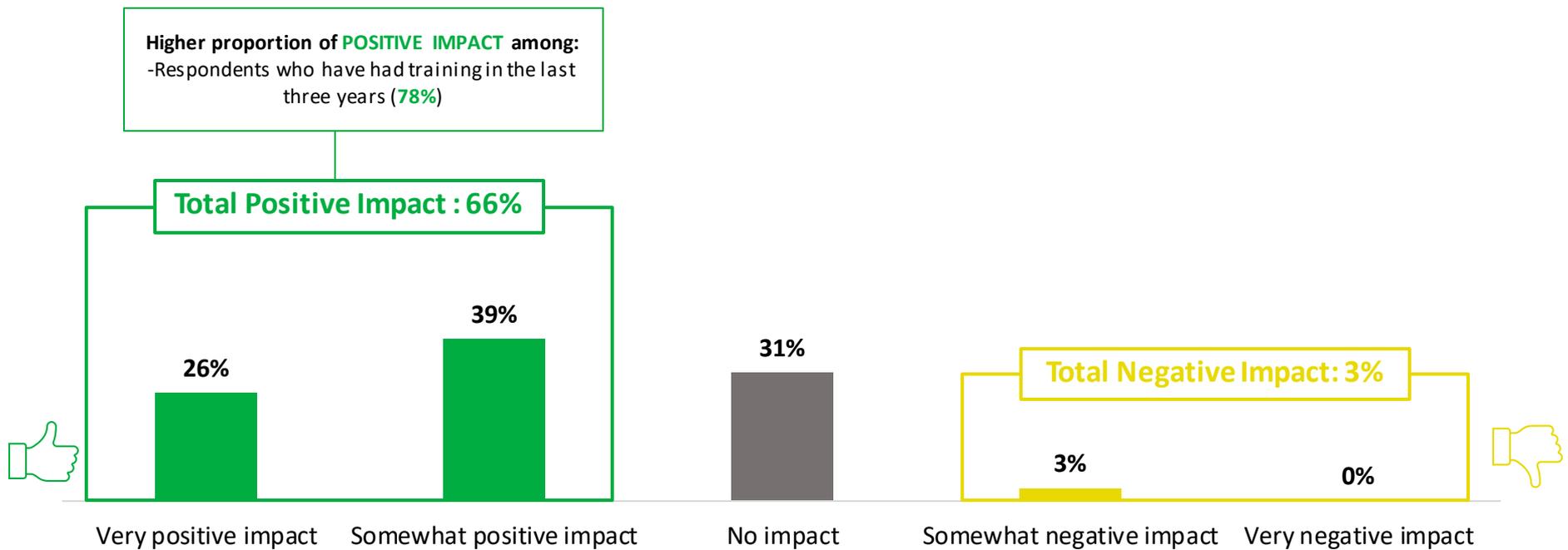


HELP/SUPPORT FOR THE IMPLEMENTATION OF SGPP

Q12. How has the implementation of the sustainable/green production practice(s) impacted your work?

Base: Respondents who have implemented atleast one SGPP (n=357)

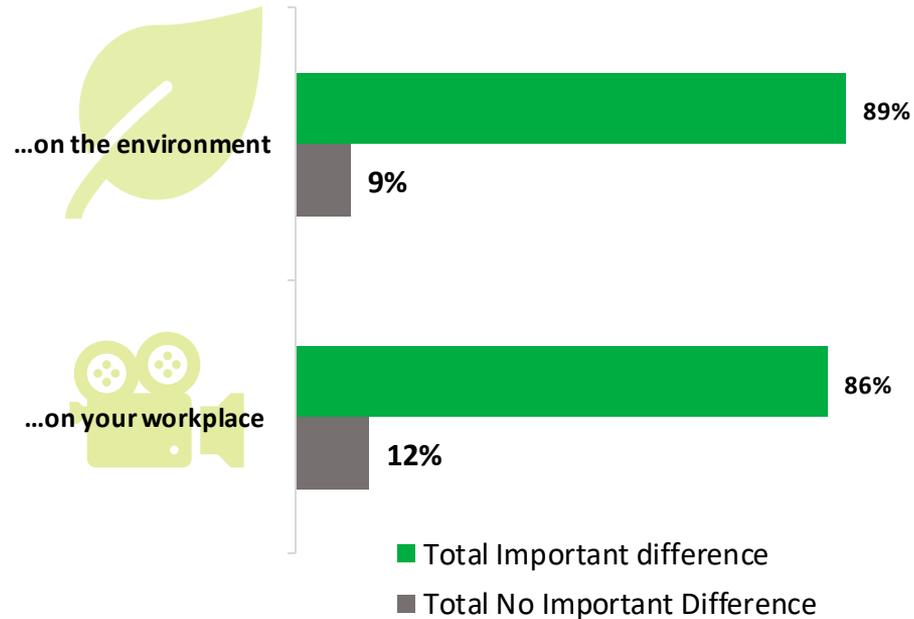
Higher proportion of **POSITIVE IMPACT** among:
 - Respondents who have had training in the last three years (**78%**)



IMPACT OF THE SGPP

Q13. To what extent do you believe that implementing sustainable/green production practices can make a difference...

Base: All respondents (n=407)



IMPACT OF THE SGPP- DETAILED RESULTS

Q13. To what extent do you believe that implementing sustainable/green production practices can make a difference...

Base: All respondents

Total	AGE			PROVINCE						DECISION MAKER		Heard of any SGPP		Training in the past 3 years	
	18-34	35-54	55+	BC	AB	MB/SK	ON	QC	ATL	Yes	No	Yes	No	Yes	No
N= 407	57	232	109	51	20*	20*	178	121	16*	365	42	273	78	98	309

...on the environment

Total Important difference	89%	91%	88%	92%	88%	95%	90%	88%	91%	88%	89%	95%	91%	86%	91%	89%
Total No important difference	9%	7%	11%	8%	10%	5%	5%	11%	7%	13%	10%	5%	8%	9%	7%	10%

...on your workplace

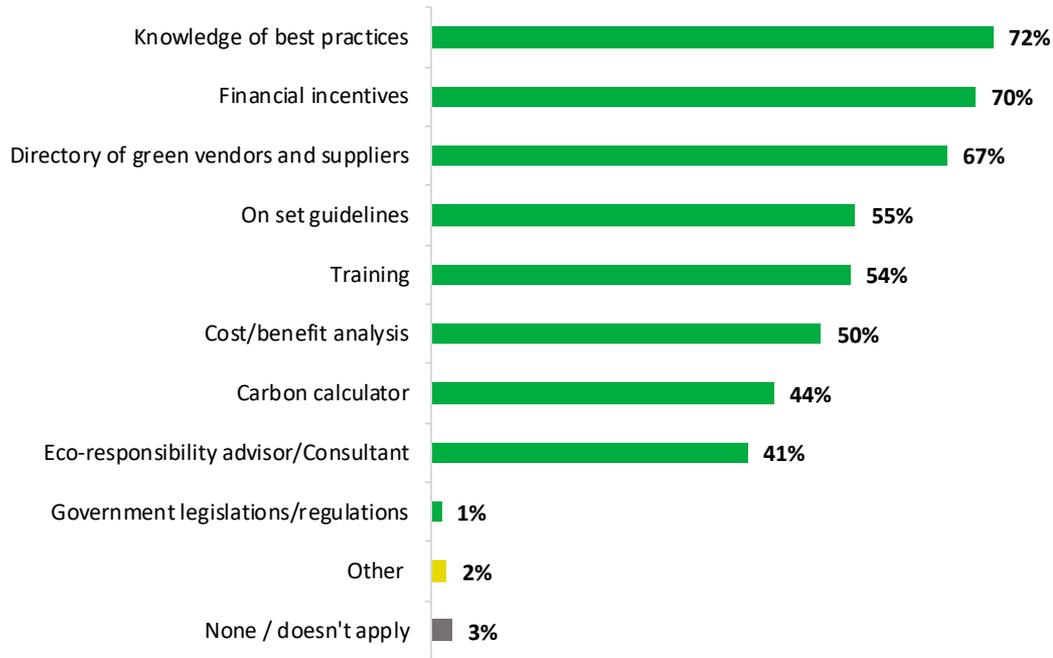
Total Important difference	86%	82%	82%	95%	88%	90%	80%	85%	85%	88%	85%	88%	89%	79%	87%	85%
Total No important difference	12%	16%	15%	5%	8%	10%	20%	13%	12%	6%	12%	12%	10%	13%	11%	12%

*Given the small number of respondents (n<30) data are presented for illustrative purposes only.

SUPPORT OR TOOL NEEDED

Q14. What support, or tools, do you need to better adopt sustainable/green production practices?

Base: All respondents (n=407)



The following are some examples giving by respondents:

« Producers & production must encourage & facilitate these measures. Individual crew members can't do it without support & time & resources »

« Guidance geared to game development instead of just Film/TV »

« Proper funding »

*As respondents could give more than one answer, total may exceed 100%.

SUPPORT OR TOOL NEEDED – DETAILED RESULTS

Q14. What support, or tools, do you need to better adopt sustainable/green production practices?

Base: All respondents

	Total	AGE			PROVINCE						DECISION MAKER		Heard of any SGPP	
		18-34	35-54	55+	BC	AB	MB/SK	ON	QC	ATL	Yes	No	Yes	No
	N= 407	57	232	109	51	20*	20*	178	121	16*	365	42	273	78
Knowledge of best practices	72%	77%	73%	70%	59%	80%	75%	75%	70%	88%	71%	83%	70%	76%
Financial incentives	70%	75%	73%	61%	71%	65%	55%	70%	75%	56%	70%	74%	69%	73%
Directory of green vendors and suppliers	67%	74%	68%	59%	53%	80%	65%	67%	67%	88%	67%	60%	71%	55%
On set guidelines	55%	56%	56%	52%	47%	35%	55%	59%	52%	75%	54%	64%	56%	50%
Training	54%	58%	62%	38%	45%	50%	50%	55%	56%	63%	53%	64%	50%	62%
Cost/benefit analysis	50%	60%	53%	40%	41%	45%	30%	58%	46%	56%	50%	50%	48%	55%
Carbon calculator	44%	40%	44%	46%	37%	45%	60%	44%	44%	44%	44%	43%	43%	45%
Eco-responsibility advisor/Consultant	41%	58%	41%	32%	31%	45%	35%	42%	45%	31%	40%	50%	40%	44%
Government legislations/regulations	1%	0%	2%	0%	4%	0%	0%	1%	0%	6%	1%	0%	2%	0%
Other	2%	4%	0%	4%	2%	0%	0%	3%	2%	0%	1%	7%	2%	0%
None / doesn't apply	3%	2%	2%	4%	2%	0%	5%	4%	1%	0%	3%	2%	3%	3%

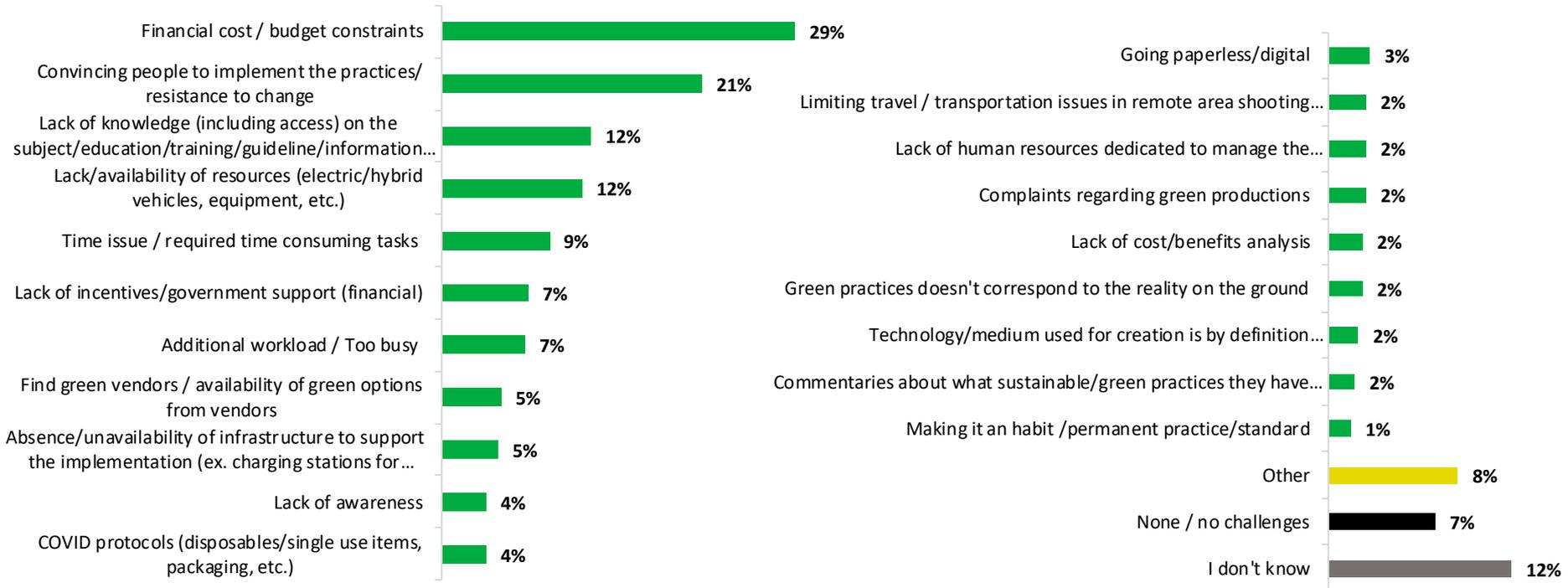
*As respondents could give more than one answer, total may exceed 100%.

**Given the small number of respondents (n<30) data are presented for illustrative purposes only.

CHALLENGES ENCOUNTERED

Q15. What challenge(s) do you encounter, or have you encountered, in the implementation of sustainable/green production practices?

Base: All respondents (n=407)



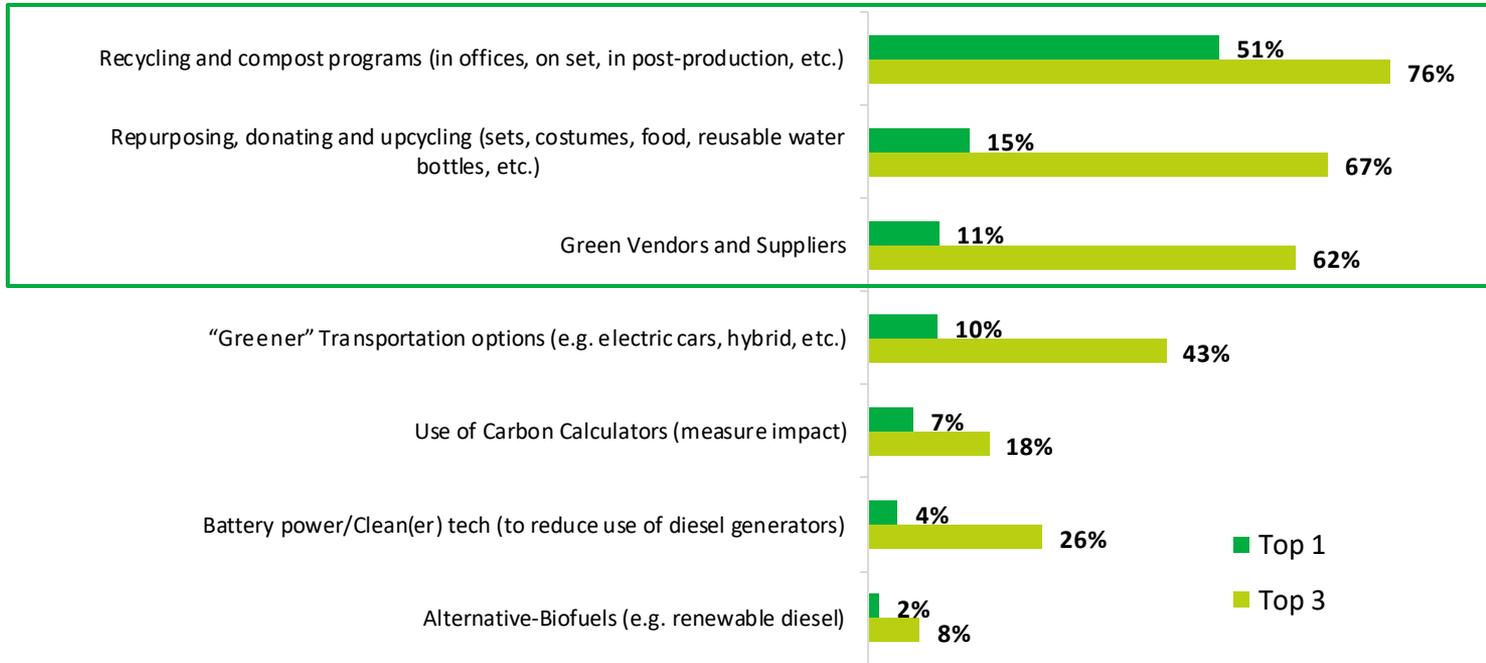
*As respondents could give more than one answer, total may exceed 100%.

SGPP TO PRIORITIZE

Q16. Rank, in order, what sustainable/green production practices should be prioritized in your workplace?

Base: All respondents (n=407)

**Top
3**



SGPP TO PRIORITIZE – Detailed results (1/2)

Q16. Rank, in order, what sustainable/green production practices should be prioritized in your workplace?

Base: All respondents

	Total	AGE			PROVINCE						DECISION MAKER		Heard of any SGPP	
		18-34	35-54	55+	BC	AB	MB/SK	ON	QC	ATL	Yes	No	Yes	No
N=	407	57	232	109	51	20*	20*	178	121	16*	365	42	273	78
Recycling and compost programs (in offices, on set, in post-production, etc.)														
Top 1	51%	46%	53%	50%	31%	35%	70%	49%	62%	56%	49%	69%	48%	54%
In the top 3	76%	75%	77%	74%	65%	80%	90%	74%	80%	88%	76%	79%	75%	78%
Repurposing, donating and upcycling (sets, costumes, food, reusable water bottles, etc.)														
Top 1	15%	21%	17%	7%	12%	25%	0%	17%	12%	31%	16%	7%	15%	17%
In the top 3	67%	72%	69%	60%	55%	80%	75%	66%	69%	81%	67%	71%	67%	65%
Green Vendors and Suppliers														
Top 1	11%	11%	8%	16%	6%	10%	15%	12%	9%	13%	11%	5%	11%	13%
In the top 3	62%	63%	64%	59%	51%	65%	65%	63%	63%	75%	62%	62%	62%	65%

*Given the small number of respondents (n<30) data are presented for illustrative purposes only.

SGPP TO PRIORITIZE – Detailed results (2/2)

Q16. Rank, in order, what sustainable/green production practices should be prioritized in your workplace?

Base: All respondents

	Total	AGE			PROVINCE						DECISION MAKER		Heard of any SGPP	
		18-34	35-54	55+	BC	AB	MB/SK	ON	QC	ATL	Yes	No	Yes	No
N=	407	57	232	109	51	20*	20*	178	121	16*	365	42	273	78
“Greener” Transportation options (e.g. electric cars, hybrid, etc.)														
Top 1	10%	12%	8%	14%	18%	20%	15%	11%	6%	0%	11%	7%	12%	6%
In the top 3	43%	44%	43%	45%	49%	40%	35%	43%	47%	19%	44%	40%	44%	41%
Use of Carbon Calculators (measure impact)														
Top 1	7%	7%	7%	5%	14%	5%	0%	5%	8%	0%	7%	5%	7%	5%
In the top 3	18%	18%	18%	18%	22%	15%	20%	17%	19%	6%	17%	21%	18%	18%
Battery power/Clean(er) tech (to reduce use of diesel generators)														
Top 1	4%	2%	4%	6%	18%	5%	0%	4%	1%	0%	4%	5%	5%	3%
In the top 3	26%	21%	22%	34%	39%	15%	10%	31%	16%	25%	27%	17%	25%	26%
Alternative-Biofuels (e.g. renewable diesel)														
Top 1	2%	2%	2%	2%	2%	0%	0%	2%	2%	0%	2%	2%	1%	3%
In the top 3	8%	7%	6%	10%	20%	5%	5%	6%	6%	6%	7%	10%	8%	6%

*Given the small number of respondents (n<30) data are presented for illustrative purposes only.

SUGGESTIONS FOR THE INDUSTRY (1/2)

Q17. Do you have any ideas or suggestions on how to make our industry greener?*

Base: All respondents

« Seminars at Festivals seem to be a great place to show how greener practices are being used »

«Publicize and celebrate productions that are following sustainable/green practices. Use this free publicity for greener TVshows and movies to incentivize other productions to follow suit.»

«Keep up the education at all levels of the industry, prioritize policies and maximize access to action-- make it the easiest path for production rather than the hardest.»

«It starts from the top. Broadcasters, Streamers, Studios need to be on board.»

«Better access to green businesses and suppliers.»

«I operate in documentary only, so very different than fiction sets, etc. Main issue for us is flights/travel which feels fairly intractable, unfortunately.»

SUGGESTIONS FOR THE INDUSTRY (2/2)

Q17. Do you have any ideas or suggestions on how to make our industry greener?*

Base: All respondents

«Each shoot has its own reality so it's hard to create a common reality for everyone. »

«Game development is completely unaware as far as I can tell. Education would be a first step.»

« Setting up a directory of green suppliers or services online. »

« Find incentives and make people aware of this upstream (e.g. mandatory training when renewing their membership or signing a letter of commitment so that it goes beyond what happens on a film set. »

«We need to educate crew and we need government at all levels to help create the much needed infrastructures. »



POTENTIAL OPPORTUNITIES

POTENTIAL OPPORTUNITIES



EDUCATION

The survey data shows that workers are interested in learning more about SGPP. In addition, there are some less popular practices that are still unknown to workers. It has also been shown that workers who have had training value SGPP more strongly. Therefore, it is important to focus on education to further engagement of workers in the industry, and expand their understanding of the other critical SGPP.



PARTNERSHIP

In order to increase the implementation of SGPP, several elements, including training, resources, vendors and suppliers, must be established. Workers also mentioned in the survey the importance of having a directory of green vendors. This creates opportunities for greater collaboration amongst stakeholders to provide comprehensive and complimentary training and resources to workers.



RESPONDENT PROFILE

RESPONDENT PROFILE

AGE	%	N
18-34	14%	57
35-54	57%	232
55+	27%	109
PROVINCE	%	N
BC	13%	51
AB	5%	20
Prairies	5%	20
ON	44%	178
QC	30%	121
Atlantic	4%	16

OCCUPATION	%	N
Producer	44%	181
Director	15%	61
Executive Producer	11%	45
Writer/screenwriter/script-writer	5%	19
Show runner	4%	16
Administration / Accounting / Finance	3%	13
Line Producer	2%	10
Production Manager	2%	8
Business Affairs	2%	7
Artist (others): graphic designer, 3D animator, etc.	2%	7
Actor/performer	1%	6
Producer (others) :Co-Producer, Associate Producer, etc.	1%	6
Director (others)	1%	6
Studio owner / host	1%	4
Other	4%	17



TEAM

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