

▶ 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



Disclaimer

The information contained herein is proprietary to Telefilm Canada and may not be used, reproduced or disclosed to others except as specifically permitted in writing by the originator of the information.

Any opinions, findings, conclusions or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of Telefilm Canada or the Government of Canada. The author(s) are not mandataries or representatives of Telefilm Canada, or the Government of Canada, and Telefilm Canada and the Government of Canada are in no way bound by any recommendations contained in this report.

Table of Contents

— CONTEXT, OBJECTIVES AND METHODOLOGY	Page 4
— RESPONDENTS	Page 7
— KEY FINDINGS	Page 10
— OPPORTUNITIES FOR IMPLEMENTATION	Page 15
— TEAM	Page 63



CONTEXT, OBJECTIVES AND METHODOLOGY

CONTEXT, OBJECTIVES AND METHODOLOGY



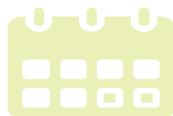
CONTEXT

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

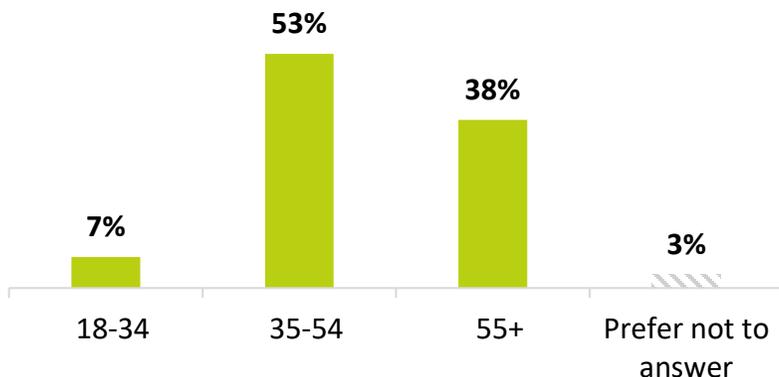
The term SGPP is used throughout the report to lighten the text. SGPP means sustainable/green production practices.



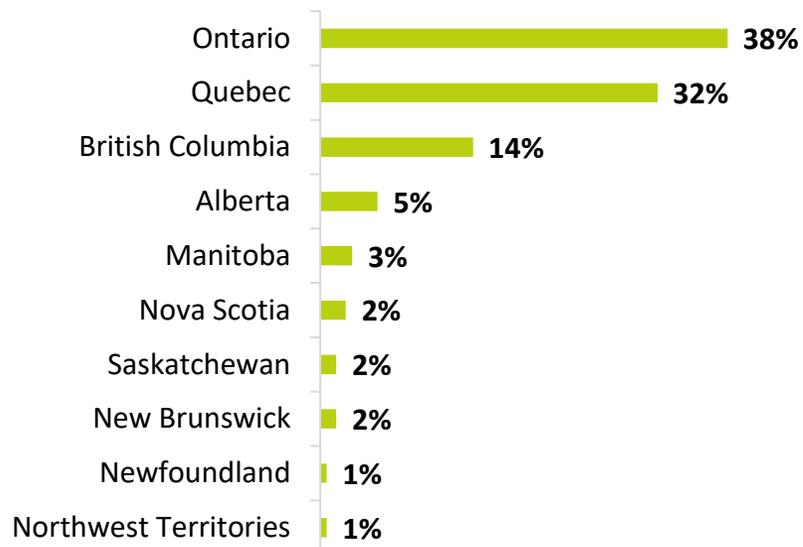
RESPONDENTS

RESPONDENT DEMOGRAPHIC

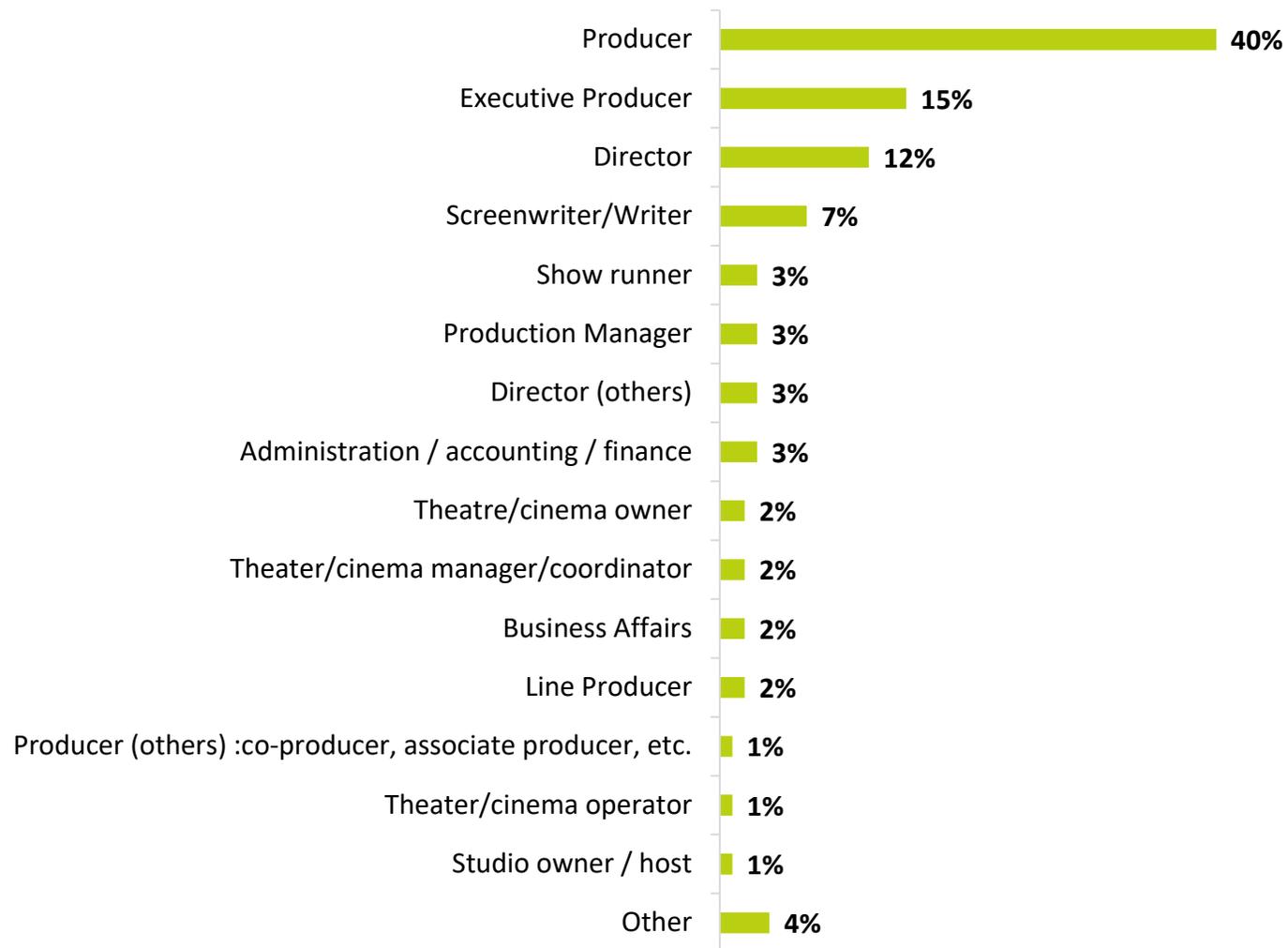
AGE



PROVINCE



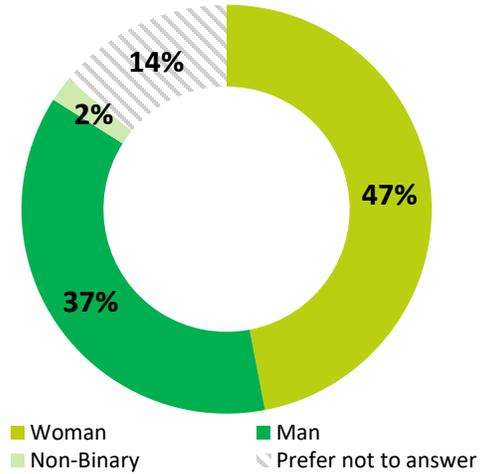
OCCUPATION



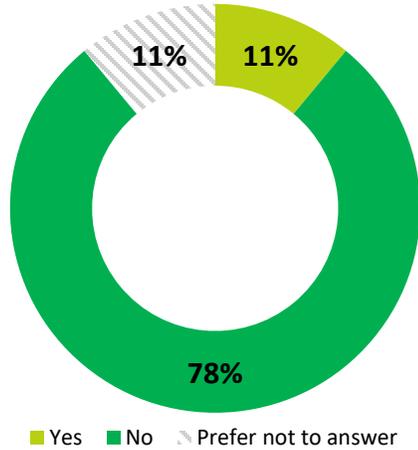
Note : For each of the identity categories, the 100% complement corresponds to "I don't know" and "I prefer not to answer".

RESPONDENT DEMOGRAPHIC – SELF-IDENTIFYING QUESTIONS

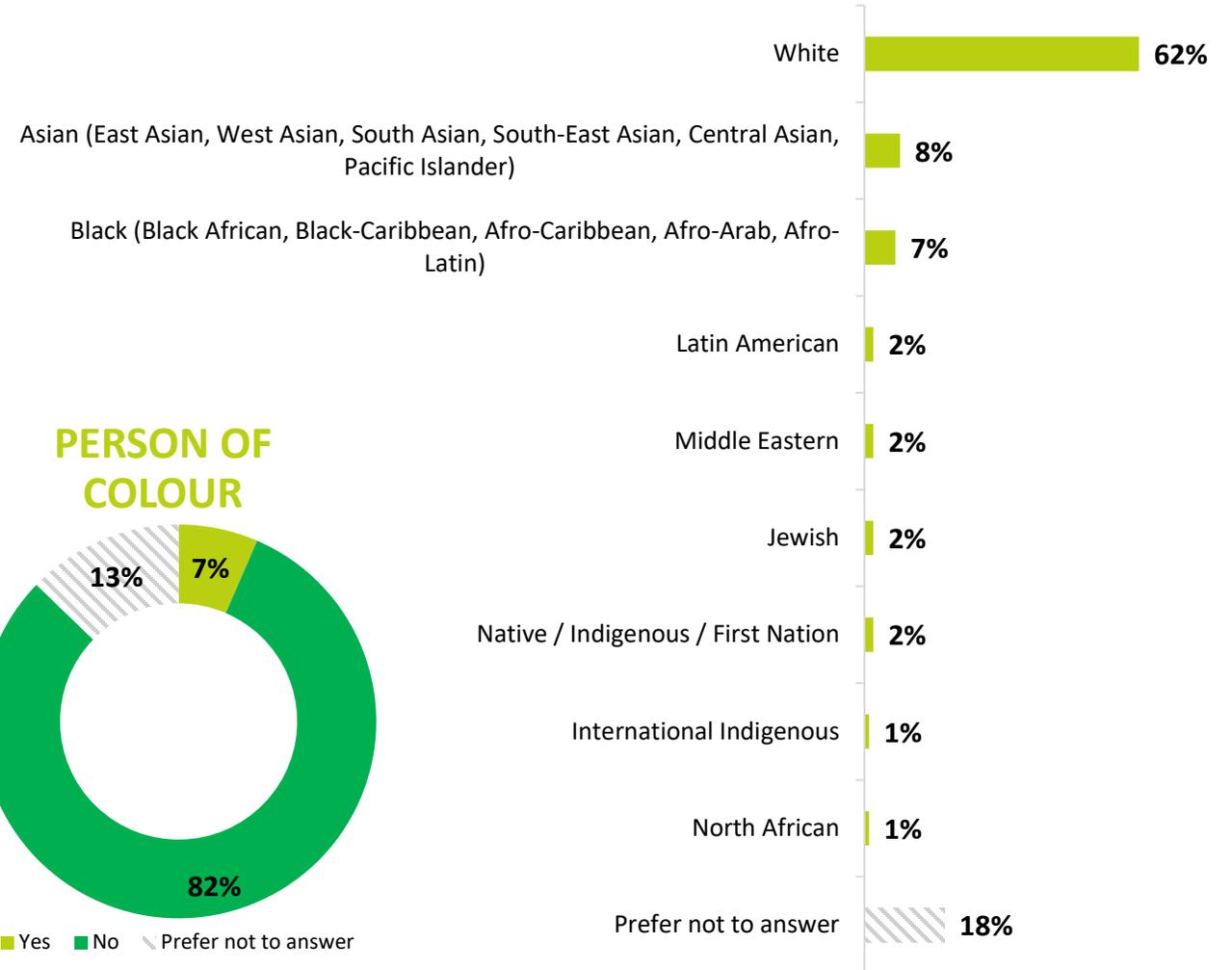
GENDER



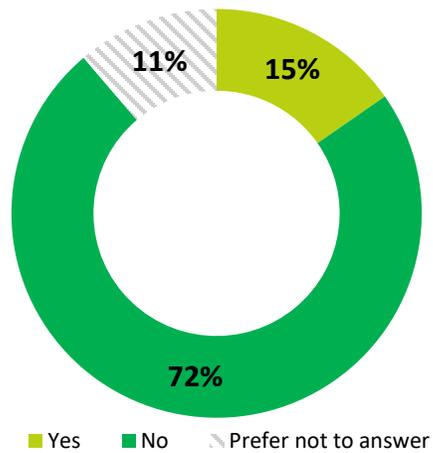
DISABILITY



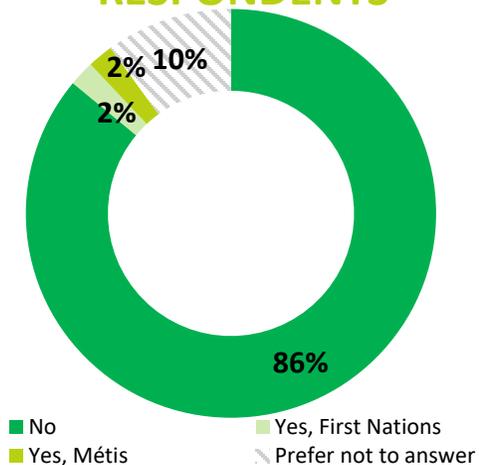
ETHNICITY



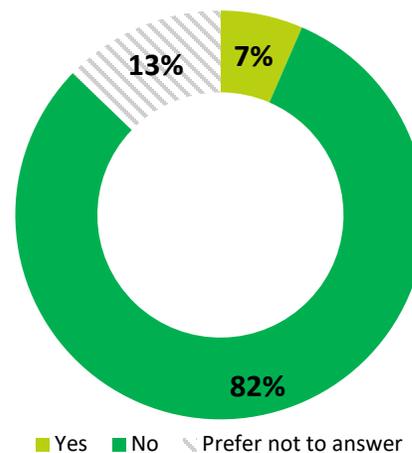
BLACK RESPONDENTS



INDIGENOUS RESPONDENTS



PERSON OF COLOUR





KEY FINDINGS

DIR

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

94%



Think that it is important their workplace incorporates SGPP

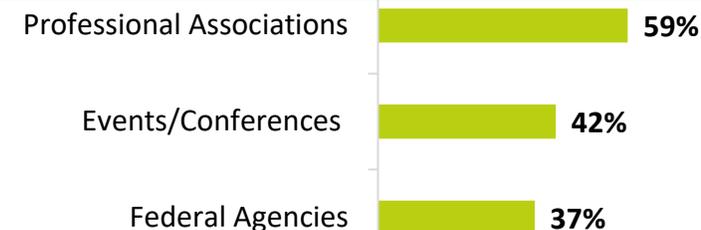
98%

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.

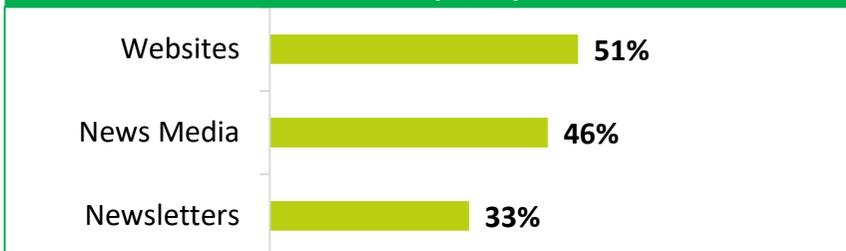
TOP 3 – SOURCES OF AWARENESS OF SGPP (Q5)



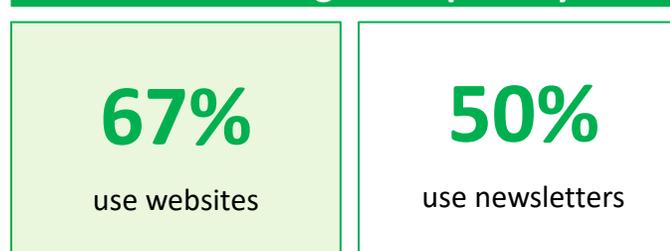
KEY FINDINGS – AWARENESS ON SGPP

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.

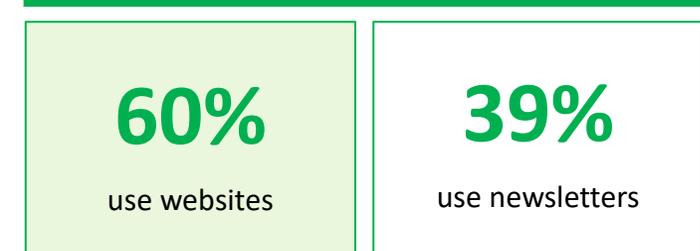
TOP 3 – PLATFORMS TO KEEP UP TO DATE WITH SGPP (Q5B)



Among respondents who have received training in the past 3 years



Among respondents who have heard of SGPP



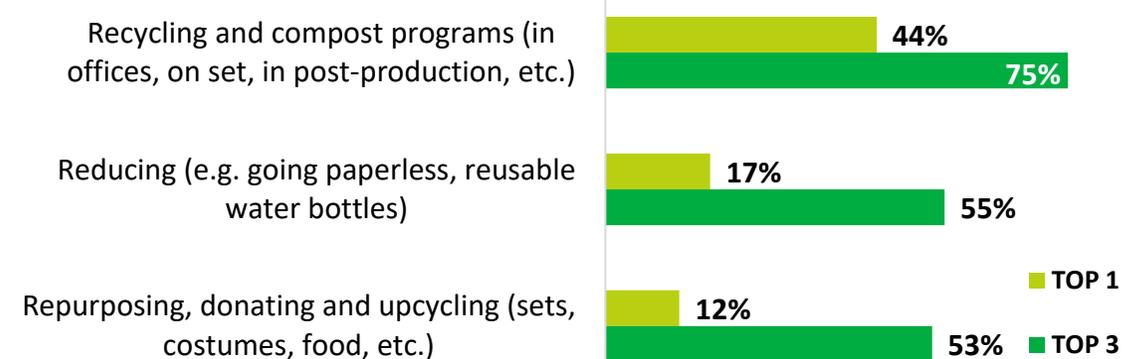
KEY FINDINGS – IMPLEMENTATION OF SGPP

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%

in 2023



25%

in 2022

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

30%

in 2023



18%

in 2022

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

68%

in 2023



58%

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 in a dimly lit room with blue and red ambient lighting. They are both looking intently at a laptop screen. The man on the left is wearing glasses and a dark t-shirt, while the man on the right is wearing a dark t-shirt. The scene suggests a collaborative work environment or a technical discussion.

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.



TEAM

TEAM

For more information on this study, please contact:

Gabrielle Blais,
Research Director

 gblais@leger360.com

 514-982-2464

TEAM

Gabrielle Blais, Research Director
Émilie Cyr, Director, Media content
Jean-François Faye, Research Analyst