



“Breaking In” to Toronto’s Film & TV Production Sector

POV

Table of Contents

Executive Summary	3
Summary Report	7
Project Aims	7
Research Approach	8
Research Context & Limitations	9
Key Findings	12
Implications	37
Considerations for decision makers	39
Recommendations	41
References	45
Appendix	46
Participant Demographics	47
Landscape Scan	52



Executive Summary

BACKGROUND

Toronto's film, television and media-based industry has experienced significant annual growth since 2016, motivating the strategic report *Spotlight on Toronto: Strategic Action Plan for the Film, Television and Digital Media Industry*, in an effort to continue building the sector's competitive advantage.

Toronto's marketability as "the world's most diverse city" is positioned to attract investment and partnerships from abroad. With the significant expansion of studio space planned for 2020, employers are faced with an urgent pressure to secure large numbers of reliable, new talent and to ensure this talent reflects the city's population.

This seemingly straight-forward task is complicated by the sector's insularity, which is managed through deep networks of personal and professional relationships. These and other barriers to access make the process of "breaking in" consistently challenging for new talent; especially for young people and for professionals from equity-seeking groups. The result is a demographically homogenous workforce sustained by talent pipelines with a similar make up.

To prioritize workforce diversity, *Spotlight on Toronto* calls on the City to collaborate with sector partners like POV and the United Way of Greater Toronto to develop a workforce strategy that engages equity-seeking groups across the sector. Essential to this mission is a holistic view of the key stakeholders, pathways, access points, gates, and enablers that define the sector experience for those trying to "break in". In the absence of existing data, this research is a first step to mapping the sector and exploring the systemic and other barriers to access that regulate the sector's workforce.

STUDY: "BREAKING IN" TO TORONTO'S FILM & TV PRODUCTION SECTOR

This study was conducted in two phases from August 2019 to the end of December 2019:

1. **The Landscape Scan** (Aug-Sept 2019) used secondary data sources and industry artifacts to identify the players defining sector practices, sources of skill development, and pathways to entry.
2. **Industry Survey & Sector Interviews** (Oct-Dec, 2019) used two sector surveys and individual informant interviews to examine how sector forces shape the way the sector "works".

Research participants across both phases reflected a representative sample based on the information available about the sector's current workforce composition.

KEY FINDINGS

The sector is disconnected, complicated and hidden

Sector stakeholders are largely siloed, resulting in distributed (occurs in many places), multilayered (involves many forms of access) barriers to access. Stakeholders manage different aspects of sector access, at times requiring incompatible processes to gain entry. Sector knowledge is often hidden and mostly accessed through individual relationships. The sector's insularity of the sector's is self-reinforcing: industry membership is largely white, cis, and male, while the networks of equity-seeking professionals tend to be further removed from the sector. The result is separate networks operating in parallel with limited overlap.

Social capital mediates access

Breaking in is not an event, but a continuous, discursive process that draws on different types of access. This access seems to be mediated by a particular kind of social capital defined by the dominant sector culture. Consequently, equity-

seeking professionals experience more significant barriers earlier in the process of ‘breaking in’ and continue to experience a layering of barriers to ‘stay in’ while navigating the industry.

Lack of diversity is not a mystery

The sector experiences of equity-seeking professionals are not unfamiliar. The majority of research participants accurately described the barriers faced by underrepresented groups, while simultaneously expressing uncertainty about how to address them. Poor representation among decision-makers results in workforce interventions that do not reflect strategies that help equity-seeking professionals gain access.

Equity-seeking professionals create alternative paths to entry

With limited pathways for equity-seeking professionals to gain sector access, equity-seeking creatives build peripheral communities that provide creative, emotional and professional support. It is through these communities that equity-seeking professionals ultimately convert their social capital into the sector-specific capital needed to “break in” and “stay in”. Interestingly, none of the diversity interventions identified during this research were found to leverage this strategy to connect sector stakeholders with more diverse talent.

Supports are partial and disconnected

The disconnectedness of stakeholders and the inconsistency in pathways to entry complicate efforts to build supports. Lack of continuity between services results in incomplete feedback about what is most/least effective; and leaves gaps in the needs addressed (e.g., training focuses heavily on theory and skills, but rarely addresses how to navigate the sector; work placements do not count toward union membership; networking events create contacts but not connections that build trust).

Young people are multiply-barriered

Toronto’s Film and TV production sector is difficult to break in to. These challenges are multiply experienced by professionals from equity-seeking groups, and further amplified for

equity-seeking young people. Sector knowledge, skills and experience interact with broader systemic barriers related to life circumstances and intergenerational factors. Overall, young people from equity-seeking groups are least likely to have first- or second-degree connections to the sector and rely more heavily on performing unpaid work and creating their own opportunities (e.g., funding their projects) in an effort to “break in”. Lack of clarity about pathways to entry and the discontinuous supports result in many young people pursuing a variety of different paths (e.g., unpaid work, education) at great personal cost, without making significant progress.

CONSIDERATIONS

Problematizing diversity may be problematic

Problematizing diversity places focus on the individual rather than on the system, targeting an increase in number of equity-seeking professionals, rather than a decrease in barriers to access. The challenge of low workforce diversity may be better understood by problematizing access and understanding workforce composition as a measure of access. Workforce diversity is an essential priority for Toronto’s Film and TV production sector; to create long-term change requires excavating processes and practices that sustain the systemic barriers experienced by equity-seeking professionals.

Measures lead to insight and accountability

Differences in language and terminology, combined with a lack of measurement and sector data complicates the evaluation of workforce diversity (including which interventions (if any) are having the desired effects). Moreover, without measurable indicators of progress, it is difficult to reinforce a shared sense of accountability for change among stakeholders.

Everyone, together

Long-term change will require the coordinated efforts of all sector stakeholders at participants. An exclusively bottom-up or top-down approach while sector silos persist will be limited in both reach and influence. A variety of activities targeted at different levels of the sector are needed to invoke immediate change and long-term sustained changes to practice.

RECOMMENDATIONS

Focus on access

- Prioritize increasing representation among sector decision-makers across all stakeholder groups.
- Define access and the processes by which it is mediated by social capital.

Standardize and measure

- Clarify shared definitions for critical workforce terms (e.g., 'diversity').
- Establish standardized workforce measures to gain a more accurate view of the sector's workforce, and access to that workforce.

Build stakeholder synergy

- Challenge stakeholder silos through purposeful relationship-building.
- Activate natural synergies (i.e., connection points between stakeholders along pathways to sector navigation – such as moving from educational institutions into a union or the workforce).

Generate community

- Create community within the sector by breaking silos between stakeholders, promoting transparency of information (e.g., sharing job information).
- Build bridges with creative communities currently outside of the sector, including the focused incorporation of equity-seeking professionals as sector decision-makers.





OVERVIEW

Toronto's Film and TV production sector has experienced significant year-over-year growth since 2016, infusing an additional \$2BN into the City's economy and the creation of 30,000 new jobs. In response to this unprecedented growth, the City endorsed the Spotlight on Toronto: Strategic Action Plan for the Film, Television and Digital Media Industry report to attract international investment and partnerships in the City's screen-based industries.

A core pillar of this action plan is the development of strong fundamentals in physical infrastructure and workforce development, which necessitates a workforce development strategy that will reliably supply top-tier talent to the sector. With the planned opening of over 1,075,000 sq. ft of new studio space in 2020, youth reflect an under-used source of new talent.

As Toronto's opportunities in screen-based industries grow, so too does the pressure for the Film and TV production sector workforce to reflect the City's diversity. While demographic data is not currently collected, a review of relevant Census data supports a common anecdotal knowledge of the sector's lack of representation. Although workforce diversity and inclusion is a priority across industries, equity-seeking professionals seem to face particularly rigid barriers to access in this sector, suggesting structural discrimination embedded in the systems and workforce processes that define it.

Multiple stakeholders, covert job opportunities, hidden networks, an aggressive culture that privileges on-set experience, and sector savvy that relies heavily on relationships offer insight into the barriers faced by all professionals seeking to "break in". These barriers are multiplied for young people, and professionals from equity-seeking groups.

The City's awareness of these opportunities has called for collaboration with sector partners,

including POV and the United Way of Greater Toronto, to develop a workforce strategy, grounded by principles of diversity and inclusion, that will engage underrepresented and equity-seeking groups in the industry.

“ People in positions of power or privilege are able to open doors for those who can't even access the doorbell. ”

PROJECT AIMS

The current research provides much-needed line of sight into the sector's operations to support evidence-based solutions. These insights include:

- Identifying the necessary and relevant skills, training and experience for marginalized youth to break into the industry and access real pathways to employment
- Differentiating the mechanisms that govern talent (hiring, movement) in the sector; and create barriers for young people and equity-seeking professionals seeking to "break in"
- Mapping the key stakeholders and existing interventions that engage the TV & Film production industry specifically to work with marginalized youth populations in the GTHA
- Outlining the benefits, and the risks if not pursued, associated to the collaborative and cross-sectoral development of a diverse workforce of talent that addresses the skilled needs of Toronto's growing TV & Film production industry

RESEARCH APPROACH

The research was conducted in two phases from September 2019 to the end of December 2019: (1) Landscape Scan (secondary research), and (2) Industry Survey & Informant Interviews (primary research).

The research was anchored by the following principles:

- The research design (how) and areas of focus (what) are guided by input and direction from members of the communities POV serves, as well as from experienced researchers.
- The collection and interpretation of data, and the sharing of findings, is conducted in a way that provides individuals with the opportunity to tell their own story, in their own words and using their own voices; and,
- The participant sample is as representative as possible at this stage, given the absence of demographic information about the sector.

Phase 1: Landscape Scan

A total landscape scan was conducted, drawing upon secondary data sources (e.g., census data, funding records) and industry artifacts (e.g., job boards, production company websites, union regulations) to identify the major players defining sector practices, sources of skill development, and pathways to entry.

A summary report of the Landscape Scan was developed (see Appendix), revealing obvious areas of disconnection between sector stakeholders, and highlighting the gatekeeping mechanisms that restrict sector entry.

Phase 2: Industry Survey & Sector Interviews

To enhance and extend the insights gained through the Landscape Scan, an intense investigation of sector experiences was conducted using two industry surveys and informant interviews. This phase comprised a total of 249 industry survey participants, 48 informant interviews and 3 focus groups (n=37).

This phase was critical to understanding how the forces revealed in the Landscape Scan come together to shape how the sector “works”. Research participants across all methods (survey, interviews, focus groups) reflected a representative sample based on the information available about the current workforce composition.

Industry Survey

The study employed established social research survey methods to collect input from industry professionals across roles, and at every career stage to share their experiences breaking into and building a career within Toronto’s Film and TV Production sector. Related research in this sector, and similar research in other sectors often emphasize participation from underserved and underrepresented communities, to platform essential perspectives that are too often underreported. Given the focus of this project is the investigation of barriers to entry, it was important to uncover the narratives and counternarratives that act as invisible barriers to access. For this reason, the survey invited input from all perspectives about the varied experiences of professionals of different identities, backgrounds, and socioeconomic statuses to comment on (1) their personal experiences, and (2) their perceptions about experiences different from their own.

The surveys were distributed through direct email to POV’s extensive professional, participant, and alumni networks, by sector unions and partner associations to their memberships by email and newsletter, by some educational institutions by list-serv email, film festivals, and community programs; and by posting in popular Facebook groups that act as job resources for the sector (see Appendix for a complete listing of contributing organizations, unions and institutions).

Sector Interviews

Sector interviews made it possible to cover a range of topics beyond what is normally covered in social surveys, providing texture and depth to the survey-based data. These interviews were opportunities to explore response patterns and

emergent themes from the survey data, and to collect personal stories that offered important context and lived examples through which to interpret these findings. The interviews were drawn from industry connections to POV, volunteers from the industry survey, and industry professionals referred to by other key informants.

Study participants

This study invited participation from all professionals and emerging talent working in and/or trying to ‘break in’ to Toronto’s Film and TV production sector. While the impetus for the study is to investigate barriers to entry experienced by equity-seeking youth, a total depiction of the sector was necessary to understand the overlapping, intersecting, and competing forces contributing to young people’s experiences (see Appendix for demographic summary of participants).

For the purpose of this study, the following definitions and demographic parameters were used to focus the research:

- **Breaking in:** Having / attempting to access continued sector employment (i.e., being sufficiently connected to gain referrals following a first job).
- **Diverse/Diversity:** Differences based on ethnicity, gender, age, race, national origin and sexual orientation.
- **Equity-seeking:** The term ‘equity-seeking’ is used in this report to refer to participants who self-identified as having experienced minoritization on the basis of their identities. This decision was made in response to the diverse range of intersectional identities reported and the comparatively small sample size for each of those identity groups. This meant that while valid comparisons could be made between the experiences of equity-seeking and non-equity-seeking, and in some cases white and non-white participants, further differentiation among equity-seeking creatives while preserving anonymity was not possible. This reinforces the need for future research with targeted sampling to excavate the differential barriers that shape the experiences of creatives from Communities of Colour and the LGBTQ2S+ communities.
- **Minoritized:** This report uses the term “minoritized” rather than “minority” or “marginalized” to more effectively capture the systemic and structural mechanisms that constitute a minority status as defined and sustained by the majority group. Minoritization is an ongoing process, not a static location.
- **Sector savvy:** Sector savvy refers to the explicit (e.g., identification of sector stakeholders and relationships between stakeholders, where to locate jobs, who to contact) and implicit (e.g., social norms, values, ways of being) knowledge of Toronto’s Film and TV production sector that permits navigation and contributes to access.
- **Youth:** Young people between the ages of 18 and 29

RESEARCH CONTEXT & LIMITATIONS

This research is the first of its kind to focus on Toronto’s Film and TV Production sector, motivated, in large part, by the absence of data reflecting the experiences of “breaking in” and “staying in” the industry. Consequently, some of the major findings of this research are equally its limitations:

Diversity information is not collected in the Canadian Film and TV Production sector; and many equity-seeking participants are reluctant to self-identify due to long histories of oppression and discrimination. Without a benchmark, it is difficult to ascertain the representativeness of the study’s sample population.

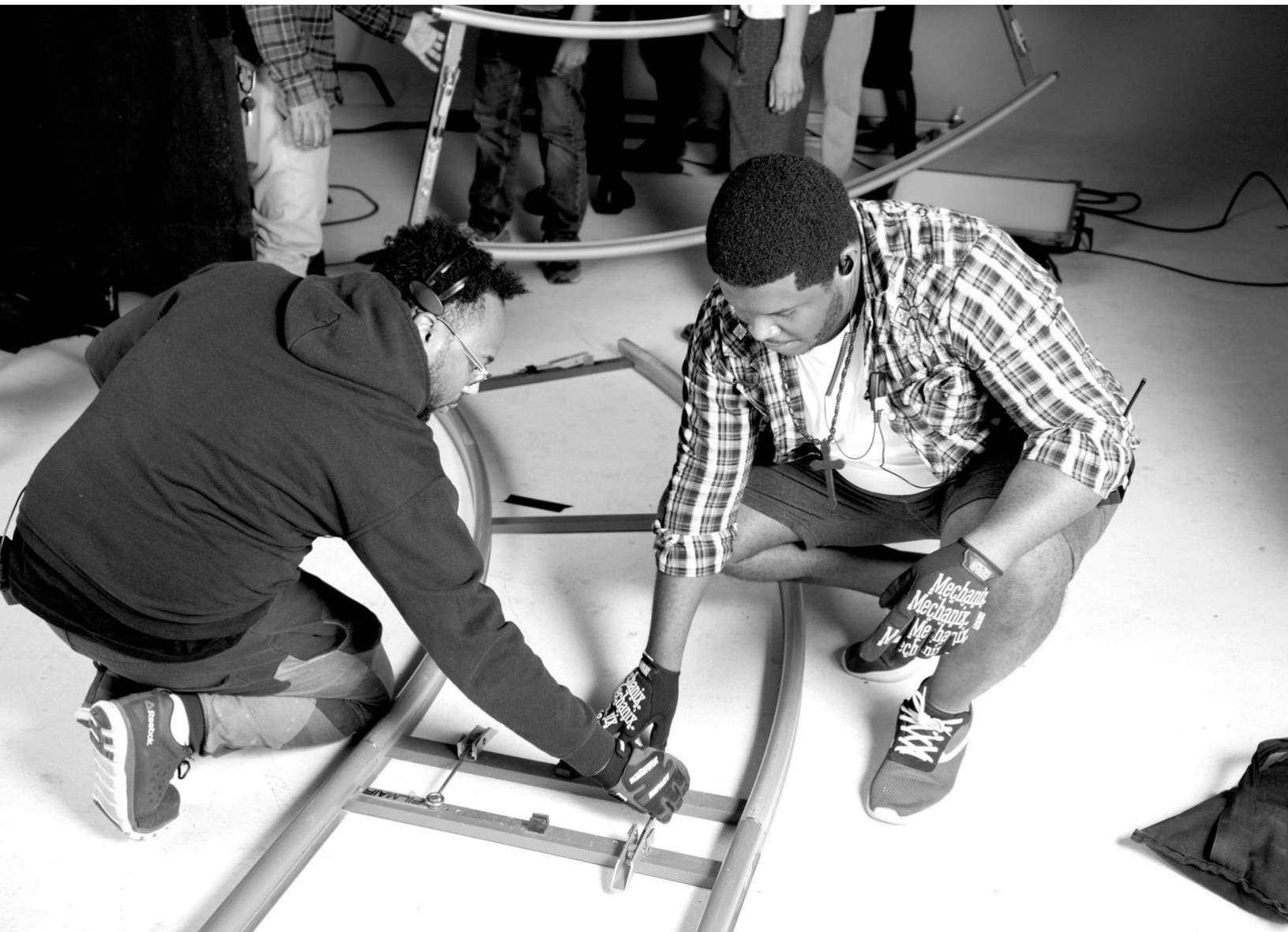
Additionally, the oppressive experiences that have made it unsafe for equity-seeking professionals to self-identify are equally likely to discourage participation in these early research efforts (due to historic lack of trust). It is expected that consistently ethical research practices and

actions to expand sector access will encourage more diverse participation in subsequent studies.

Limited funding has been committed to statistical research on the sector's workforce diversity, contributing to a lack of consistent definitions and measures of diversity and workforce composition. Currently, there is no benchmark against which to compare changes year-over-year in order to assess the (in)effectiveness of various diversity initiatives. Moreover, without standardized measures, it is difficult to define clear 'goals' for improvement.

The sector is insular and disconnected, which means the same barriers faced by individuals trying to 'break in' are experienced by those trying to connect from within the industry. It is therefore possible that the uptake of research interventions (e.g., the survey) was suboptimal for some populations due to the indiscernibility of pathways to them.

Together, these limitations encourage treatment of this research as a preliminary exploration of the sector, and the findings as impetus to conduct more elaborate and targeted research to more fully understand the complexities of access, mobility and representation.





KEY FINDINGS

The following summarizes the key themes and important findings that emerged from both phases of the research. The complex and obscured nature of the sector necessitates a holistic approach to interpretation to combat enduring barriers to access that have benefited from the disconnectedness of sector stakeholders.

1. The sector is disconnected, complicated and hidden

Participants consistently described Toronto's Film & TV Production sector as a complex, networked, often hidden and highly exclusive community. Participants, regardless of background, identity and experience emphasized the difficulty of accessing relationships, opportunities, and information as endemic to the sector's structure and organization.

While this knowledge has historically remained anecdotal, the Landscape Scan (see Appendix) revealed a sector operating through a variety of disparate stakeholders (e.g., Production companies, Government, Unions & Associations, Educational Institutions), each of which acts as a gatekeeper to a separate part of the industry:

- **Production companies, studios & media corporations** own the means of production and the products. They drive profit directly and are mainly accountable to their clients. Some production companies offer training events periodically. Talent identification, selection and movement is achieved through relationships, which means the composition of a company's talent pool is - determined by the composition of their personal networks.
- **Unions & Guilds** are the primary gatekeepers to predictable, steady employment to union members on unionized productions. Unions offer internal apprenticeships and training to permittees and full members, and a small few have single-point connections to community programs (e.g., DGC-POV).
- **Government, Councils & Associations** exercise influence at the industry level through policy, funding, advocacy, labour agreements, conferences, development programming and research. These stakeholders influence how production companies, studios, media companies can do business; and the way producers, unions and guilds may work together.
- **Educational institutions** have formalized the skill-development aspect of the Film & TV production sector. Although film and television production jobs tend not to prioritize formal education, these institutions play an important role in positioning the sector as a viable career path and delivering baseline knowledge about key industry roles (e.g., director, cinematographer, screenwriter). Educational institutions have some connections to production companies through individual relationships and work placements.
- **Community services** connect young people to industry jobs. The majority of these services are structured to support underserved and underrepresented youth from equity-seeking groups, who face the greatest barriers to securing stable employment. None of the Toronto-based employment services currently place emphasis on the film and television production sector.

Although there are some points of connection between stakeholders (e.g., between Production companies and Unions), these stakeholders operate largely in parallel. This way of operating is markedly different from the ways industry professionals engage with these stakeholders: in order to navigate the sector, individuals must draw upon information, opportunities, and contacts that are ‘owned’ by different stakeholders. In the absence of cooperation, these dependencies inevitably result in incompatibilities that must be resolved by individual professionals.

A hidden, referral-based job market

A necessary step to “breaking in” (and staying in) involves being aware of job opportunities. Legacy sector practices, dating back to a time when family-run production services dominated, have resulted in a referral-based job market. This mode of navigation differentially creates barriers to access for professionals from different communities.

- Work on unionized sets is the most ‘publicized’ (albeit internally to the unions) and connecting talent to these opportunities is often managed directly by each respective union (i.e., not to the production company).
- Hiring for non-union sets or non-union roles is directly controlled by the production company, often by a production coordinator or another entry/mid-entry level role. These jobs are rarely posted publicly, and the need is often emergent, which limits lead-time to source talent. Typical practice involves drawing upon existing personal networks (e.g., of the producer, the production coordinator, professionals already working on the project, etc.) and/or asking for referrals.
 - 36% of participants reported “gaining access to advancement opportunities” as the primary barrier they experience
 - 21% of participants reported “gaining access to entry level positions” as their most frequently experienced barrier
 - 20% of participants reported “uncertainty about how to navigate the industry” as the most common barrier experienced
 - 23% of participants identified “difficulty accessing/building industry networks” as the most challenging barrier to entry

More accessible = lower quality

Alternative channels connecting talent with opportunities have been created by industry professionals, often through online platforms like Facebook (e.g., I Need a Producer, I Need a Production Assistant). These channels are used to link professionals who might not otherwise be connected to projects (i.e., via their social networks), and can connect projects with a broader, potentially more diverse pool of talent.

- 36% of participants reported “demand for unpaid and/or very low pay work” as their most common barrier to entry

The Landscape Scan combined with informant interviews suggested an inverse relationship between the accessibility of sector opportunities and the quality of those opportunities. As there is no oversight to the quality of online postings, opportunities posted in more public forums were more often unpaid/very low

wage, and lacked the workplace protections (e.g., restriction on daily hours, quality of treatment on-set, risk of unhealthy work environment) that more formalized sets might offer.

While online group administrators work hard to mediate what is/is not appropriate to post, it is not possible to ‘vet’ these opportunities. This is not to delegitimize these online groups; rather, to highlight that for those attempting to “break in” without existing sector connections, the more accessible pathways to entry are less reliable, and involve higher personal risk.

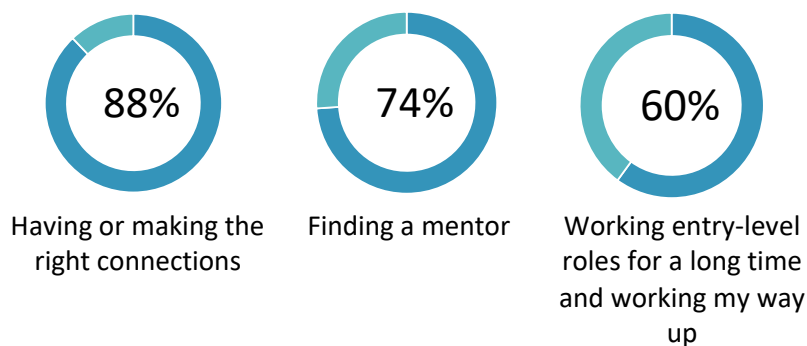


2. Social capital mediates access

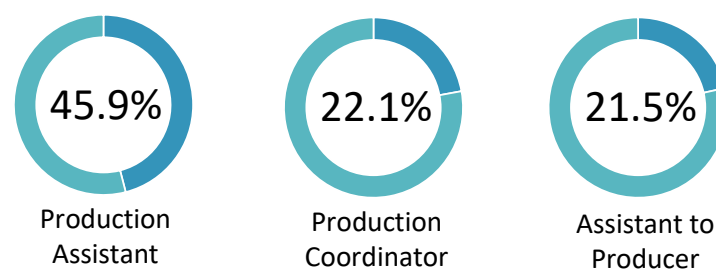
There is no reliable path to entry

Participants in both the industry survey and the informant interviews reported widely varying pathways to breaking in. While no single, reliable path to sector entry was discovered, the industry survey revealed patterns in role occupation and variables that participants felt most influenced their ability to “break in”.

The vast majority (83%) of participants reported occupying at least three entry level roles (e.g., Production Assistant, Production Coordinator) for several years and using the relationships, social capital and sector savvy gained through industry exposure to secure progressive work.



Among those 83%, Production Assistant, Production Coordinator and Assistant to the Producer were the most frequently occupied entry-level positions.



Other entry roles included showrunner’s assistant, assistant accountant, executive assistant, and researcher.

- A smaller group of participants (17% of total population - 63% White and 37% Equity-seeking) reported a more direct path to their current roles, having occupied only 1-3 roles prior to securing the job they reported as the desired state. In all cases, these participants had occupied a combination of Director, Producer, Showrunner and Writer roles.

Entry enablers

Regardless of position, participants consistently highlighted social capital as a critical enabler to both sector entry and career progression and identified the following essential enablers.

A majority of participants reported that their use of sector supports was often motivated by the need to develop and increase social capital – even when these supports contend to deliver other forms of value (e.g., skill development):

- 65.2% of survey respondents reported participating in professional development programs (i.e., at University/College, through community programs, etc.)
 - 43.9% expected the program would help build an industry network
 - 56.1% reported the most valuable aspect of the program(s) as the opportunity to network with other industry professionals

Equally interesting are the comparatively low importance assigned to support factors that are accessible independently of social networks and relationships

- Going to film school (29.3%)
- Cold calling as many places as possible (20.2%)
- Pursuing professional development (17.6%)

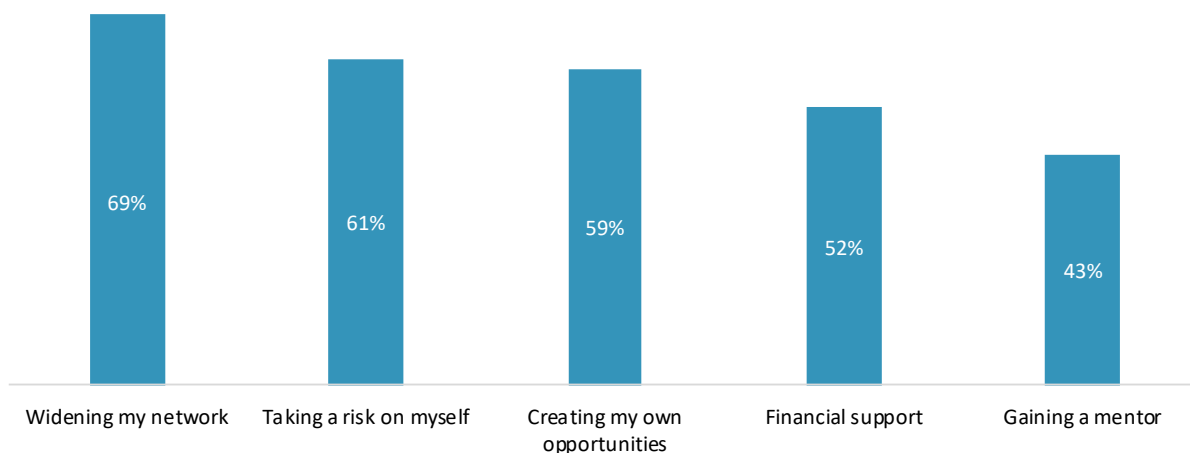
These findings seem to underscore the role of social capital as the sector’s main navigational currency.

“Breaking in” is not an event, it’s about continuous access

The complexity in structure and functioning of Toronto’s film and tv production sector means that sector navigation is a continuously evolving process. Gaining initial entry through a first job (paid or unpaid) represents the first point of “breaking in”; however, continued career development requires progressing through a series of additional “gates” (e.g., building a network, gaining referrals, securing more continuous employment, progressing in roles, securing financing, etc.). While an initial entry point to the sector is, of course, a necessary condition, “getting in” does not guarantee “staying in” over the long-term.

After “getting in”, participants emphasized that sector survival depends on the ability to continually navigate accessing the right resources, at the right times. This means having and gaining access to different forms of capital, information, knowledge, skills, locations, decisions, people and other resources on an on-going basis.

Having the right kind of social capital was found to reliably facilitate access to a variety of resources, enabling movement through each successive professional juncture.



- 69% indicated that “widening my network” and 43% selected “gaining a mentor” as critical steps to career-building.
- Financial capital was also significant to career longevity, with participants citing the importance of “financial support” (52%), “taking a risk on myself” (61%), and “creating my own opportunities” (59%).

Informant interviews clarified the relationship between social and financial capital, in this case, explaining that access to a wider social network (including having a mentor) could permit the transformation of social capital into financial capital (e.g., by connecting them to paid work, to funding, etc.).

- The relationship between social and financial capital is important. Individuals who entered the sector with existing relationships already possessed some of the social capital required to gain progressive sector access. In contrast, survey respondents and interviewees who did not have existing relationships spent more time in entry-level positions doing precarious and low or unpaid work.

Participants were also keen to highlight the personal characteristics they experienced as most supportive of their efforts to build and maintain a career: passion, hard work and resilience. While this might, at first, seem self-evident in a complex and highly competitive industry, their inclusion highlights an important way that participants understand their experiences of “breaking in”:

Myth: Success is a direct measure of effort

This effort-outcome narrative frames success as a personal achievement and ignores the social and systemic forces that shape the individual experience. This narrative provides a backdrop to all subsequent findings and operates as a discursive barrier that impedes discussions about diversity, equality, and access.



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FLOAT

PROD.

ROLL

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SCENE

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TAKE

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DIRECTOR: AMIRA MAHAMUD
FARHIYA DINI

CAMERA: Natalie Chattargoon

DATE: JULY 22ND 2019

INT. EXT. DAY

SYNC

3. Lack of diversity is not a mystery

Awareness of the lack of diverse representation in Toronto’s Film and TV production sector is not new. Cultural dominance of the sector by cis-gendered, white males has been reported globally, with a variety of interventions introduced in the UK, US, and now Canada (see – CMPA, 2018). These interventions have tended to focus on gender as an entry point to research on equality and measurable change (e.g., Golick & Daniels, 2019).

Although demographic information is not collected by the Canadian Film and TV production sector, and the categorial limitations of Census data (e.g., broad and varied age categories, binary gender options), the anecdotal evidence is so strong that the City of Toronto has incorporated workforce diversity as a strategic pillar for this sector (Toronto Film, Television and Digital Media Board, 2017).

Organization-led initiatives have emerged (e.g., “Your Stories Taken to Heart” – CBC), but, as reflected by the participant distribution of the current research, system-wide change has been slow and inconsistent. The industry survey and informant interviews revealed how the hidden and disconnected nature of the sector, traditional ways of working, and relationship dependency create systemic barriers to access at every stage.

Access requires a specific kind of social capital

Social capital is a capability that arises from the prevalence of trust in a society or in certain parts of it...Where trust is prevalent, groups and societies can move and adapt quickly through many informal contracts.

Francis Fukuyama, *Trust: The social virtues and the creation of prosperity* (1995).

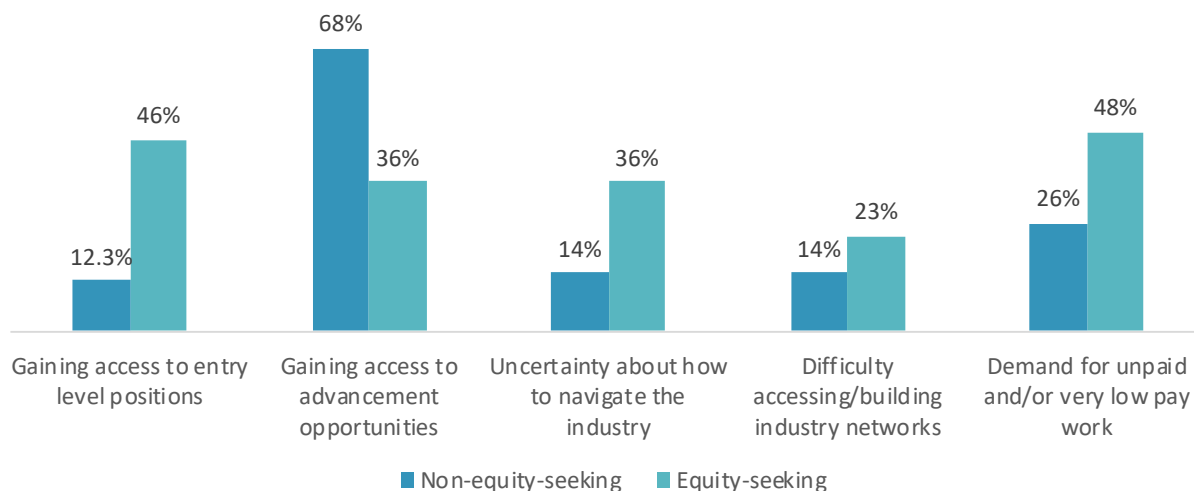
Without a unifying mechanism to connect sector stakeholders and explicate the hidden job market, social capital is the dominant currency. The historic cultural dominance of the sector seems to mean that a particular kind of social capital governs access; and this form of social capital is not uniformly available.

The specific qualities defining the social capital most valued in Toronto’s film and tv production sector are difficult to isolate. Interviews revealed its production through the informal exchanges between sector members, and the tacit cultural knowledge embedded in identity. The interviews demonstrated the ways these qualities are taken for granted by most sector members (who reflect the dominant culture) and exposed through the overlapping narratives of professionals from equity-seeking groups. Exacerbated by institutionalized discrimination, these experiences of “othering” reported by equity-seeking professionals demand a kind of continuous “code-switching¹” to adapt to a (micro)aggressive environment.

¹ Code-switching refers to the practice of interacting in different ways according to the social context. While most people interact differently in different settings (e.g., workplace vs home), structural inequalities have institutionalized white cultural norms as legitimate. This creates incentive for minoritized individuals to improve their prospects by adapting their language and behaviours to the sector’s dominant culture (code-switch) (Waring, 2018).

Barriers are experienced differently

Barriers to entry are experienced by every professional trying to break in and stay in. Although these barriers, at first, appear universal, the multilayered reality of access means these barriers are experienced differentially by different groups.



These findings outline differences in the frequency with which these barriers are experienced by participants from the industry-dominant culture, and professionals from equity-seeking groups:

- 36% of participants (68% of White participants and 36% of Equity-seeking participants) reported “gaining access to advancement opportunities” as the primary barrier they experience
- 21% of participants (12.3% of White participants and 46% of Equity-seeking participants) reported “gaining access to entry level positions” as their most frequently experienced barrier
- 20% of participants (15% of White participants and 36% of Equity-seeking participants) reported “uncertainty about how to navigate the industry” as the most common barrier experienced
- 23% of participants (14% of White participants and 23% of Equity-seeking participants) identified “difficulty accessing/building industry networks” as the most challenging barrier to entry
- 36% of participants (26% of White participants and 48% of Equity-seeking participants) reported “demand for unpaid and/or very low pay work” as their most common barrier to entry

Significantly, participants from equity-seeking communities experience major barriers earlier in the process of “breaking in”, highlighting the systemic nature of factors mediating sector access.

The most frequently reported barriers faced by participants equity-seeking professionals include:

- “Lack of access to advancement opportunities” (74.7%);
- “Microaggressions by superior or colleagues” (69.9%) and “harassment by superiors or colleagues” (33.7%);
- “Negative assumptions about my skills/abilities” (67.5%); and,
- “Feeling/being ‘othered’” (65.1%)

It is critically important to consider that 100% of respondents from these communities reported common experiences of harassment and overt discrimination in the workplace.

Participants described experiencing these barriers as:

- “Unequal pay for similar jobs” (56.6%)
- “Not being recognized/rewarded for performance” (55.4%)
- “Limited access to industry networks” (50.6%)
- “Exclusion from meetings, discussions/decisions” (45.8%)
- “Not advancing beyond middle management” (43.4%)
- “Lack of access to entry-level positions” (36.1%)

Participants explained the basis of these barriers as:

- “Lack of knowledge of how to ‘climb up’” (32.5%)
- “Limited ability to work for free/low pay” (28.9%)
- “Inability to access financing” (27.7%)

Together, these reports seem to describe a distinctively antagonistic workplace, where individuals from the BIPOC and LGBTQ2S+ communities face barriers to access on the basis of identity; and do not feel valued as contributing members of their professional community.

Access involves more than job opportunities

The barriers explored in the industry survey focused specifically on barriers endemic to the sector – that is, barriers that seem directly connected to accessing work. The survey also invited respondents to elaborate (by inserting text) on their experiences. These qualitative inputs, in combination with the informant interviews, consistently revealed additional forms of ‘access’ not typically considered in discussions about “breaking in”. These barriers, often connected to socio-economic status, and multiplied by intersectionality, describe systemic obstacles place limits on ‘who’ this industry seems to be ‘for’.

*Access is **distributed** (occurs in many places), **multilayered** (involves many forms of access), and **continuous** (occurs repeatedly over time).*

In the absence of research in Toronto’s film and television production sector, this study drew upon research from other sectors that overlapped in focus (i.e., barriers) and/or participants (i.e., a diverse and representative participant population, young people, young people from underserved communities). A more encompassing definition of ‘access’ was found in these studies (e.g., NEET, 2018), and the findings from these studies offer a preliminary basis for interpreting the experiences of the current study’s participants.

Different barriers are tied to different types of access:

- Financial security or supported living allows individuals to do ‘free’ or very low pay work
- Access to transportation permits individuals to get to film/tv sets spread throughout and outside the City of Toronto
- Access to a driver’s license (cost to become licensed, vehicle to practice) is required for most Production Assistant roles
- Reliable internet access is required to access job groups and real-time opportunities
- Access to financial capital is required for union dues, training, and content creation (e.g., for a portfolio or demo reel)
- Access to information is required to understand how the industry ‘works’ – where to look for information/opportunities, who to get to know, how a set is run

Individuals who do not identify as members of the sector-dominant culture face more of these barriers, earlier in the process of “breaking in” (see Key Finding #1).

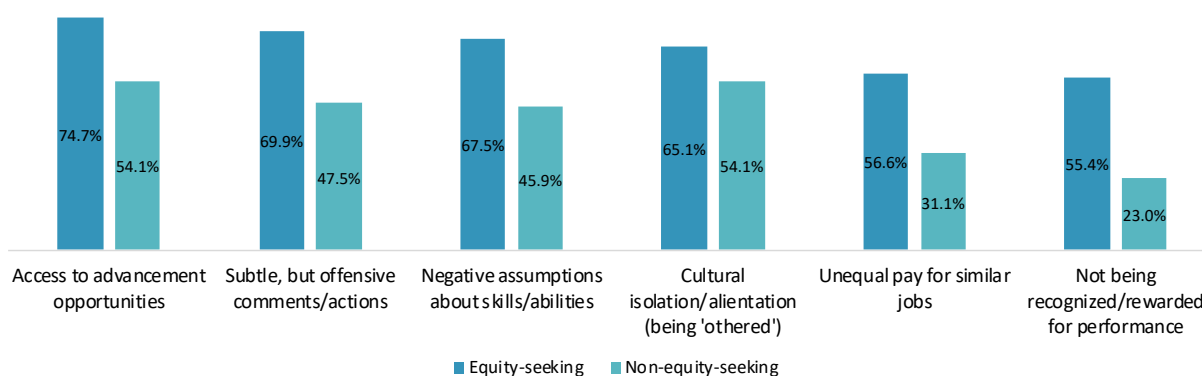
Recognizing that “breaking in” is a discursive experience (not an event) that involves multiple types of access is fundamental to understanding differential experiences of these “common” barriers; and systematic nature of the barriers experienced specifically by equity-seeking professionals.

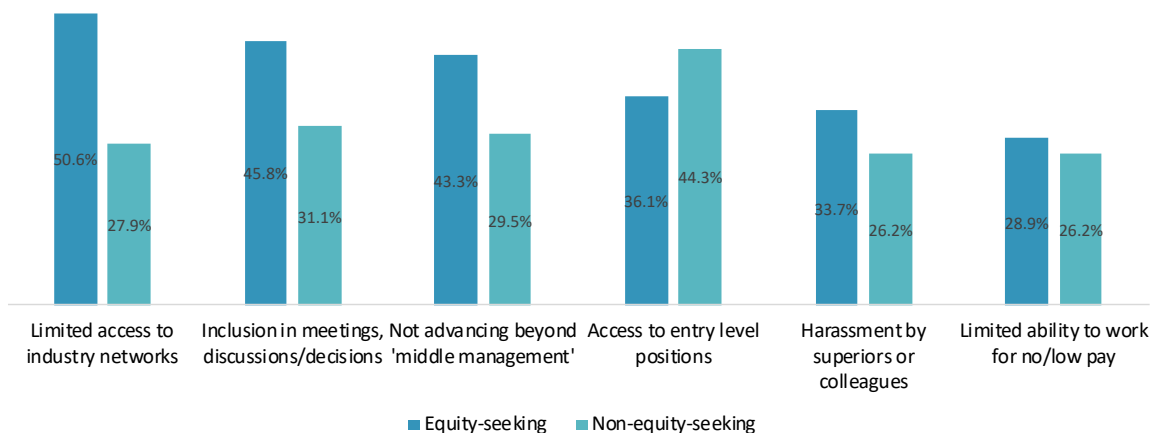
Awareness does not equal action

Workforce diversity is a growing priority across sectors. As with other sectors, Toronto’s Film and TV production industry has started to introduce some programs to support the creation of a more representative talent landscape. At present, these interventions seem to be organizational initiatives aim to shift hiring practices, but do not include system-level imperatives that would mandate wide-scale change. At the organizational level, these initiatives are particularly vulnerable to individual differences in perception (i.e., some individuals feel diversity is improving, or that lack of representation is about talent), potentially limiting the effectiveness of these efforts.

A critical decision made early in the research process was to explore narratives about sector access and the experiences of individuals with diverse backgrounds from all perspectives. While it was expected that different experiences would result in alternative, perhaps opposing narratives (e.g., “it’s about skill, not identity”), this research also sought to explore counter narratives. The hope was these counternarratives might explain why awareness, alone, has been insufficient to drive tangible change.

The industry survey and informant interviews confirmed a majority of participants are aware of the challenges faced by professionals from equity-seeking groups. Specifically, respondents reflecting the sector’s dominant demographic not only expressed awareness that the additional barriers exist (i.e., 79.7% of survey respondents confirmed that individuals from underrepresented groups face additional barriers to entry and success in the industry); but were highly accurate in describing the reported experiences of professionals from equity-seeking groups (accuracy defined as the cogency between the reported experiences of equity-seeking professionals, and those identified by White respondents for minoritized groups).





These findings led to an important discovery: lack of awareness does not explain lack of progress.

Two additional, important findings from the survey and interviews provided new insight into the forces behind this entropy.

- When asked to identify what has helped equity-seeking professionals overcome barriers, respondents from different groups provided significantly different responses:
 - Respondents who reported not experiencing barriers on the basis of their identity recognized the importance of supportive bosses/mentors (68.9%), formalized mentorship programs (67.2%), and diversity and gender parity policies/programs (59%).
 - In contrast, respondents who do experience barriers on the basis of their identity indicated that hard work (71.1%), finding community and drawing upon peer support (63.9%), creating opportunities for oneself (60.2%), and support of a professional mentor (60.2%) were the most helpful in overcoming barriers.
- The invitation to share current or potential personal and workplace practices to increase workforce diversity, generated a consistent pattern of responses:
 - Individuals recognized they could influence workforce composition when asked to make a referral, but consistently cited the limitations of their network (i.e., “I don’t know anybody”), the dearth of diverse talent (i.e., “there aren’t many talented BIPOC professionals to choose from”)
 - Unions and production companies acknowledged limitations to their networks, and described tentative efforts to expand it (e.g., going to high schools to increase awareness of the sector as a viable career path).
 - Most interviewees expressed a helplessness at knowing where to start and resolved that the industry would ‘naturally’ change – asserting that it was, indeed, already changing.

These two findings contribute significantly to understanding why a clear lack of diversity exists, and highlight the harm of poor representation among sector decision-makers:

- Current interventions reflect the dominant narrative (e.g., diversity programs), but not what works according to equity-seeking professionals.
- Decision-makers developing solutions refer to strategies that help them (i.e., mentorship, supportive bosses), without considering the systemic barriers faced by equity-seeking professionals attempting to access these programs.

- Diversity policies, in the absence of measures, are low-stakes, and unable to hold employers (e.g., production companies, studios and broadcasters) accountable.

All of the existing interventions problematize diversity and focus on increasing the number of professionals from equity-seeking groups on film/tv projects; rather than addressing access (i.e., by helping build and transform social capital).

Not only might this orientation risk encouraging a ‘checklist’ approach to talent management, creating the conditions in which tokenism and othering may thrive (i.e., suggesting someone is hired only because of their identity); it may fail to create system changes that shift practice for long-term effects.

Improvement is relative, and overestimated

Participant responses to the question of intervention clarified an unexpected narrative that might be working against efforts in support of large-scale change: that diversity is better ‘on its own’.

This narrative was articulated frequently by union and education stakeholders, who cited shifts in classroom demographics (which have experienced an increase in international students – STATCAN, 2018) as evidence of an impending shift in workforce composition.

In contrast to the hope expressed by stakeholders, the expected relationship between course composition and workforce composition does not appear to hold.

- Survey respondents currently enrolled in formal training (e.g., College/University) and recent graduates consistently reported more Women (72.2%), People of Colour, Indigenous and LGBTQ2S+ (55.5%) in programs compared to the workforce.

As discussed later in this report (see Key Finding #5 – Supports are partial and disconnected), connections between educational institutions and the sector are cursory (stakeholders are connected, not embedded), and do not build the relationship equity needed to reliably gain sector access.

Some industry interviewees were also receptive to this narrative, citing personal experiences of “having more diversity” on their sets. Further probing revealed the likely source of this narrative: a film/tv set that goes from having no professionals from equity-seeking groups, to having one professional who identifies differently from the dominant culture is a 100% improvement.

While this relative change is significant, it does not denote a major trend, nor is it a leading indicator of the changes to come.



4. Equity-seeking professionals create alternative paths to entry

Difficulty accessing relationships, opportunities, and information is endemic to the Film and TV production sector's structure and organization; however, the strategies and activities that support "breaking in" and aid sector navigation are markedly different for professionals from equity-seeking groups.

While white, cis-male professionals entering the industry are more likely to report leveraging existing social capital to build equity and connections within the sector, professionals from equity-seeking groups overcome barriers to entry by:

- "finding community" on the sector's periphery (63.9%),
- "creating their own opportunities" (60.2%); and,
- "finding a supportive boss/mentor" (60.2%); often members of their community who had "broken in".

It is important to acknowledge that in all cases, "breaking in" requires social support. The difference is the proximity of that support to the film and tv production sector. Industry-led mentorship, apprenticeship and internship programs are most readily accessed by professionals whose culture is the sector's dominant culture. For many equity-seeking professionals, these supports are created outside of the dominant sector network; and group members who successfully "break in" become the links between these outside communities and sector opportunities – they become the pathway.

Community is a bridge to capital

Informant interviews clarified the function of community as a nexus for transforming community-based equity into financial, creative, and industry social capital.

The challenges described by equity-seeking professionals are not synonymous with the challenges of a 'cut-throat' and 'harsh' industry. While the film and tv production sector may be known for its roughness; callous feedback and ruthless competition cannot be compared to the identity-based aggressions and self-erasure experienced by equity-seeking professionals.

For equity-seeking professionals, community is an important resource where hard work and talent are recognized and where the emotional and social supports necessary for continued resilience may be found. In a sector where on-set experiences are a cultural departure, and individuals feel forced to 'code-switch' and 'perform' aspects of themselves, community can be a critical safe haven of care, witnessing, and support.



5. Sector supports are partial and disconnected

The disconnectedness of sector stakeholders and the inconsistent pathways to entry complicate efforts to create supports for “breaking in”. Training, whether through educational institutions, production companies, or community partners, is frequently touted as having a two-fold benefit: building necessary skills and facilitating industry connections (networking). While most programs make strides towards both, their relative importance to and adequacy for “breaking in” may be overestimated.

Sector savvy outdoes existing skills

Learning on-the-job is both the tradition and an expectation in the Film and TV production sector. Although an increasing number of University and College-level degrees, certificates and post-graduate programs are offered, the majority of industry professionals reported viewing formal education as a (mostly unnecessary) luxury. Informant interviews clarified that while these programs profess to arm students with the foundational knowledge required to work in the sector, entry-level positions and hiring practices emphasize personal qualities (e.g., reliability, commitment, hard work) over production-specific skills.

65.2% of survey respondents had attended some form of formal industry-related training.

- 58.5% of the total survey population and 55% of participants currently in training were motivated to build upon existing skill sets.
- 41.5% of the total survey population and 65% of current training participants report wanting to develop new technical skills.

In some cases, formal education has gained a negative reputation among sector employers, who view graduates’ film and TV knowledge creating unrealistic expectations relative to their actual work experience.

Most participants who pursued formal training were at least partially motivated by the need to build personal equity in the sector and hoped these programs would provide network access.

- 43.9% of the total survey population and 65% of current training participants hoped their participation would help them build a professional network,
- 31.7% of the total survey population and 45% of current training participants pursued training as a means of “breaking in”.
- 26.8% of the total survey population and % of current training participants were seeking information about how to navigate the sector.

Training focuses on what, not how

The Landscape Scan revealed a variety of training available, both through formal educational institutions and more needs-based offerings by production companies, unions, associations and community partners. These programs are largely skills-based, with University and College programs placing equal emphasis on theory (see Appendix – Landscape Scan for complete summary of program offerings).

Feedback from training participants and recent alumni revealed training can offer important benefits:

- “Access to production equipment (cameras, etc.)” (55%)
- “Finding out what I like/don’t like’ (55%)
- “Provides me with a safe place to explore and fail” (40%)
- “Technical training” (40%)
- “Learning the ‘rules’ of the industry” (35%)
- “Collaborating with peers” (30%)
- “Finding out what I’m naturally good at” (30%)

Additionally, participants seemed to have an accurate expectation of the sector’s realities, revealed by their most anticipated challenges upon graduation, which paralleled the actual barriers reported by industry professionals earlier in this report:

- 78.9% indicated that “finding opportunities (i.e., knowing which jobs are available)” was the most pressing challenge they expected to face
- 52.6% expected that “convincing people to take a chance on me” may be difficult
- 42.1% reported “finding paid (instead of unpaid) work”

None of the benefits focused on workplace experience or building an industry network, both of which are necessary for breaking in and positioned by educational institutions as significant program value.

The focus of most training and their perceived benefits, combined with the anticipated challenges post-graduation, highlighted the need for more pragmatic knowledge about how to bridge from the classroom to sector work. Indeed, 26.3% of current training participants and recent alumni said they were “unsure where to start” after graduation, in order to break in.

Specifically, participants expressed on-going needs for the following:

- “help finding work after graduation” (47.4%)
- “paid experience that counts toward union membership” (42.1%)
- “practical advice on how and where to break in” (42.1%)
- “more meaningful work placements” (31.6%)
- “more of an ‘employment focus’ in programs” (31.6%)
- “a better understanding of entry level roles and the jobs available on the sector besides the obvious ones” (26%)

“ “ *A lot of graduates seem lost once they graduate and the people that find jobs are ones with previous connections. For some reason, breaking into industries and what to do seems to be kept a secret.*

These findings seem to point to the need for knowledge, or ‘sector savvy’ that goes beyond technical skills. Indeed, this prioritization of attitudinal and soft skills is echoed by sector employers, whose responses reveal that the most important qualities for breaking in are also among the most often missing.

Combined with the qualities prioritized by sector employers, these findings seem to reveal important discrepancies between the training available, and the supports required:

- Program content has a technical focus, while industry professionals seek information about navigating the industry and running a business (this is relevant to non-business owners, as the irregularity of sector work requires professionals to forecast, manage finances and plan resources)
- The most desirable qualities according to employers focus on attitude and ways of working, and the qualities most often missing from new talent center on personal qualities like attitude and self-awareness.
- Theory-based programs often lack the practicality and hands-on experience needed to understand how a project ‘works’
- Some, but not all programs offer 12-14-week work placements
- Work placements and expert instructors provide industry contacts, but the timing and environment do not enable students to build social capital
- Industry connections may point to opportunities, but do not necessarily lead to work

Both new professionals and industry employers place higher value on training that focuses on the how (i.e., how the industry works, how a project/set works, expectations on either side of a project) than on what (i.e., specific technical skills). The majority of existent training, however, focuses on what.

“ “ *Many young people in my program feel no incentive to work in an industry that doesn’t seem to want to support young filmmakers and therefore everyone wants to work in the United States.*

Mentorship is elusive and exclusive

Mentorship (formal and informal) was a major factor in facilitating “breaking in”, regardless of experience or background. All stakeholder and informant interviews identified mentorship opportunities as a reliable way to both gain access to the industry (i.e., for professionals breaking in) and to identify credible talent (i.e., for employers seeking new talent).

In spite of this awareness, mentorship opportunities are rare – in most cases, individuals must seek out their own mentors, which requires network access and social capital (i.e., for a mentor to invest time and effort, their mentee must seem worthwhile). Formalized mentoring exists through some unions and associations; however, these opportunities are exclusive to membership. Consequently, one of the most consistent pathways to entry is also among the most difficult to access.

Work placements build contacts, not connections

Work placements provided through training programs or internships were identified as another promising support. Typical placements last 12-14 weeks, with the expectation that this exposure will lead to paid work.

Informant interviews revealed that the current design of these placements and internships offer only partial rewards:

- Work placements are relatively brief, and while students meet a number of industry professionals, they do not spend enough time to build social capital. That is, the conditions of work, and the time spent on-set is not enough for existing professionals to get to know the placed students well enough to refer or hire them.
 - These findings were corroborated by sector employers, who indicated that the perception of new talent as “too high risk” (29%) is an obstacle faced by young people “breaking in”.
- Placements and internships are typically unpaid, which means the work completed does not count toward union membership. For many participants, taking time away from paid work to complete a training program is challenging, and doing more unpaid or low pay work beyond the program to fulfill union membership requirements may be unrealistic. These costs create a barrier to union entry, rather than aiding it.

Current training participants and recent alumni illuminated the ways the structure of work placements might compromise their ability to deliver experiences that may be transformed into job opportunities:

- 50% of respondents reported being responsible for sourcing their own work placements as part of the program (35% indicated the school arranged the placement, and another 15% expressed uncertainty about how the placement “worked”).

Given the difficulty of “breaking in” is mediated, in large part, by a lack of sector connections (social capital), relying on this same mechanism to access work placements (which are meant to bridge training and workplace) is likely to reinforce, rather than deconstruct, this barrier to access.



6. Young people are multiply barriered

While specific barriers presented in this report may become more or less relevant over the course of a career (e.g., full-time professionals have more sector social capital and may have more access to financial capital compared with new talent), young people tend to be multiply impacted by all barriers in their efforts to “break in”. Overall, young people identified an average of 3-4 barriers to “breaking in” they experienced regularly. These barriers are outlined below, in descending frequency.

Social capital

The most common barrier to access experienced by young people was a lack of social capital across multiple dimensions, including both trust and sector social capital:

- 66.5% cited having little or no credibility with employers (i.e., employers do not ‘know’ them or how they work),
- 62.4% indicated the insularity of the industry (hiring practices),
- 61.3% reported having no or limited connections who have sector connections in their networks,
- 40.7% indicated having no or limited connections to the sector,
- 25.8% report feeling ‘othered’ as a result of differences in norms, values, attitudes and beliefs; and,
- 26.8% reported experiencing subtle but offensive comments/actions as the major barrier.

Informant interviews clarified that for racialized young people, the formation of sector relationships does not necessarily result in social capital, who often do not feel trusted or trusting at work.

Sector knowledge, skills & experience

Sector knowledge was found to be elusive for all professionals trying to “break in”, and this gap was especially prominent for young people.

- 69.1% indicated that “not knowing where to look for entry level positions” was the most significant barrier to “breaking in”;
- 57.2% cited a “lack of knowledge about where to begin”
- 52.6% reported an “inability to gain work experience to secure union/guild membership”
- 47.4% identified “negative assumptions about skills/abilities” as a significant barrier
- 36.6% cited simply “inexperience” as a major obstacle

Interestingly, barriers related to skill were not about the possession of technical skills; rather, the inability to access on-set opportunities to build, demonstrate and refine those skills. Indeed, respondents were more concerned with employers’ perceptions of and assumptions about their skills, than the objective quality of those skills. Interviewees consistently referenced the expectation of “on-the-job learning” typical of entry-level sector roles. Furthermore, although barriers to education are featured prominently in other youth-based research (e.g., NEET, 2018), this did not surface as a primary concern for survey or interview participants. These findings are in-line with the sector’s perceptions of the limitations of formalized film/tv education discussed earlier.

Life circumstances

Life circumstances, especially financial security, also present a significant challenge to sector access.

- 68% cited the prevalence of “internships that are unpaid” as a major barrier to access
- 40.7% expressed an “inability to access financing”
- 35.1% indicated that the “financial investment in one’s career” required was not a realistic option

In addition to the financial investment and risks inherent in “breaking in” (which were equally identified in the broader industry feedback – see Key Finding #2), young people described the impacts of financial insecurity further downstream:

- Limited access to transportation
- Inability to get a driver’s license
- Limited access to job search resources (e.g., computer and internet access)

Intergenerational factors

Racialized young people reported an additional barrier to sector access that, in many cases, differentiates their experience from their non-racialized peers:

- Familial perceptions of the industry as high-risk and unstable presented significant barriers for new Canadians and first-generation Canadians. In many cases, parents made great sacrifices to provide their families with more reliable access to quality education and a financially stable future; and the idea of choosing a future fraught with financial risk seems unimaginable.
- Additionally, intergenerational poverty or financial insecurity creates further pressures to pursue a path to financial stability that will enable young people to support their families (not only themselves).
- Parents who are new to Canada, and/or who experience un/low employment are less likely to have work connections, networks and knowledge of sector norms to assist their children in job searching (NEET, 2018). Toronto’s Film and TV production is a niche sector, further reducing the likelihood that parents will have social connections (capital) to leverage.

It is essential to understand that the barriers reported by equity-seeking young people go beyond what might be considered ‘physical access’ (i.e., being in contact with sector members, awareness of potential funding sources). The intersection of structural and social barriers faced by underrepresented youth mean that while they might technically be able to pursue these paths (e.g., anyone can apply for union membership), a variety of factors influence their actual accessibility (e.g., ability to perform unpaid sector work to gain experience while maintaining other jobs, familiarity with complicated funding application

Interventions must go beyond simply ‘showing folx the door’, and instead, equip them with the practical knowledge, sector savvy and social capital needed to move through them.

Sector perspective

Working professionals in Toronto’s Film and TV production sector were invited to share their perceptions about young people entering the sector, which revealed both shared and counter narratives to the experiences of young people trying to “break in”.

54.2% felt there is a hesitance to hire young talent, reporting the following barriers:

- 60% suggested their “lack of experience makes the investment too high”
- 52% indicated that young people “require too much support or time investment”
- 32% cited a “lack of access to young talent (through networks, unions, etc.)”
- 29% stated simply that young people are “too high risk”
- 17% referenced a “low quality talent pool”

These findings were consistent with the experiences shared by young people trying to break in, and the way industry professionals perceive their skills.

An additional insight uncovered during the informant interviews offered an explanation for the frustration many young people and sector employers expressed about one another: while young people and employers valued personal qualities like hard work, passion and reliability over prerequisite technical skills, these terms carried different meanings.

- For young people, “passion” meant excitement about the industry, enthusiasm about their work, and a commitment to creativity. In contrast, employers understood “passionate” as synonymous with “hardworking” and “doing whatever is necessary”.
- For employers, “hardworking” meant demonstrating agency, autonomy, and a willingness to “figure it out”. For young people, hard work involved adhering to long days, odd hours, and doing whatever they were told.
- For employers, “reliability” meant showing up early and being available at all times (while on-set). For young people, “reliability” meant consistently completing tasks as directed. In this case, attention seems to be a contentious currency, as employers expect staff to be attentive and available at all times. Changes in the social landscape, in which social media and mobile devices are prominent, were identified as a major source of this contention. For young people who feel the need to be always connected, and always on top of and responsive to potential work opportunities (given the dynamics of sector work), being engaged with a mobile device feels necessary. For employers, this breeds inattentiveness and compromises the speed at which staff can respond “in the moment” on-set.

These nuanced differences seem to have significant repercussions on employers’ evaluations of the ‘quality’ of young talent; and the frustrations young people express about the way they are evaluated (assumptions about their skills). Young talent, being new and in a sector where “learning on the job” is an expectation, infer this to mean they will be given instruction. The reality of on-set learning, however, is that it is largely self-directed. Employers expect young people to observe, ask questions (when appropriate), and to be responsive to the needs of the professionals they support. The discrepancy between these expectations seems to cause to new talent to feel unsupported and confused on-set, while employers feel frustrated about the investment they feel new talent requires.



IMPLICATIONS

The implications of the insularity and disconnectedness of Toronto’s Film and TV production sector has been thoroughly discussed throughout this report. Siloed stakeholders complicate sector navigation, and opportunities are accessed through seemingly ‘closed’ social networks using sector-specific social capital. This closed system creates a self-perpetuating cycle of talent reproduction in which incoming film and tv production talent mirrors that which already exists.

	Sector	Youth breaking in”	Workforce Diversity
The sector is disconnected, complicated and hidden	<ul style="list-style-type: none"> • Complicated navigation limits access to top talent. • Duplication of efforts across stakeholders result in unnecessarily used resources (e.g., multiple stakeholders offering the same/similar training). • Limited stakeholder connections reduce the sector’s ability to be responsive and agile to changing industry needs. 	<ul style="list-style-type: none"> • Onus is on individuals attempting to “break in” to navigate access to information, connections and opportunities across and between stakeholders. • Requirements for “breaking in” are unclear, inconsistent, and often incompatible (e.g., young people need experience to secure even unpaid work [and build more experience]). 	<ul style="list-style-type: none"> • Sector savvy is tacit knowledge passed through generations and social networks, which promotes a dominant (White, cis-gendered male) sector culture. • Complicated layers of access create multiplicative barriers for professionals from equity-seeking groups.
A specific social capital mediates access	<ul style="list-style-type: none"> • Social capital is not a proxy for talent. • Near-exclusive reliance on sector networks does not guarantee access to top talent. • Missed opportunities for innovation and competitive advantage. • Creates a self-perpetuating insularity that makes change difficult. 	<ul style="list-style-type: none"> • Often do not have their own social capital and must rely on family and close relationships to bridge social network capital. • Referral culture primes negative assumptions about individuals who have not been referred (i.e., not good if not referred), making it harder for young people to build credibility and social capital. 	<ul style="list-style-type: none"> • Equity-seeking professionals often do not have the type of social capital that dominates the industry, resulting in multiple, layered barriers to access. • Lack of representation among sector decision-makers.
Supports are partial and disconnected	<ul style="list-style-type: none"> • Disconnected stakeholders prevent pull-through of supports for new talent, compromising their system-level influence, and potentially reducing the ROI of programs / initiatives. • Incompatibilities between stakeholder requirements and programming results in lost talent (people leave the sector). • Lack of transparency and limited communication between stakeholders leads to 	<ul style="list-style-type: none"> • Young people have trouble accessing supports that help; and invest in programs and initiatives that do not deliver on expectations. • Sector navigation becomes increasingly complicated, resulting in some young people leaving the sector. 	<ul style="list-style-type: none"> • In many cases, specific supports do not exist; this leaves equity-seeking professionals (who are already disadvantaged by barriers to access) without systems that support entry. • Poor representation in decision-makers results in interventions that do not match needs.

	Sector	Youth breaking in”	Workforce Diversity
	<ul style="list-style-type: none"> investment in programs that are not working as expected. Lack of representation among decision-makers results in interventions not perceived as useful/valuable for their target audience. 		
Lack of diversity is not a mystery	<ul style="list-style-type: none"> Sector appears not to value diversity. Reduced ability to meet requirements of international film and tv projects (lost profit). 	<ul style="list-style-type: none"> Young people’s experiences are countered by narratives of what ‘should’ be, preventing constructive dialogue about what is. Young people feel ‘othered’ and discouraged from sector membership. 	<ul style="list-style-type: none"> An overestimation of change may be undermining the sector’s sense of urgency and stakeholder accountability to increase workforce diversity.
Equity-seeking professionals create alternative paths to entry	<ul style="list-style-type: none"> A widening community of diverse creatives is developing in spite of sector constraints. Opportunity to bridge sector and communities to access more talent. Opportunity to learn from communities not bound by the sector’s traditional ways of working. 	<ul style="list-style-type: none"> Young people can access different kinds of support (creative, emotional, professional, etc.). Provides a creative community where their learning can continue. May find mentors who share their experiences, providing guidance and sector access. Communities can sometimes provide financial capital to support creative works. 	<ul style="list-style-type: none"> Provide some access points to an otherwise impervious industry, although may reinforce being ‘othered’ by the sector. Connection to similar creatives, permitting a sharing of knowledge, resources and relevant supports (e.g., funding).

COVID 19

Six months after this research was completed, the COVID 19 pandemic halted production across the global film and television production sectors. As of March 2021, some production work has restarted in Ontario under restricted conditions. This continues to be an enormous loss to the sector, especially for creatives whose work is already precarious many of whom remain unemployed.

Current research in other sectors continues to signal the disproportionate impacts of these losses on women, Black, Indigenous, People of Colour, and new Canadians, highlighting the systemic barriers that pre dated COVID 19.

The characteristics of the film and television production sector its insularity, the dominance of white, cis male creatives in decision making roles, the sector specific social capital that holds currency underscore the likelihood that equity seeking creatives, and especially young equity seeking creatives, will face exacerbated barriers to access at a time when increased competition, unpredictable schedules, and higher production stakes are likely to motivate a return to ‘tried and true’ ways of working (i.e., distributing work among close relationships, calling upon familiar talent, prioritizing work assignments according to union seniority).

The realities of the COVID 19 pandemic illuminate the urgency of addressing the barriers to access discussed in this report. Without immediate, system wide interventions, the sector risks losing the progress made to date in diversifying the workforce, potentially compromising Toronto’s creative and production potential for years to come.

Considerations for decision makers

The structure and organization of the sector that originated this closed network has prevented the forging of relationships and connections that could transform it. Consequently, sector professionals experience pressure from all sides to “make changes” but feel unsure of where to start. Moreover, real change will require coordinated efforts across stakeholders at all levels – an undertaking that will necessitate the formation of new relationships, and a restructuring to operate in ways the sector never has before.

Problematizing diversity may be problematic

Diversifying the workforce is a requirement that demands immediate action. Lack of workforce diversity is not a new, nor a newly identified problem, evidenced by the diversity-focused initiatives that have emerged in recent years. The persistence of the sector’s homogeneity in the face of these efforts suggests that a reframing of the ‘problem’ might be worthwhile.

Current diversity initiatives ‘problematize’ diversity and focus on ‘increasing diversity’ by increasing the number of equity-seeking professionals on film and tv projects. While this frame might help some individuals access roles, it might also encourage a “checklist” approach to addressing the problem, without addressing the barriers that exclude them in the first place. In other words, this approach does not necessarily change practice.

The current research uncovered a potential alternative framing of the problem: access. Problematizing access would mean shifting goals from “increasing representation” to “breaking barriers” to access. Addressing barriers would necessitate system-wide changes in practice, which, if adequately addressed, would have the consequence of increased diversity. In this frame, diversity is a measure of access; and a sector permeated with barriers to access would lack workforce diversity.

Measures lead to insight and accountability

A major factor that seems to be limiting progress is the absence of measurability. At present, there are no measures in place to provide quantitative or qualitative feedback about the workforce landscape. Although much of the sector seems to share anecdotal awareness of its homogeneity, it is not unanimous. The absence of clear data about workforce composition allows for counternarratives to persist, and potentially undermine (or at least slow down) efforts to create change. Moreover, when efforts are made to change practice, it is difficult to say with confidence whether the workforce is changing as expected, and at what pace; and to identify why these changes are or are not occurring.

Regardless of whether the collection of sector demographic data is a viable option, standard definitions for terms like “diversity”, “equality”, “emerging professionals”, and “youth” would ensure consistency in the language and parameters used across stakeholders. Additionally, the identification of qualitative and quantitative indicators that measure access would provide two-fold benefit: first, these indicators would provide real feedback on individual organization and sector-wide progress. These indicators could be used not only evaluatively, but also to provide feedback on where progress is and is not being made (e.g., which programs are/are not working) and why. The ability to check-in on progress and identify persistent barriers to access would allow stakeholders to respond with more informed actions. Second, sector-standardized measures would provide an accountability mechanism that is currently lacking. This may help to unify currently disconnected stakeholders by setting both individual and collective expectations and responsibilities for improving workforce composition.

Diversity among decision-makers

Participants consistently reported a lack of representation among sector decision-makers. The slow progress toward workforce diversity and the misalignment between interventions (e.g., diversity initiatives) and activities that affect change (e.g., building community, extending social capital) seem to evidence these gaps.

To devise appropriate solutions to the problem of access, it is critical to privilege the perspectives, voices and feedback of those who are most barred. This calls for an immediate change in the composition of decision-makers across the sector and provides a clear, measurable accountability for change that all stakeholders can make right away.

Everyone, together

The exclusivity and insularity of the industry appears to have persisted, in part, because the primary sector stakeholders are siloed. This same disconnection limits the reach of diversity-focused practices initiated by any given stakeholder. It follows that for real change to occur, a united effort, at multiple levels will be required - no single stakeholder is wholly responsible for the composition of the workforce, or for the ways the sector operates. At the same time, systemic change takes time, which means that relying solely on top-down change is unlikely to keep pace with the sector's employment needs. To meet the complementary demands of market growth and workforce diversification, both system-wide and scaled interventions are needed.



RECOMMENDATIONS

This report provides an overview of the central themes that emerged through an initial scan of Toronto's Film and TV Production sector, exposing important dimensions of the experiences, success, and challenges of individuals trying to 'break in' to the industry, with a focus on young people from equity-seeking groups.

As the first initiative of its kind, this document provides a foundation for further exploration, discussion and action. It is intended as a call to action for the sector as a whole, to address the systemic that limit sector access for equity-seeking professionals; and limit the sector's ability to access highly skilled diverse talent.

The following recommendations are a starting point. Sector-level recommendations reflect total-sector actions that invite stakeholder collaboration and contribute to system-level change. Partner-level recommendations focus on the specific actions POV and industry partners may take to mobilize change and create momentum connected to sector-level initiatives.

Sector-level Recommendations

Focus on Access

A typical approach to workforce diversification is the use of diversity initiatives and programs that focus on increasing the number of sector members from equity-seeking groups. This research has revealed the limitations of problematizing diversity, the most significant of which is an overemphasis on the individual. A novel approach may be to problematize access, which places emphasis on the barriers that shape the differential experiences of "breaking in" and "staying in" based on identity.

A focus on access aims at the reduction and removal of barriers; and uses workforce diversity as an important measure of progress.

For this to be effective, increased representation among sector decision-makers should be the first priority.

Additionally, while this study provides a preliminary definition of access (in its various forms and highlights the barriers to access experienced by individuals trying to "break in", additional research is strongly recommended to understand how access is mediated, including (but not limited to) the type and role of social capital. This research, conducted under the guidance of equity-seeking professionals in decision-making roles, would provide evidence-based support for the development of near- and long-term workforce interventions.

Standardize and Measure

Currently, there are no Canadian benchmarks to reflecting the demographics of the Film and TV production sector. In the absence of such data, the sector is limited in its ability to develop evidence-based interventions and to measure progress. In addition to a lack of data is a lack of consensus on the language, terminology and definitions used to describe the sector's workforce.

1. Standardize industry definitions of "diversity", "young people" and career stages (e.g., emerging, full-time professional) to bring consistency to parameters used for programs, funding and other supports offered to sector professionals.

2. Standardize and track entry-level skill requirements by role to provide (1) a measure of sector capability, (2) create a feedback loop between workforce needs (e.g., skill gaps, new roles) and sector training offerings (institution and non-institution based).
3. Establish shared workforce measures that can be used by employers and the sector as a whole to inform workforce interventions, evaluate change, and identify persistent barriers to improvement.
4. Introduce a diversity maturity model to track and inform sector change; and provide a supporting toolkit to address barriers to diversity and promote anti-oppressive workforce practices among sector stakeholders.

Build Stakeholder Synergy

The disconnectedness of sector stakeholders seems to be a central factor in barriers to access (for both employers and professionals). Not only has this resulted in incompatible requirements, but also in duplication of efforts and expense. Building relationships between traditionally separate stakeholders is a priority, with emphasis on opportunities to use synergistic offerings to optimize sector support.

Natural synergies discovered during this research include:

- Introducing work-integrated learning whereby work placements count toward union membership requirements.
- Increasing the depth of partnerships between production companies and educational institutions to support job-after-placement.
- Connecting funders with workforce development programs to mobilize funds earlier in the career path (i.e., targeting funds to support training, membership, certifications, driver's licenses – not only content development/production).
- Creating a universal curriculum incorporating development programs across the sector into a single learning path.

Awareness, communication and transparency of activities, programs, and offerings between stakeholders was frequently requested during the informant interviews. Stakeholders expressed frustration at the difficulty of remaining current about initiatives and programs that might be points of collaboration.

Create regular opportunities for stakeholders to connect with each other and diverse sector talent:

- Annual cross-sector strategizing to communicate sector observations, challenges and strategic priorities across stakeholder groups, with the goal of coordination and alignment.
- Quarterly connects between sector champions (i.e., representatives from each key stakeholder group) to address a selected, shared challenge.
- Rotating showcase events hosted alternately by different sector stakeholders (e.g., Unions, Educational Institutions, Community Partners) that display current activities, programs, initiatives and priorities.
- Coordinated outreach (e.g., shared roadshows) during which sector stakeholders partner to conduct talent outreach and education.

Foster Community

Community is a major source of connection and support both for sector members and those who are trying to “break in”. There is a distinct opportunity to intentionally build a sense of community within the sector, including building bridges between internal and peripheral creative communities, to facilitate collaboration between diverse creatives, and to provide points of connection for those trying to “break in”.

Introduce community-building practices that foster connection and platform diverse talent trying to “break in”:

- Activity-based networking events that invite diverse creatives at all career stages to collaborate “live” on a project or piece of work.
- Incubation centers for emerging talent that connect young people with sector mentors on real projects.
- Showcase events for emerging artists, new production companies and community services.
- Formalized mentoring programs that cross stakeholder boundaries (i.e., not siloed by stakeholder).
- Local (Toronto-based) funding for local (Toronto-based) creatives paired with industry mentorship and work placement.
- Cross-community mentorship programs to build relational bridges between sector professionals from different communities, and between sector professionals and new talent.

Importantly, these community-building events must integrate various creative communities. Currently, these activities often occur in parallel (inside/outside the sector). Ensuring diverse representation among stakeholders, organizers and decision-makers is critical.

Expedite and Support with Policy

Systemic change requires coordinated, top-down and bottom-up support. It is strongly suggested that the recommendations listed here are supported by policy-level changes to clarify sector objectives, promote accountability, and expedite cooperation.

Immediate policy-level recommendations include:

- Ensuring equity-seeking professionals comprise the majority of decision-maker roles concerned with policies related to access and diversity.
- Standardization of definitions, measures, and workforce reporting.
- Diversity requirements for stakeholder leadership composition.
- Diversity requirements for all major productions.
- Tax reductions for employers to support hiring professionals from equity-seeking groups.
- Tax-deductible and/or discounted rates for employers to engage consulting support on anti-oppressive workforce practices and diversity and inclusion.
- Fee subsidies for equity-seeking youth for common sector certifications/requirements (e.g., driver’s licensing, union fees).



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Appendix

Key Participant Demographics

Obtaining a representative sample population for this research was a priority. In the absence of reliable demographic data for the sector, a multi-channel approach to invite participation was employed. It is expected that the demographic representation outlined below approximates the current distribution of sector participants.

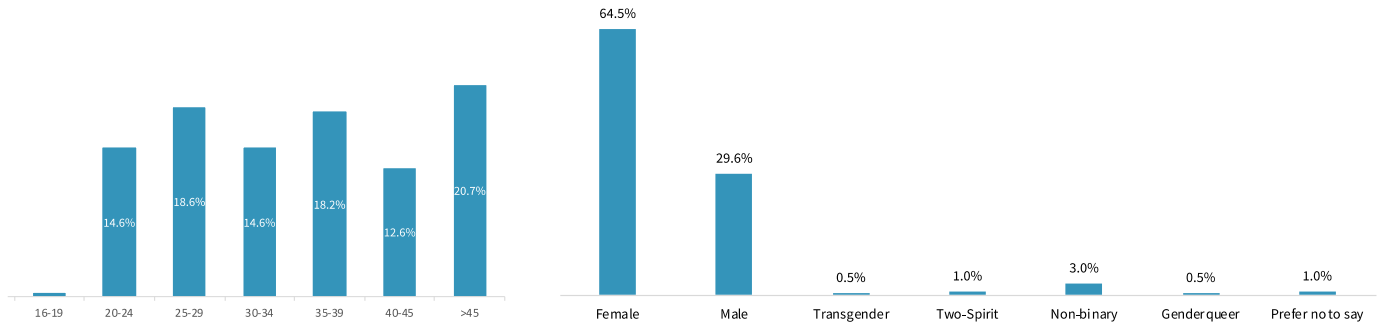


Figure 1. Participants' reported age

Figure 2. Participants' reported gender

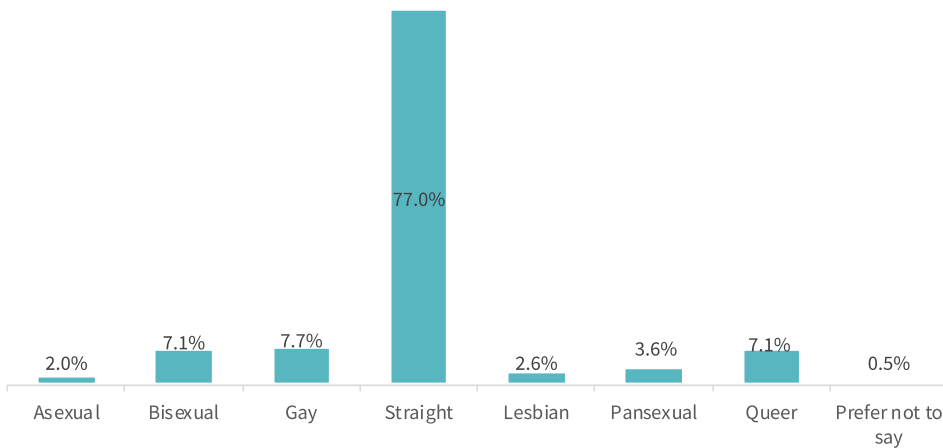


Figure 3. Participants' reported sexual orientation

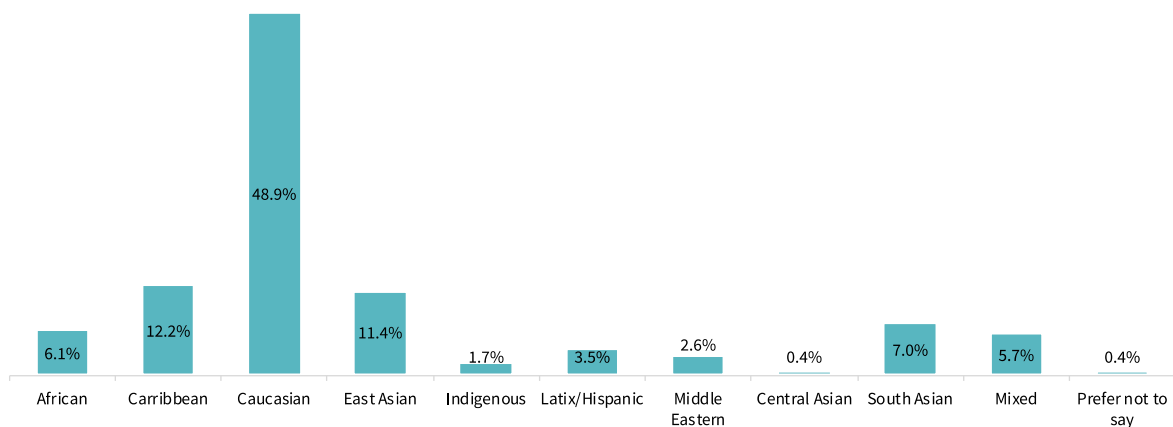


Figure 4. Participants' reported ethnicity

Figures 2 and 4 reflect what might be considered an overrepresentation of White participants, and a higher-than-expected participation of participants identifying as female. These findings align with anecdotal awareness of an ethnically uniform sector; and a recent focus on gender for diversity initiatives (specifically, equality for women) (e.g., WIFT, 2019). The higher level of female participation in this study may be interpreted as both a consequence of this focus (i.e., awareness of and mandates in support of gender equality have been prioritized) and increasing comfort with self-advocacy for White female-identifying sector professionals. In other words, progress in workforce diversification to-date appears to center on straight, White women.

Sector Experience

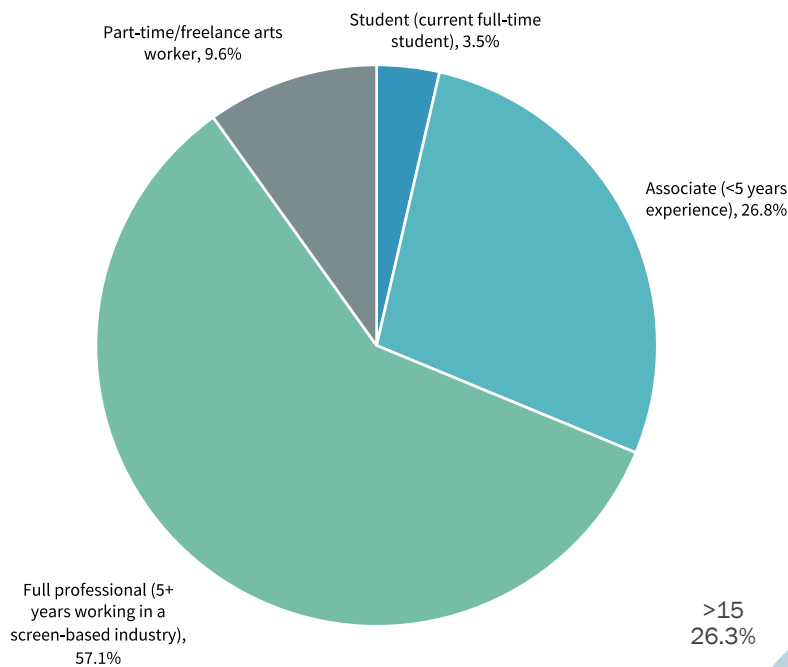


Figure 5. Reported career stage

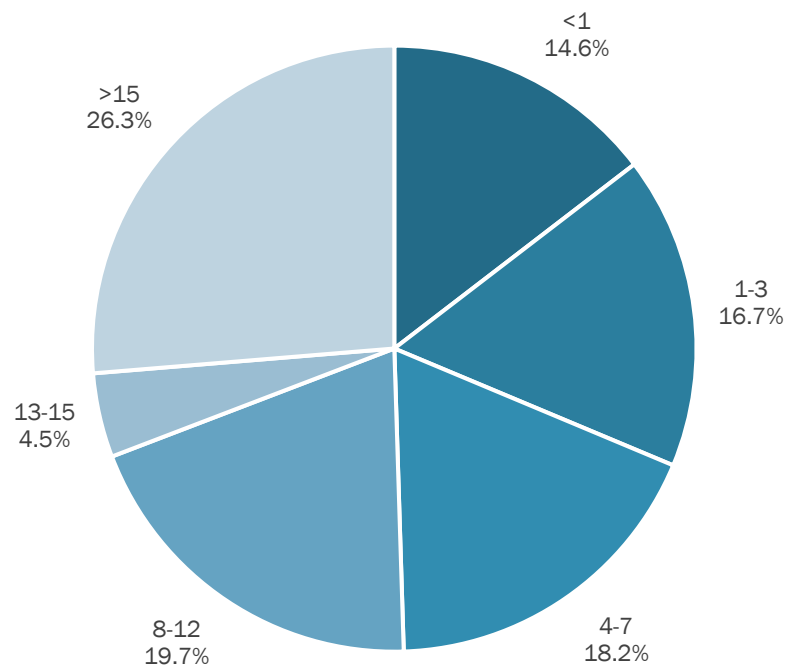


Figure 6. Number of years working in the film and TV production industry

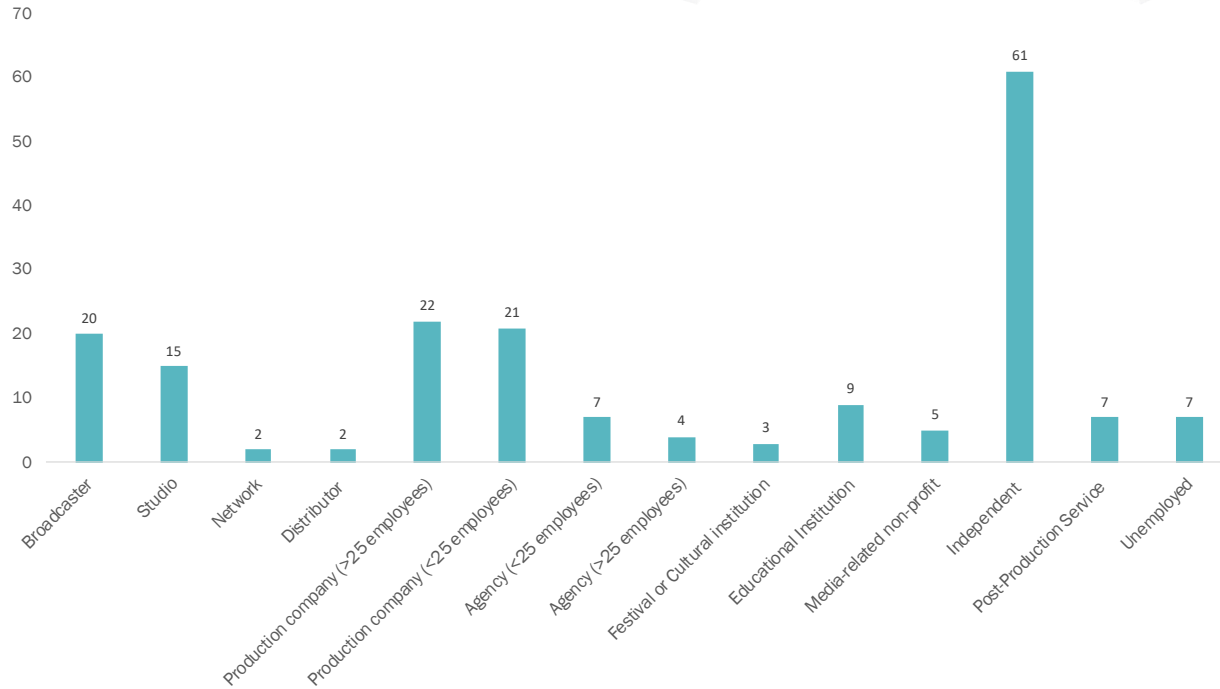


Figure 7. Primary location of occupation

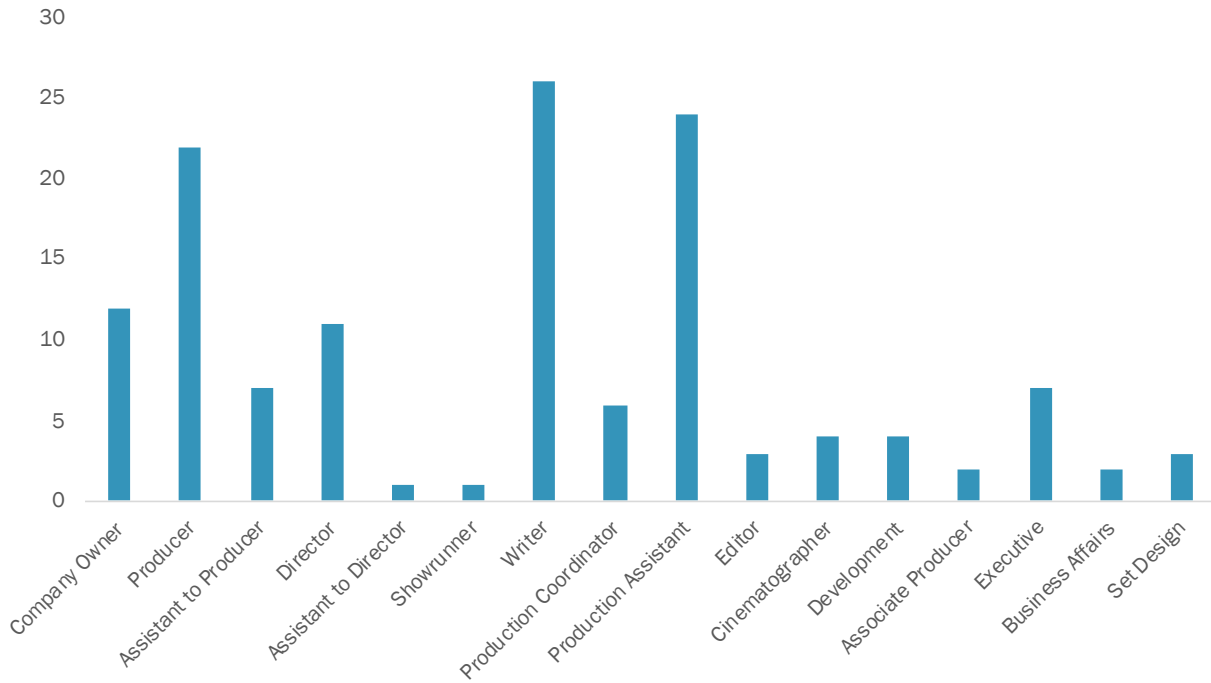


Figure 8. Primary category of occupation

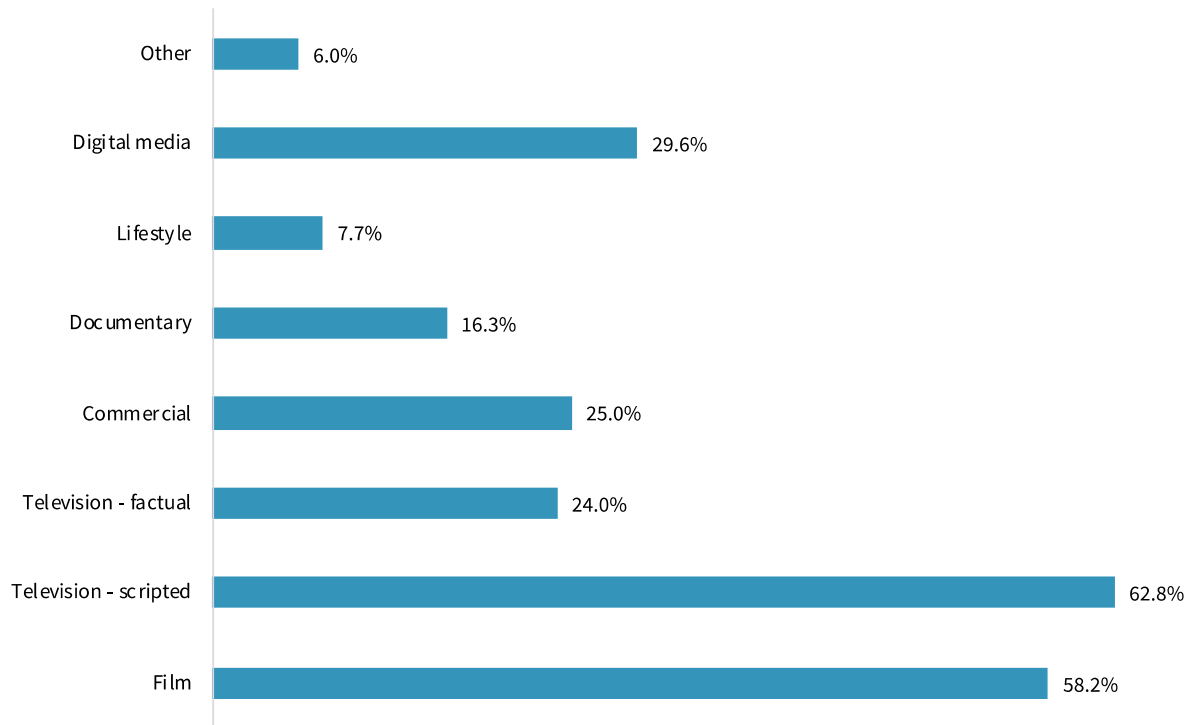


Figure 9. industry sector focus of participants

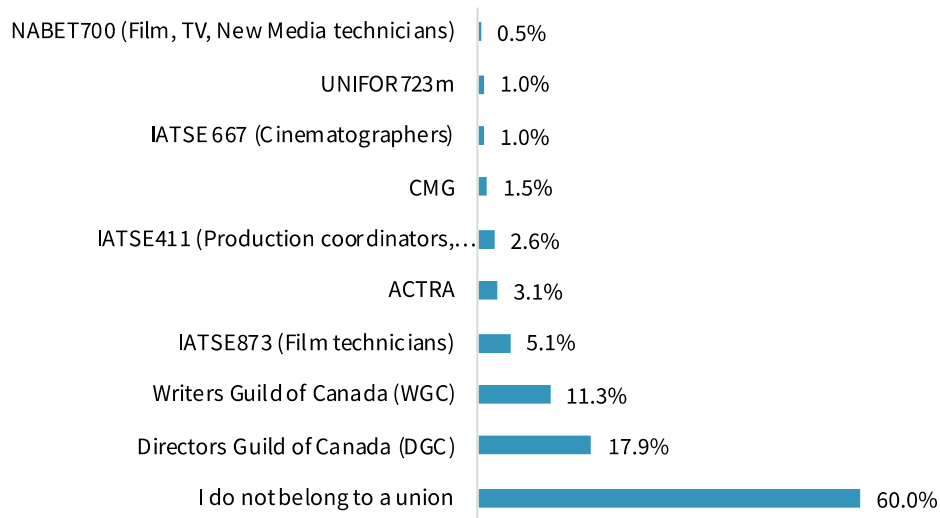


Figure 10. Union membership

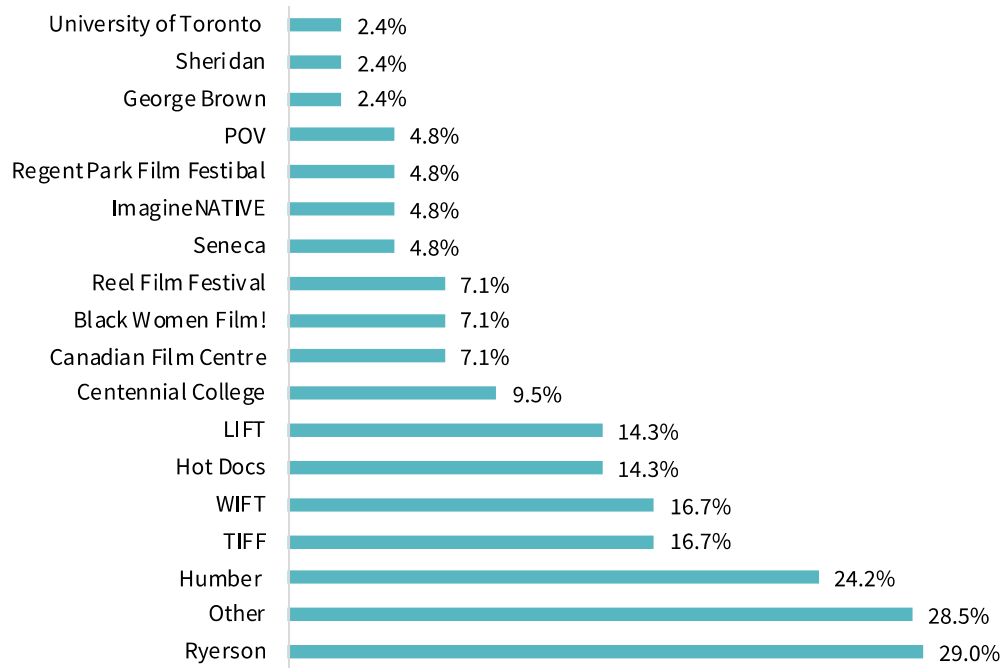


Figure 11. Training program participation



Toronto's Film & TV Production Sector:
Landscape Scan

Table of Contents

Purpose of the report	54
The Big Picture	55
Demographics	55
Major Players	56
Production Companies, Studios & Media Corporations	56
Unions & Guilds	56
Government, Councils & Associations	57
Educational Institutions	57
Community Services	58
Skill Development	58
Universities and Colleges	58
Other Training	59
Pathways to Entry	60
Entry-level roles	60
Work placements	60
Unions	61
Mentoring & Apprenticeship	61
Grants, self-funding & festivals	62
Landscape Scan Observations	62
Additional References	65

PURPOSE OF THE REPORT

Toronto has adopted a new strategic action plan to increase competition in the global film and television market. A core pillar of this action plan is the development of **strong fundamentals in physical infrastructure and workforce development**.

Expanding physical and human infrastructure to meet the increased demand for location filming necessitates a new workforce development strategy that will supply top-tier talent behind the camera.

“Diversity is our strength”

Toronto’s appeal is aided by its diversity. Often referred to as the “most multicultural city in the world”, major productions expect a talent pool that reflects the city’s population. While diversity in front of the camera has garnered increasing attention internationally in recent years, diversity behind the camera is critically lacking.

Improving the diversity of Toronto’s Film and Television production sector has a cascade of benefits, not the least of which includes differentiating Toronto from competitor cities (e.g., Chicago, Vancouver, Atlanta) with more homogenous populations. With a projected 30,000+ new jobs to accompany Toronto’s studio expansions, it is in the city’s best interests to make diversity a foundational component to the new workforce strategy.

Youth are an untapped market

The current talent pool staffing Toronto’s film and television productions is not large enough to meet the demands of over 1,075,000 sq. ft of new studio space set to open by 2020.

The sector will necessarily seek pathways to expedite the identification and development of future talent, with schools and other educational institutions as likely sources.

There is risk in this approach

While appropriate training equips young people with the skills needed for film and television production, workforce practices complicate the transition from school to work: hidden opportunities, reliance on well-connected social networks, and an aggressive culture that privileges on-set experience. These sector qualities challenge the career progression of established professionals, let alone young people attempting to ‘break in’.

Equity-seeking youth face amplified barriers

The barriers to entry present for all are amplified for young people from underrepresented groups. While this is true across all forms of employment, the networked and clandestine qualities of the film and television sector require strengths where diverse youth are most likely to have gaps (lack of social networks and mentors to navigate the job market, limited access to meaningful opportunities for gaining the experience necessary to secure employment, lack of accessible and affordable transportation). Additionally, the extreme lack of diversity in film and television production suggests structural discrimination embedded in systems and workforce processes these young people must also navigate.

Breaking barriers is not ‘optional’

It is essential to Toronto’s commitment to diversifying the film and television production sector to address the systemic barriers inherent in current workforce practices, with specific attention to the implications on future talent (youth).

The first step to understand the multi-layered barriers faced by incoming talent is a total landscape scan to identify the major players defining sector practices, sources of skill development, and pathways to entry.

This report summarizes findings from an initial landscape scan of existing data, industry artifacts, and secondary research, analyzed through the lens of diverse and barriered youth. The contents of this report summarize the ‘what’ of Toronto’s Film and Television production sector.

A critical next step involves primary research with representatives from all stakeholder groups (see Major Players) to understand how these forces come together to shape the sector’s landscape.

THE BIG PICTURE

In 2018, the film and television industry generated 51,580 full-time direct and spin-off jobs in Ontario, contributing \$1.9 billion to the province’s economy.

The City of Toronto reported that investment in Toronto’s film and television industry, including major productions, animation/VFX, music videos and commercials, grew 29.4% to reach a production investment of \$2 billion in 2016. This investment translated into 1,432 on-screen productions that employed 30,000 skilled workers.

For this level of growth, there is surprisingly little information about the workforce composition supporting it.

Demographics

A combination of broadcasting industry data from the Human Resources and Skills Development Canada (“HRSDC”) Employment Equity report (2016) and census data for the motion picture and video industries provides a preliminary benchmark for the participation of women, and youth (ages 20-24) in the screen-based production sector.

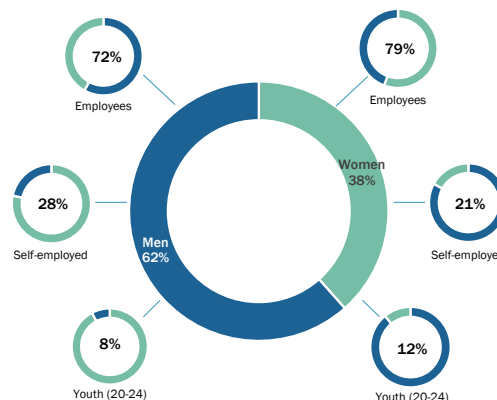


Figure 1. Workforce composition of motion picture and video industries by gender

In 2016, women occupied less than half (38%) of the screen-based production roles and were more likely to be employees (79%) than their male counterparts (72%). Youth ages 20-24 occupied 10% of sector roles, with male youth outnumbering female youth by 25%. Interestingly, youth representation was proportionally higher for women than men.

Census data also offers some insight into the distribution of roles by gender.

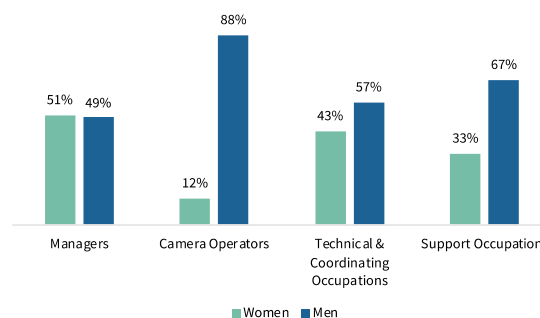


Figure 2. Gender composition of film and television production roles

- 2016 census data suggests an almost equal representation of men and women in manager roles, with women occupying decreasing proportions of technical/coordinating (43%) and support (33%) roles.
- The most significant disparity in representation is in film and video camera operators, with women occupying just 12% of those positions.

Not the whole story

- There is no data to represent the participation of visible minorities, LGBTQ2S+, Indigenous peoples, or persons with disabilities in Toronto’s film and television production sector overall,

series included in the study and were awarded only 0.69% of contracts from 2014-2017.

MAJOR PLAYERS

A multilayered network of stakeholders shapes the way Toronto's Film and Television production sector functions, both directly and indirectly.

Production Companies, Studios & Media Corporations

Providing the physical basis for film and television production work, these stakeholders are the foundation of the sector. Where demographic composition might lack in diversity, the size, structure, and specialties of these companies varies dramatically.

Toronto is home to over 200 independent production companies with a minimum of 2 employees, and many more individual filmmakers, directors, writers and producers who offer parallel services.

9 of Canada's 12 largest media corporations are headquartered in Toronto (Bell Globemedia, Torstar, Rogers, Corus, CHUM Limited, CBC, and Alliance Atlantis). Governed by the CRTC, these companies hold a diverse mix of television operations (and other media), controlling a large portion of the film and television workforce.

900,000 square feet of studio space is currently available for rent in Toronto. All major studios (e.g., Pinewood, Cinespace, Revival 629, Wallace Studios) offer in-house pre- and post-production services.

Together, these stakeholders are the ultimate gatekeepers to industry, defining the work and roles available in film, television (scripted and factual), and commercial projects.

Unions & Guilds

14 unions and guilds represent on-screen production workers in Toronto, actively representing their members in negotiations for wages, benefits and working conditions. Additionally, these unions offer a combination of

A closer look at gender representation

The Women in View on Screen 2019 report adds depth to the census data by examining female representation in three key creative roles from 2014-2017: writers, directors and cinematographers. This report is the only report that includes data on women of colour and Indigenous women (this data is not available for men from minority groups and youth).

Film

In 2017, 25% of film production writing, directing and cinematography contracts were awarded to women, with only 4% of those given to women of colour and 1% to Indigenous women. Although women's total representation in key creative roles saw a small (5%) increase between 2014 and 2017, women of colour and Indigenous women experienced reductions in the number of contracts awarded to them.

Television

Women's share of creative work accounted for 27% in television; with 1.8% of those contracts secured by women of colour. Women of colour comprised 5% of directors, less than 2% of writers and 0% of cinematographers during this period. No Indigenous women worked on any of the

mandatory and optional training (for fee) to their members.

Union membership is achieved through a stepwise process involving a combination of qualified experience, supplemental training and membership fees. Applicants progress from applicant to permittee to full member. Specific criteria for qualifying experience (hours), and length of time to achieving full membership vary by union. In some cases, formal assessments and sponsorship from an existing union member are required to gain admission.

Increasing diversity by not closing doors

- Diversity is not part of collective agreements or union programming ('diversity' is also not defined)
- No proactive outreach focuses on diversifying union membership
- A natural shift in the workforce is expected (without intervention) by not limiting applicants from any particular groups

Since film and television productions are categorized by their union involvement, unions play a critical role in shaping the composition of the workforce. Union projects can only hire union members, into roles for which full members are given priority (i.e., over permittees). This means the accessibility of union membership directly determines the accessibility of union film and television employment.

Government, Councils & Associations

National and local government bodies (e.g., Toronto Film & Television Office), councils (e.g., Ontario Arts Council) and trade associations (e.g., CMPA) exercise influence at the industry level through a variety of mechanisms including policy, funding, advocacy, labour agreements, conferences, development programming and research.

These stakeholders influence how production companies, studios, media companies can do

business; and the way producers, unions and guilds may work together.

Diversity initiatives driven by these stakeholders are achieved through policy change and funding allocation. Current initiatives prioritize supporting diverse filmmakers through grants and other funding; and educating production companies on creating inclusive working environments.

Impacts on Youth in Toronto

- Youth focused and diversity initiatives have a national or provincial scope, potentially diluting their impacts in Toronto
- Only one association (Black Women Film!) was found to focus on supporting women of colour
- No associations specifically supporting LGBTQ2S+, Indigenous peoples, persons with disabilities, or youth were found

Educational Institutions

Educational institutions, including Universities and Colleges deliver bachelor, diploma and certificate programs focusing on the context, theory and skill-based knowledge relevant for a variety of entry- and mid-level sector roles. All programs include hands-on practice to varying degrees (see Skill Development section).

Diversity is a stated priority for Universities and Colleges across all programs, and admissions processes are designed to equalize opportunity. The actual diversity of the student population is heavily influenced by outreach and recruiting activities, school reputation, cost, location, and support resources.

Although film and television production jobs tend not to prioritize formal education, these schools remain a potential conduit to the workforce. The diversity of participants in film and television production programs may therefore exert some

influence over the sector's workforce composition.

A diverse cohort of graduates is not enough

- Although the pool of graduates appears (anecdotally) to be more diverse in recent years, the level of diversity is inconsistent by sector and group
- Moreover, an equivalent increase in diversity has not been observed in film and television production roles

Community Services

Community services include employment and other services that help connect young people to industry jobs. The majority of these services are structured to support underserved and underrepresented youth from equity-seeking groups, who face the greatest barriers to securing stable employment.

None of the Toronto-based employment services currently place emphasis on the film and television production sector, suggesting an opportunity to leverage this touchpoint to provide much-needed information, guidance and connections to young people trying to break into the industry.

Skill Development

A wide variety of institutionalized, formal and informal skill development opportunities exist to equip Toronto's film and television production talent with the knowledge required to perform effectively in production roles.

The structure and content of these programs varies by type of organization, due, in large part, to differences in the intended outcomes of those programs.

Universities and Colleges

36 bachelor's degree, diploma, certificate and post graduate programs are offered by 6 Toronto-based Universities (3) and Colleges (3).

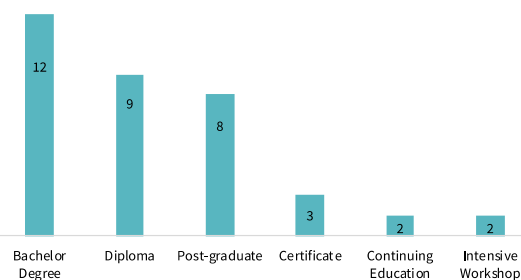


Figure 3. Number of university and college programs by type

The structure of these programs follows a traditional diploma framework: fee-based, 3-4-year programs that require OSSD (or equivalent) for admission. Additionally, 20% of these programs require work samples and/or a portfolio submission.

The contents of bachelor and diploma programs are expansive. While all programs advertise a combination of theory and practical application, they are heavily classroom-based.

29% of programs offer (unpaid) work placements or internships with an average length of 14 weeks. Placements appear, in some cases, to be facilitated by the school through industry partners, while in other cases the placement appears contingent on the students' ability to coordinate it.

Post-graduate and continuing education programs are shorter in duration (8-18 months) and focus more intensely on a narrower skillset. Post-graduate programs require a degree or diploma from an accredited institution, though not necessarily in film or television. Continuing education programs recognize work experience as a prerequisite. A resume and cover letter are also required as part of the application package.

A small number of intensive workshops are offered by two of the institutions. One appeals specifically to high school students (ages 15-19) considering post-secondary education in a creative industry or field. These workshops focus intensively on a particular aspect (e.g., genre,

technique) of film or television production (e.g., documentaries).

Other Training

Training and workshops are offered by several production companies, studios, unions, associations and film festivals.

Program content

Two models of programming define these offerings:

1. Development programs that appeal to specific audiences and run repeatedly (annually, monthly, etc.); and,
2. Ad hoc workshops delivering a specific skill (e.g., using photoshop) offered according to interest and trainer availability.

The content of training/development programs remains stable, while the topics covered in ad hoc workshops evolve as participant needs or interests change.

In contrast to University and College programs, which emphasize theory and classroom-based work, programs offered by industry partners focus on practical, project-based application.

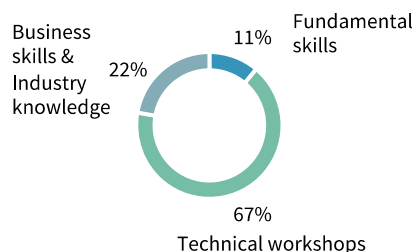


Figure 4. Percentage of programs by content type

Programs offered through industry partners are also differentiated by their combined focus of technical and business skills.

As these programs are staffed by established professionals who continue to work in the sector, these programs appear to be uniquely positioned to supply hard-to-access information about

navigating the film and television production sector to their participants.

Program structure

All programs offered through industry partners boast workshops delivered by ‘experts’ in their respective areas. In this way, mentorship is conceived of as a natural part of the programming. This structure differs, however, from programs constructed with mentorship at the center.

- 8 Toronto-based programs are structured as mentorships. These programs are, on average, 8-12 weeks in duration and focus a specific output (e.g., a script, a documentary).
- Mentoring occurs for the total cohort of participants (together) and prioritizes how to develop a project to pitch.

Target participants

Industry programs are for production professionals at various stages of their careers, with 81% requiring industry/on-set experience and/or a project in the works (e.g., script, treatment).

Support for equity-seeking groups is minimal.

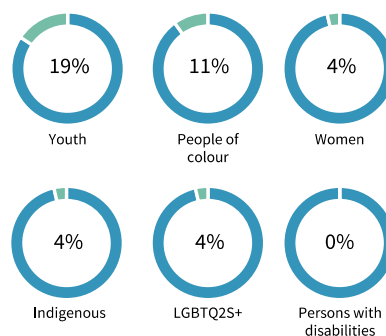


Figure 5. Percent of programs supporting equity-seeking groups

- 19% of programs support youth in general (not specific to equity-seeking groups).
- 11% of all programs focus on supporting people of colour; and 4% highlight women, Indigenous people, and LGBTQ2S+ professionals.

Programs supporting equity-seeking groups are unspecific about their support of youth, but given the majority require industry experience, they privilege working professionals.

PATHWAYS TO ENTRY

Career-building in the film and television production sector is uniquely shaped by the nature of production work, which is project-based and intermittent.

Film & television production roles

Roles in film and television production are inconsistently pathed, with most individuals occupying multiple (sometimes seemingly unrelated) jobs. The roles, themselves, are also not constructed as ‘jobs’ per say, in that they lack the stability of full-time employment in other sectors. Even established professionals experience a level of precarity that may undermine conceptions of a ‘career’. It is largely up to the individual, through a combination of hard work, the ‘right’ relationships and good timing (‘luck’), to proactively manage their careers.

What it means to ‘break in’

The nature of film and television production work means that securing a job is insufficient to ‘break in’ to the industry. For this report, ‘breaking in’ means having the connections to secure work and support oneself financially.

While there is no established path to guarantee entry, a number of intersecting entry points exist.

Entry-level roles

Perhaps the most obvious starting point of industry access is through entry-level production roles (e.g., production assistant).

Access is complicated

- The majority of roles are not advertised, which means young people require access to industry insiders (e.g., production coordinators, other

PAs, directors) who know of current opportunities.

- Most jobs require experience (especially on-set), creating a tautology of needing experience to gain experience.
- Referrals trump resumes – unknown talent is perceived of as riskier, and productions are more likely to leverage the same talent repeatedly.
- Union membership is required for unionized productions, which reduces the number of actual roles available to young people.

Work placements

Work placements and internships, as part of training or offered directly by a production company, provide an alternative, unpaid, path to gaining experience.

Access requires capital

- Work placements provided by production companies are unlisted. Young people need well-connected relationships to learn of these opportunities, and the social capital of referrals to be considered for them.
- Training-provided placements require both financial and social capital, as these placements are part of for-fee programs, some of which require participants to source their own placement opportunities.
- Work placements are typically unpaid and demanding, requiring participants to have the financial resources to support themselves without a salary or other work.

Youth face layered barriers to access

- The same social barriers preventing access to entry level jobs block young people from work placements
- The power of referrals is underscored for members of equity seeking groups who still face challenges in overcoming negative perceptions about their abilities

Unions

Union membership forms the talent pool for unionized productions, thus acting as gatekeepers to larger opportunities.

Union membership also grants access to job-seeking supports, including: 'hot lists' (projects in production and job postings), direct access to a network of working professionals (member directories and events), and supplementary training.

A labyrinth to access

- Membership requires a minimum level of experience in the industry (average of 2 years) and paid hours worked on-set or in a production office (usually 30-40 hours).
- The process for gaining membership is lengthy, often requiring individuals to work first as permittees (which requires previous experience) and complete union-provided training (for a fee)
- Referrals by union members (in some cases family members) are often necessary to validate membership applications.
- Applicants must pay application fees with no guarantee of acceptance; and union membership requires payment of annual union dues.

Restricted outreach

- Unions perform some outreach to increase membership
- This outreach tends to target the same talent sources year over year, appealing to demographics that mirror existing members
- Knowledge of the existence and role of unions is networked and limited to individuals with some connection to union members

Caveats to every step

- Work placements often do not count toward union membership requirements
- Young people without relationships with union members (or family already in the union) are unable to gain access
- Union membership privileges working professionals over young people doing unpaid work to gain experience

Mentoring & Apprenticeship

Apprenticeship = paid experience

Apprenticeships are a paid alternative to the more common unpaid work placements and internships. Two paid apprenticeships were discovered during this landscape scan (with NABET-700 and DGC). These apprenticeships are offered to non-members hoping to break into the industry. Unlike unpaid work placements, the hours accumulated during apprenticeships do count toward union membership requirements.

Mentors and mentoring

Although unlikely to guarantee entry on its own, mentorship can provide access to networks, and the associated social capital necessary for securing entry-level roles and work placements.

There seem to be two distinct types of mentorship offered:

1. Mentorship through training programs
2. Individual mentorship (mentor/mentee relationship)

There are important differences in the nature, purpose and outcomes of these two types of mentorship.

Mentored training programs supply industry knowledge and provide mentoring in the context of a particular project (skill application, quality) to a cohort of participants. The value of these programs is in having an industry expert deliver

step-by-step guidance about how to deliver a project from inception to funding and sometimes beyond. Participation in these programs results in new industry contacts (the mentor(s)), though possibly without the relationship intimacy needed to gain referrals.

In contrast, **individual mentorship** goes beyond supplying information, involving more direct support of emerging talent. Mentors can help mentees by connecting them with a variety of industry partners, extending their personal networks and building social capital, sharing job and other opportunities, and bringing clarity to the various pathways the mentee might pursue to 'break in' (and stay in).

Given the circuitous paths most sector professionals follow, a mentor who can offer guidance about the way different experiences can build transferrable skills and create different pathways, can be invaluable.

Access requires...access

Apprenticeships and mentorships require greater investment in participants and are higher risk for the sponsoring organizations (e.g., unions) and individuals (mentors). This increased commitment heightens their exclusivity.

- Apprenticeship opportunities require industry savvy to expect they might exist, and to know where to look.
- Individuals without existing industry connections are unlikely to possess this know-how, keeping these opportunities hidden.
- Mentorships are typically established on a one-to-one basis, making them near-impossible to establish without reliable sector relationships.
- Mentorships are a personal investment on the part of mentors, raising the importance of referrals to safeguard that commitment.

Grants, self-funding & festivals

For some, funding and presenting a completed project can create visibility and industry access.

Festivals

Festivals provide a platform for exposure and practice with the business side of the film and television production sector (e.g., creating a pitch, business plan, etc.). Toronto is home to a variety of film festivals, a few of which specifically support youth filmmakers.

Some festivals also highlight filmmakers from equity-seeking groups, such as:

- ImagiNATIVE supports Indigenous projects
- The Inside Out Festival exhibits films by LGBTQ2S+ people of all ages, races and abilities
- The Reelworld Film festival showcases work by Black, Indigenous, People of Colour (BIPOC) Canadian filmmakers and media artists

Funding

Several funding options are available through national and regional associations. 40 publicized grants were examined

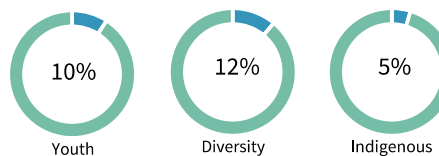


Figure 6. Percent of grants supporting equity-seeking groups

- 4 (10%) of which were allocated to emerging artists
- 5 (12.5%) had a diversity focus
- 2 (5%) were for Indigenous filmmakers

Self-funding a micro-budget project is an option, albeit the least likely path for underserved youth.

Emerging does not mean youth”

- “Emerging” is defined on the basis of experience, not age (i.e., having fewer than 3 professional credits)
- The emerging category therefore includes youth *and* working professionals
- Grant and funding eligibility privileges experienced filmmakers by requiring industry experience, at least one completed project, or peer recognition as an ‘artist’

The gap in production sector demographics undermines diversity efforts

- Equity-seeking groups are sparsely reflected in existing research and the data collected are infrequently updated.
- Diversity initiatives tend to focus on the gender imbalance permeating the industry, with limited focus on intersectional realities (e.g., women of colour).
- Youth are largely absent from all data, especially youth from equity-seeking groups.
- The absence of these data prevents a complete understanding of the sector's current workforce, begs the question of how current diversity initiatives are being measured, and limits the development of targeted interventions that will affect genuine change.
 - ⇒ This is relevant to all levels of programming and interventions: government, regional, and sector-specific
- The underrepresentation of youth in these data undercuts efforts to tailor programming to meet the sector's most significant needs, and to demonstrate the sector impacts of youth programs.
- Regulated environments (e.g., broadcasting) are more likely to have diversity requirements, but without this data it is difficult to estimate their effectiveness. Moreover, these requirements tend to support working professionals (i.e., through hiring practices), without influencing the sector's accessibility to young people.

Training is not a panacea

- Information without action is just theory – having production knowledge and technical skills, alone, does not translate into opportunity
- Knowledge to support navigating the industry is incomplete and difficult to access
- Connections to industry networks and relevant social capital seem to be necessary conditions

to 'breaking in' that surpass the value of education and mediate the utility of industry savvy

The most promising pathways to breaking in are the most exclusive.

- Publicized information seems to erode in value, with the highest potential opportunities embedded in hidden and privileged networks
- The entry-level jobs, apprenticeships and mentoring opportunities delivering the highest prospects for breaking in, are the most challenging to access
- Apprenticeships and mentorships also offer the fewest (in number) total opportunities, increasing the need to leverage social capital to secure these positions

The film and television production sector is difficult to access for all, but *not equally difficult for everyone.*

Industry supports privilege

- Social capital in the form of industry relationships is the crux of success.
- Social capital of this kind is extremely difficult to develop independently, making it harder for young people without the right connections to break in.
- Young people with these relationships seem more likely to come from privileged demographic groups.
- This systematic privileging of a particular kind of social capital is embedded in industry supports, like unions and guilds (i.e., through membership requirements that mandate experience, referrals and a financial investment).
- Publicly available information to guide industry access is equally shaped by this privileged perspective, with 'advice' focusing on "using the resources you have" and "not asking for permission". Taken in the context of youth and equity-seeking groups, this guidance ignores

the fundamental barriers to resources and relationships they experience.

Intervening at the right level(s)

This landscape scan exposes the layered nature of industry barriers, emphasizing the importance of recognizing where barriers originate, how (and by whom) they are perpetuated, and the cascade effects of making changes.

For example:

- Hiring based on referrals creates a self-perpetuating cycle of hiring talent from the same talent pools, which might prompt recommendations to change those hiring practices. An examination of how those talent pools become populated, however; reveals upstream barriers such as the homogeneity of union membership (for union productions).

Equally, it is critical to recognize that barriers are both sector-specific and more generalized.

For example:

- Poor social networks are known barriers for underrepresented youth across all employment sectors but are exacerbated in the film and television production sector due to the networked nature of its hidden job market.

This dynamic relationship between sector and social barriers has two major implications:

1. **Solutions implemented without considering sector and social factors are incomplete** (e.g., it is inadequate to instruct production coordinators to hire more diverse talent if the talent pool is not also made more diverse)
2. **Acknowledging forces outside of the sector may challenge stakeholder accountability to create change** (e.g., an employer cannot change the importance of having a driver's license for some roles, even if it is cost-prohibitive for some young people)

These early observations provide a springboard for deep primary research to validate and elaborate on how these observations are enacted.

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