

SUMMARY REPORT

FULL REPORT

Eco-Awareness Survey 2023

Interest and Implementation of
Sustainable/Green Production Practices

Survey among workers of the audio-visual industry

TELEFILM PARTNER
C A N A D A OF
CHOICE

October 25, 2023



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CONTEXT, OBJECTIVES AND METHODOLOGY

CONTEXT, OBJECTIVES AND METHODOLOGY



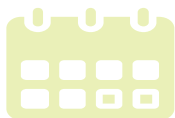
CONTEXT

Telefilm Canada commissioned Leger for a second year to survey workers of the audio-visual/production industry to 1) assess their interest and awareness towards **sustainable/green production practices (SGPP)** in the workplace and 2) measure any changes or evolution from the previous year.



HOW

An invitation note with an open link was sent by partners - **AQPM, BSO, CBC, CMF, CMPA, ISO, NFB and Radio-Canada**- to their distribution lists. The Web survey was completed by 333 workers of the industry.



WHEN

The survey was carried out between **June 28 and July 21, 2023**, and lasted an average of **11 minutes**. The survey was available in English and French, based on each respondent's preference.

NOTES TO READERS

COMPARISON WITH 2022

When possible, results have been compared with those of the 2022 edition of the Study. In 2022, 407 industry workers were surveyed between June 5 and July 28.

NOTES TO READERS

ROUNDING OF NUMBERS

Please note that the numbers in this report have been rounded for ease of understanding. However, the numbers before rounding were used to calculate the totals provided. As a result, the totals may not match up exactly with the manual addition of the rounded numbers.

SIGNIFICANT DIFFERENCES

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

Numbers in **bold green** indicate statistically significant differences that are higher than the complement, while numbers in **bold red** indicate statistically significant differences that are lower than the complement. It should be noted that significant differences vary depending on a number of factors, including the size of the samples compared.

SAMPLE SIZE

Please take note that the sample size for certain sub-groups, particularly those aged 18 to 34, as well as those in the Atlantic provinces and the Prairies, were less than 30 respondents. As statistical tests cannot be conducted on samples of this size, the results for these sub-groups should only be considered as indicative and no trends can be inferred. In the report, a * is used to signify sub-groups with fewer than 30 respondents.

DEFINITION OF SGPP

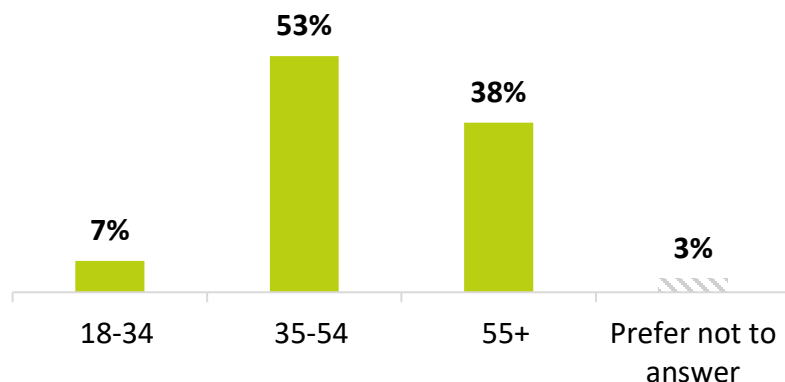
The term SGPP is used throughout the report to lighten the text. SGPP means sustainable/green production practices.

A photograph of a group of people, likely in a gaming or streaming environment, wearing large headphones and sitting at desks with computer monitors. The scene is dimly lit with warm, yellowish light. In the foreground, a man with short dark hair is seen in profile, wearing large black headphones and resting his chin on his hand. Behind him, a woman with long red hair, also wearing headphones and a purple and white striped shirt, is looking towards the left. Further back, other individuals are visible but out of focus. A semi-transparent dark grey banner is overlaid across the bottom half of the image, containing the word "RESPONDENTS" in white, bold, sans-serif capital letters.

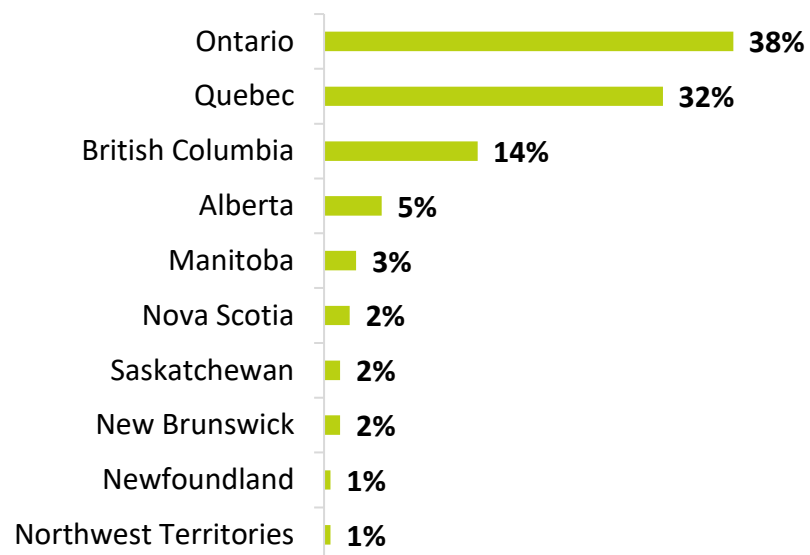
RESPONDENTS

RESPONDENT DEMOGRAPHIC

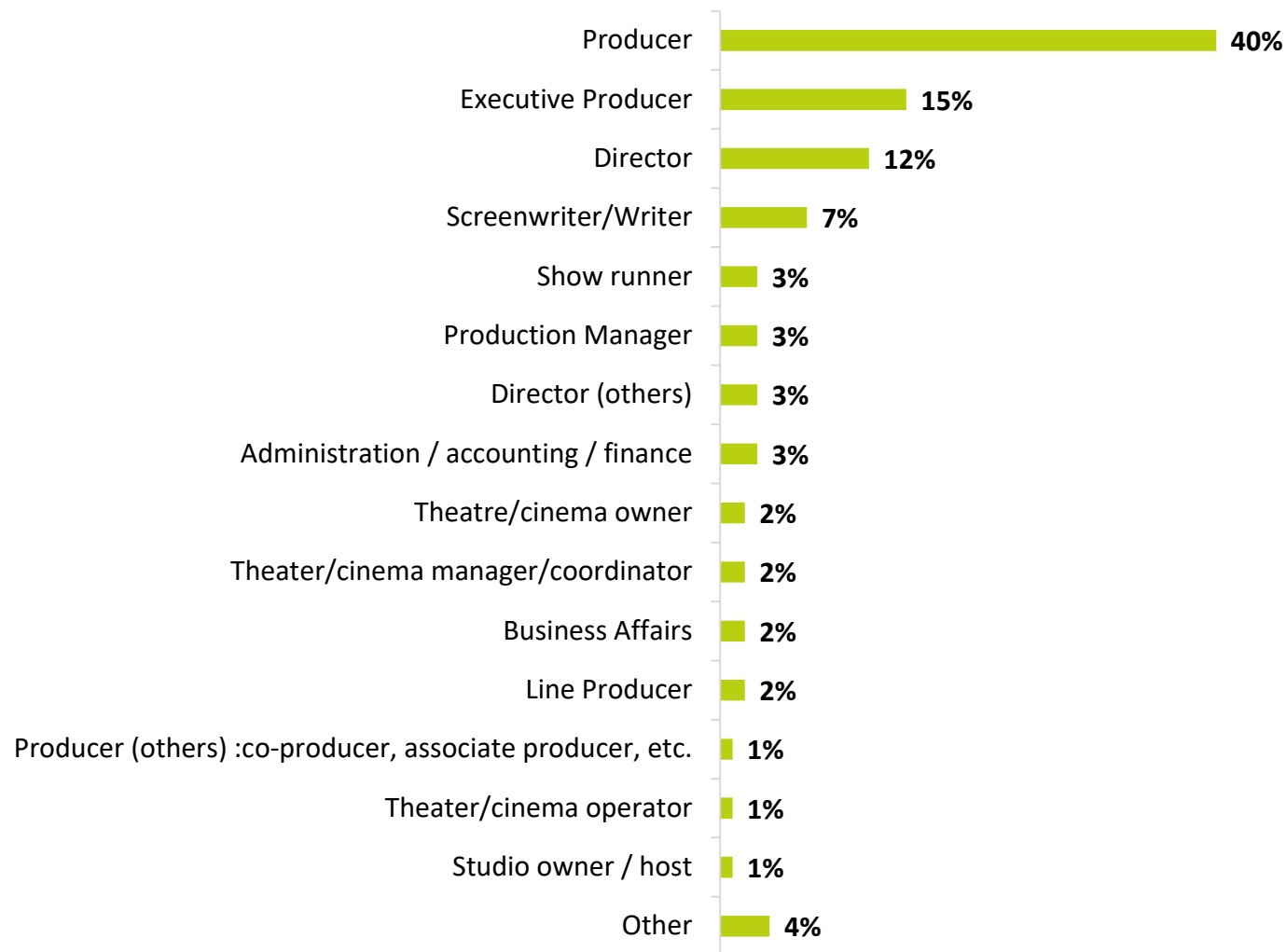
AGE



PROVINCE

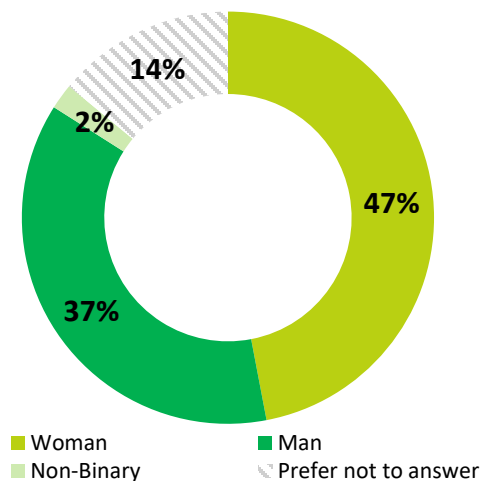


OCCUPATION

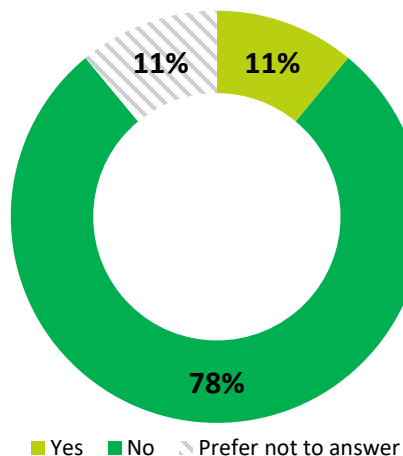


RESPONDENT DEMOGRAPHIC – SELF-IDENTIFYING QUESTIONS

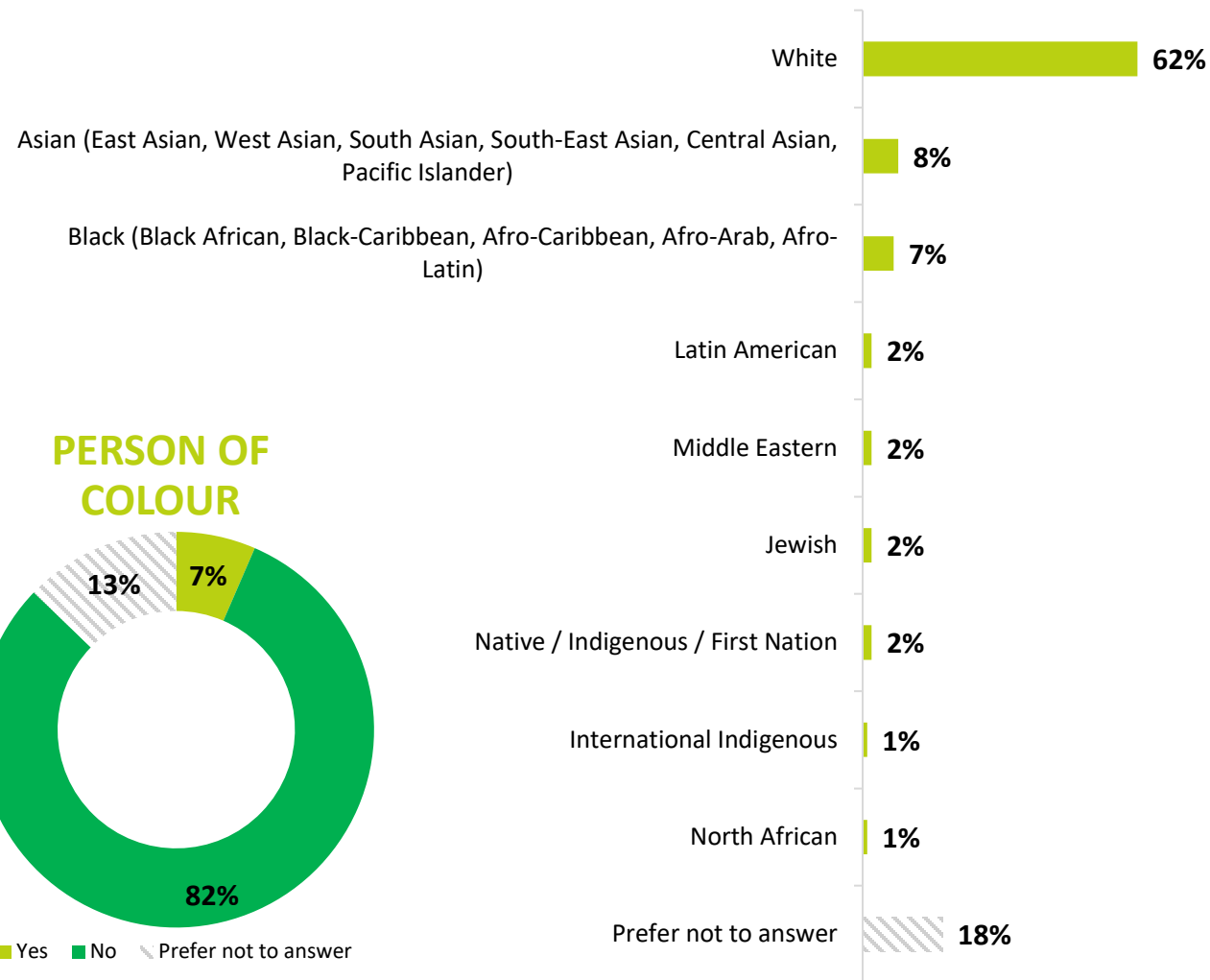
GENDER



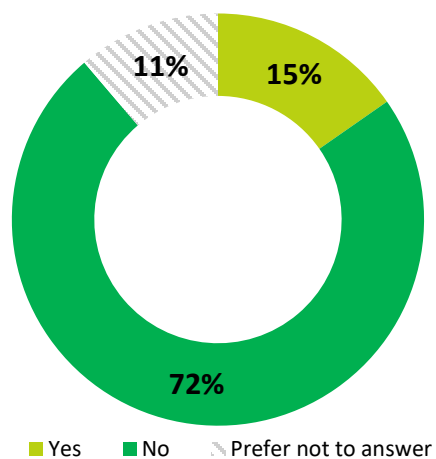
DISABILITY



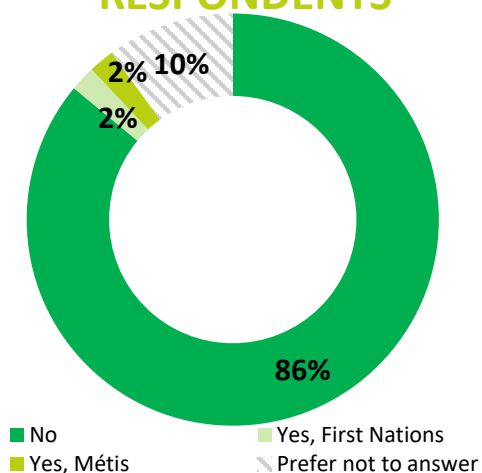
ETHNICITY



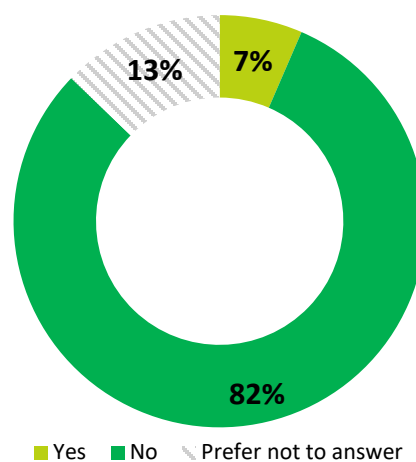
BLACK RESPONDENTS



INDIGENOUS RESPONDENTS



PERSON OF COLOUR





KEY FINDINGS

KEY FINDINGS – AWARENESS ON SUSTAINABLE/GREEN PRODUCTION PRACTICES (SGPP)

94%



Think that it is important their workplace incorporates SGPP

98%

Are aware of at least one SGPP

Respondents most aware of the different sustainable/green production practices (SGPP) were decision makers, respondents who have already heard of SGPP, as well as those who have attended training on SGPP in the last three years. The SGPP best known by respondents are: **Reducing** (93%) and **Recycling and Compost Programs** (91%). The importance of SGPP and their awareness remain stable compared with 2022.

More than a third of respondents (35%) define SGPP as **Decisions/production practices that create minimal impact on the environment**. This is the understanding of the largest number of respondents for the second year, followed by **Reduce carbon footprint/greenhouse emissions** (23%) and **Avoid disposable single use/non-sustainable items** (22%). Most participants heard about SGPP through professional associations, events or conferences, and federal agencies.

TOP 3 – SOURCES OF AWARENESS OF SGPP (Q5)

Professional Associations	59%
Events/Conferences	42%
Federal Agencies	37%

KEY FINDINGS – AWARENESS ON SGPP

The three platforms workers use to keep up to date on SGPP are **Websites** (51%), **News Media** (46%), and **Newsletters** (33%). It appears that individuals who have received training in the past three years and those who have already heard of SGPP prefer staying up-to-date through websites and newsletters.

TOP 3 – PLATFORMS TO KEEP UP TO DATE WITH SGPP (Q5B, SEE P.26)



Among respondents who have received training in the past 3 years

67%

use websites

50%

use newsletters

Among respondents who have heard of SGPP

60%

use websites

39%

use newsletters

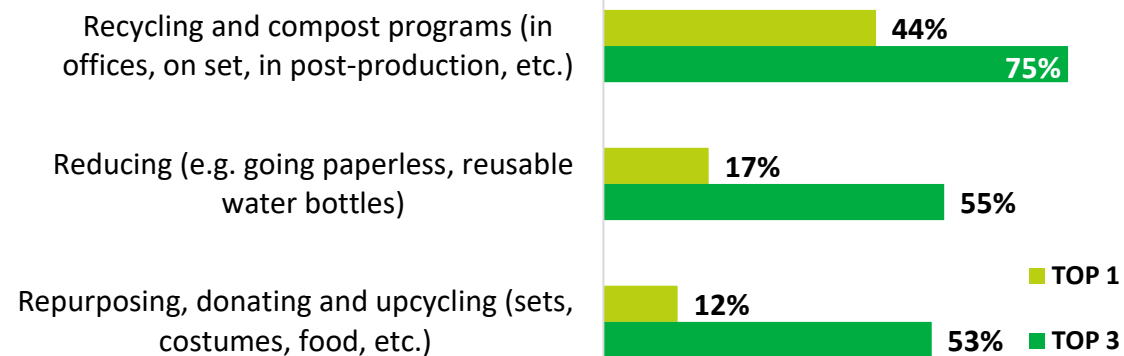
KEY FINDINGS – IMPLEMENTATION OF SGPP

The SGPP that is most widely implemented in the workplace is still **Recycling and Compost Programs** (85%), followed by **Reducing** (79%) and **Repurposing, Donating and Upcycling** (61%). For the other SGPP, less than half of the respondents have implemented them in their workplaces. However, a quarter of respondents are thinking about implementing **Green Vendors and Suppliers** (25%), **Use of Carbon Calculators** (26%), **Battery power/Clean(er) tech** (28%), **Alternative-Biofuels** (28%) and **Greener Transportation options** (32%). 65% of respondents who have implemented SGPP believe they positively impact their work. Respondents who have had training within the last three years are more likely (76%) to believe so.

TOP 5 – POSITIVE IMPACT OF THE IMPLEMENTATION OF SGPP (Q12B)



TOP 3 - SGPP TO PRIORITIZE IN THE WORKPLACE (Q16)



Participants have identified **cost or budget constraints** as the most pressing challenge when it comes to the implementation of SGPP (62%). **However, 13% of respondents noted that cost savings were a positive impact of the implementation of SGPP.** Regarding tools and support needed to better adopt SGPP, in order of importance, almost seven out of ten respondents (68%) mention wanting **Financial incentives**, followed by **Knowledge of Best Practices** (63%) and **Directory of Green vendors/Suppliers** (59%).

KEY FINDINGS – SCRIPTS INCORPORATING CLIMATE-RELATED THEMES



Among the workers in the industry whose main occupation is producer, executive producer, line producer, show runner, director, writer or screenwriter...

44%

have developed or are developing stories/scripts that incorporate climate-related themes.

58%

mention that their narratives reflect the normalization of sustainable on-screen behaviour.

23%

mention that script ideas or sustainable behaviours have been of interest, or have been raised as a source of interest, to buyers, international co-producing partners, or commissioning editors.

SIGNIFICANT CHANGES SINCE 2022

% OF RESPONDENTS WHO RECEIVED HELP/SUPPORT FOR THE IMPLEMENTATION OF SGPP (Q11)

33% ↑ **25%**
in 2023 in 2022

% OF RESPONDENTS WHO USE CARBON CALCULATORS IN THE WORKPLACE (Q10)

30% ↑ **18%**
in 2023 in 2022

% OF RESPONDENTS WHO ARE AWARE OF THE FOLLOWING SGPP: BATTERY POWER/CLEAN(ER) TECH (Q8)

68% ↑ **58%**
in 2023 in 2022

UNDERSTANDING/DEFINITION OF SGPP (Q3)

2023 2022

Decisions/production practices that create minimal impact on the environment

35% 28%

Reduce carbon footprint / greenhouse emissions

23% 16%

Raise awareness/inform our crew/collaborators about SGPP

20% 2%

% WHO HEARD ABOUT SGPP FROM THE FOLLOWING SOURCES (Q5)

2023 2022

Federal agencies

37% 22%

Broadcasters

36% 3%

TRAININGS ON SGPP RECEIVED (Q9B)

2023 2022

CBC/Radio-Canada seminar

18% 5%

Reel Green

10% 2%

A photograph of two men, one with glasses and one without, looking intently at a laptop screen. The scene is dimly lit with strong blue and red ambient lighting, creating a high-tech or creative atmosphere. The man on the left is wearing a red t-shirt and glasses, while the man on the right is wearing a dark t-shirt. The laptop screen is partially visible in the foreground.

OPPORTUNITIES FOR IMPLEMENTATION

OPPORTUNITIES FOR IMPLEMENTATION (1/2)



PUTTING THE SPOTLIGHT ON GREEN PRODUCTIONS

When asked to share their recommendations for the industry, many respondents mentioned the idea of **giving greater recognition to productions that implemented sustainable practices**, or whose stories feature green behaviours. This can include giving greater visibility to the various productions and the people working on them or giving bonuses or financial incentives to these productions to set a good example and publicize the good initiatives already in place.



ASSIGN A DEDICATED RESOURCE TO IMPLEMENTATION OF SGPP

The fact that resources are already overloaded is mentioned by many as one of the obstacles to adopting more SGPP. Several people raised the idea that there should be **a resource dedicated to setting up and coordinating the various practices** in order to maximize production efforts and relieve other workers of this responsibility. The comparison with the person in charge of enforcing safety measures during the COVID-19 pandemic was brought up by many respondents to demonstrate that it is possible to create specific positions like this, but you need the means to do so.

OPPORTUNITIES FOR IMPLEMENTATION (2/2)



KEEP THE FOCUS ON EDUCATION

The results show that people who have had training in the last three years are **more likely to be aware** of the different SGPP, implement them in their workplace, and believe that implementing sustainable practices positively impacts their workplace. **However, the lack of information and knowledge on the matter remains**, and a majority of workers have not attended training on SGPP in the last couple of years. It is necessary to increase the promotion of the trainings on SGPP to ensure that workers are more aware of them and take them.



CREATION OF A GREEN DIRECTORY

Workers are still expressing the **importance of having a directory of green vendors and suppliers** as well as collaboration among all stakeholders to provide resources and trainings adapted to their reality. Workers frequently mentioned in the survey that they encountered cost and budget constraints or lack of resources. The creation of a green directory paired with a dedicated resource to coordinate the SGPP on productions could help to resolve these issues.



FINANCIAL SUPPORT REQUESTED

Budget constraints and staff shortages remain the key issues when it comes to implementing SGPP. Despite their good intentions, these two problems are holding them back in their green transition journey. Several respondents mentioned that financial measures could come directly from the Federal government. Discussions should be initiated with the relevant organizations or institutions to see what avenues could be envisaged to help those wishing to make their production more sustainable.



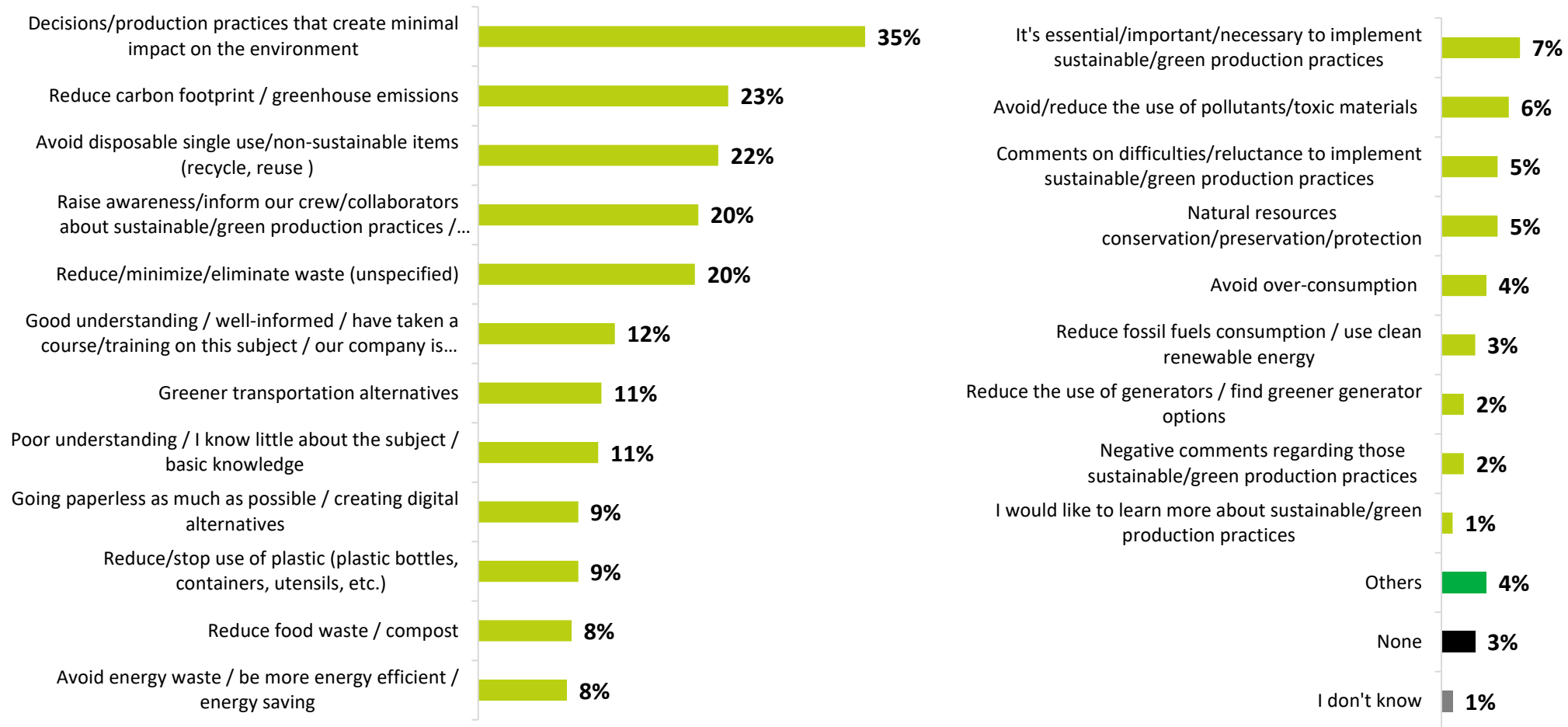
DETAILED RESULTS

AWARENESS OF SGPP

UNDERSTANDING OF SGPP

Q3 – What is your understanding of sustainable/green production practices?*

Base : All respondents (n=333)



*Open-ended question. Answers were coded to create the following categories. /As respondents could give more than one answer, total may exceed 100%.

UNDERSTANDING OF SGPP – *EVOLUTION SINCE 2022 (1/2)*

Q3 – What is your understanding of sustainable/green production practices?

Base : All respondents

	TOTAL 2023	TOTAL 2022
<i>Unweighted n=</i>	333	407
Decisions/production practices that create minimal impact on the environment	35%	28%
Reduce carbon footprint / greenhouse emissions	23%	16%
Avoid disposable single use/non-sustainable items (recycle, reuse)	22%	26%
Raise awareness/inform our crew/collaborators about sustainable/green production practices / have every department to buy in	20%	2%
Reduce/minimize/eliminate waste (unspecified)	20%	17%
Good understanding / well-informed / have taken a course/training on this subject / our company is following a green protocol	12%	12%
Greener transportation alternatives	11%	12%
Poor understanding / I know little about the subject / basic knowledge	11%	12%
Going paperless as much as possible / creating digital alternatives	9%	12%
Reduce/stop use of plastic (plastic bottles, containers, utensils, etc.)	9%	12%
Reduce food waste / compost	8%	3%

UNDERSTANDING OF SGPP – *EVOLUTION SINCE 2022 (2/2)*

Q3 – What is your understanding of sustainable/green production practices?

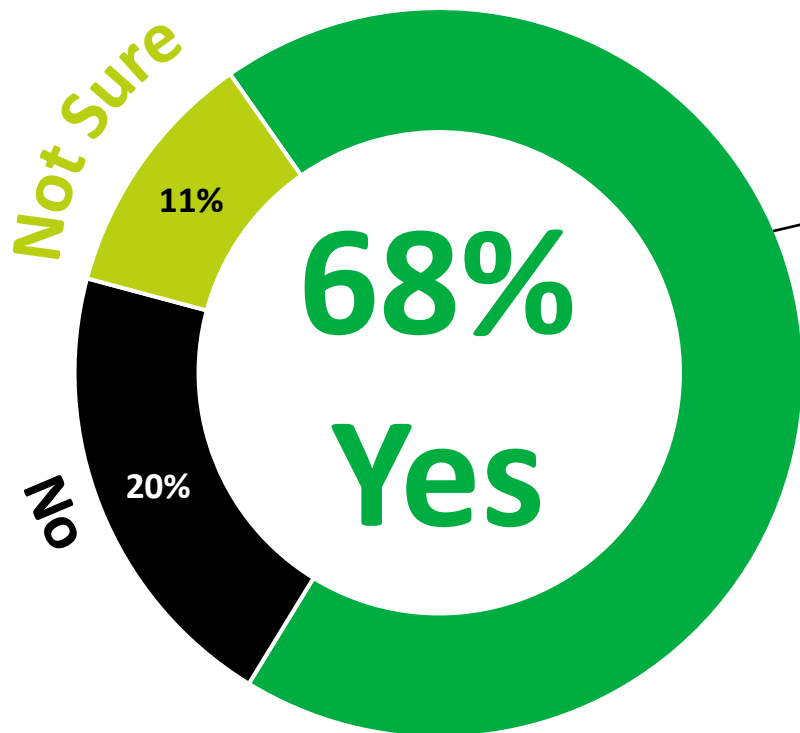
Base : All respondents

	TOTAL 2023	TOTAL 2022
<i>Unweighted n=</i>	333	407
Avoid energy waste / be more energy efficient / energy saving	8%	8%
It's essential/important/necessary to implement sustainable/green production practices	7%	4%
Avoid/reduce the use of pollutants/toxic materials (smoke, pyrotechnics, cleaning products, etc.)	6%	2%
Comments on difficulties/reluctance to implement sustainable/green production practices (various)	5%	2%
Natural resources conservation/preservation/protection	5%	2%
Avoid over-consumption (material good)	4%	4%
Reduce fossil fuels consumption / use clean renewable energy (others and unspecified)	3%	5%
Reduce the use of generators / find greener generator options	2%	4%
Negative comments regarding those sustainable/green production practices	2%	0%
I would like to learn more about sustainable/green production practices	1%	3%
Others	4%	10%
None	3%	3%
I don't know	1%	3%

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, or in studio post-production ?

Base : All respondents (n=333)



Higher proportion of **YES** among :

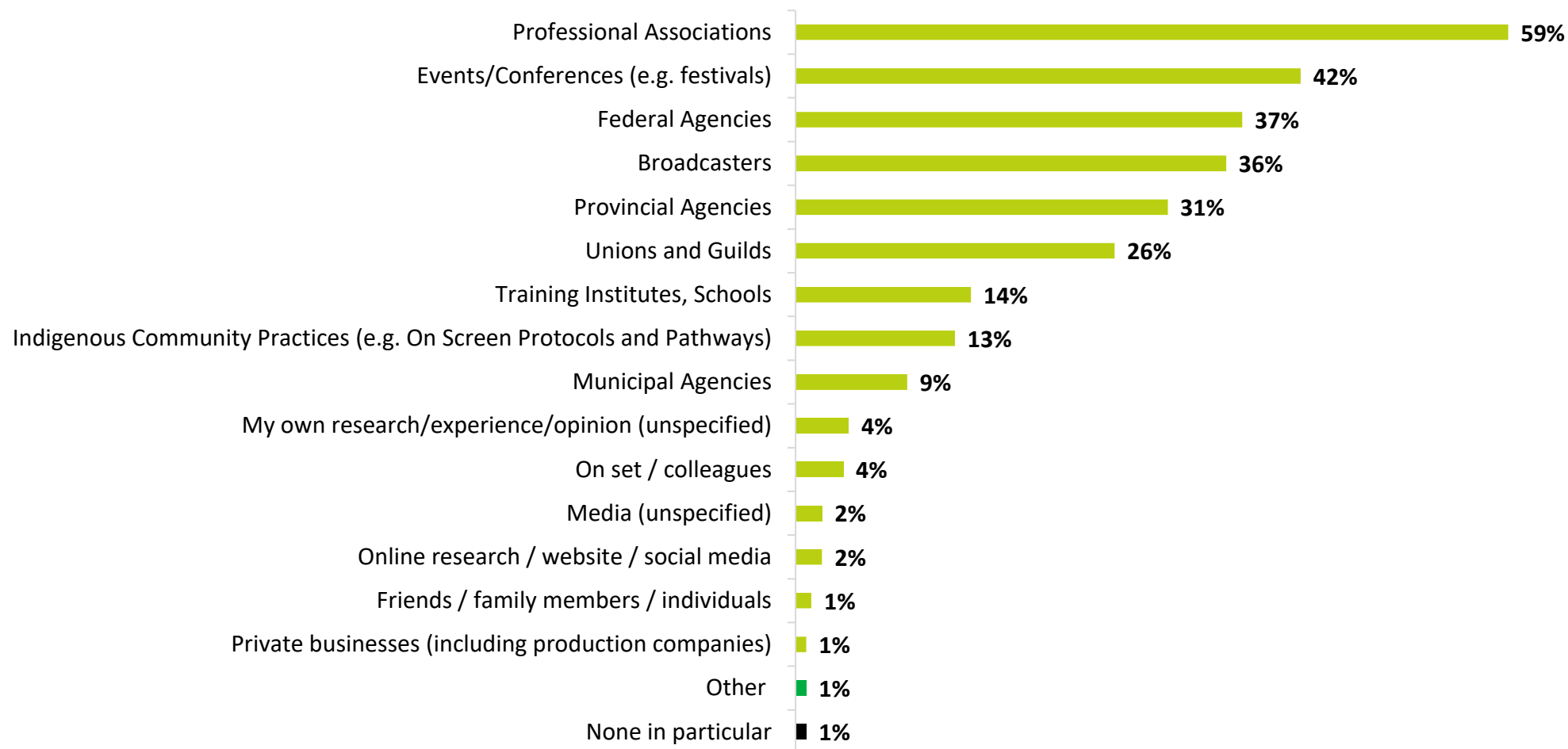
- Respondents who mostly work in television content (**78%**)
- Producers (**77%**)
- Respondents who mostly work in documentary content (**76%**)

	TOTAL 2023	TOTAL 2022
<i>Unweighted n=</i>	333	407
Yes	68%	67%
No	20%	19%
Not sure	11%	14%

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 any SGPP (n=228)



*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 (n=228)

	TOTAL	AGE			PROVINCE						TYPE OF CONTENT						
		18-34	35-54	55+	ATL	QC	ON	MB/SK	AB	BC+TERRI	FEATURE FILM	TELEVISION	INTERACTIVE DIGITAL MEDIA	SHORT FORM SCREEN CONTENT	ANIMATION	DOCUMENTARY	OTHER
N=	228	15**	122	85	8***	76	92	7***	12**	33	101	124	30	27**	20**	95	11**
Professional Associations	59%	60%	59%	59%	-	67%	48%	-	50%	73%	60%	67%	60%	44%	55%	63%	45%
Events/Conferences (e.g. festivals)	42%	40%	46%	36%	-	42%	39%	-	58%	39%	41%	35%	43%	56%	25%	44%	73%
Federal Agencies	37%	27%	30%	47%	-	36%	34%	-	33%	39%	40%	35%	47%	30%	25%	48%	45%
Broadcasters	36%	33%	32%	42%	-	26%	41%	-	33%	27%	21%	42%	23%	26%	15%	43%	82%
Provincial Agencies	31%	27%	29%	35%	-	30%	26%	-	33%	39%	37%	33%	43%	26%	15%	38%	27%
Unions and Guilds	26%	33%	30%	18%	-	26%	23%	-	25%	33%	37%	30%	30%	26%	25%	31%	27%
Training Institutes, Schools	14%	33%	16%	9%	-	22%	10%	-	0%	9%	15%	15%	23%	19%	20%	16%	27%
Indigenous Community Practices (e.g. On Screen Protocols and Pathways)	13%	7%	12%	15%	-	3%	15%	-	42%	15%	14%	15%	17%	11%	15%	21%	27%
Municipal Agencies	9%	13%	9%	9%	-	12%	5%	-	17%	9%	9%	10%	13%	7%	5%	7%	27%

*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.

***Results are not presented, since the number of respondents is too low (n<10).

SOURCE OF AWARENESS OF SGPP – EVOLUTION SINCE 2022

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

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

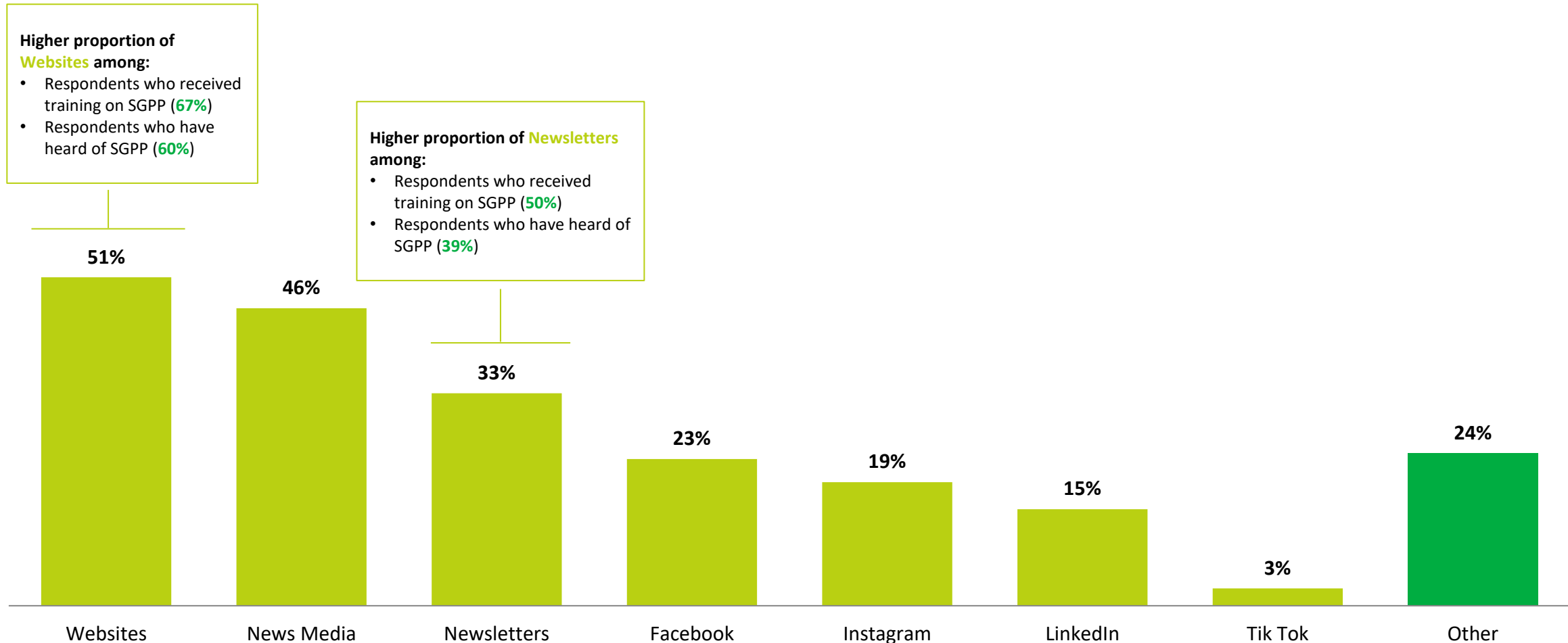
		TOTAL 2023	TOTAL 2022
	<i>Unweighted n=</i>	228	273
Professional Associations		59%	51%
Events/Conferences (e.g. festivals)		42%	42%
Federal Agencies		37%	22%
Broadcasters		36%	3%
Provincial Agencies		31%	26%
Unions and Guilds		26%	30%
Training Institutes, Schools		14%	18%
Indigenous Community Practices (e.g. On Screen Protocols and Pathways)		13%	15%
Municipal Agencies		9%	11%
My own research/experience/opinion (unspecified)		4%	5%
On set / colleagues		4%	8%
Media (unspecified)		2%	3%
Online research / website / social media		2%	3%
Friends / family members / individuals		1%	3%
Private businesses (including production companies)		1%	- *
Published articles		0%	2%
Other		1%	2%
None in particular		1%	- *

*New code, no comparison with 2022 possible.

FAVOURITE PLATFORMS TO KEEP UP TO DATE WITH SGPP

Q5B – Which platform(s) do you use to keep up to date with sustainable/green production practices or to engage with this kind of content?*

Base : All respondents (n=333)

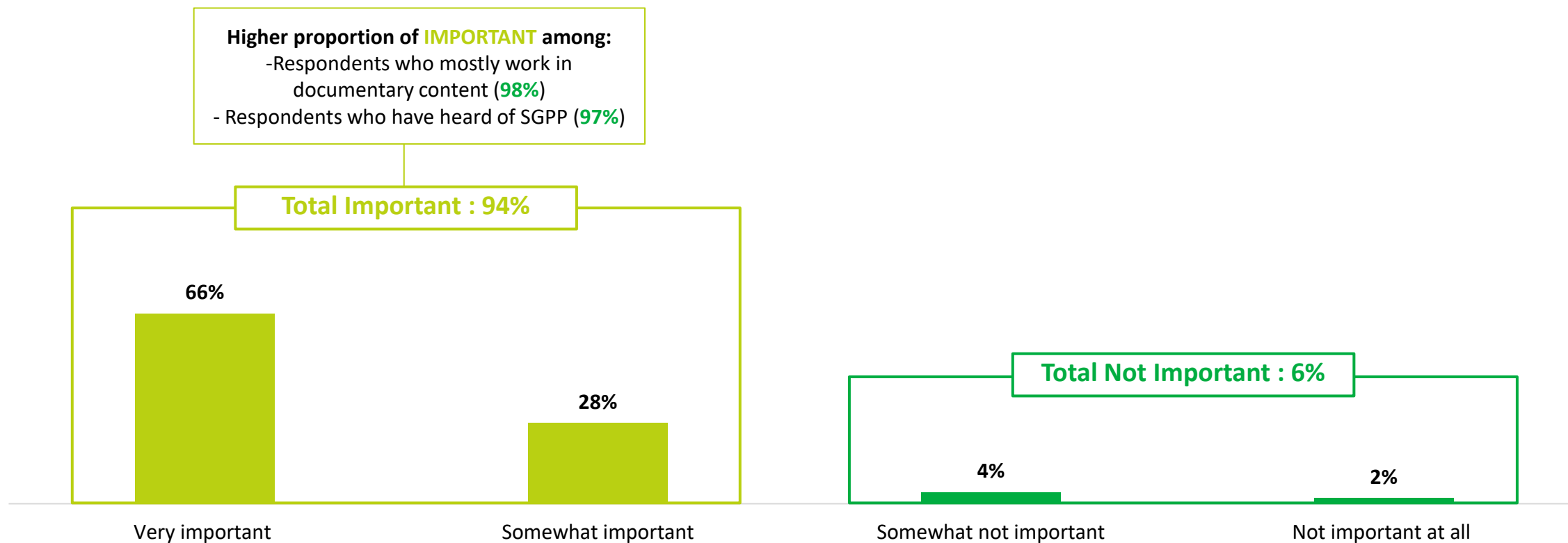


*As respondents could give more than one answer, total may exceed 100%.

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=333)



IMPORTANCE OF THE INCORPORATION OF SGPP - *EVOLUTION SINCE 2022*

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 ?

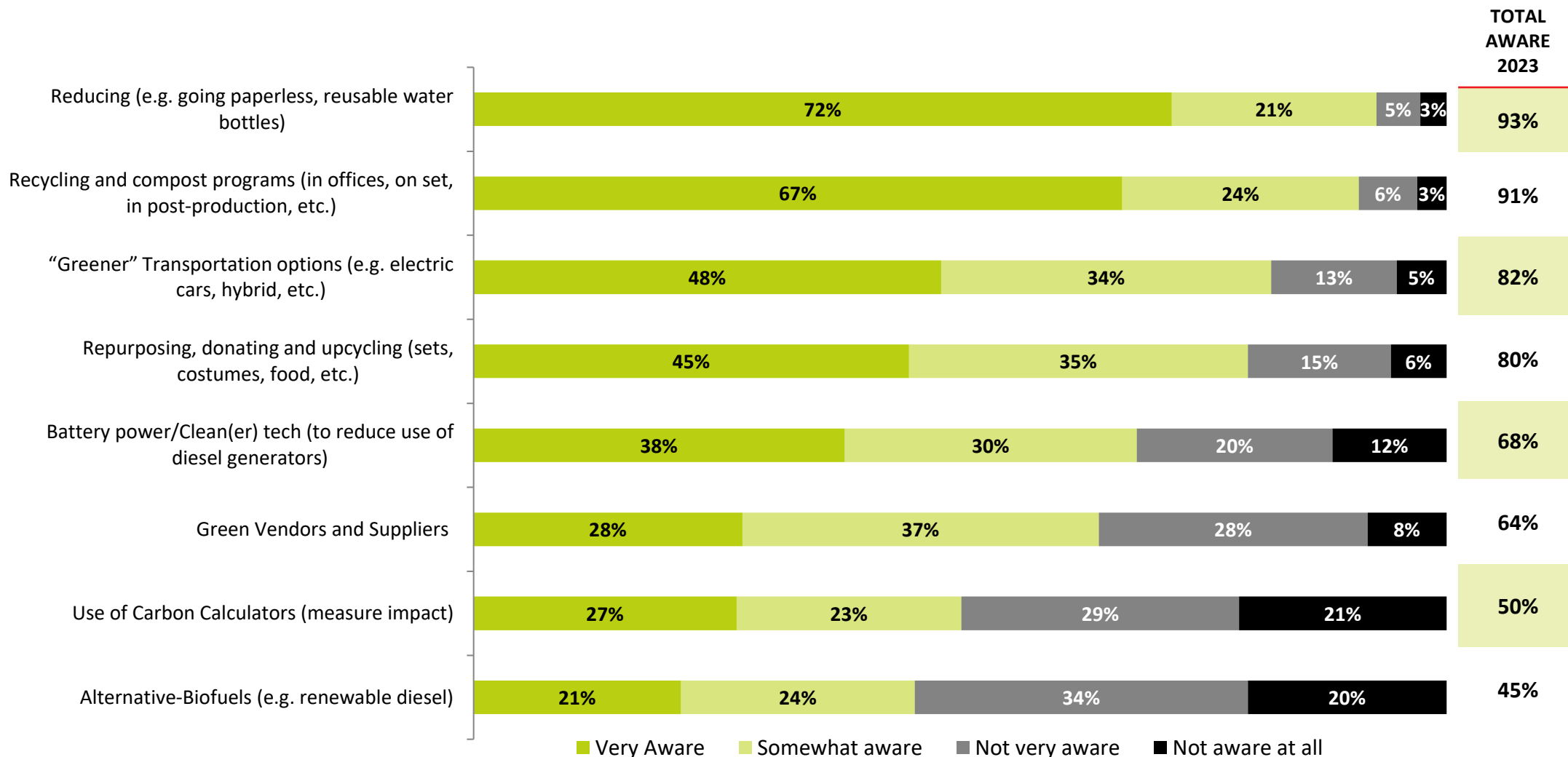
Base : All respondents

	TOTAL 2023	TOTAL 2022
<i>Unweighted n=</i>	333	407
TOTAL IMPORTANT	94%	96%
Very important	66%	71%
Somewhat important	28%	24%
TOTAL NOT IMPORTANT	6%	4%
Somewhat not important	4%	3%
Not important at all	2%	1%

AWARENESS OF SPECIFIC SGPP IN THE WORKPLACE (1/2)

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=333)



98%

of respondents are aware of at least one sustainable/green production practices.

AWARENESS OF SPECIFIC SGPP IN THE WORKPLACE (2/2)

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		HEARD OF SGPP		TRAINING IN THE LAST PAST 3 YEARS	
		18-34	35-54	55+	ATL	QC	ON	MB/SK	AB	BC+TERRI	YES	NO	YES	NO	YES	NO
N=	333	23**	176	125	15**	106	128	15**	18**	50	299	34	228	68	88	245
Reducing (e.g. going paperless, reusable water bottles)	93%	96%	93%	92%	80%	92%	98%	80%	94%	88%	94%	79%	99%	75%	100%	90%
Recycling and compost programs (in offices, on set, in post-production, etc.)	91%	91%	91%	91%	93%	85%	98%	87%	89%	88%	93%	74%	97%	78%	99%	88%
“Greener” Transportation options (e.g. electric cars, hybrid, etc.)	82%	96%	81%	82%	73%	83%	81%	67%	83%	88%	84%	62%	92%	54%	97%	77%
Repurposing, donating and upcycling (sets, costumes, food, etc.)	80%	74%	77%	82%	67%	75%	91%	73%	67%	72%	83%	50%	89%	54%	98%	73%
Battery power/Clean(er) tech (to reduce use of diesel generators)	68%	48%	66%	73%	53%	57%	76%	60%	72%	78%	71%	47%	79%	43%	85%	62%
Green Vendors and Suppliers	64%	61%	65%	63%	53%	51%	75%	40%	72%	72%	68%	32%	78%	31%	86%	56%
Use of Carbon Calculators (measure impact)	50%	57%	53%	45%	40%	41%	59%	40%	44%	58%	53%	29%	66%	15%	91%	36%
Alternative-Biofuels (e.g. renewable diesel)	45%	30%	46%	45%	47%	33%	52%	40%	50%	52%	48%	24%	55%	24%	69%	37%

*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.

AWARENESS OF SPECIFIC SGPP IN THE WORKPLACE – EVOLUTION SINCE 2022

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?

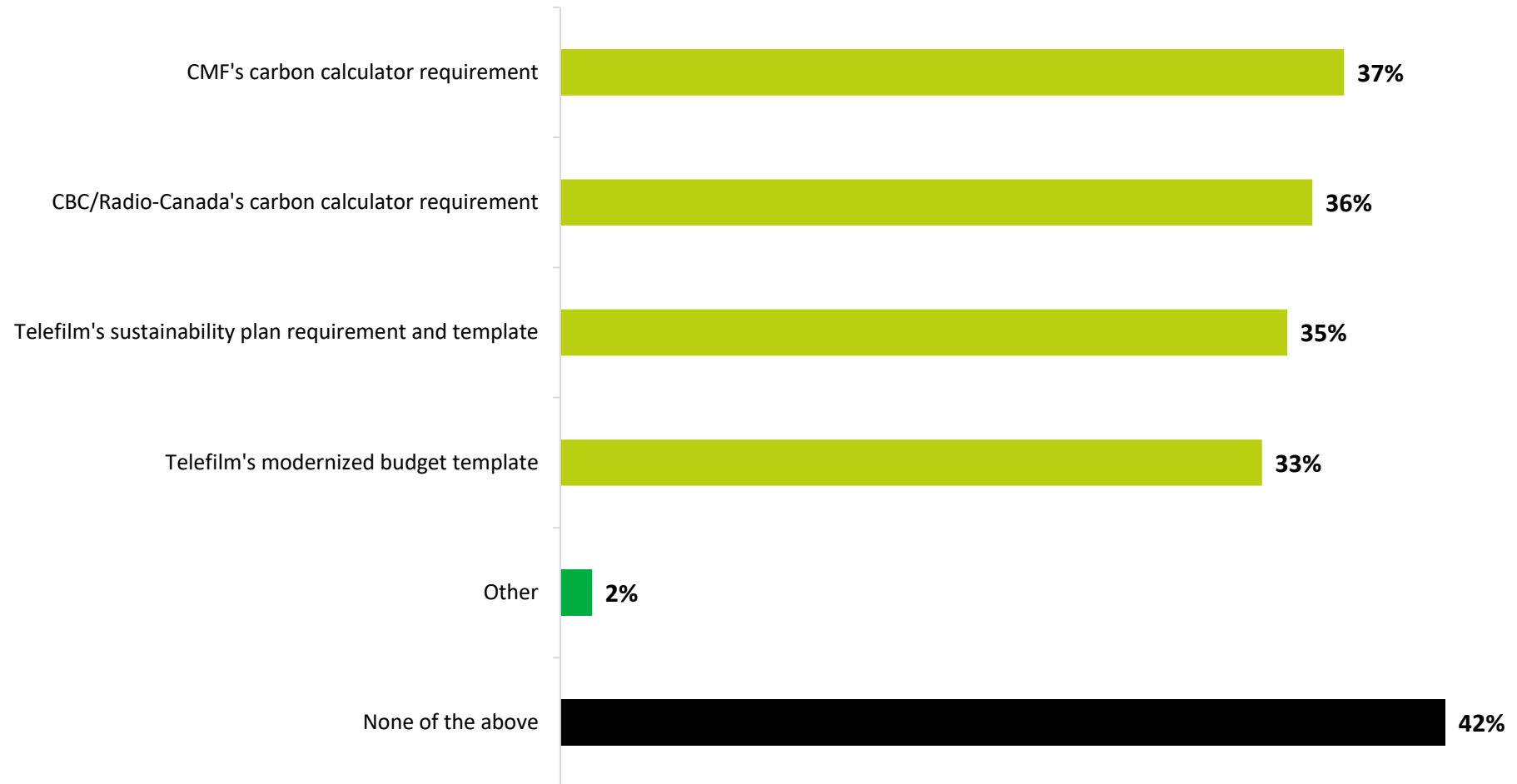
Base : All respondents

	TOTAL 2023	TOTAL 2022
<i>Unweighted n=</i>	333	407
Reducing (e.g. going paperless, reusable water bottles)	93%	_*
Recycling and compost programs (in offices, on set, in post-production, etc.)	91%	91%
“Greener” Transportation options (e.g. electric cars, hybrid, etc.)	82%	81%
Repurposing, donating and upcycling (sets, costumes, food, etc.)	80%	82%
Battery power/Clean(er) tech (to reduce use of diesel generators)	68%	58%
Green Vendors and Suppliers	64%	62%
Use of Carbon Calculators (measure impact)	50%	43%
Alternative-Biofuels (e.g. renewable diesel)	45%	44%

AWARENESS OF INITIATIVES IN THE INDUSTRY (1/2)

Q22 – Are you aware of the following initiatives in our industry ?

Base : All respondents (n=333)



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

AWARENESS OF INITIATIVES IN THE INDUSTRY (/2)

Q22 – Are you aware of the following initiatives in our industry ?

Base : All respondents (n=333)

	TOTAL	DECISION MAKER		HEARD OF SGPP		TRAINING IN THE LAST PAST 3 YEARS		PROVINCE					
		YES	NO	YES	NO	YES	NO	ATL	QC	ON	MB/SK	AB	BC+TERRI
N=	333	299	34	228	68	88	245	15**	106	128	15**	18**	50
CMF's carbon calculator requirement	37%	39%	21%	48%	10%	63%	28%	53%	35%	40%	27%	22%	38%
CBC/Radio-Canada's carbon calculator requirement	36%	37%	21%	49%	4%	69%	24%	47%	35%	39%	33%	22%	32%
Telefilm's sustainability plan requirement and template	35%	37%	15%	45%	7%	65%	24%	33%	26%	38%	20%	28%	52%
Telefilm's modernized budget template	33%	36%	12%	43%	12%	63%	23%	40%	28%	37%	27%	28%	38%
Other	2%	2%	0%	2%	0%	5%	0%	0%	2%	1%	0%	0%	4%
None of the above	42%	39%	71%	28%	76%	14%	52%	40%	47%	37%	53%	50%	40%

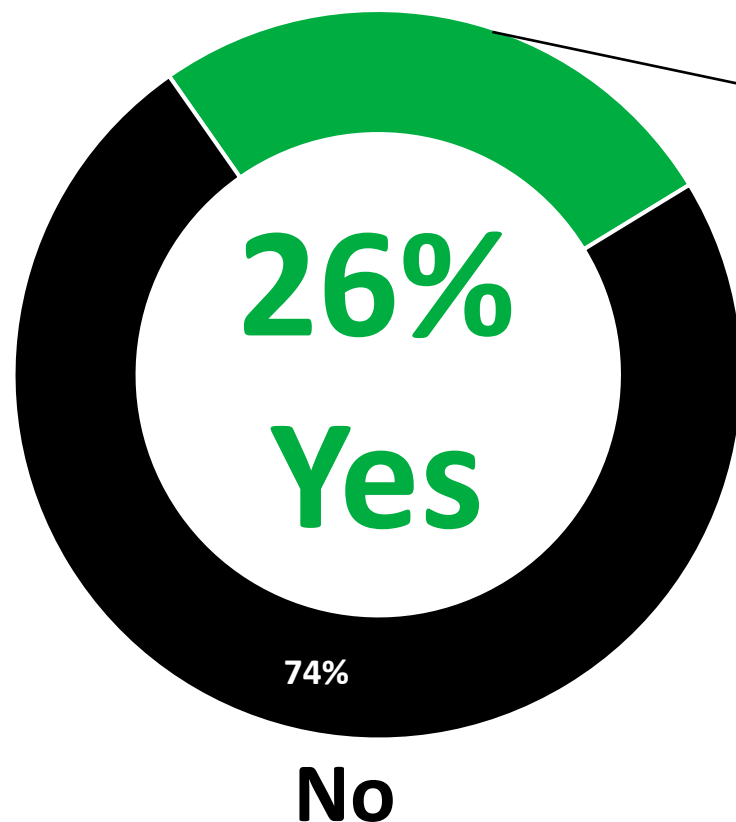
*As respondents could give more than one answer, total may exceed 100%.

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

ATTENDING A TRAINING ON SGPP

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

Base : All respondents (n=333)



Higher proportion of **YES** among :

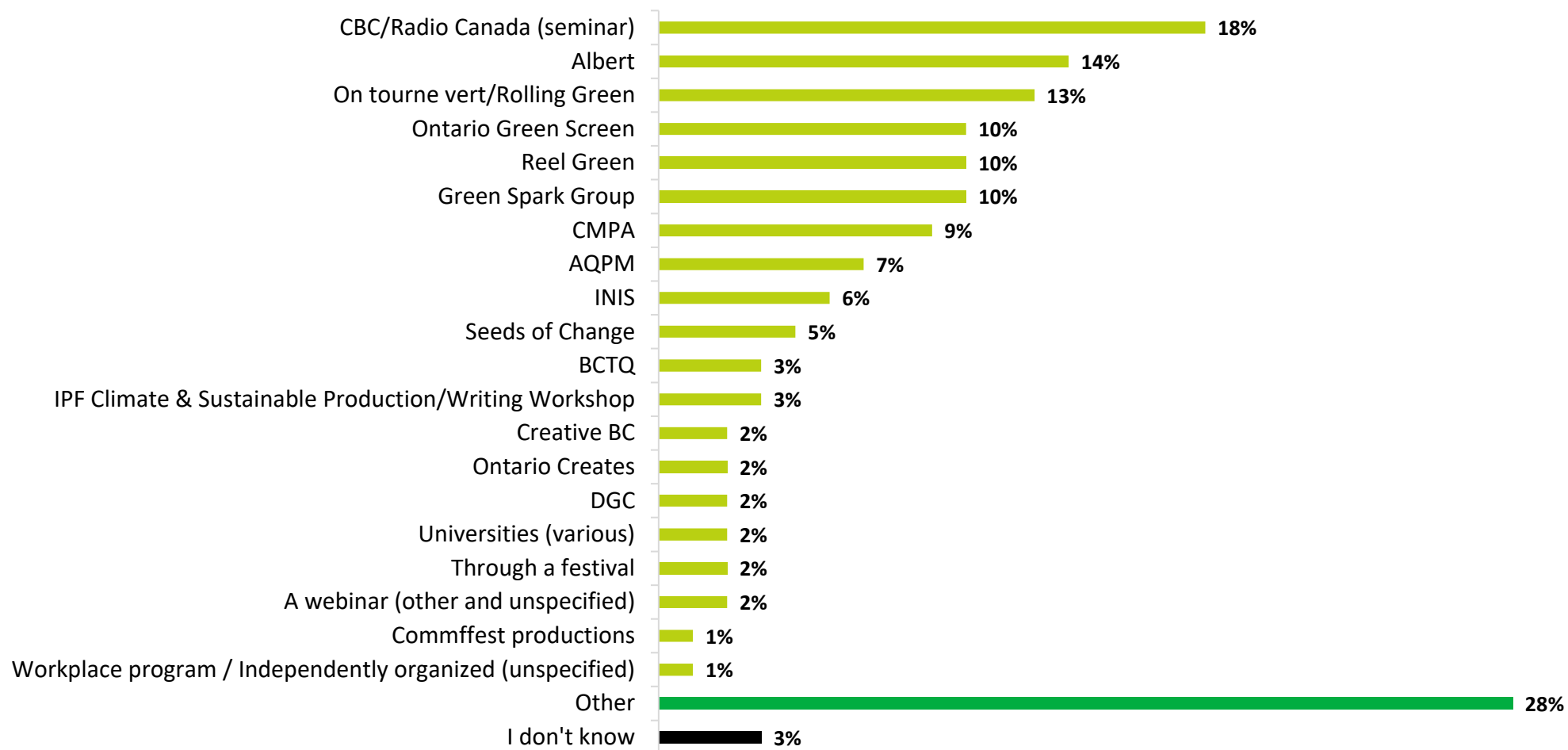
- Respondents who have heard of SGPP (**38%**)
- Producers (**37%**)
- Respondents who mostly work in television content (**33%**)
- Decision makers (**29%**)

	TOTAL 2023	TOTAL 2022
<i>Unweighted n=</i>	333	407
Yes	26%	24%
No	74%	76%

TRAINING ON SGPP

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

Base : Respondents who have attended training on SGPP in the last three years (n=88)



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

TRAINING ON SGPP – EVOLUTION SINCE 2022

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

Base : All respondents

	TOTAL 2023	TOTAL 2022
<i>Unweighted n=</i>	88	98
CBC/Radio Canada (seminar)	18%	5%
Albert	14%	8%
On tourne vert/Rolling Green	13%	7%
Ontario Green Screen	10%	9%
Reel Green	10%	2%
Green Spark Group	10%	_*
CMPA	9%	_*
AQPM	7%	2%
INIS	6%	8%
Seeds of Change	5%	_*
BCTQ	3%	4%
IPF Climate & Sustainable Production/Writing Workshop	3%	_*

	TOTAL 2023	TOTAL 2022
<i>Unweighted n=</i>	88	98
Creative BC	2%	4%
Ontario Creates	2%	4%
DGC	2%	2%
Universities (various)	2%	3%
Through a festival	2%	_*
A webinar (other and unspecified)	2%	_*
Commfest productions	1%	2%
Workplace program / Independently organized (unspecified)	1%	5%
Academy Of Canadian Cinema & Television	0%	2%
Sustainable Media Production Canada	0%	2%
Other	28%	41%
I don't know	3%	8%



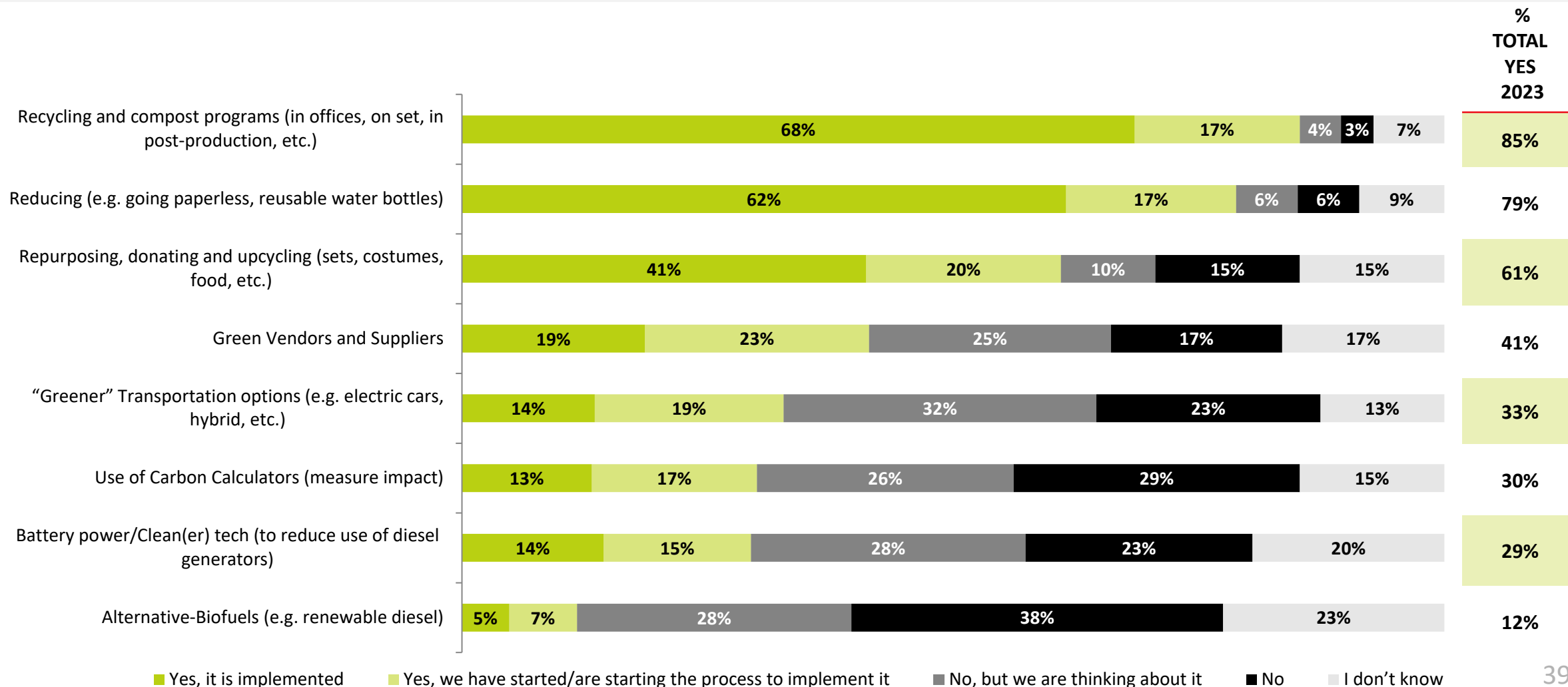
DETAILED RESULTS

IMPLEMENTATION OF SGPP IN THE WORKPLACE

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=333)



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

	TOTAL	DECISION MAKER		HEARD OF SGPP		TRAINING IN THE LAST PAST 3 YEARS	
		YES	NO	YES	NO	YES	NO
N=	333	299	34	228	68	88	245
Recycling and compost programs	85%	89%	56%	91%	71%	97%	81%
Reducing (e.g. going paperless, reusable water bottles)	79%	82%	56%	87%	59%	91%	75%
Repurposing, donating and upcycling	61%	65%	24%	70%	38%	82%	53%
Green Vendors and Suppliers	41%	44%	15%	53%	15%	67%	32%
“Greener” Transportation options (e.g. electric cars, hybrid, etc.)	33%	35%	12%	41%	10%	50%	27%
Use of Carbon Calculators (measure impact)	30%	32%	9%	41%	4%	69%	16%
Battery power/Clean(er) tech	29%	31%	12%	35%	15%	42%	25%
Alternative-Biofuels (e.g. renewable diesel)	12%	12%	6%	14%	4%	19%	9%

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

IMPLEMENTATION OF SGPP IN THE WORKPLACE – EVOLUTION SINCE 2022

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?

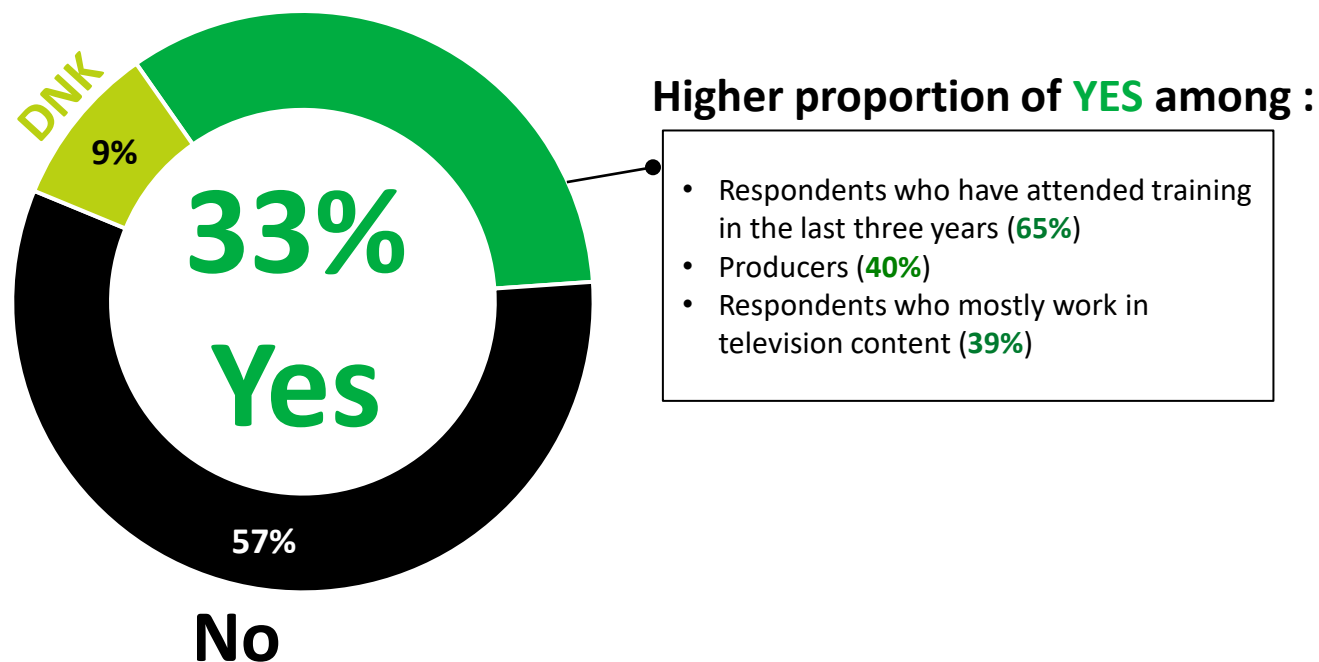
Base : All respondents

	TOTAL 2023	TOTAL 2022
<i>Unweighted n=</i>	333	407
Recycling and compost programs	85%	82%
Reducing (e.g. going paperless, reusable water bottles)	79%	_*
Repurposing, donating and upcycling	61%	64%
Green Vendors and Suppliers	41%	37%
Use of Carbon Calculators	30%	18%
“Greener” Transportation options (e.g. electric cars, hybrid, etc.)	33%	30%
Battery power/Clean(er) tech (to reduce use of diesel generators)	29%	26%
Alternative-Biofuels (e.g. renewable diesel)	12%	11%

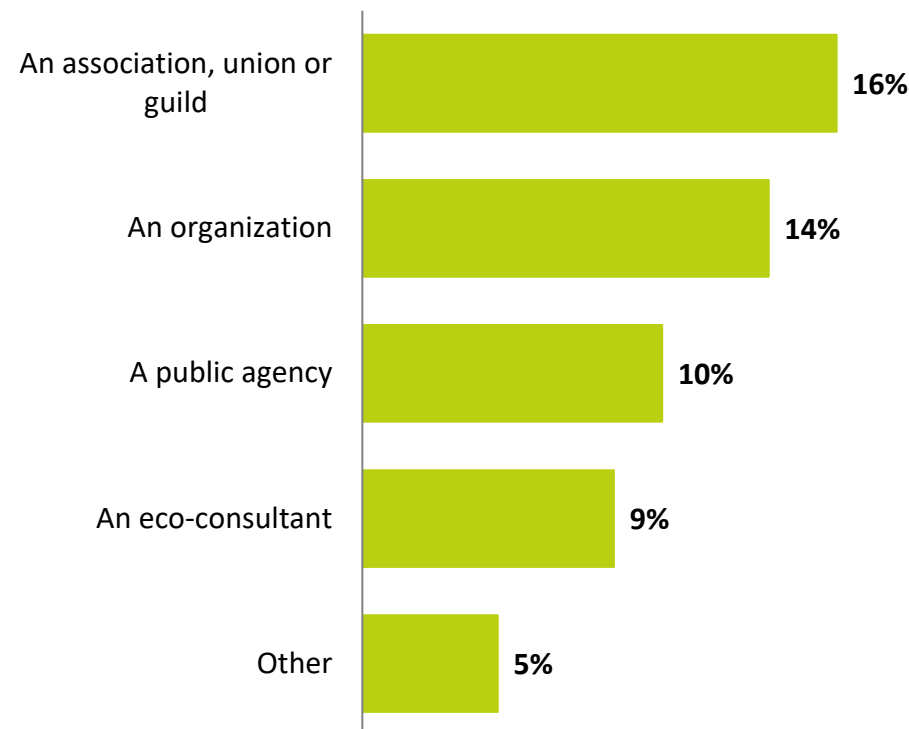
HELP/SUPPORT FOR THE IMPLEMENTATION OF SGPP

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 at least one SGPP (n=299)



Respondents who received information on implementing the SGPP received it from...

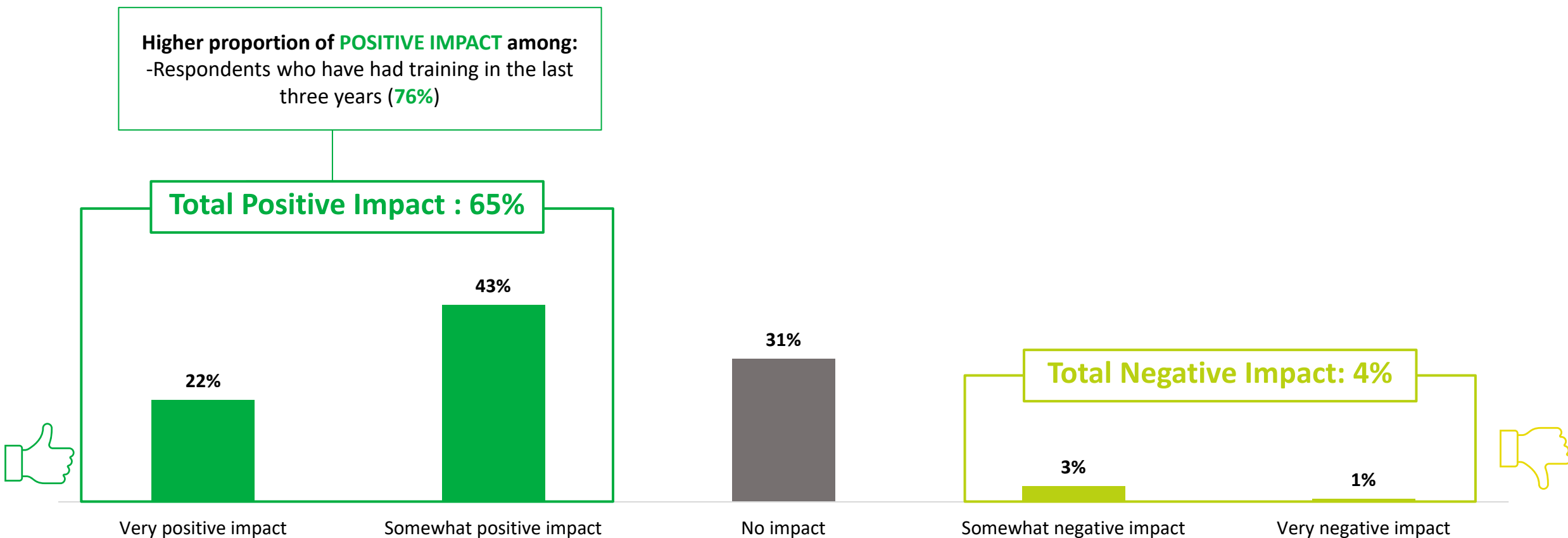


	TOTAL 2023	TOTAL 2022
Unweighted n=	299	357
Yes	33%	25%
No	57%	63%
I don't know	9%	13%

IMPACT OF THE IMPLEMENTATION OF SGPP

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

Base: Respondents who have implemented at least one SGPP (n=299)



IMPACT OF THE IMPLEMENTATION OF SGPP – EVOLUTION SINCE 2022

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

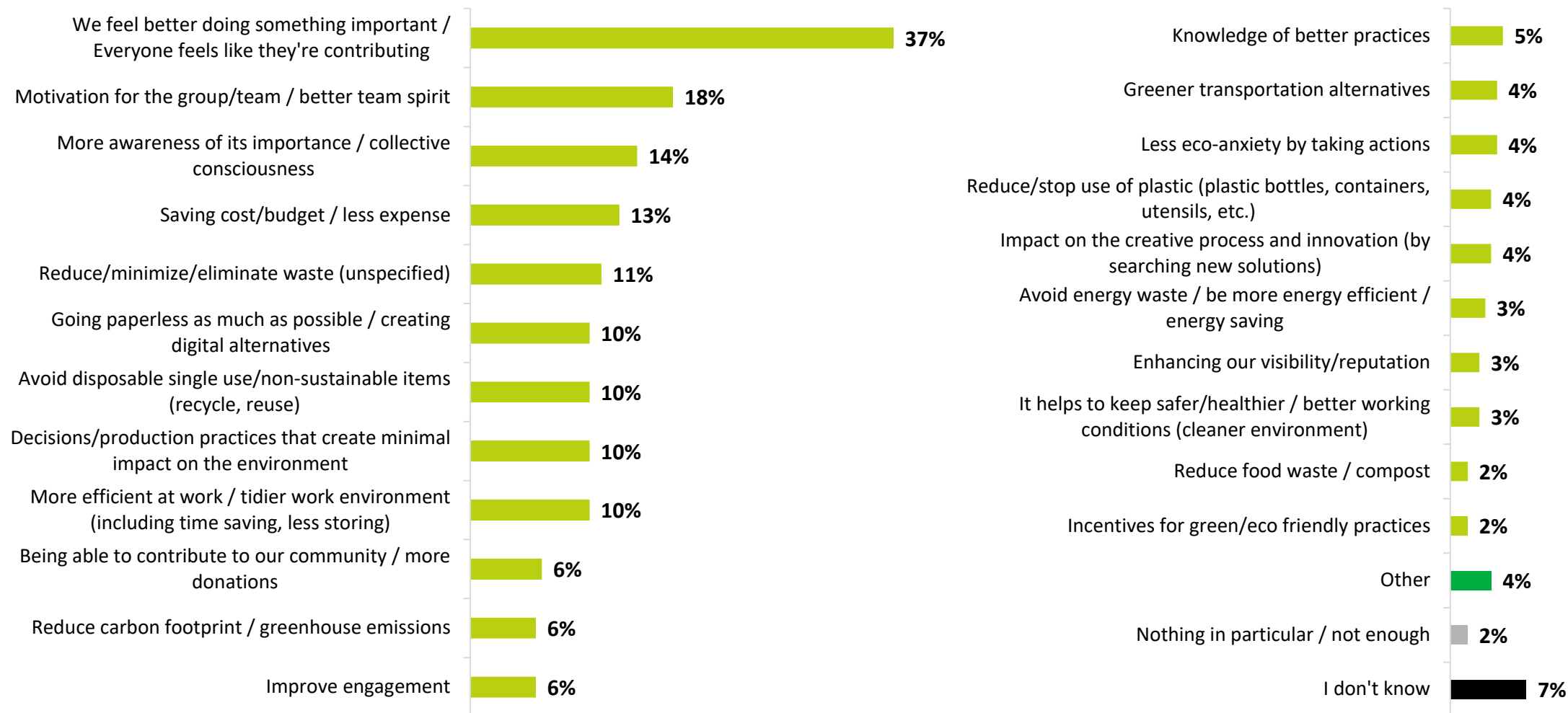
Base: Respondents who have implemented at least one SGPP

	TOTAL 2023	TOTAL 2022
<i>Unweighted n=</i>	299	357
TOTAL POSITIVE IMPACT	65%	66%
Very positive impact	22%	26%
A somewhat positive impact	43%	39%
NO IMPACT	31%	31%
TOTAL NEGATIVE IMPACT	4%	3%
A somewhat negative impact	3%	3%
Very negative impact	1%	0%

POSITIVE IMPACT OF THE IMPLEMENTATION OF SGPP (1/2)

Q12B – Please explain how the implementation of sustainable/green production practice(s) has had a positive impact on your work ?

Base : Respondents for whom SGPP has had a positive impact on their work (n=194)



POSITIVE IMPACT OF THE IMPLEMENTATION OF SGPP (2/2)

Q12B – Please explain how the implementation of sustainable/green production practice(s) has had a positive impact on your work ?

Base : Respondents for whom SGPP has had a positive impact on their work (n=194)

*For illustrative purposes only, here are some examples of positive impact taken from the verbatim:

« It's made the process of creating much more enjoyable and meaningful knowing what we are doing makes a difference. It's also led to better stories and scripts and received positive responses from talent and crew .»

« Encouraging to see filmmakers coming together to do something about climate change.»

« Saves \$ and the planet.»

« We have small crews, and sustainability is important to us. Some things (carpooling) help save money, and some (composting) just make us feel that we're doing the right thing.»

« Feel like we are contributing to a better world - collective mission is empowering »

NEGATIVE IMPACT OF THE IMPLEMENTATION OF SGPP

Q12C – Please explain how the implementation of sustainable/green production practice(s) has had a negative impact on your work?

Base : Respondents for whom SGPP has had a negative impact on their work (n=13*)

***As only a small number of respondents mentioned negative impacts, the answers were not coded. Respondents mentioned mostly budget or staff issues. For illustrative purposes only, here are some examples of negative impact taken from the verbatim:**

« It is ridiculously cumbersome to go through all the applications, write ups, and bureaucracy, plus the time it takes to adhere to the rules. We are a very small team and this has incurred way more human-power than is necessary for our small production. Plus with declining broadcaster budgets this impacts the amount of quality we can put on screen »

« The carbon calculator and extra administration of all these green plans is a huge burden on budgets and staff »

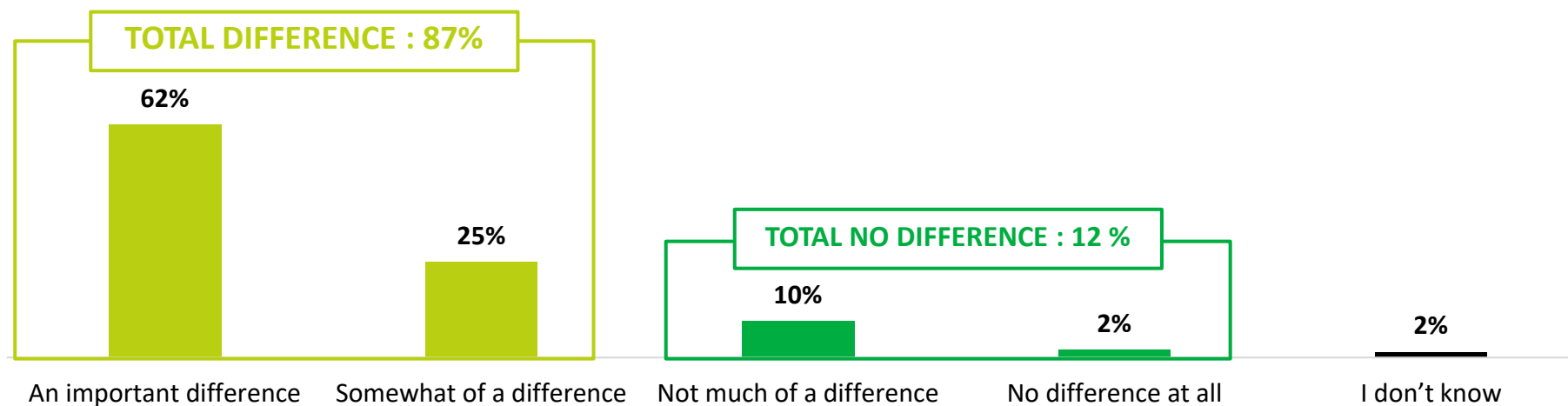
« In an industry that moves as quickly as ours does, there is an uphill battle to get everyone on the same page with green production practices »

IMPACT OF THE SGPP ON THE ENVIRONMENT AND WORKPLACE

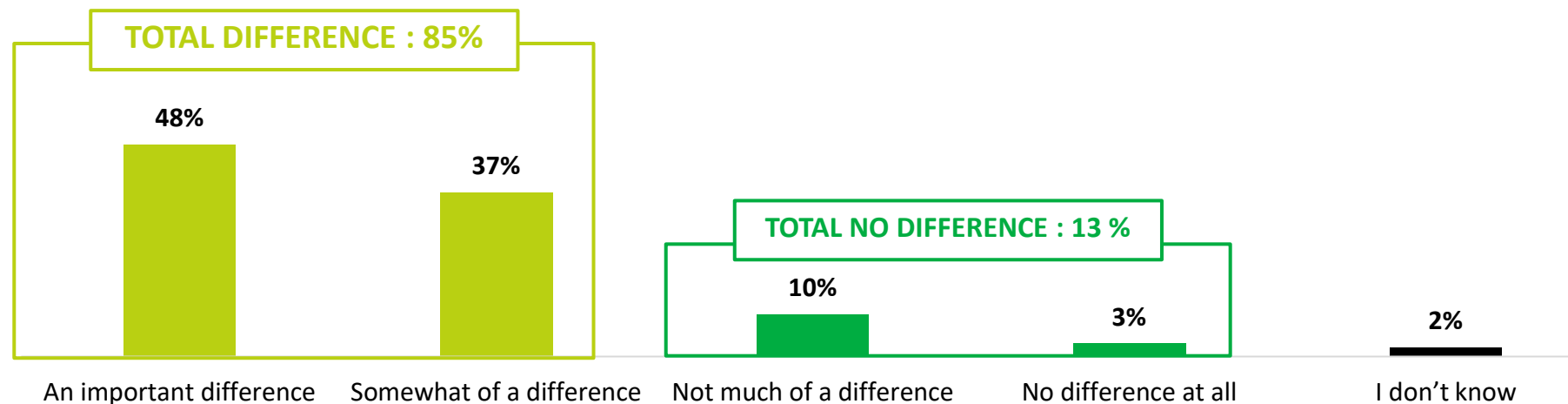
Q13. To what extent do you believe that implementing sustainable/green production practices can make a difference...

Base: All respondents (n=333)

... ON THE ENVIRONMENT



... ON YOUR WORKPLACE



IMPACT OF THE SGPP ON THE ENVIRONMENT AND WORKPLACE – EVOLUTION SINCE 2022

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

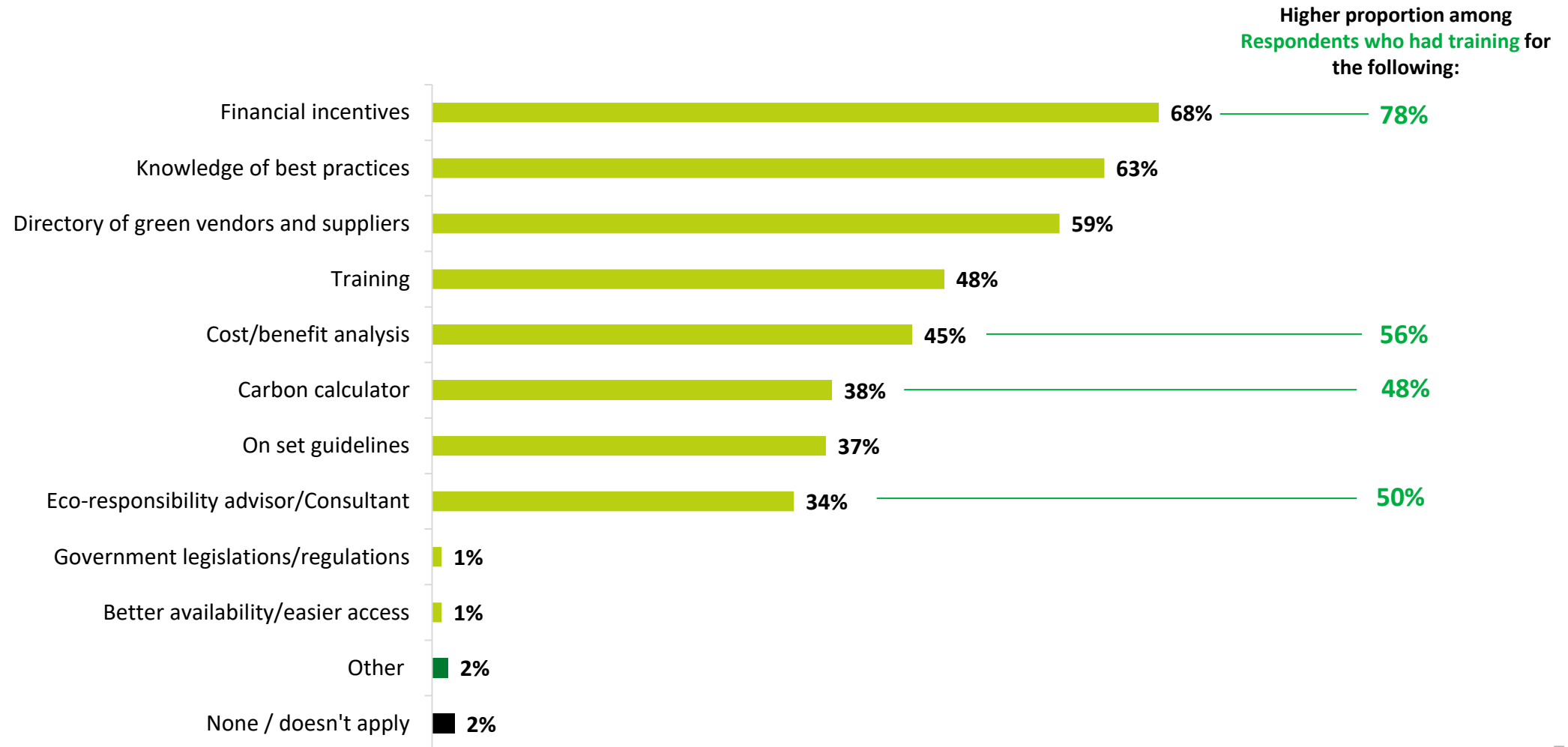
Base: All respondents

	TOTAL 2023	TOTAL 2022
<i>Unweighted n=</i>	333	407
... ON THE ENVIRONMENT		
TOTAL DIFFERENCE	87%	89%
An important difference	62%	68%
Somewhat of a difference	25%	21%
TOTAL NO DIFFERENCE	12%	9%
Not much of a difference	10%	7%
No difference at all	2%	2%
I DON'T KNOW	2%	1%
... ON YOUR WORKPLACE		
TOTAL DIFFERENCE	85%	86%
An important difference	48%	56%
Somewhat of a difference	37%	30%
TOTAL NO DIFFERENCE	13%	12%
Not much of a difference	10%	10%
No difference at all	3%	2%
I DON'T KNOW	2%	2%

SUPPORT OR TOOL NEEDED TO BETTER ADOPT SGPP

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

Base : All respondents (n=333)



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

SUPPORT OR TOOL NEEDED TO BETTER ADOPT SGPP – EVOLUTION SINCE 2022

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

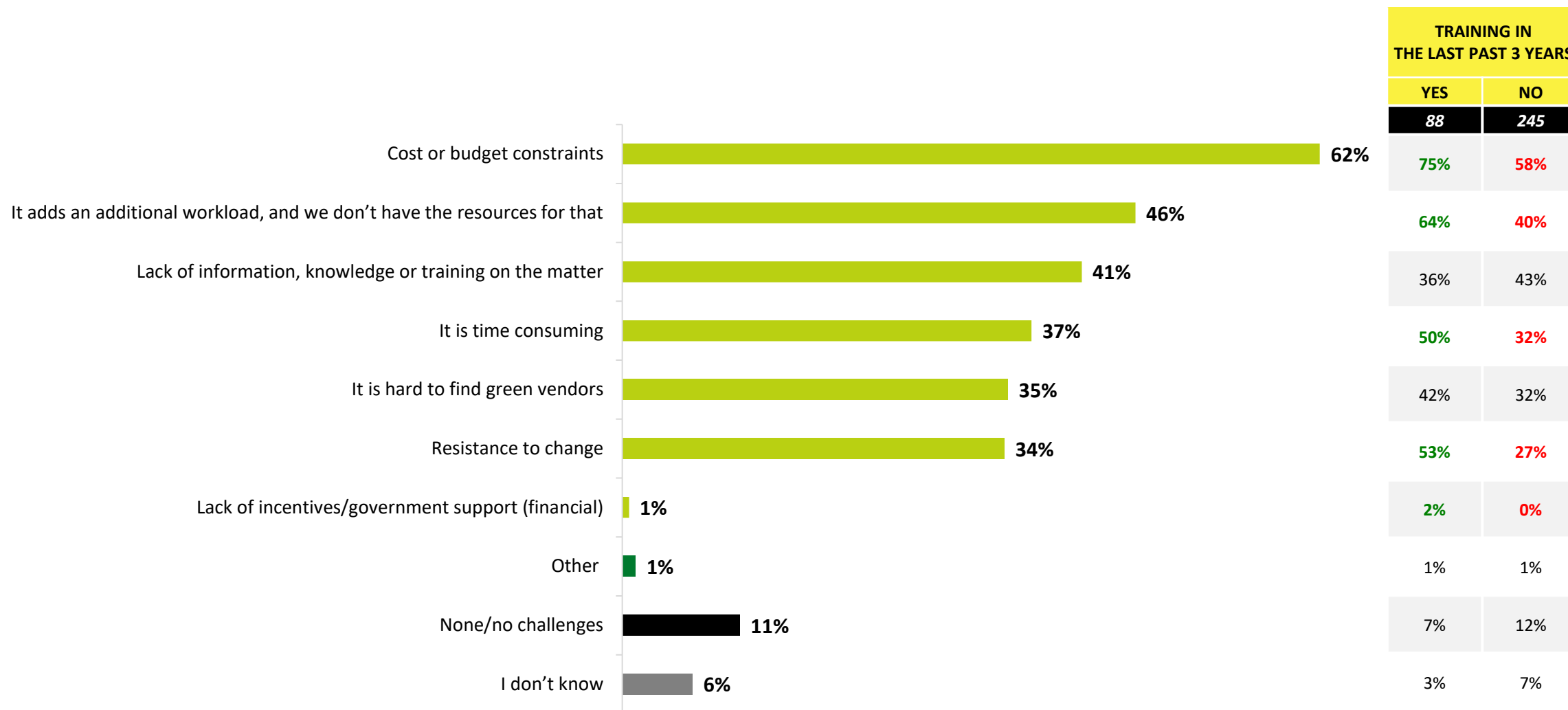
Base : All respondents

	TOTAL 2023	TOTAL 2022
<i>Unweighted n=</i>	333	407
Financial incentives	68%	70%
Knowledge of best practices	63%	72%
Directory of green vendors and suppliers	59%	67%
Training	48%	54%
Cost/benefit analysis	45%	50%
Carbon calculator	38%	44%
On set guidelines	37%	55%
Eco-responsibility advisor/Consultant	34%	41%
Government legislations/regulations	1%	1%
Better availability/easier access	1%	-*
None / doesn't apply	2%	3%
Other	2%	2%

CHALLENGES ENCOUNTERED IN THE IMPLEMENTATION OF SGPP

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

Base : All respondents (n=333)



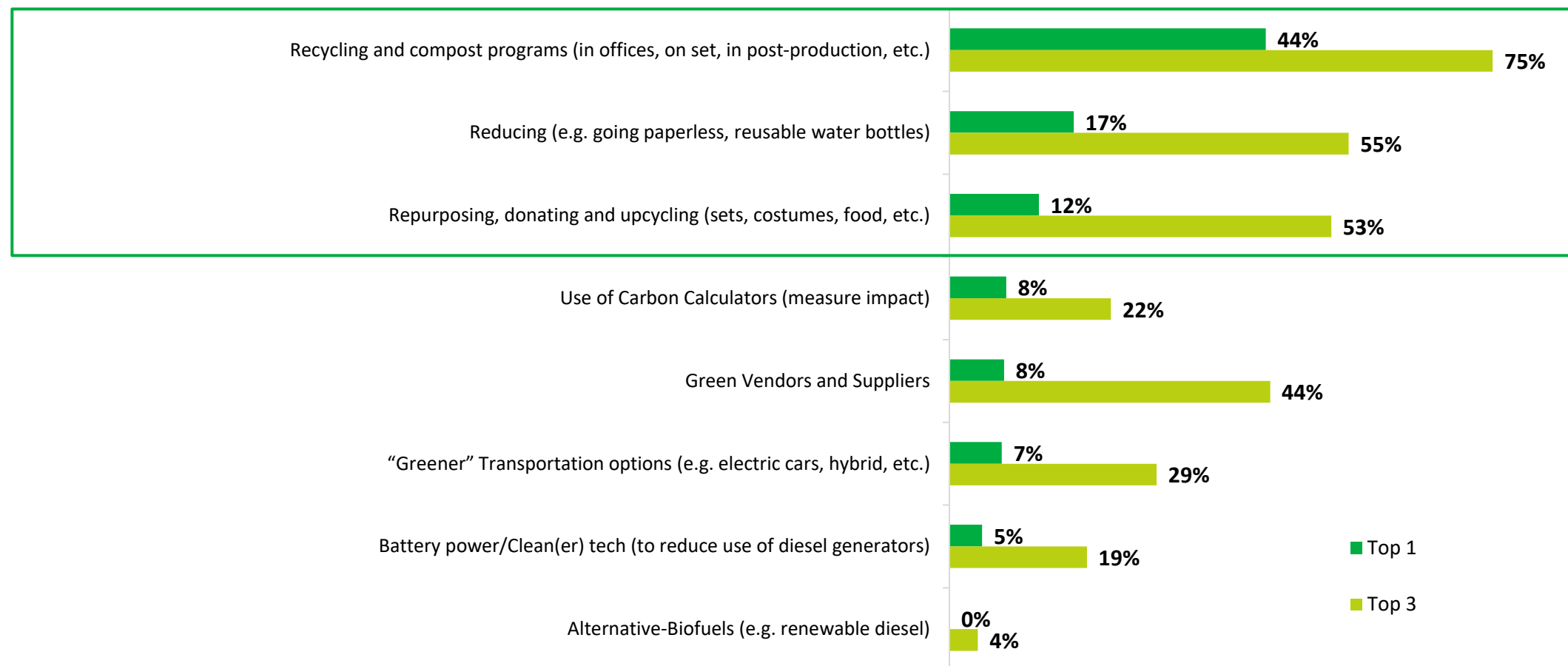
*As respondents could give more than one answer, total may exceed 100%.

SGPP TO PRIORITIZE IN THE WORKPLACE

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

Base : All respondents (n=333)

Top 3



SGPP TO PRIORITIZE IN THE WORKPLACE – 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						HEARD OF ANY SGPP		TRAINING IN THE LAST PAST 3 YEARS	
		18-34	35-54	55+	ATL	QC	ON	MB/SK	AB	BC+TERRI	YES	NO	YES	NO
N=	333	23**	176	125	15**	106	128	15**	18**	50	228	68	88	245
Recycling and compost programs (in offices, on set, in post-production, etc.)														
Top 1	44%	26%	37%	54%	60%	42%	42%	40%	56%	42%	39%	50%	35%	47%
In the top 3	75%	74%	70%	82%	87%	75%	77%	67%	89%	66%	71%	84%	72%	76%
Reducing (e.g. going paperless, reusable water bottles)														
Top 1	17%	22%	18%	15%	13%	17%	21%	7%	22%	10%	17%	19%	17%	17%
In the top 3	55%	70%	53%	55%	60%	53%	63%	47%	56%	40%	52%	57%	49%	57%
Repurposing, donating and upcycling (sets, costumes, food, etc.)														
Top 1	12%	26%	11%	13%	7%	15%	13%	13%	6%	10%	12%	19%	8%	14%
In the top 3	53%	48%	53%	53%	47%	50%	53%	53%	50%	60%	48%	68%	44%	56%
Use of Carbon Calculators (measure impact)														
Top 1	8%	13%	10%	4%	13%	7%	6%	20%	6%	10%	9%	7%	15%	5%
In the top 3	22%	26%	27%	15%	27%	27%	20%	20%	6%	22%	26%	18%	33%	18%

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

SGPP TO PRIORITIZE IN THE WORKPLACE – 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						TRAINING IN THE LAST PAST 3 YEARS		HEARD OF ANY SGPP	
		18-34	35-54	55+	ATL	QC	ON	MB/SK	AB	BC+TERRI	YES	NO	YES	NO
N=	333	23**	176	125	15**	106	128	15**	18**	50	88	245	228	68

Green Vendors and Suppliers

Top 1	8%	9%	10%	5%	0%	9%	9%	0%	0%	6%	10%	7%	10%	0%
In the top 3	44%	52%	44%	44%	40%	42%	41%	60%	56%	48%	45%	44%	45%	38%

Greener” Transportation options (e.g. electric cars, hybrid, etc.)

Top 1	7%	4%	9%	5%	7%	9%	4%	13%	0%	12%	10%	6%	9%	1%
In the top 3	29%	22%	31%	27%	20%	33%	27%	40%	17%	24%	33%	27%	32%	22%

Battery power/Clean(er) tech (to reduce use of diesel generators)

Top 1	5%	0%	6%	4%	0%	0%	5%	7%	11%	10%	5%	4%	5%	3%
In the top 3	19%	4%	18%	21%	7%	16%	18%	13%	28%	28%	17%	20%	21%	12%

* Items mentioned by less than 5% of respondents are not shown.

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

SGPP TO PRIORITIZE IN THE WORKPLACE – EVOLUTION SINCE 2022

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

Base : All respondents

	TOTAL 2023	TOTAL 2022
<i>Unweighted n=</i>	333	407
Recycling and compost programs (in offices, on set, in post-production, etc.)		
Top 1	44%	51%
In the top 3	75%	76%
Reducing (e.g. going paperless, reusable water bottles)		
Top 1	17%	-
In the top 3	55%	-
Repurposing, donating and upcycling (sets, costumes, food, etc.)		
Top 1	12%	15%
In the top 3	53%	67%
Use of Carbon Calculators (measure impact)		
Top 1	8%	7%
In the top 3	22%	18%

	TOTAL 2023	TOTAL 2022
<i>Unweighted n=</i>	333	407
Green Vendors and Suppliers		
Top 1	8%	11%
In the top 3	44%	62%
Greener" Transportation options (e.g. electric cars, hybrid, etc.)		
Top 1	7%	10%
In the top 3	29%	43%
Battery power/Clean(er) tech (to reduce use of diesel generators)		
Top 1	5%	4%
In the top 3	19%	26%
Alternative-Biofuels (e.g. renewable diesel)		
Top 1	0%	2%
In the top 3	4%	8%



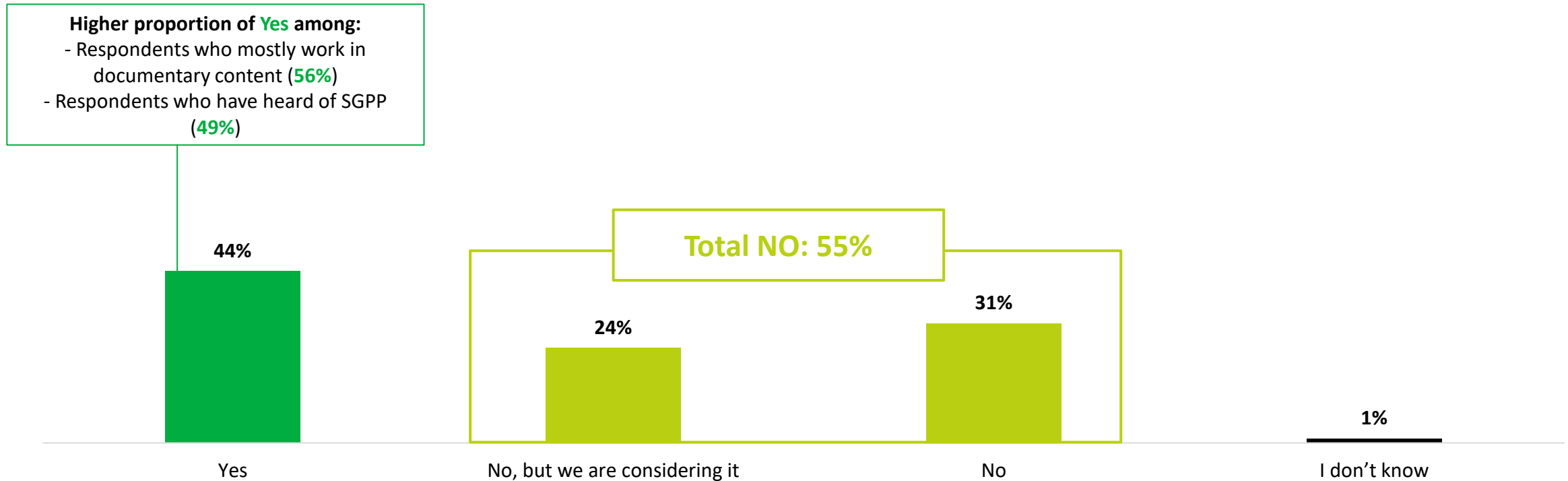
DETAILED RESULTS

SCRIPTS INCORPORATING CLIMATE-RELATED THEMES

DEVELOPMENT OF SCRIPTS INCORPORATING CLIMATE-RELATED THEMES

Q19 – Have you recently developed or are you developing stories/scripts that incorporate climate-related themes?

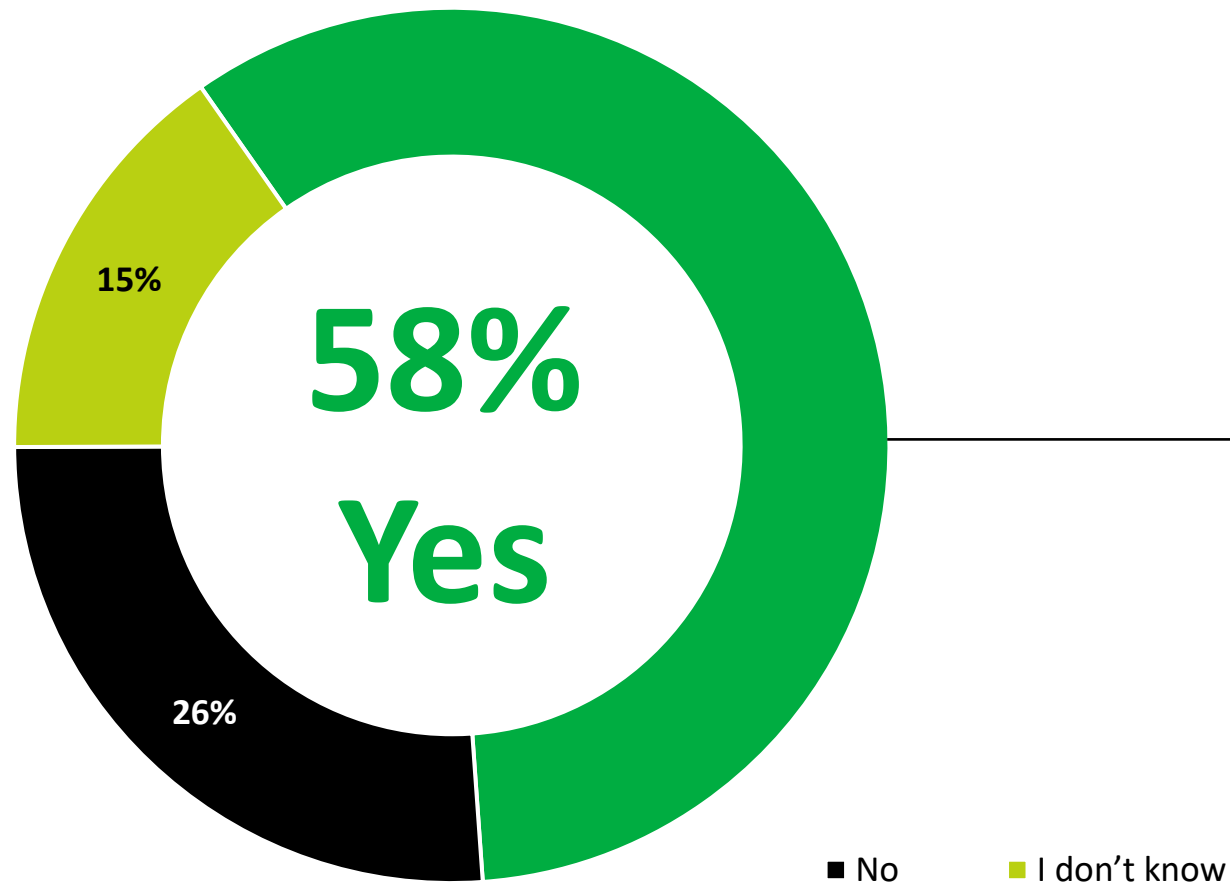
Base : Respondents whose main occupation is producer, executive producer, line producer, show runner, director, writer or screen-writer (n=255)



SCRIPT REFLECTING SUSTAINABLE BEHAVIOURS

Q20 – Does your narrative reflect the normalization of sustainable on-screen behaviour? (e.g., reusable water bottles, recycling, commuting by bike, etc.)

Base : Respondents whose main occupation is producer, executive producer, line producer, show runner, director, writer or screen-writer (n=255)

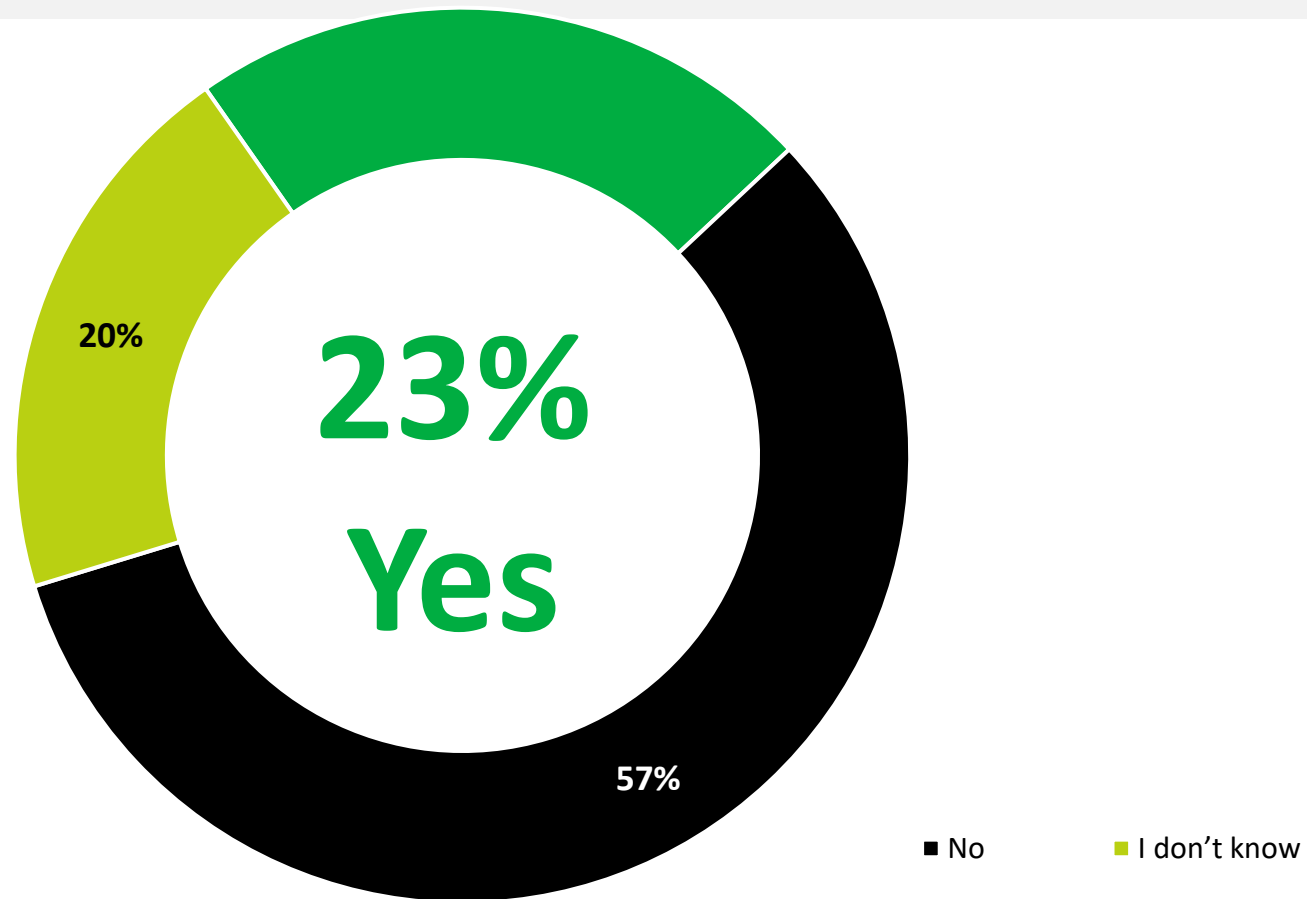
**Higher proportion of YES among :**

- Respondents who have attended training on SGPP in the last three years (**78%**)
- Respondents who mostly work in documentary content (**66%**)
- Respondents who have heard of SGPP (**65%**)

INTEREST FOR SCRIPT REFLECTING SUSTAINABLE BEHAVIOURS

Q21 – Have either script ideas or sustainable behaviours been of interest, or been raised as a source of interest, to buyers, international co-producing partners, or commissioning editors?

Base : Respondents whose main occupation is producer, executive producer, line producer, show runner, director, writer or screen-writer (n=255)





SUGGESTIONS FOR THE INDUSTRY

SUGGESTIONS FOR THE INDUSTRY (1/2)

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

Base: All respondents

« Favouring local or regional shooting, minimizing foreign projects, and working with local teams in the regions and abroad »

« Showcase and celebrate sustainable/green production practices »

« Awards for the top green productions in the zone »

« Educating the craft and catering companies, and having them reduce or eliminate the use of single-use plastics, and switching fully to biodegradable utensils, etc. »

« It really is about educating people about the alternatives and letting them know how to contribute in their own way. All of the production offices now seem to be going paperless, which is a good start, but Producers, PMs and Coordinators as well as Heads of Departments should have training and resources about how they can "greenify" their departments »

« Everyone needs to think about this every day and everyone needs to contribute on reducing and/or eliminating carbon footprint and waste »

*The following items are spontaneous mentions given by respondents in the open-ended question. Examples are shown for illustrative purposes only.

SUGGESTIONS FOR THE INDUSTRY (2/2)

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

Base: All respondents

« I think everybody would do it if money was available. Everybody wants to be greener. Nobody (independent productions) can come close to affording it »

« Choosing the green option has to be cheaper than the previously standard option »

« Let the leaders lead by example! »

« Increase tax incentives for greener productions »

« Yes, it needs to come from the federal level »

« We need to find a solution for the production truck fleet to switch entirely from fossil fuels to 100% electric or hybrid. We also need to decarbonize available generators as quickly as possible. »

*The following items are spontaneous mentions given by respondents in the open-ended question. Examples are shown for illustrative purposes only.




TEAM

TEAM

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TEAM

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