

ELAN

ENGLISH-LANGUAGE **ARTS** NETWORK

**SURVEY
OF THE
ENGLISH-LANGUAGE
FILM/TV/MEDIA INDUSTRY
IN QUEBEC**

FOR THE

**ENGLISH-LANGUAGE ARTS NETWORK OF QUEBEC
with funding from Telefilm Canada**

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**MAGNETIC NORTH ASSOCIATES
Rigaud, Quebec**



Executive Summary

- There has been a significant shift in the demographic profile of the English-Quebec production industry since the last similar survey of English-Quebec producers in 2003. Today's industry is more female, has fewer immigrants, and is much more bilingual. Sixty two per cent say they speak fluent French. This demographic shift may be caused by the departure of members of the industry with poorer French language skills or an increase in language skills.
- Most respondents work part-time, and 35% receive less than a quarter of their income from media work. This is consistent with the large number of actors, 38%, who took this survey. On the other hand, most directors and producers work full time, or nearly full time, in the industry. Overall, 68% of respondents making less than \$50,000 per year.
- Canadian television production is the most important source of revenue. Forty three per cent earn the majority of their income from Canadian TV drama, theatrical features, and "other" films. 34% earn most of their income from documentary TV, international co-productions, and U.S. TV drama. 23% from all other production genres, including interactive websites and video games.
- A large minority of respondents believe they suffer disadvantages as English-speakers in Montreal. Forty four per cent say that being English-speaking has had a negative impact on their career. A large majority, 69%, also say that there are fewer job opportunities for them in Montreal compared to Vancouver or Toronto. A significant number say they will have to leave Montreal because there is not enough work in English, and they can't access work in French even if they are bilingual.
- Most respondents say the biggest problem in the industry is the low level of English-language production. Many said production has been declining for many years. They correlate this to the small size of the English-Montreal market, too few producers working in English, and the paucity of local non-news television production.
- In five years, 44% of respondents believe they will continue working in Quebec, whether in English or French. 26% are unsure where they will be working, 10% believe they will be working elsewhere, and 18% are unsure they will stay in the industry. The most pessimistic are directors; only 31% believe they will continue working in Quebec. The strategy of many is either to leave Montreal or try to work in the French industry, if they can.
- A large majority, 72%, know something about the Official Languages Act. On the other hand, 62% did not know it could be used to improve production in English-Quebec. A substantial number of respondents, 45%, know something about ELAN.

- **Slightly less than half of respondents were aware of the Telefilm programs Feature It! and Multi-platform, Multi-success. Of the 15% of respondents who participated in these programs, they said they gained a great deal from the guest speakers and the networking opportunities.**

Methodology

This survey was sent to over 2,000 members of the English-language production industry in Quebec. ELAN had the cooperation of a number of associations and guilds to send the survey to their membership. In fact, based on union membership numbers, we estimate that the overall size of the English-language production industry is roughly 3,000 people.

ACTRA-Montreal sent the invitation to participate in the survey to about 1,300 of its 2,600 members. DGC-Quebec sent the survey link to its anglophone members- approximately 75 people in various work categories. DOC Quebec notified its anglophone and allophone members- about 50 people, mostly directors and producers. ELAN sent the invitation to its 105 members working in the film and television industry.

The Montreal Film Group placed the invitation to take the survey on their website and notified their 2,000 members about the survey. Approximately 60% of the MFG membership are anglophones. Telefilm sent the invitation to 261 members of the Quebec industry from its own lists. We culled names of producers, directors, and writers from information obtained from the APFTQ, CMF, Telefilm, and SODEC websites. These included 45 producers and 21 writers who were also asked to distribute the list further.

There is some overlap among these various association mailing lists, so some people received this survey from more than one source. However, the survey could only be taken once from any computer.

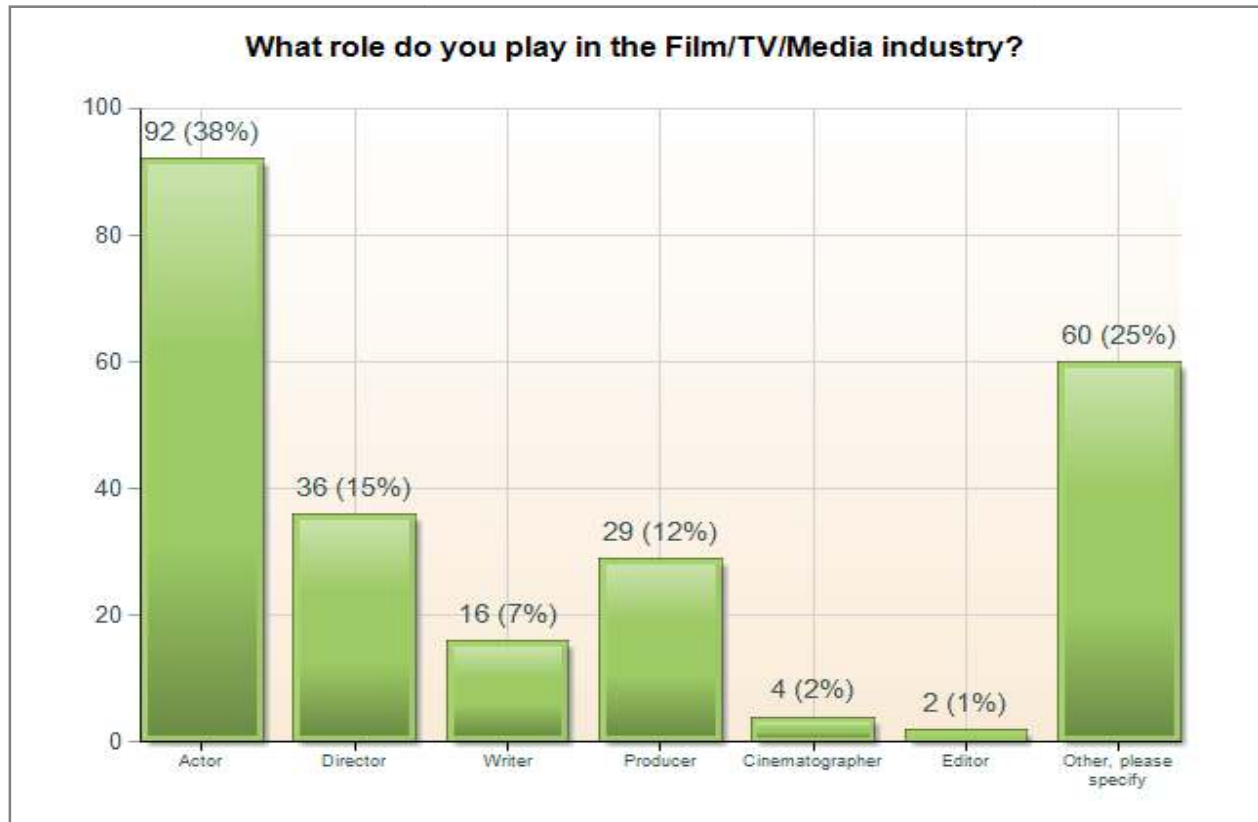
ELAN was funded to undertake this project by Telefilm under its Official Languages Activities program. The questionnaire was designed by consultants from Magnetic North Associates, Fortner Anderson, and ELAN Executive Director Guy Rodgers. It was launched in English and French on Feb. 26 on the Zoomerang website. The survey closed on March 15, 2010.

During this period, the English-language survey had 401 visits to the website, and 240 completed questionnaires. There were also 138 respondents who said they wanted to be consulted in the future, and they gave their names, telephone numbers, and email addresses to ELAN. The French-language survey had 40 visits, 14 completed questionnaires, and 9 respondents asked to be consulted in the future by ELAN. It should be noted that each respondent did not necessarily answer every question, so the number of responses varies for each question. Anonymous responses to the open questions are included verbatim in the appendices.

We have compared results of this survey with similar historic surveys, particularly the “Survey of English-speaking Film and TV Producers in Quebec” for QCGN, October, 2003; and the Survey of English-speaking Visible Minority Filmmakers in Quebec” for FAVEM, June, 2003.

Survey Questionnaire

Question 1. What role do you play in the Film/TV/Media industry?



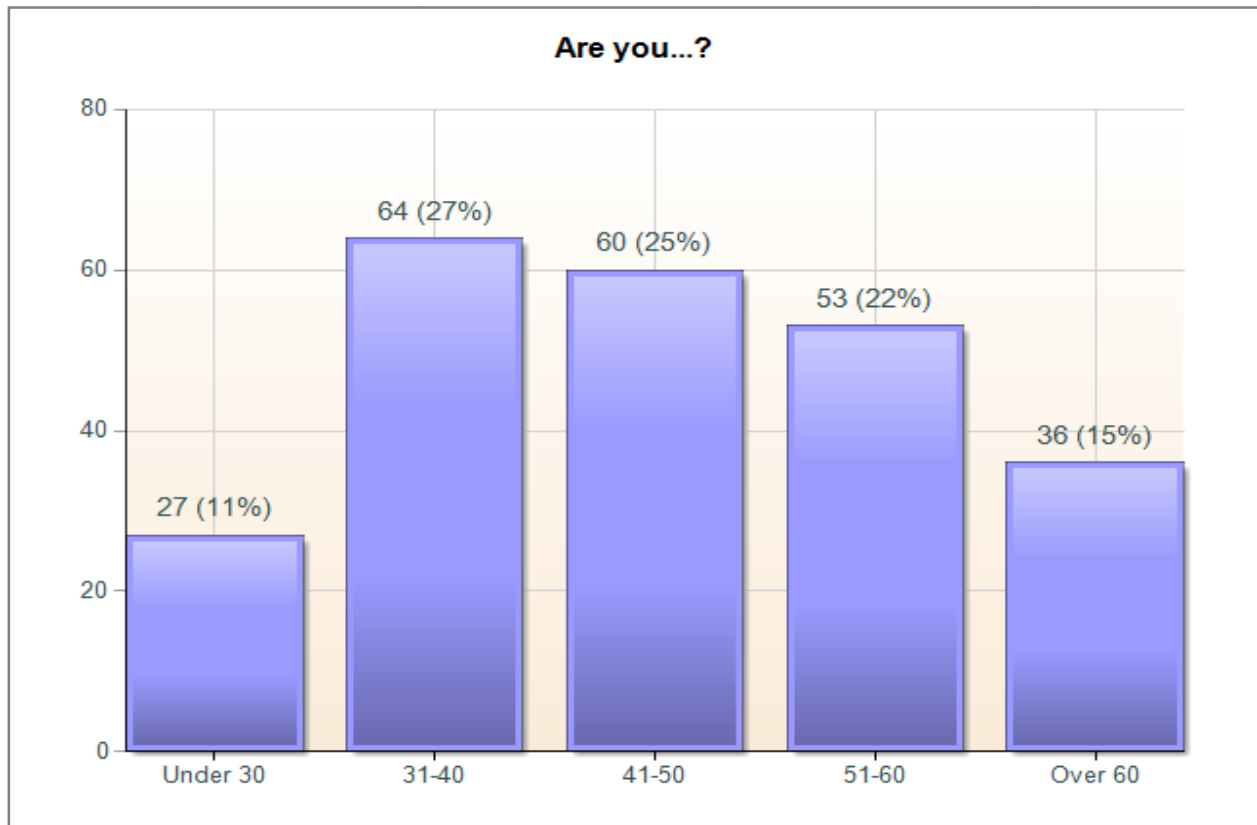
There were 239 respondents to this question. 38% identified themselves as actors, 15% as directors, 12% as producers, and 7% as writers.

Of the 25% who answered “other”, most gave multiple roles such as producer/director/writer. About 14 fit in those categories, or 6% of the total. Another 22, or 9%, were in multiple roles including acting, or some variation of acting like stunt performer. The final 23, or another 10%, were in other roles such as composer, public relations, accountant, assistant director, or production manager. See the Appendix A for the answers to the “Other, please specify” question.

Including the “other” category, about 114 actors or part-time actors, nearly 50% of the total, responded to the survey and weights the results towards their perspective. We can see from answers to other questions that a relatively high percentage of actors work part-time in the industry- 43% said they earn less than half their income from industry work. About half of writers earn less than half their income by writing.

On the other hand, about 80% of producers and 70% of directors said they earn more than 75% of their income from industry work.

Question 2. Age.



The chronological spread of respondents shows a mature industry, but one that is not too heavily weighted in the older range. 38% of respondents were 40 years or less, and 37% were 51 years or more. Actors are relatively younger than other categories with 35%, younger than 40.

Directors are relatively young as well. The largest group of directors, 44%, are 40 years old or less. Producers tend to bunch in their 30's and 50's. Presumably, the younger producers make documentaries, and the older ones produce drama.

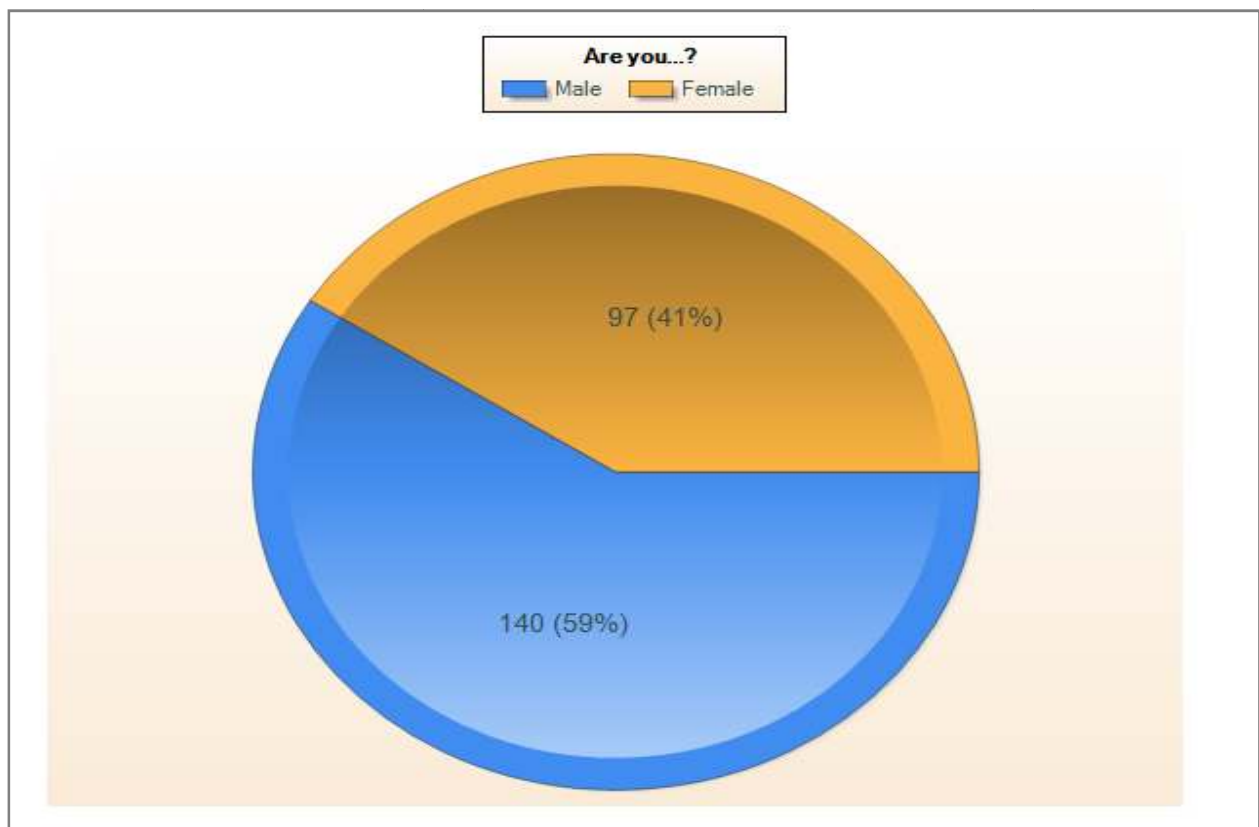
If we compare age with other questions, it seems the young respondents (under 30) are less sure they will be working in Quebec in five years than older respondents. They are more likely to work part-time in the industry now, more likely to be female, more likely to be fluently bilingual, know nothing about the Official Languages Act, and less likely to be immigrants than older respondents.

Comparison with other surveys. QCGN surveyed English-Quebec producers in 2003. FAVEM surveyed English-Quebec visible minority producers and filmmakers in 2003. DOC surveyed documentary filmmakers across Canada in 2002. See methodology for more details.

The age of members of the industry in English-Quebec is comparable today with the QCGN survey and roughly comparable with the DOC survey. When visible minorities were surveyed, respondents were significantly younger.

Age	ELAN (2010)	QCGN (2003)	FAVEM(2003)	DOC (2002)
<30	11%	9%	39%	7%
>50	37%	38%	12%	33%

Question 3. Gender.



Women make up 41% of respondents, and are most likely to be actors (40%), directors (39%), and are a majority of the “other” category (54%). Women also tend to be a higher proportion of younger respondents: 46% of those <30 and 47% of those 31-40. Since there tend to be more immigrants in the older age groups, it is not surprising that women make up fewer immigrants- 35%.

Women represent a higher proportion of respondents with income less than \$30,000 (48%), and a lower proportion of those making more than \$51,000 (32%).

Women are best represented in U.S TV drama (47%), documentary (45%) international co-productions (45%), and interactive websites (50%). This latter point is surprising because only 25% of respondents working most in games were women.

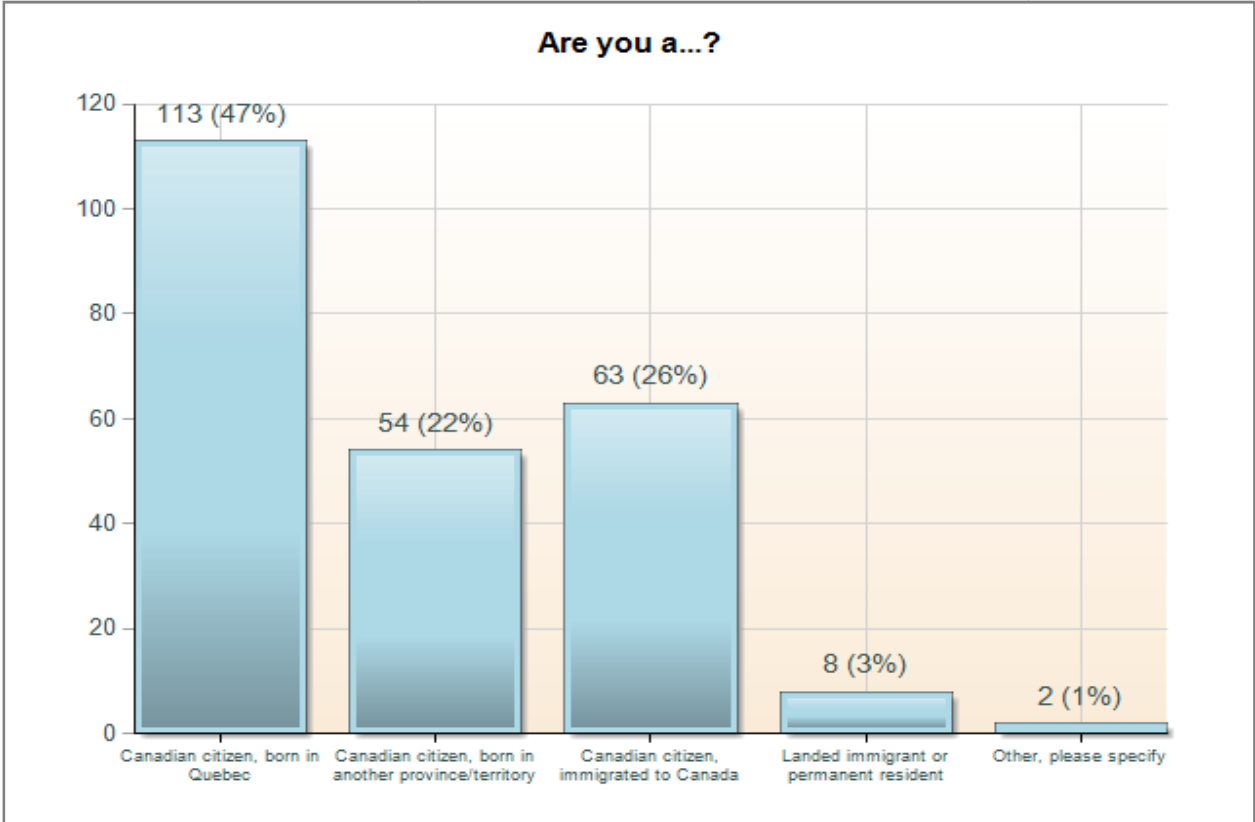
On average, a higher proportion of women are members of ACTRA, Montreal Film Group, DOC, DGC, and ELAN, than other organizations. Significantly more women than men had heard of ELAN.

Comparison with other surveys. See methodology for more details.

The gender of members of the industry in English-Quebec is comparable today with the national DOC survey of documentary filmmakers, and the FAVEM survey of visible minorities. The lower percentage of women in the QCGN survey is likely attributable to the focus of that survey on producers. The percentage of female producers in the ELAN survey is 31%.

Gender	ELAN (2010)	QCGN (2003)	FAVEM(2003)	DOC (2002)
Male	59%	67%	61%	58%
Female	41%	33%	9%	42%

Question 4. Citizenship.



69% of respondents were born in Canada and 47% in Quebec. About 29% are immigrants, but immigrants make up a larger proportion of older respondents. In fact, 64% of respondents over 60 are immigrants and only 30% of those under 30 are immigrants. Specific research would help determine the reasons for this marked shift.

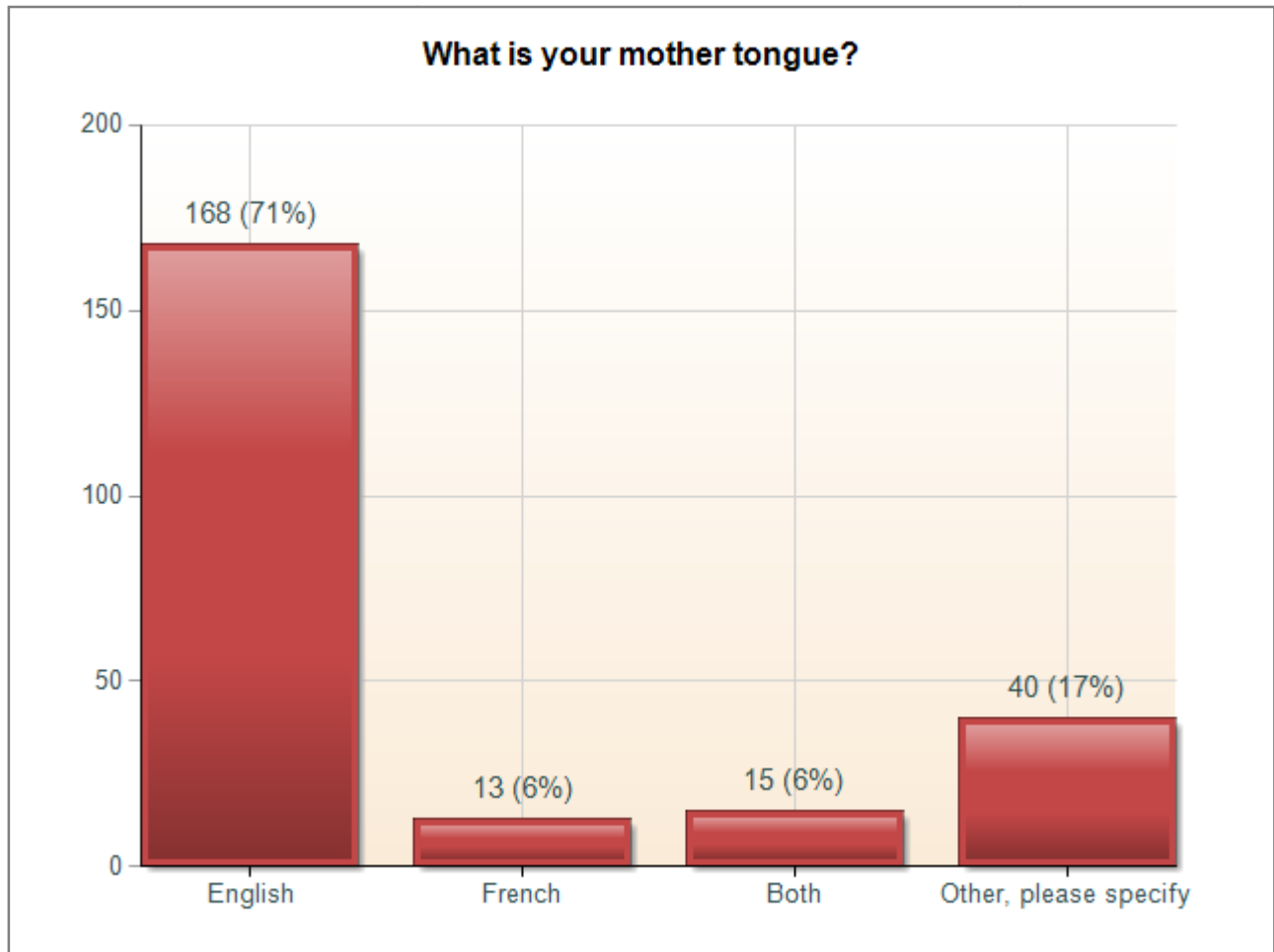
Immigrants adjust to Quebec’s languages, and are often tri-lingual. 55% say their language of work is mostly English. These include 60% of Quebec-born, 51% of Canadian-born outside Quebec, and 52% of immigrants. 61% of immigrants, 65% of Quebec-born, and 56% of Canadian-born outside Quebec say they are fluent in French. See Appendix B for answers to the “Other, please specify” question.

Comparison with other surveys. See methodology for more details.

Immigrants in the English-Quebec industry make up about 29% of the total. Not surprisingly, this is nearly 50% fewer than the FAVEM visible-minority survey. The QCGN survey was limited to producers in 2003, but the percentage of immigrants was 9% higher.

Citizenship	ELAN (2010)	QCGN (2003)	FAVEM(2003)
Canadian-born	69%	62%	22%
Immigrants	29%	38%	78%

Question 5. Mother tongue.



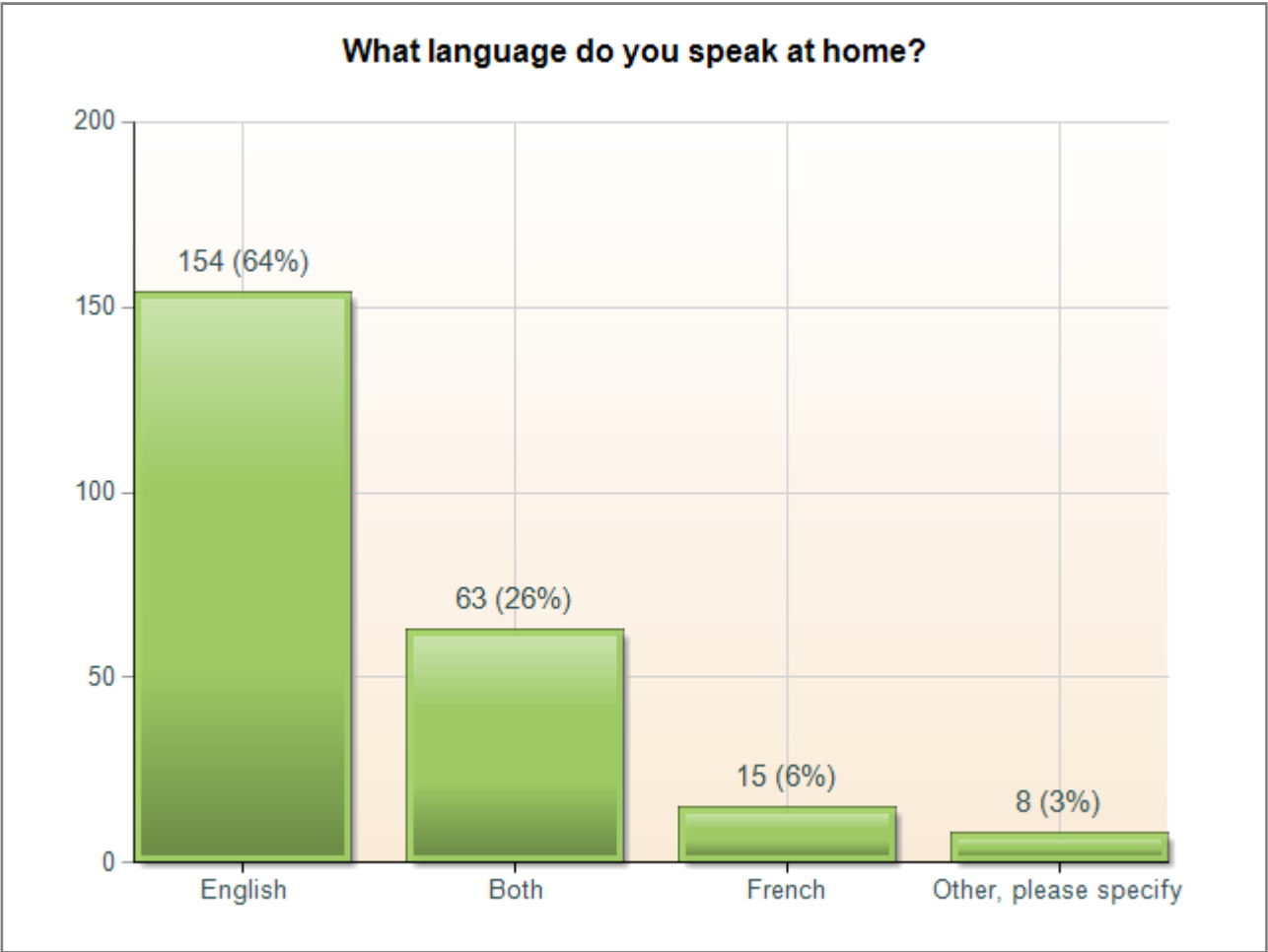
The percentage of respondents whose mother tongue is English is 71%, or 167 out of 235 who answered this question. Among these, the percentage of Quebec-born whose mother tongue is English is 76%. It is 89% for Canadian-born outside Quebec, and among immigrants 51% have English as their mother tongue.

Respondents whose mother tongue is English had the least knowledge of the Official Languages Act. 67% said they were not aware the OLA could improve opportunities for the film/TV industry, compared to 54% of francophones, and 48% of allophones.

More allophones considered themselves fluent French-speakers than anglophones. 68% of allophones speak fluent French compared to 54% of anglophones. See Appendix C for answers to the "Other, Please specify" question.

There was no comparable question about mother tongue in the other surveys.

Question 6. Language spoken at home.



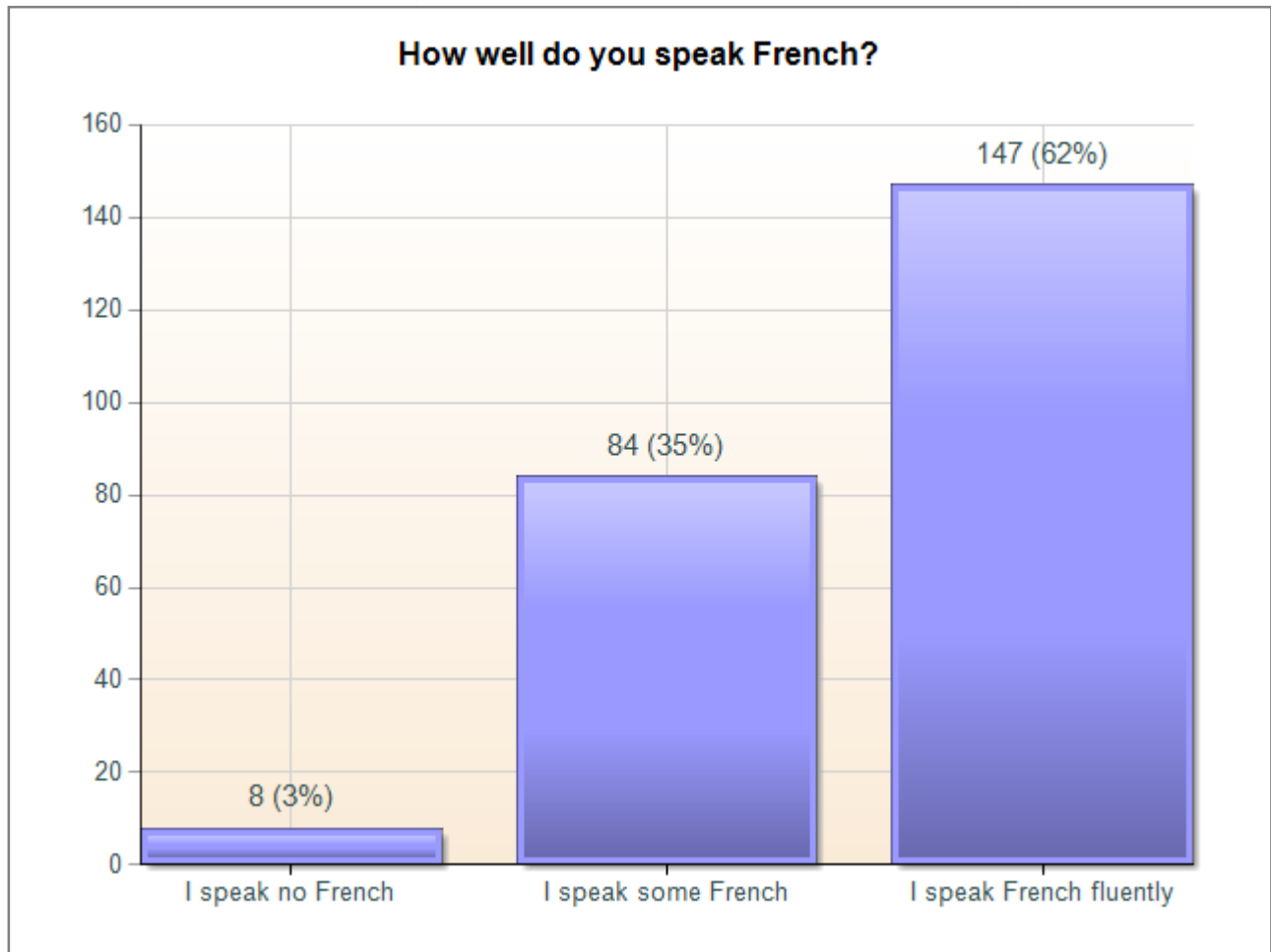
The percentage of respondents who speak English at home (64%) is similar to historic levels as we can see in the comparison with the 2003 survey below. However, the ELAN survey asked a new question. How many spoke both English and French equally at home? It is surprising to see that 26% do. Presumably, this is indicative of the level of inter-marriage between anglophones and francophones, and an interesting comment on the high level of bilingualism among these respondents (see Question 7 below).

Comparison with other surveys. See methodology for more details.

Neither the QCGN survey, nor FAVEM, differentiated between people who spoke French only and spoke both English and French equally at home. English spoken at home by members of the industry in English-Quebec is comparable today with the QCGN survey. However, since there was no “both” question in 2003, it is difficult to judge the differences between French and both. The decline in the other languages spoken at home is consistent with the lower number of immigrants in the ELAN survey. FAVEM is very different because it was aimed at visible minorities who were mostly allophone immigrants.

Language at home	ELAN (2010)	QCGN (2003)	FAVEM(2003)
English	64%	67%	31%
French	6%	6%	3%
Both	26%	NA	NA
Other	3%	11%	63%

Question 7. How well do you speak French?



62% of respondents said they speak French fluently, and only 3% said they didn't speak French. This is a significant increase in bilingualism over previous survey levels.

Producers are the most bilingual. 86% said they speak fluent French, compared to 57% of actors who are fluent, and 50% of directors and writers.

Although the youngest respondents are the most bilingual, there is no clear-cut trend across age groups. 74% of respondents in their twenties speak fluent French compared to 56% of those in their thirties, 65% in their forties, 58% in their fifties, and 60% in their sixties.

While 69% of respondents believe there are fewer job opportunities in Montreal compared to Toronto and Vancouver, as one would expect, employment perceptions are improved by bilingualism. 64% of respondents who speak fluent French believe there are fewer opportunities in Montreal. This compares to 76% of those who speak some French who believe there are fewer jobs here, and 88% who speak no French.

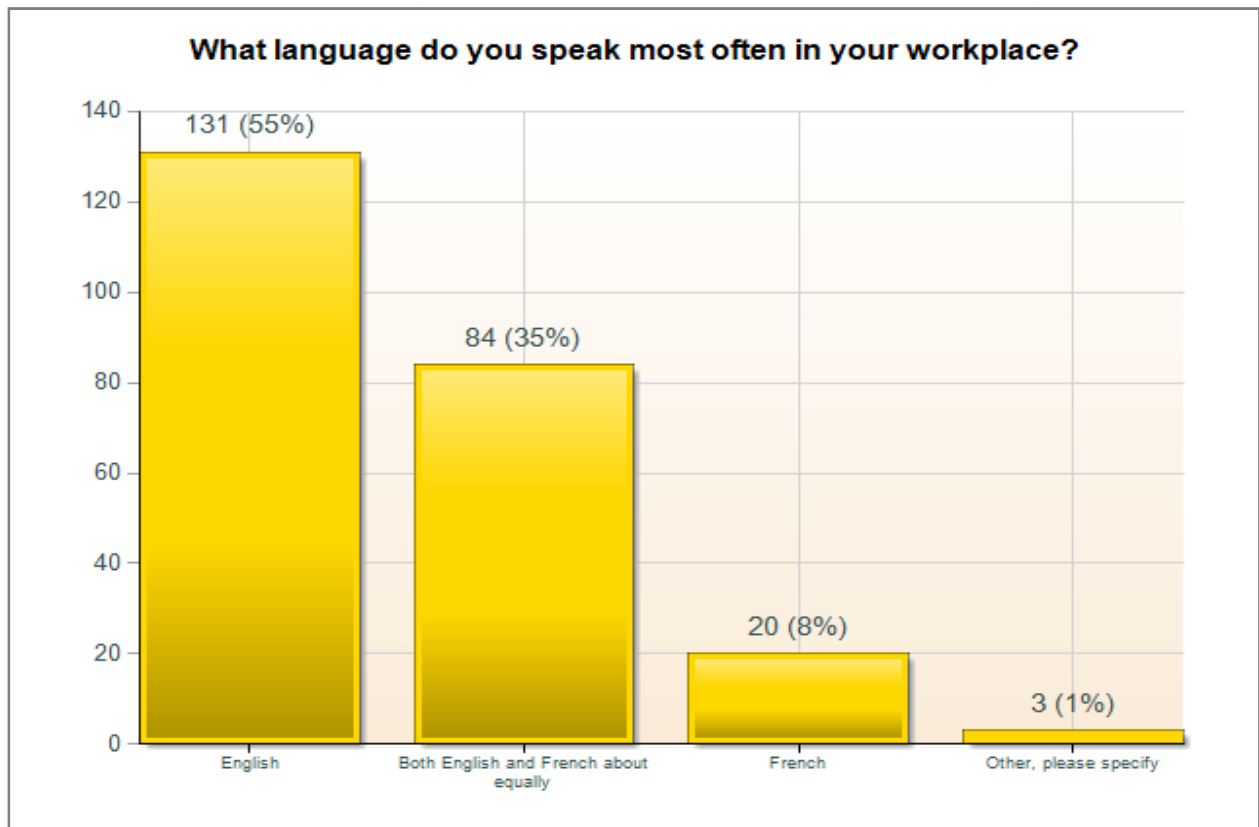
Comparison with other surveys. See methodology for more details.

The quality of French spoken by the respondents to this survey, compared to those who answered this question on the QCGN survey, is significantly different. The percentage of respondents who said they could speak some French is about the same. But the percentage who said they could speak no French has fallen from 23% in 2003 to 3% in 2010. At the same time, those who say they can speak French fluently has increased from 44% to 62%.

Additional research would be required to account for this increased bilingualism (or decrease in unilinguals) within the English-language production industry in Quebec. This increase in bilingualism is even more pronounced when it is recalled that 86% of producers in 2010 spoke fluent French compared to the 44% in 2003 from a group uniquely comprised of producers.

Bilingualism	ELAN (2010)	QCGN (2003)
Speak no French	3%	23%
Speak some French	35%	33%
Speak French fluently	62%	44%

Question 8. Language spoken in the workplace.



We can see an evolution towards greater use of French.

71% of respondents spoke English as their mother tongue, 12% had French or both as mother tongue, and 12% had another mother tongue.

The language spoken at home now shows 64% English, 6% French, 26% both, and 3% other. Many anglophones live in bilingual or French-speaking households, and allophones live in English- or French-speaking households.

55% speak mostly English at work, 8% mostly French and 35% speak both languages equally at work. The language of work continues to have a higher percentage of French. See Appendix D for answers to the “Other, Please specify” question.

Undoubtedly, as anglophones and allophones move into French environments at home and work, the quality of French improves, and this is confirmed by the fluency in French which we have seen is very high from the previous question.

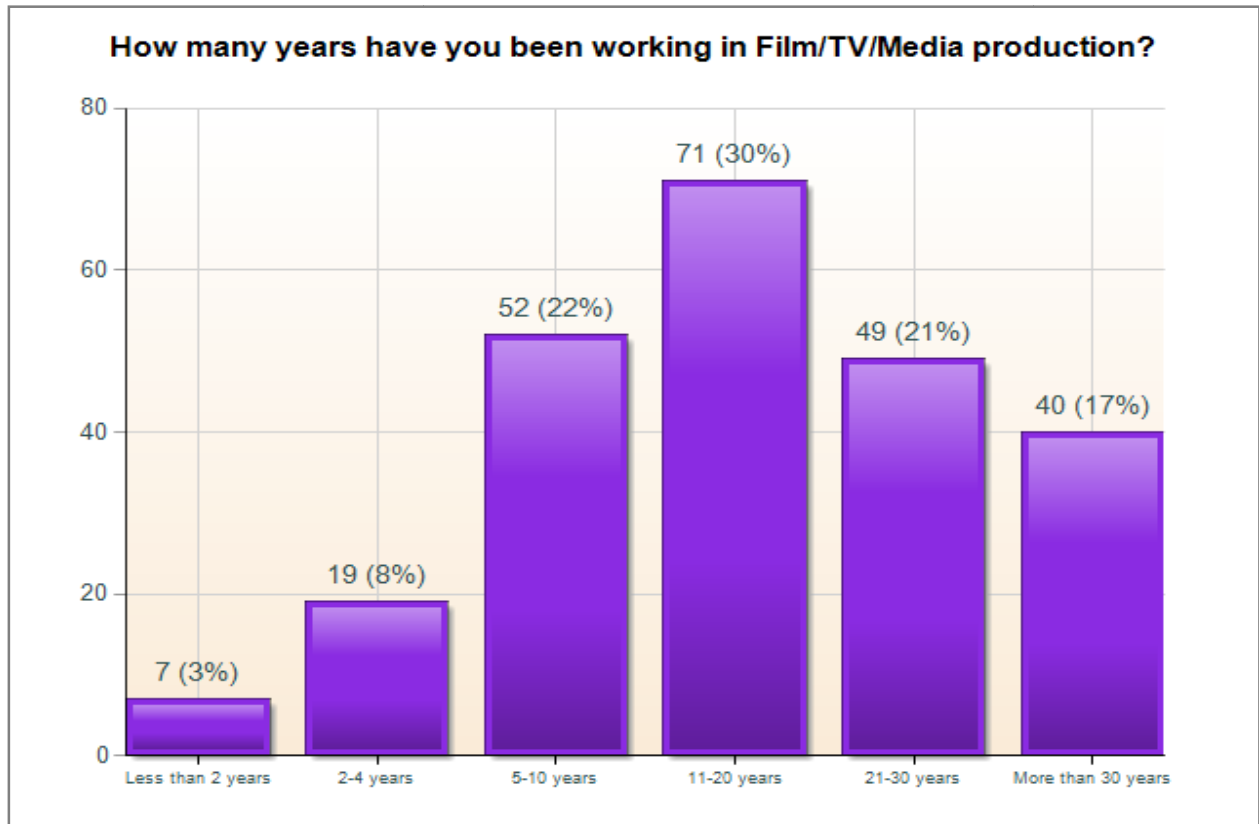
Comparison with other surveys. See methodology for more details.

French has increased slightly as the language of work compared to the QCGN survey. This is consistent with other linguistic trends noted towards greater bilingualism among respondents to the ELAN survey.

French at work is significantly higher compared to the FAVEM survey. However, the FAVEM question did not offer both English and French as an option. Clearly, some French or English answers would have been placed in the “both” column if it had been available to FAVEM respondents.

Language at work	ELAN (2010)	QCGN (2003)	FAVEM(2003)
English	55%	62%	84%
French	8%	6%	16%
Both	35%	32%	NA
Other	1%	NA	NA

Question 9. Years working in Film/TV/Media production.



Industry experience peaks in the 11-20 year period. Based on respondents with over 11 years experience, this is a slightly more mature industry than we see in previous surveys.

Looking more closely at the data, we see that producers are the most mature category. 28% have more than 30 years experience. We believe these are the drama producers, and wonder who will replace them. Directors are more evenly spread across the different columns, though DGC members tend to be older. We assume documentary directors may belong to DOC instead of DGC, and drama directors are DGC members. Actors are evenly spread, but peak at 11-20 years experience.

Male respondents tend to be older, females younger. Immigrants are also older with 11 or more years experience. The animation industry is more experienced compared to other production genres.

Older respondents with more than 11 years experience say they are likely to be working in Quebec in five years (in either English or French). Respondents with less than 10 years experience are not as sure where they will be here in five years. 44% of all respondents believe they will be working in Quebec. 34% have more than 10 years experience and 10% have less.

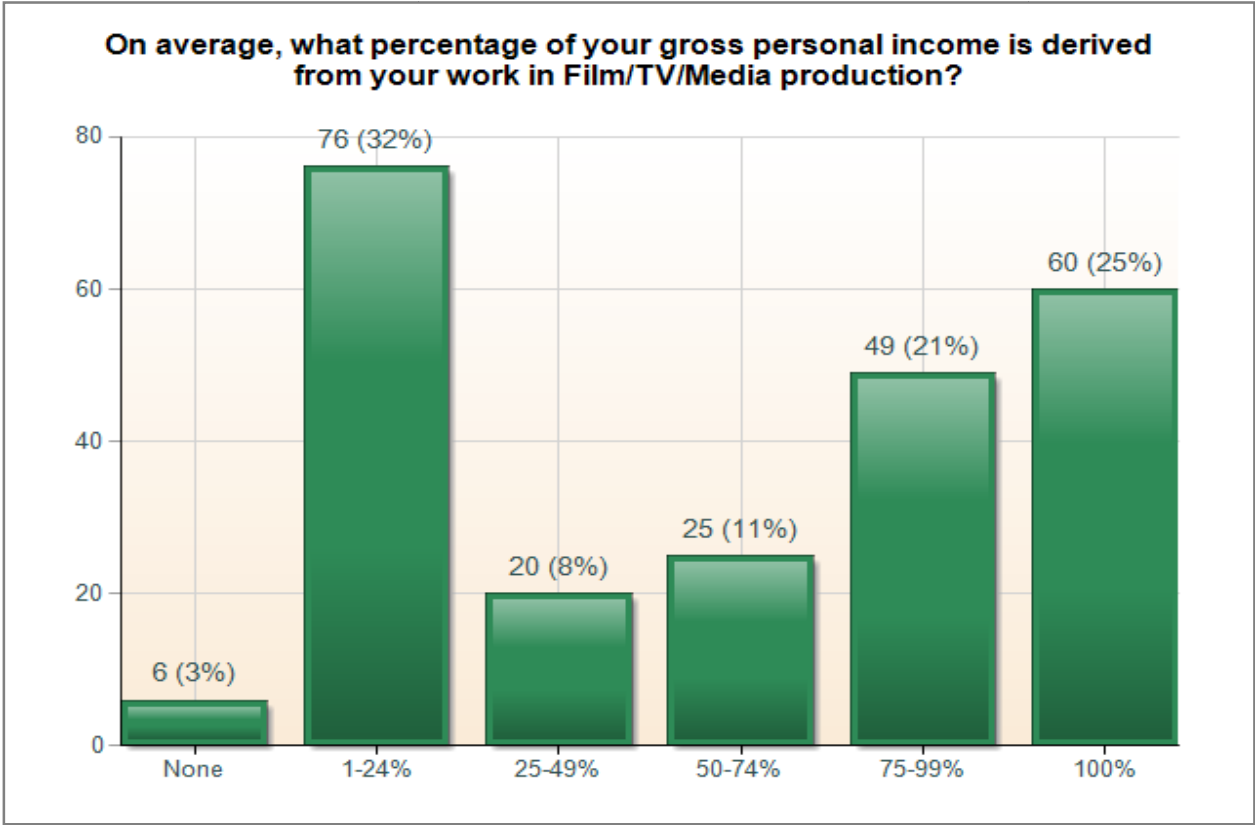
Comparison with other surveys. See methodology for more details.

ELAN respondents are the most experienced from these surveys, but the maturity of this industry is similar to that in the QCGN and DOC surveys. Once again, the FAVEM respondents are mirror reverse with only 8% all respondents having 11 or more years experience.

Note: the FAVEM survey asked for the length of time their company was in operation up to 11 or more years, and DOC survey identified only less or more than 10 years.

Experience	ELAN (2010)	QCGN (2003)	FAVEM(2003)	DOC (2002)
<2 years	3%	5%	17%	NA
2-4 years	8%	8%	58%	NA
4-10 years	22%	23%	17%	41%
11-20 years	30%	25%	8%	59%
21-30 years	21%	25%	NA	NA
>30 years	17%	15%	NA	NA

Question 10. Gross personal income derived from Film/TV/Media production.



Most of these free-lancers are actors, and 52% of actors earn less than one quarter of their income from acting. On the other hand, 26% of actors make 75% or more of their personal income within the industry. 44% of writers make 75% or more from writing. 71% of directors earn more than 75% of income directing, and 79% of producers are in this category.

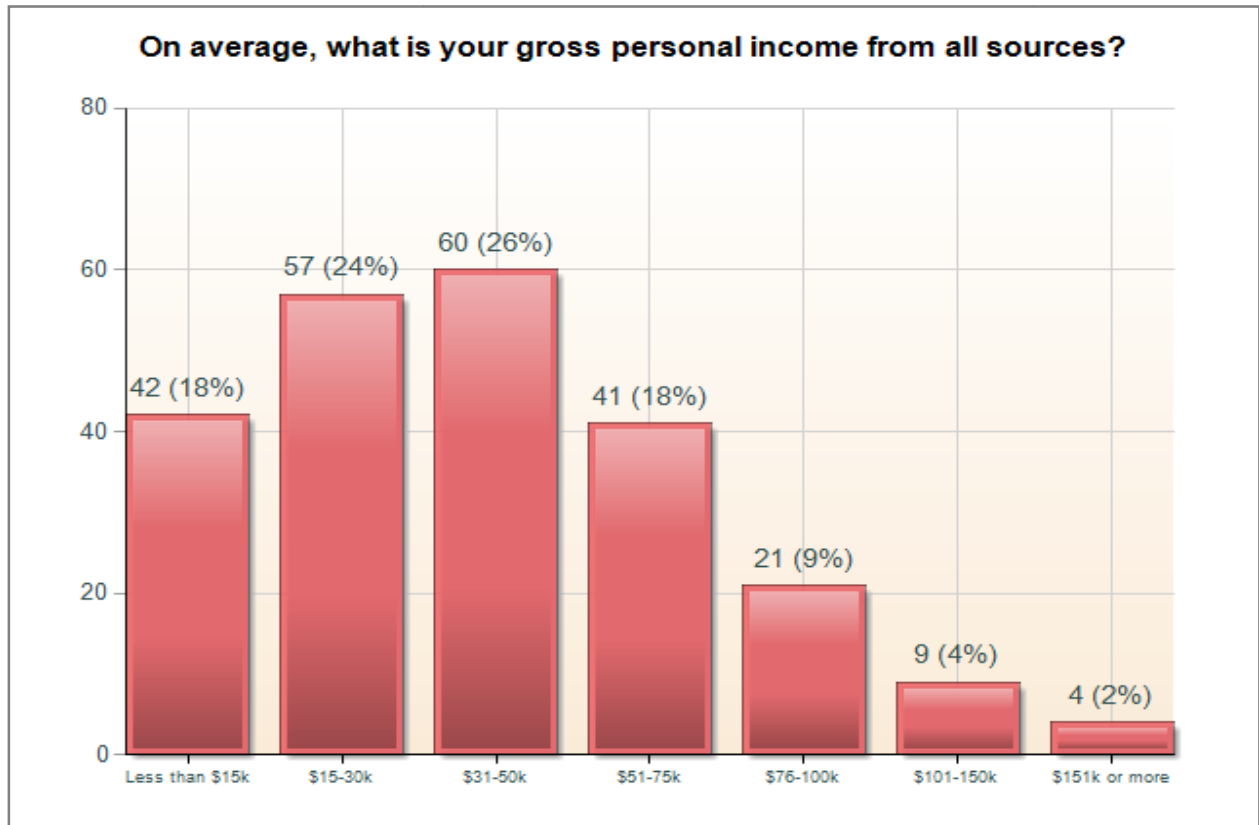
Comparison with other surveys. See methodology for more details.

Most of the respondents for the ELAN survey are actors, writers, and others who tend to work free-lance. Therefore, it isn't surprising that ELAN many respondents do not work full time in the industry. The QCGN survey was largely limited to producers whose income was mostly or entirely generated from production work.

Note: the FAVEM survey included 100% and 75-99% together, and DOC survey identified only less or more than 50% of income.

Percentage Income	ELAN (2010)	QCGN (2003)	FAVEM(2003)	DOC (2002)
None	3%	2%	22%	NA
1-24%	32%	3%	19%	NA
25-49%	8%	6%	13%	35%
50-74%	11%	15%	9%	65%
75-99%	21%	32%	37%	NA
100%	25%	42%	NA	NA

Question 11. Gross personal income from all sources.



Gross incomes for all respondents peak in the \$31-50k range, and 50% of all respondents have gross incomes from \$15k to \$50k. Of 233 who answered this question, the top earners were not bunched in one discipline. Respondents with incomes over \$100k were three producers, three writers, two directors, and one actor.

Men make up the majority of high earners with 79% of those grossing over \$75k. Immigrants represent 32% of those making over \$75k. Speaking French fluently is a decided advantage for all income categories below \$100k.

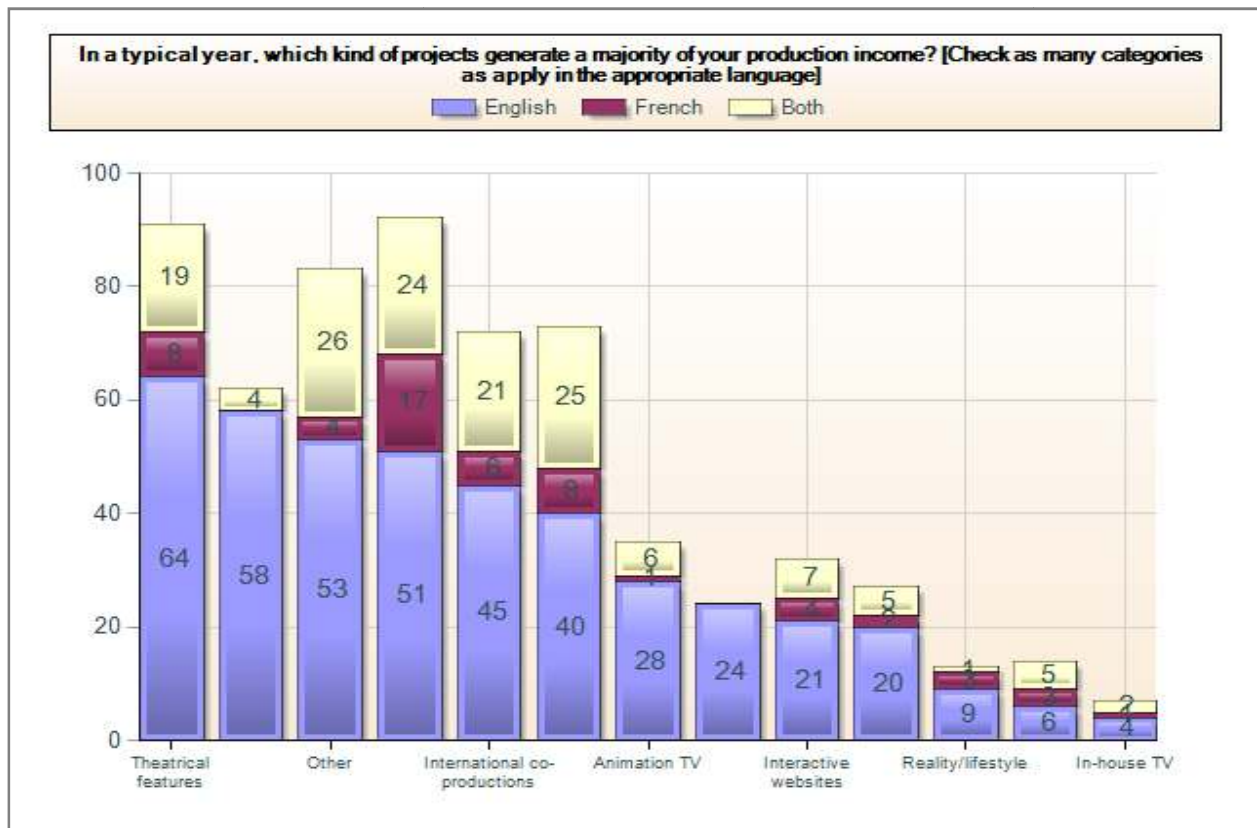
Comparison with other surveys. See methodology for more details.

Mid-range income (\$15-75k) for ELAN and QCGN respondents is nearly identical. This means the ELAN respondents are making less as a result of inflation on these categories over the last 7 years. Higher percentages at upper range for QCGN represents more producers' incomes, and lower range for ELAN represents more free lance incomes.

Note: Gross income not available for FAVEM. Gross income for DOC survey respondents are totals below \$30k and above \$76k only.

Gross Income	ELAN (2010)	QCGN (2003)	FAVEM(2003)	DOC (2002)
<\$15k	18%	10%	NA	NA
\$15-30k	24%	27%	NA	28% (below \$30K)
\$31-50k	26%	26%	NA	NA
\$51-75k	18%	15%	NA	57% (\$30K to \$76k)
\$76-100k	9%	8%	NA	NA
\$101-150k	4%	10%	NA	15% (above \$76k)
\$>151k	2%	5%	NA	NA

Question 12. In a typical year, which kind of projects generate a majority of your production income?



Respondents said they receive a majority of their income, on average, from two or three different genres on this list. Few seem to work exclusively in any genre. The following genres were identified as providing the majority of income for each respondent.

Genre	Total	Actors	Directors	Writers	Producers	Percentage of total
Domestic TV drama	92	47	7	4	9	15%
Theatrical features	91	30	7	6	16	15%
Other	83	40	13	3	15	13%
Documentary TV	73	17	20	1	11	12%
International co-productions	72	29	5	4	9	12%
U.S. TV drama	62	34	1	3	4	10%
Animation TV	35	22	2	2	2	6%
Interactive websites	32	11	7	-	4	5%
Children's TV	27	12	3	2	2	4%
Digital games	24	16	2	-	-	4%
Variety TV	14	8	-	1	2	2%
Reality/lifestyle TV	13	1	3	1	3	2%
In-house TV	7	2	1	-	2	1%
Total	625	249	71	27	79	100%

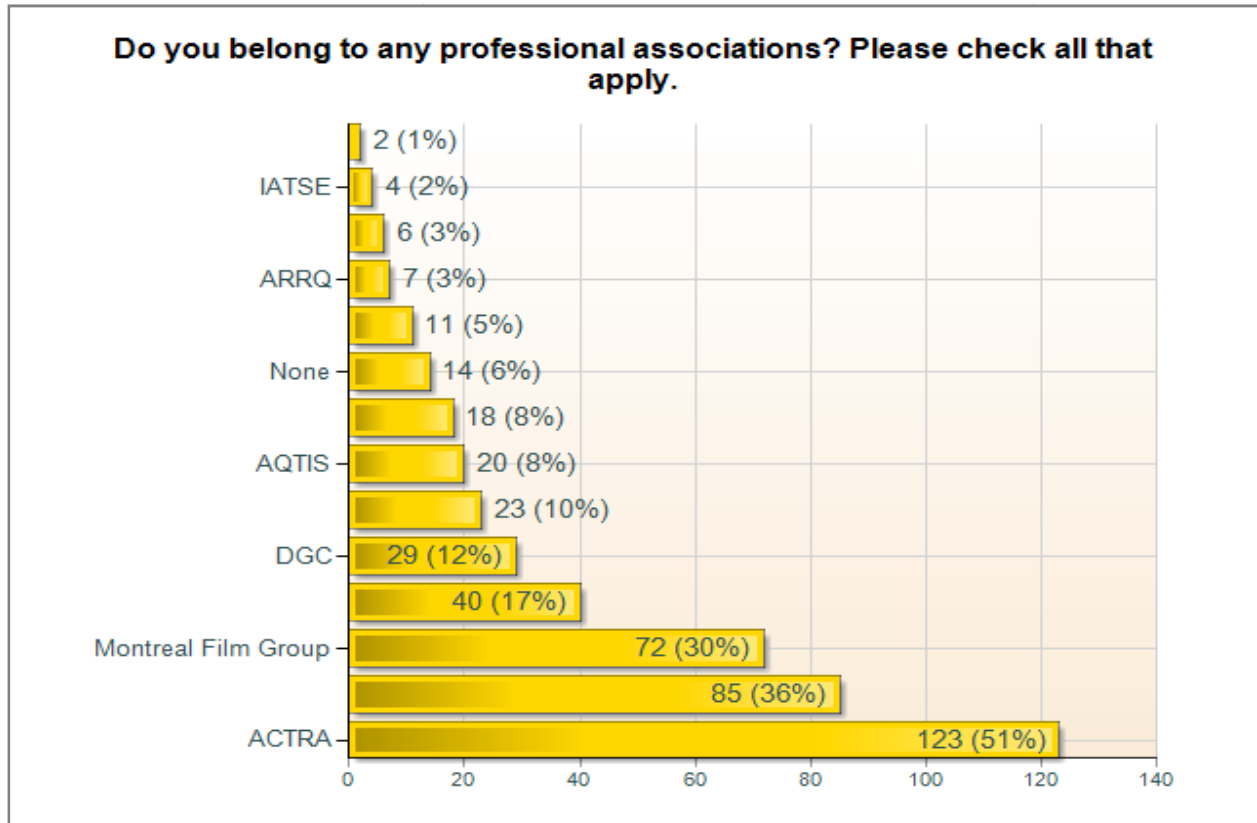
Note- theatrical feature would include both docs and drama, and respondents could mark as many genres as they wanted.

The numbers refer to the individual responses to this question. 40% of responses were from actors, 13% from producers, 11% from directors, and 4% from writers. Other disciplines, or those who claimed multiple disciplines, make up 32% of the responses.

We can see from this table that domestic TV and theatrical features provide the most employment to the respondents, followed by “other”, documentary TV, international co-productions, and U.S. TV drama. The importance of theatrical features is surprising, and may be partly explained by the inclusion of documentary as well as drama in this genre.

We don’t know from this survey what constitutes “other”, but it is the most important genre for respondents under 40 years old. The importance of this genre should be followed up in future research.

Question 13. Professional associations.



Respondents were asked to identify all the professional associations they belong to. They identified the following: CFTPA 1%, IATSE 2%, APFTQ 3%, ARRQ 3%, SARTEC 5%, 'No associations' 6%, DOC 8%, AQTIS 8%, WGC 10%, DGC 12%, ELAN 17%, MFG 30%, Other 36%, and ACTRA 51%. Most responses in the "Other" included Union des artistes. Apparently many actors belong to both ACTRA and Uda. See Appendix D for answers to the "Other, Please specify" question.

If we look at responses by discipline, we see that many respondents work in several disciplines and the lines between membership in professional associations and craft are often blurry. There were 123 ACTRA members. Ninety identified themselves as actors, 23 as "other" (including actor and something else), and 10 were in categories such as director, producer, editor, etc. Out of 28 DGC respondents to this question, 11 were directors, 12 "others" (again usually multiple disciplines), and 5 identified themselves as writers or producers.

ELAN's 40 respondents cover a very broad spectrum of crafts. Six are actors, 12 directors, 3 writers, 8 producers, 1 cinematographer, 1 editor, and 9 others. The Montreal Film Group's 72 respondents also cover quite a wide spectrum: 7 actors, 22 directors, 5 writers, 12 producers, 3 cinematographers, and 23 others. WGC has 23 respondents, and they include 1 actor, 8 directors, 7 writers, 3 producers, and 4 others. DOC has a more narrow membership- 9 directors, 4 producers, and 5 others.

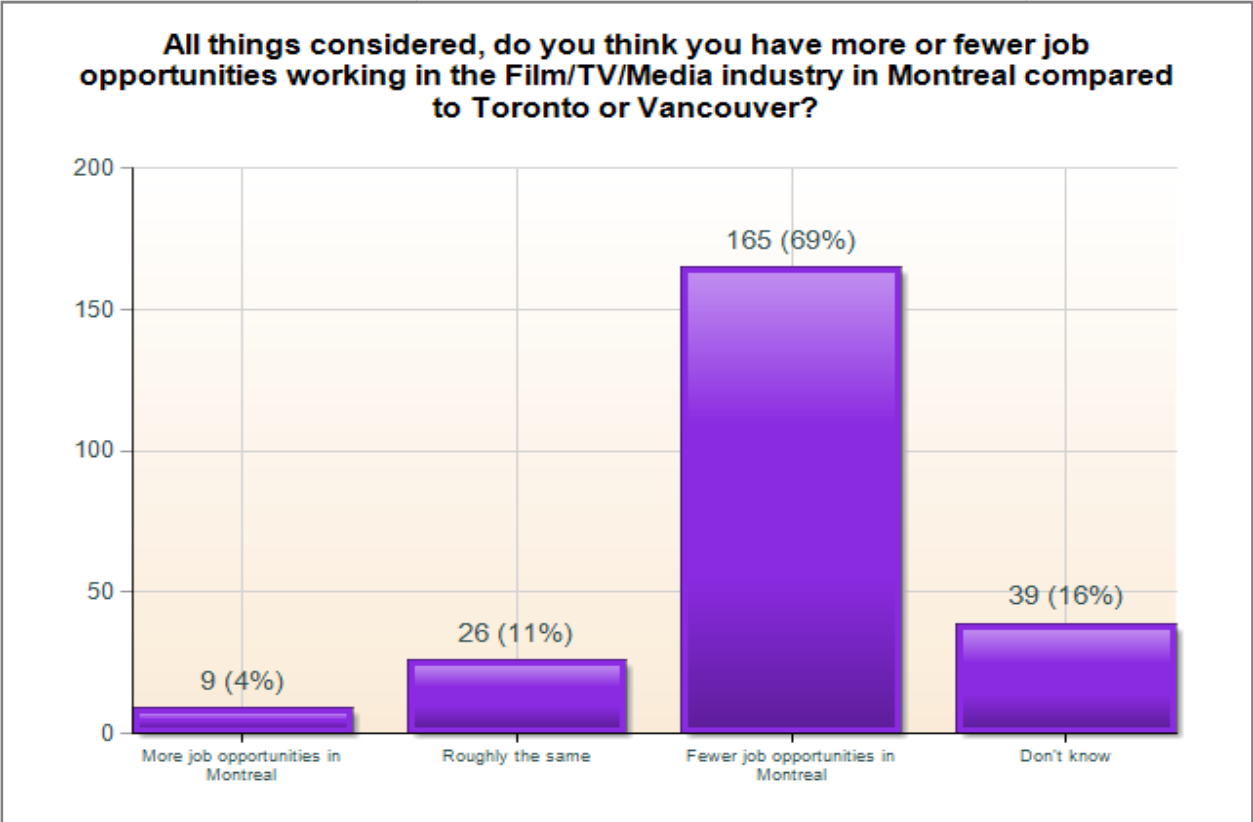
Looking at the age of respondents from the following associations, we see that the youngest -- under 40 years old -- are members of MFG (50%). ELAN's under-40 members represented 41% of its respondents, and ACTRA's members 36%. DGC respondents are older with only 21% under 40.

The associations with the highest percentage of women among its respondents were ELAN and DOC. DOC respondents were 56% female, and ELAN 51%. All other associations had a majority of male respondents.

WGC members are the most knowledgeable about the Official Languages Act. Only 4% say they know nothing about it, 91% know little/some, and 4% know a lot. Twenty per cent of ELAN members say they know nothing of the OLA, 78% know a little or some, and 3% know a lot about it. DGC members are also knowledgeable with 24% knowing nothing, 76% knowing little/some, and none knowing a lot. 29% of ACTRA members know nothing, 68% know little/some, and 3% know a lot.

Not surprisingly, ELAN members know the most about ELAN. 72% know little/some, and 28% know a lot. DOC members are the next most knowledgeable about ELAN- 73% know little/some, 11% know a lot, and 17% know nothing. MFG is the next group with some knowledge of ELAN- 55% know little/some, 16% know a lot, and 38% know nothing. Other association respondents know less about ELAN. We assume that groups with higher knowledge of ELAN likely have more cross-over membership.

Question 14. More or fewer job opportunities working in the Film/TV/Media industry in Montreal compared to Toronto or Vancouver?



As this graph shows, 7 out of 10 respondents believe there are fewer job opportunities in Montreal compared to Toronto or Vancouver. This belief is widespread across disciplines, age groups, and income levels. Respondents are more pessimistic about working in Montreal than their colleagues were when they answered a similar survey in 2003. See below.

Comparison with other surveys. See methodology for more details.

If we overlook the difference in the questions noted below, we see a greater pessimism today than seven years ago about employment or production opportunities in Montreal. 20% of English-language producers told the QCGN survey that it was more advantageous producing in Quebec while only 4% of ELAN respondents believe there are more job opportunities in Montreal than Toronto or Vancouver. Today, 69% believe it is more difficult here compared to 54% in 2003.

Note: The questions are different, but the idea behind them is the same. The ELAN survey asked respondents to compare job opportunities in Montreal, Toronto, and Vancouver. The QCGN survey asked producers whether it was more or less advantageous producing in Quebec.

More or less advantageous here	ELAN (2010)	QCGN (2003)
Better in Montreal	4%	20%
Roughly the same	11%	12%
Worse in Montreal	69%	54%
Don't know	16%	12%

Question 15. If you answered the previous question with either more or fewer opportunities in Montreal, briefly, please explain why.

There were 165 responses to this question. Only 4 might be considered positive while 161 were definitely negative. There are clearly serious problems with English-language production in Montreal. See Appendix F for the verbatim answers from all respondents.

The primary problem is simply not enough English production, and therefore not enough work. The reasons include inadequate support by the Quebec Government for English production, too few companies producing in English, too few producers, poor access to key television and distribution executives, no local television production, too little drama, and various other structural issues.

The general lack of local television drama was a recurring theme. Many respondents commented on the paucity of local television production in English, and blamed this partly on poor access to key television executives in Toronto. A few pointed to CBC as not doing enough.

A number pointed out that compared to Toronto and Vancouver, Montreal was a small market, further sub-divided by language. One said the quality of Montreal production was inadequate, and high quality work was done elsewhere. Another lamented the demise of Telescene and Cinar, and the huge impact that had on the small producer base here.

Many identified the decline in service production as causing problems for English talent. It was thought Montreal couldn't compete with Vancouver because of its proximity to Los Angeles. Some also pointed to local union problems between IATSE and AQTIS as causing decline in service production. Others felt that a monopoly in studio space in Montreal has caused some U.S. producers to look elsewhere for more competitive rates.

Linguistic problems of one sort or another were frequently raised. Since most production in Montreal is in French, and English production has been declining for many years, an obvious strategy for bilingual respondents is to look for work in French. Those responding to this survey have not been satisfied with this experience.

It should be remembered that most respondents said they spoke fluent French, but many encountered obstacles when looking for French work. Some said they had an English accent and couldn't find work. Others said they were perfectly bilingual, but still couldn't get French work. Some of these linguistic problems may be caused by other or unknown reasons, but the frequency of these complaints is widespread.

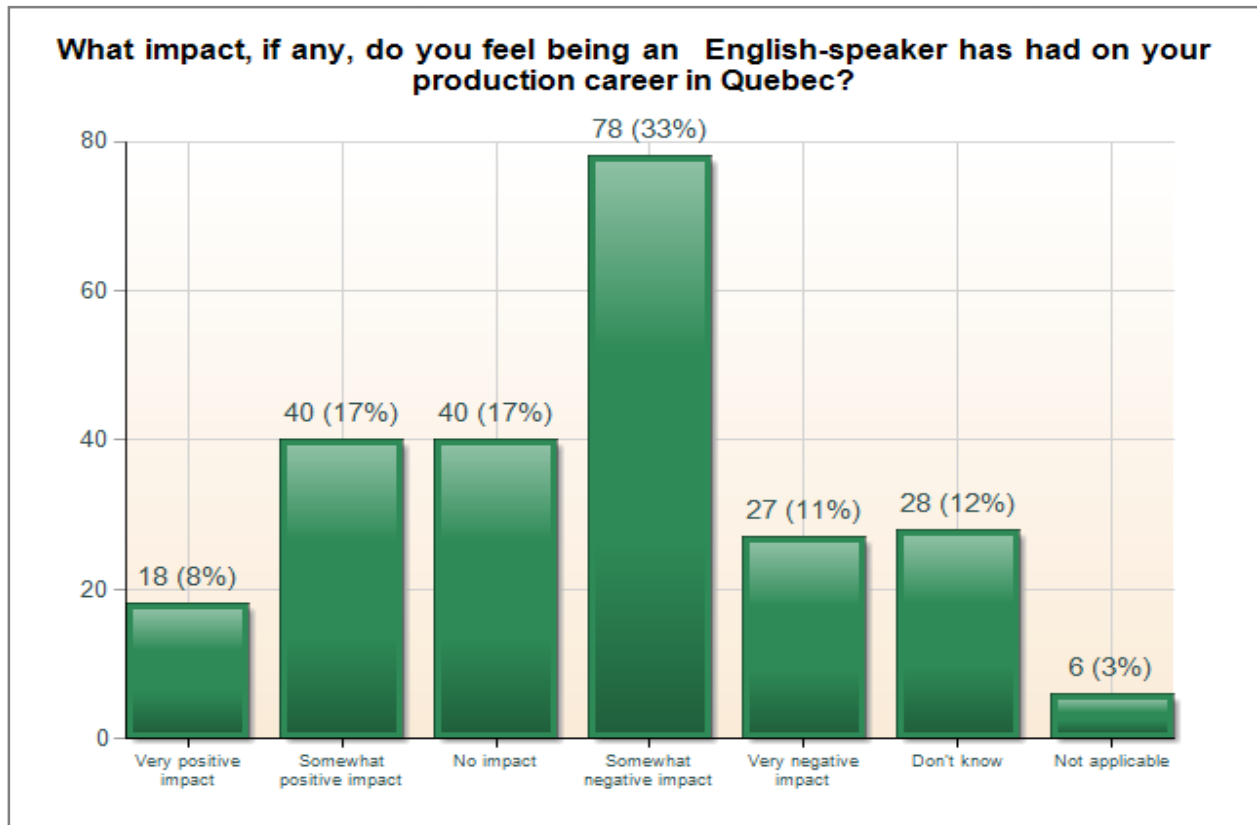
The four positive comments were from bilingual people who were able to work successfully in both linguistic industries.

Many pointed out that Toronto and Vancouver have larger industries, and Toronto especially is the media centre of English-Canada. Work is easier to get there. Several said they get most of their work in Toronto or even the U.S.. However, a few said they couldn't get work in Toronto because the Ontario tax credit discourages Toronto producers from hiring outside people, especially in categories such as director or writer.

At the same time, a number of respondents complained about competition from Toronto and Vancouver for the little work available here. One said that Montreal was a small market, but competition for work was national. They said talent was being hired from outside Quebec and brought to work in Montreal on domestic productions. Others said that the creative pool was shrinking as talent leaves the city in search of work elsewhere. This creates a vicious cycle with more talent being brought into Montreal because the talent pool grows shallower.

About six respondents complained of racial prejudice in getting work. Some said they found work in English easier to get in Toronto than here.

Question 16. Career impact of being an English-speaker in Quebec.



As we can see from this graph, 33% of respondents believe being an English-speaker has had a somewhat negative impact on their career in Quebec. Combining the somewhat and very categories, 44% believe being an English-speaker has had a negative impact compared to 25% who believe it had a positive impact.

Looking at the disciplines, the negative impact has been felt most by writers and directors, specifically 63% of writers and 61% of directors. 50% of producers and 37% of actors believe this has been a negative factor. On the other hand, respondents who think being English-speaking is positive is led by writers (31%), followed by actors (24%), producers (21%), and directors (14%). The rest feel that being English-speaking has had no impact or they don't know.

Broken down by age, 52% of respondents in their thirties were negative. This is followed by 44% of those in their twenties and sixties, 42% in their forties, and 36% in their fifties.

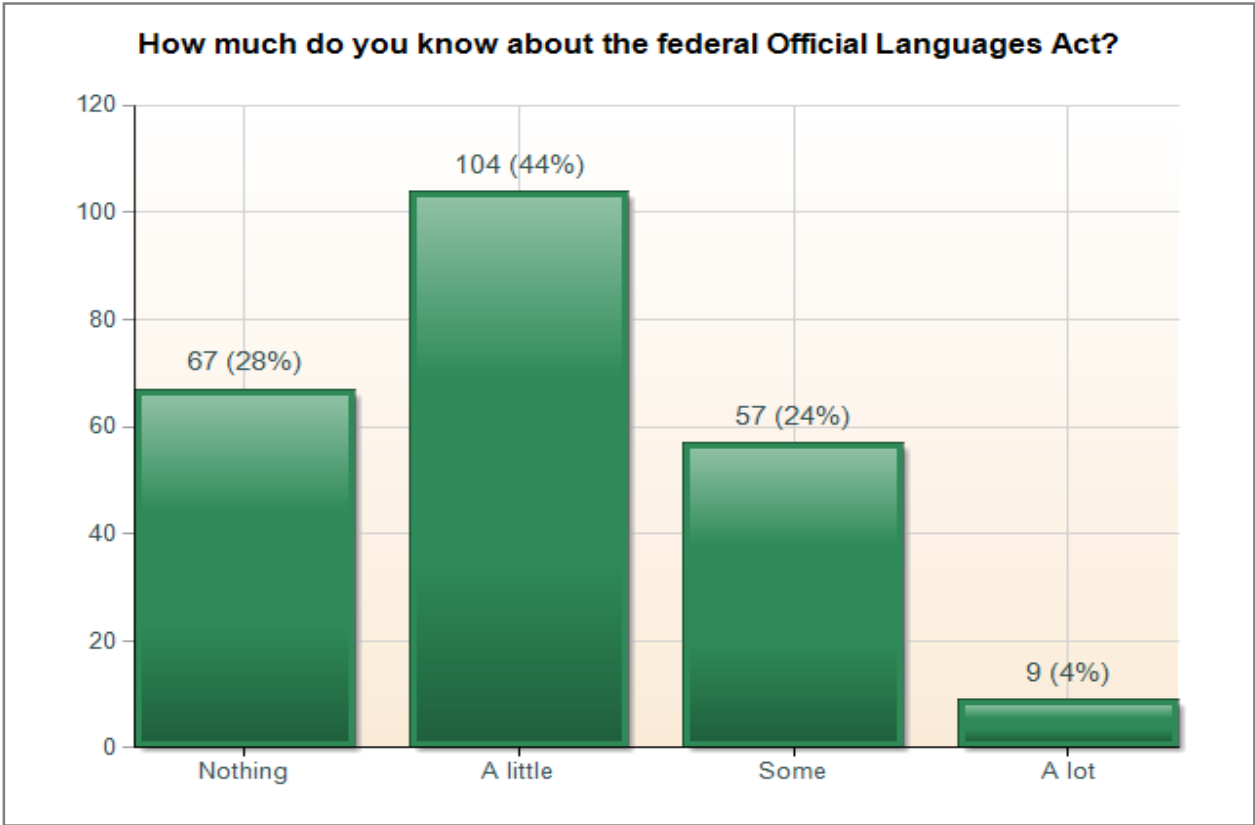
58% of immigrants believe this has had a negative impact compared to 48% of Canadians born outside Quebec and 35% of Canadians born inside Quebec.

Comparison with other surveys. See methodology for more details.

44% of ELAN respondents think being an English-speaker has had a negative impact on their career in Quebec. This compares with 32% in the QCGN study, and 47% in FAVEM.

Impact of English	ELAN (2010)	QCGN (2003)	FAVEM(2003)
Very positive	8%	23%	17%
Somewhat positive	17%	11%	10%
No impact	17%	9%	10%
Somewhat negative	33%	16%	30%
Very negative	11%	16%	17%
Don't know/Not app.	15%	25%	16%

Question 17. Knowledge of Official Languages Act.

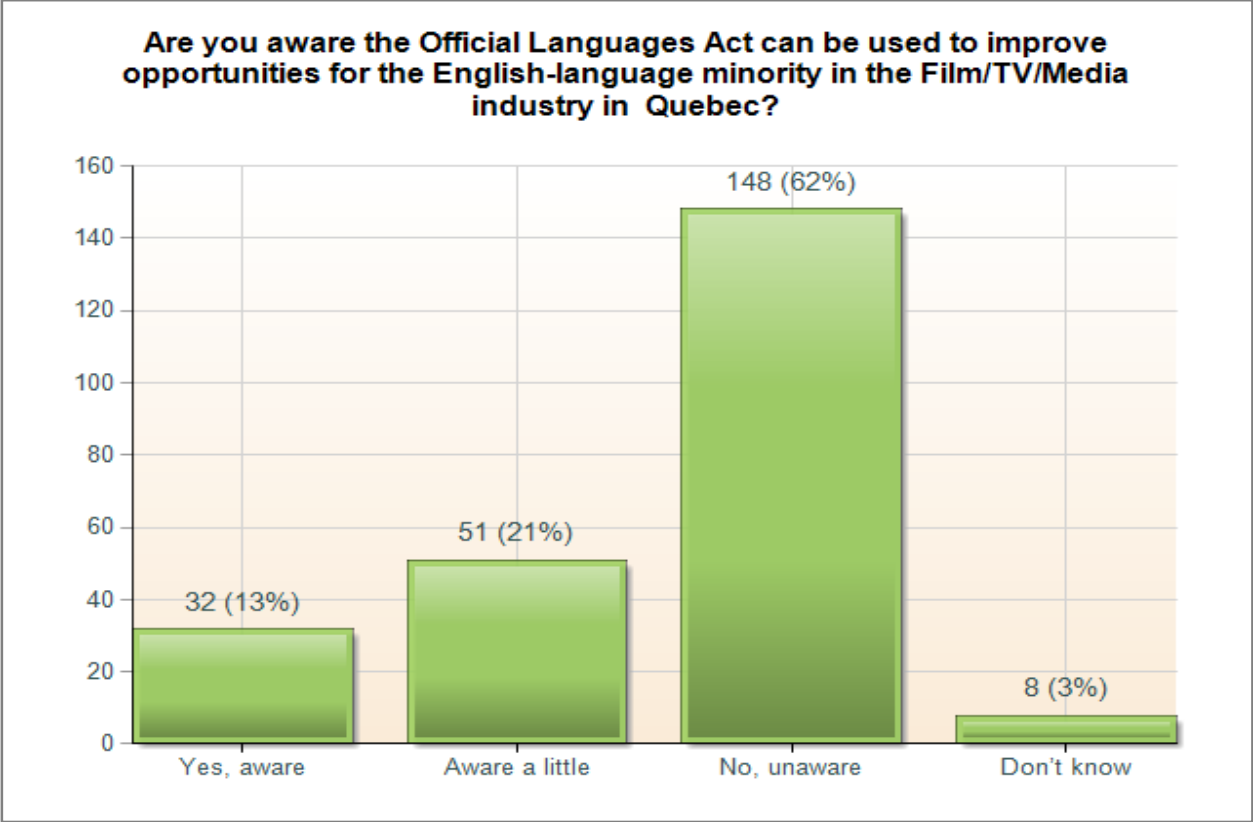


A substantial majority, 72%, say they know something about the Official Languages Act. Most of those, however, say they know a “little” about it. A substantial minority say they know “some”. Very few believe they know “a lot” about it.

Among age groups, the youngest group reported knowing the least about the Act, and knowledge of the Act increased according to age. Fifty-five per cent of twenties said they knew nothing, and among the sixties, only 14% said they knew nothing about it.

Men are less aware of the Act than women. Thirty three per cent of males said they knew nothing compared to 20% of females. More respondents born in Quebec said they knew nothing, 34%, than those born elsewhere in Canada, 21%, or immigrants, 23%.

Question 18. Are you aware the Official Languages Act can be used to improve opportunities for the English-language minority in the Film/TV/Media industry in Quebec?

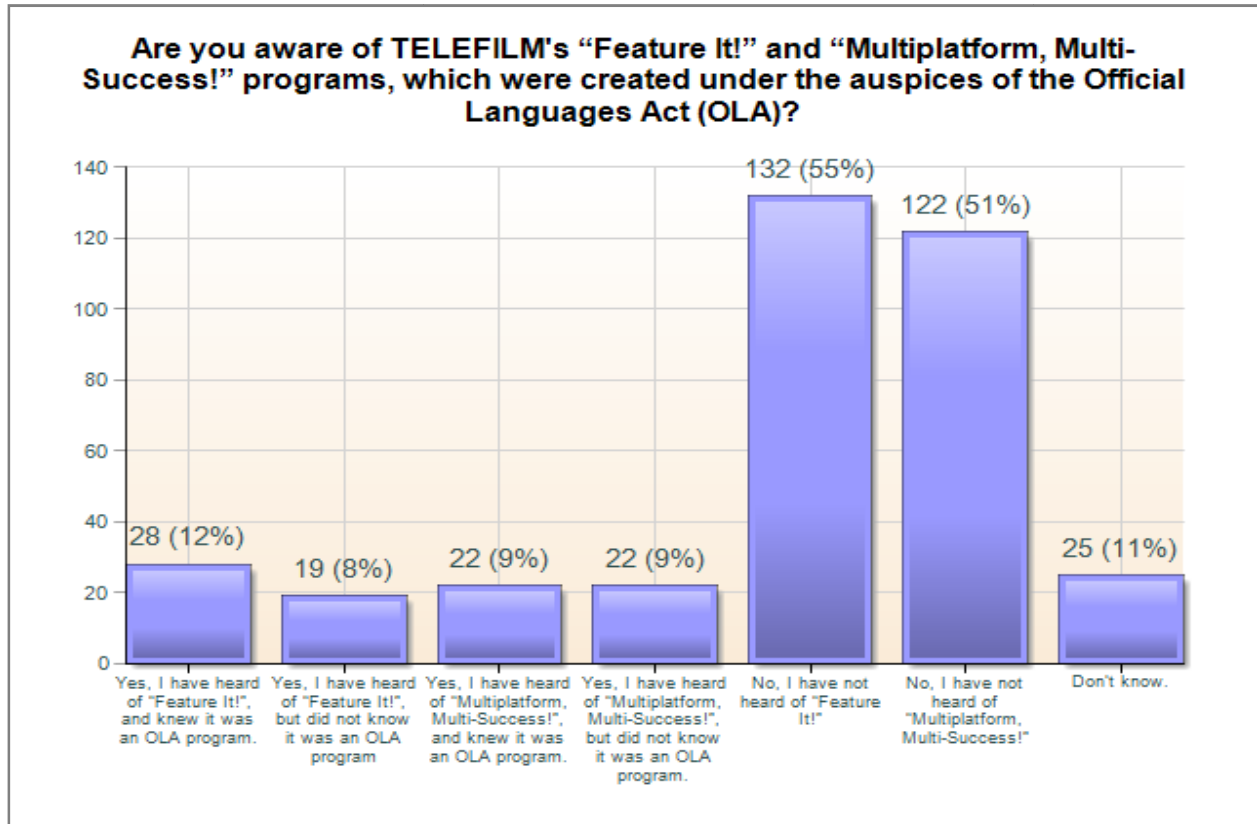


A substantial majority of respondents are unaware the Official Languages Act can help them or improve opportunities for the official language minority in Quebec.

The least aware were actors with 71% unaware the Act could be used this way. Directors (63% unaware) and writers (58% unaware) come next. The most aware of this use of the Act were producers. Only 41% of them checked the unaware box.

In terms of professional associations, 73% of members of ACTRA said they were unaware. 53% of the Montreal Film Group were unaware, 48% of DGC, and 39% of DOC. Interestingly, 43% of ELAN members were also unaware the Act could be used to improve opportunities for the English-language industry.

Question 19. Are you aware of TELEFILM’s “Feature It!” and “Multiplatform, Multi-Success!” programs?



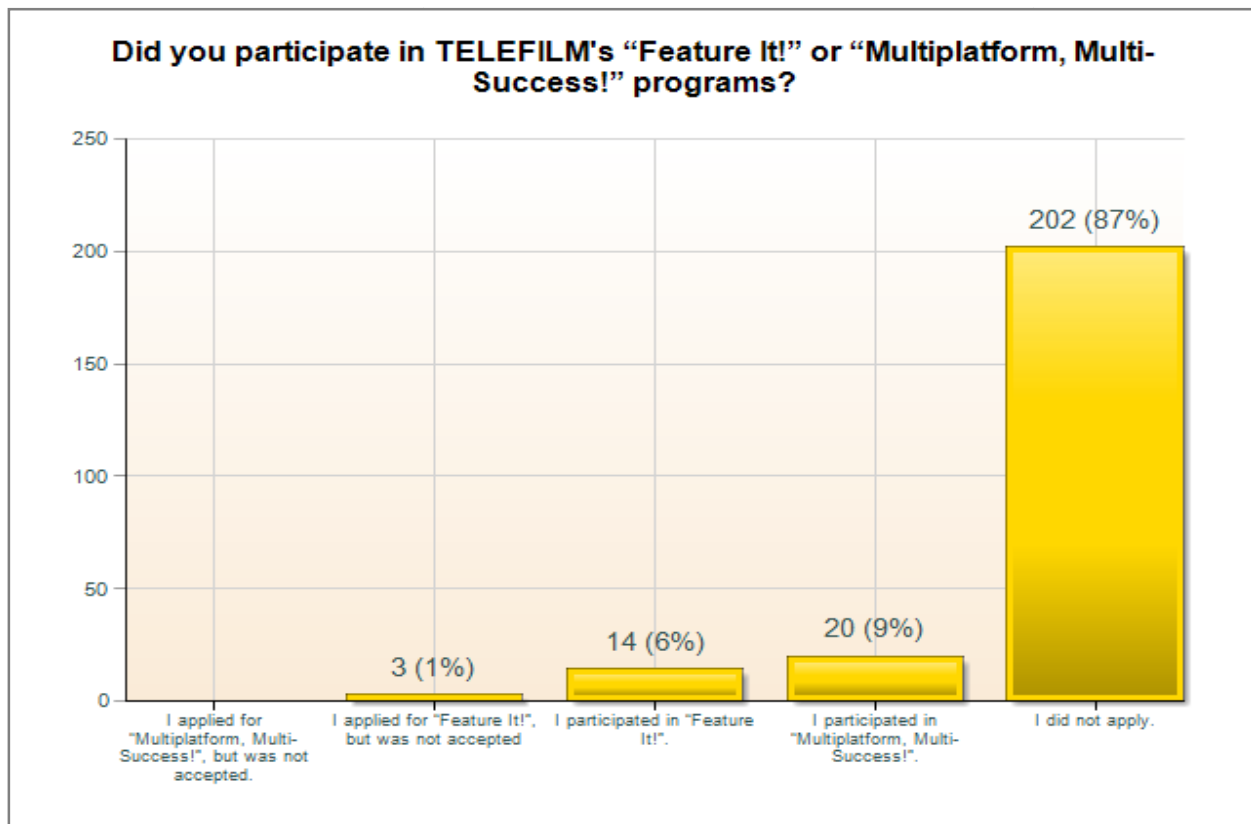
Slightly over half of the respondents have not heard of either Feature It! or Multiplatform, Multi-Success. Of those who had heard of these programs, more than half knew they were OLA projects, especially concerning Feature It!.

Among disciplines, 69% of producers had heard of Feature It!, and 66% had heard of Multiplatform Multi-Success. 44% of writers had heard of each of these programs. 64% of directors knew of Feature It! and 86% knew about Multiplatform. Unsurprisingly, actors had the least recognition of these programs with 29% hearing of Feature It! and 34% knowing about Multiplatform.

Among respondents in their twenties, 38% had heard of Feature It!, and 50% had heard of Multiplatform. Those in their thirties were the most familiar with these programs- 52% knew about Feature It! and 59% knew about Multiplatform. 48% in their forties, 43% in their fifties, and 31% in their sixties had heard of Feature It! Multiplatform was known to 42% in their forties, 53% in their fifties, and 36% in their sixties.

If we look at the 153 respondents who speak English at home, we see that 41% had heard of Feature It! and 46% had heard of Multiplatform. Among the 62 who speak both English and French at home- 53% had heard of Feature It!, and 48% had heard of Multiplatform.

Question 20. Did you participate in TELEFILM’s “Feature It!” or “Multiplatform, Multi-Success!” programs?



Eight seven per cent of respondents did not apply for these Telefilm programs. Many of these would not have been eligible.

Looking at the results by discipline, we see that 17 respondents applied for Feature It!, and 14 were accepted. Those accepted included 2 directors, 2 writers, 9 producers, and 1 other. There were 20 respondents who participated on Multiplatform, Multi-Success. These included 6 directors, 1 writer, 8 producers, and 5 others. On the other hand, 26 directors, 13 writers, and 14 producers did not apply to either program.

We can see that younger respondents tended to participate in these programs. Seventy one per cent of Feature It! respondents are under 40 and only 29% are older. Seventy five per cent of Multiplatform respondents are under 40, and 25% are older.

Question 21. What do you think worked best in TELEFILM's "Feature It!" or "Multiplatform, Multi-Success!" programs, and what do you think could be improved?

The 35 responses to this open question are listed in Appendix G. Since most answers did not identify the program they were discussing, we cannot make a detailed analysis of each program. However, certain general points seem clear.

More English-language training is needed in Quebec, and these programs help meet that need. Most participants were impressed with the speakers. There was a sense in some cases that they wanted a more "real world" experience. One producer thought it should be geared to network TV production, and another thought it was too genre driven.

As for structure, the compressed three day schedule of the Multiplatform program was too intense for some, and didn't allow time to absorb the information. There were requests that the program be continued for these participants with "updates", and not be a "one-off" experience.

Some found the wide professional range of participants was a problem. One suggested breaking the program into two- one entry-level and the other advanced. Another respondent would have liked a less competitive environment between producers, and more collaborative.

Many commented on the networking value of the program, and the opportunity it provided to meet people. Given other comments (see Question 24 and Appendix I below) about the need for networking, these programs played a useful role in helping meet that need for those who were able to participate.

Writers were happy getting to know producers, and some made contacts that are ongoing. One said it helped to meet English-Quebec producers and another would have liked French producers to also be invited. Another wanted an opportunity for more "matchmaking" between producers and consultants.

One respondent who was rejected for the program wanted more feedback on the reason. This raises a question about the number of people who can benefit from this experience, and whether it can be taped for wider distribution. Obviously, this is not the same as participating, but it would help disseminate the information to a wider audience.

Question 22. What other kind of support could TELEFILM, or any other Federal agency, provide to assist your production career?

There were 131 responses which can be seen in Appendix H. Most suggestions were directed at Telefilm, and centered on funding in one form or another.

There were a number of requests that Telefilm make access to the industry easier. These ideas included setting up internships (presumably at Telefilm), funding short films or other media (like webisodes); support workshops ; open up auditions; broaden eligibility for Telefilm funding; and support a development fund for creators, not just producers. There was also a suggestion that smaller productions be supported so more projects could be funded.

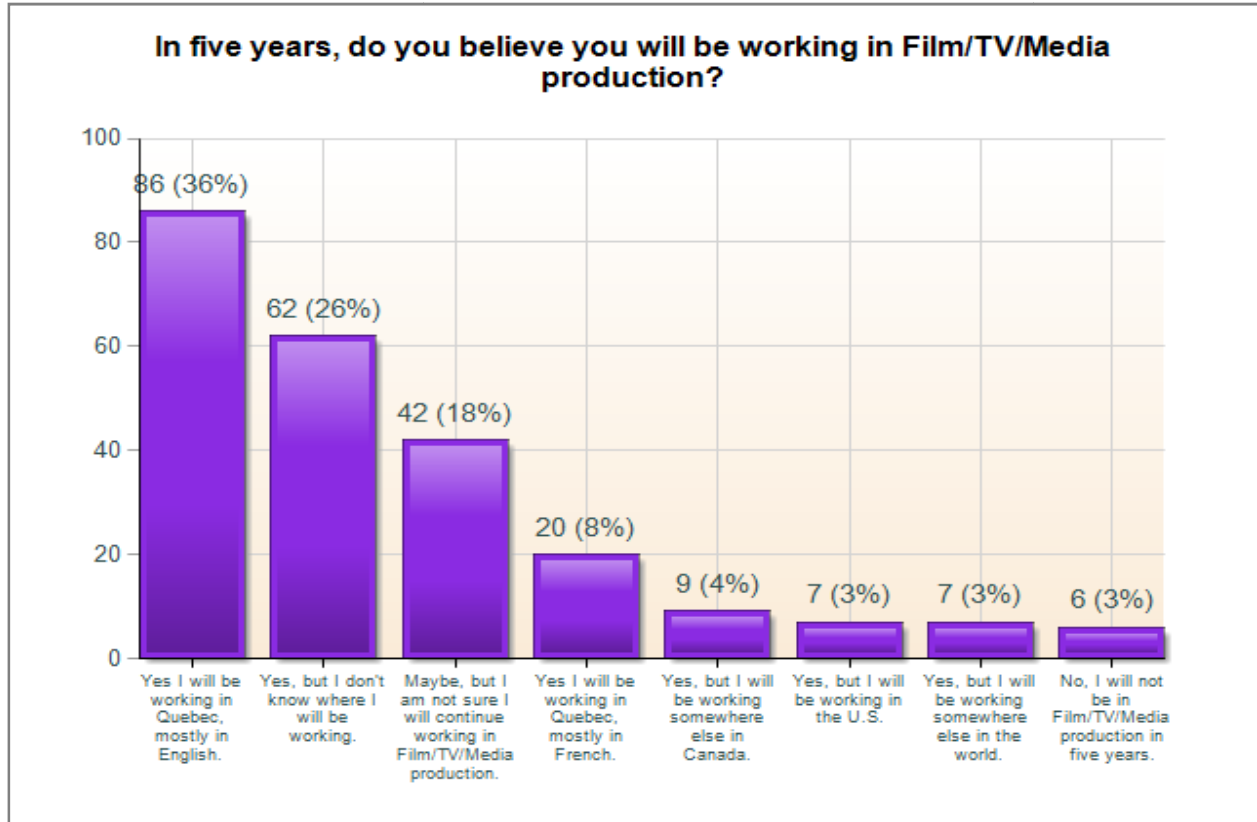
Writers wanted the “Writer’s First” program re-established. One also wanted scripts based on adaptations made eligible for funding, and several wanted more screenwriter’s grants. On the flip side, one producer wanted more flexibility to hire writers and actors from outside Quebec.

Expanding funding for documentaries was mentioned by several respondents. The problem of broadcaster control over documentary production was a concern. Most of these wanted more diversity in documentary funding, and the broadcast trigger to access CMF or other funding loosened or eliminated. One wanted Telefilm to establish a program similar to the Canadian Independent Film and Video Fund which helped fund docs before they had a broadcast sale. Another wanted docs eligible for Telefilm’s feature film fund.

Many wanted support to make contacts within the industry. There were suggestions that Telefilm improve its communication with the respondents; create a jobs billboard (especially for editors); and help networking. One suggested Telefilm support networking through the Montreal Film Group. Another respondent wanted Telefilm to support networking with broadcasters. Another wanted Telefilm to make French-language work more accessible, and increase English-French collaboration. Others wanted Telefilm to promote handicapped actors and support visible minorities. One imaginative idea was to establish a discount card for production services.

Government policies were raised, such as concerns about labour mobility between Quebec and Ontario, regional status of English-Montreal production, and incentives for theatres to exhibit Canadian features. A number wanted something done by the CRTC, presumably, to increase local television production, especially of drama; decrease reality TV; and strengthen Canadian content rules.

Question 23. In five years, do you believe you will be working in Film/TV/Media production?



The most optimistic respondents to this question were producers. Sixty two per cent said they would be working in Quebec, in English or French, five years from now. The most pessimistic were directors. Only 31% thought they would still be working in Quebec. Actors (47%) and writers (50%) were in the middle of the spectrum.

The youngest respondents are the most likely to leave Quebec. Only 22% of them think they will be working here in five years. The next most pessimistic age group are in their thirties with 39% saying they believe they will be here. This pessimism in the most youthful cohort is worrying for the future of the industry.

The percentage believing they will stay increases to 45% of forties; 63% of fifties; and 42% of sixties.

Comparison with other surveys. See methodology for more details.

Fifty nine per cent of the QCGN producers survey believed they would be working in English or French in Quebec in five years. That number has increased to 62% in this survey. Due to the lack of comparatives it is impossible to know if the weaker attachment to Quebec in other sectors has increased or is related to specific trades. This study provides a baseline for future research.

Five Years from now	ELAN (2010)	QCGN (2003)
Quebec in English	36%	51%
Quebec in French	8%	8%
Canada outside Quebec	4%	3%
U.S.	3%	0%
Elsewhere in the world	3%	5%
Not sure where	26%	20%
Not sure I will continue	18%	14%
Won't be in this industry	3%	0%

Question 24. What is the biggest challenge that you face pursuing your career in Quebec, and what would you recommend to solve this challenge?

This open question elicited 179 responses which can be seen verbatim in Appendix I. We asked respondents to identify their biggest challenge, and any solution they could suggest. The results were quite eclectic since the respondents occupy very different disciplines within the industry. For example, more than one actor wanted restrictions on hiring non-Quebec talent, and one producer wanted more flexibility to hire outside talent. We have divided the responses into challenges and solutions, and did not try to untangle or categorize the results by discipline.

Challenges

The leitmotif that one can hear throughout the majority of responses is the fact there is simply not enough English-language production. This is raised in terms of a lack of work in general, especially in drama; funding problems for English-Quebec production; lack of local non-news television production; and lack of work from other types of productions, such as French-language programs, English production controlled from outside Quebec, or American service productions.

This leads to the conclusion that one needs to leave Quebec to make a living in English, and many have reached that conclusion. As some point out, the labour pool is shrinking and this makes it more difficult to produce high quality, and high income, programming here. One videogame director said that it was difficult finding a variety of good actors and not over-using a few. One person pointed out that important English-language production companies have either dissolved or moved to Toronto.

Some respondents say they get most of their work outside Quebec while others complain that inter-provincial labour mobility is restricted by Ontario tax credits rules. Therefore, they can't work on Ontario productions if they are a Quebec resident.

Aside from lack of production and the problem of earning a living in Montreal, the largest single issue for a significant minority of respondents (about 20%) revolved around language. This problem seems to be a particular concern for actors. With the decline of English production, many say they must work in French production to survive. However, they face obstacles as a result of their accent, or their identification with English-language production even if their accent is perfectly acceptable. A small group of three were concerned about their allophone or French accents limiting access to English production.

There was a strong complaint about the lack of local television production which distinguishes the English-language industry in Montreal from the Toronto and French-language industries. Meanwhile, Vancouver is able to exploit its scenery and Pacific time zone to get a great deal of service production.

Documentary filmmakers complained about funding, the time lag getting money from agencies, and a couple said they had problems marketing their programs.

Government policy raised a number of complaints. Some complained that Telefilm needed to take more risks and not act like a film studio which doesn't nurture local production. One feared that CRTC Cancon rules were "fading", and was in collusion with cable companies to the detriment of Canadian production. A number had general complaints about the poor treatment of English-Quebec production by federal agencies, and uneven treatment by provincial agencies or policies, such as the two-tier Quebec tax credit rules.

Some complained about union issues. One said there were too many unions, and a couple others pointed to the IATSE-AQTIS fight as hurting service production here. On the other hand, one wanted more union support.

Several respondents raised problems of isolation in one form or another. They say it is important who you know, and it is difficult to meet producers. A couple respondents also have the feeling that the production community here is a very small "old boys' club", and this club is the beneficiary of public support at the expense of the less well-connected.

Solutions

The easiest solution to the production problem is more funding. Some respondents had more specific ideas, such as eliminating the CMF broadcast trigger to access production funds; giving English-Montreal programs regional status for funding by CMF; better support for English-Quebec production by federal agencies; tax credit to encourage local television production; and more TV advertising production.

Considering the desire to increase access to French productions, some want to take French classes or make it easier to take French classes. Others suggest increasing English-French cooperation by encouraging more bilingual projects; better access to Union des artistes; meeting French producers; and developing more roles for anglophones or allophones in French programs. The objective of this last idea would be to show Quebec society as it is, and non-French accents would be a casting advantage.

Some suggested increasing industry organization or cohesion. Several people want help networking with key industry players, or mentoring under more senior producers. One person said ELAN should improve its communication with the industry, and another said networking was needed and that ELAN schmoozers helped.

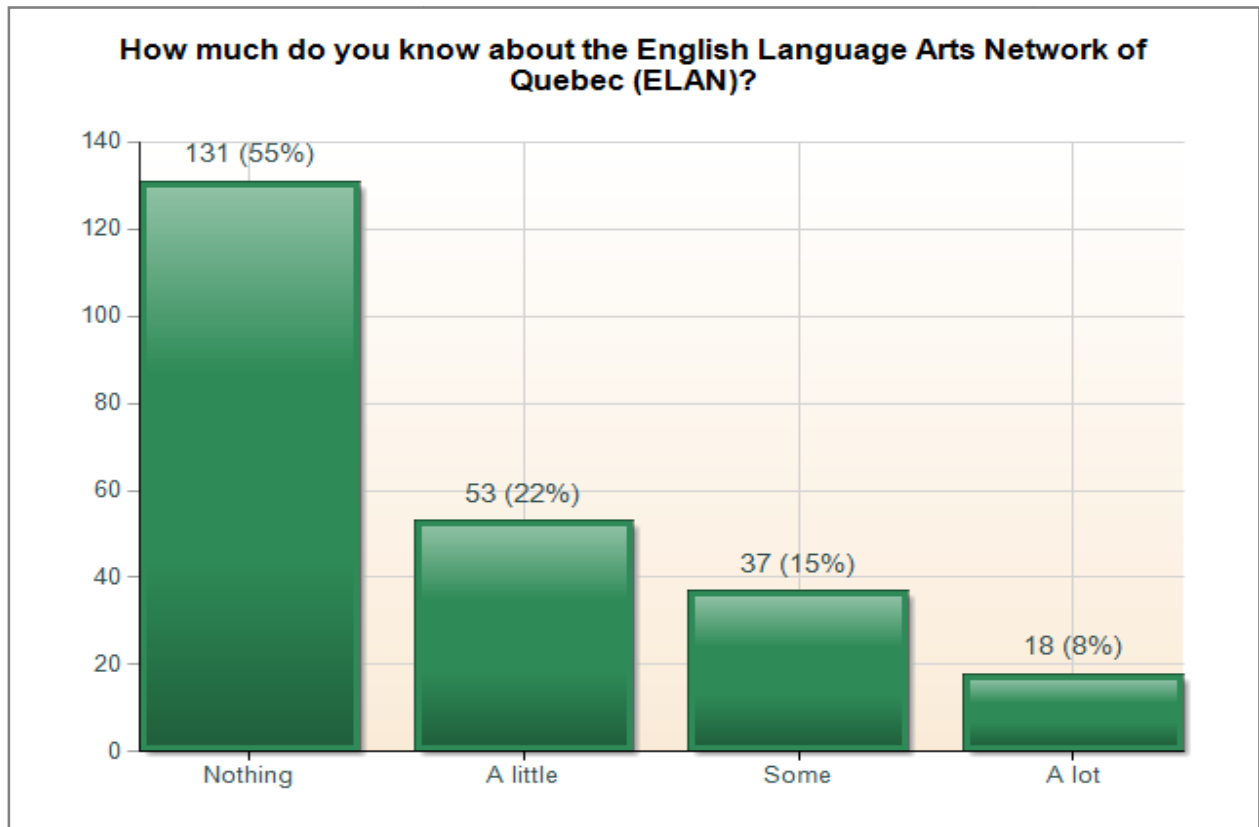
Some want incentives to hire English-Quebec actors, or visible minorities. Others want to increase inter-provincial labour mobility. Some want more service production.

Better education or training was mentioned by a number of respondents. One suggested Telefilm help train production managers. Others want easier access to acting courses, or technical training.

Some want more effort finding the Canadian audience through better marketing and distribution.

A few have only one suggestion for themselves- join the exodus to Toronto. One wants to hire a Toronto agent, but didn't say whether they wanted to stay in Montreal or not.

Question 25. How much do you know about ELAN?



Nearly half of respondents, 45% said they know something about ELAN, and slightly more than half did not. Younger respondents know most about ELAN. Fifty two per cent of those in their twenties knew about ELAN, 45% in their thirties, 53% in their forties, 40 % of those in their fifties, and only 33% of those over 60. Film workers still establishing their careers receive the greatest benefit from a multi-disciplinary resource and information sharing network like ELAN.