



New Media Freelance Content Creators

Prepared for:

Cultural Human Resources Council (CHRC)
New Media Steering Committee

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EXECUTIVE SUMMARY

This study of the new media freelance workforce was initiated to better understand its composition and skill needs. The study addressed the demographic composition of new media freelancers, their activities, income, and skills training and education.

For this study, a web-based survey of 622 new media freelancers was conducted. Respondents were recruited through cooperation from regional freelancer association, and the adoption of a 'viral' approach, whereby respondents were encouraged to get other freelancers to complete the survey. Respondents were screened out if they were non-residents of Canada, employers or employees. A prize was awarded to the person whose name was drawn among those who participated in the survey. The number of completed surveys represented 23 percent of the total number of individuals who 'touched' the survey. The error associated with this survey sample is 3.8 per cent.

New media freelancers are a young, highly educated workforce. One-half are between 25-34 years of age, split fairly evenly between women and men. Nearly one-half have a university degree or professional credentials, and about a third have a college diploma, while a majority live in Ontario. The share of the new media freelancer workforce comprised of visible minorities is similar to their share of the national workforce.

Close to one-half of freelancers work on a part-time basis, and most work at home for local clients on contracts lasting less than six months. Website development is the primary type of freelance work. Most earn less than \$4,000 a month from new media freelance work.

Nearly 80 per cent of freelancers have participated in some media education or training. There is a wide range of accreditation for their new media training and education, with the most popular being a public college certificate/diploma.

Nearly half of freelancers have never received any support from others for new media training, while almost all have contributed to their own training. Half of these have contributed \$5,000 or more. Less than a fifth have received contributions toward training from an employer or client in the previous 12 months, although nearly one third in Ontario have done so.

Classroom instruction is by far the preferred method of new media training. Almost all are interested in taking additional training to remain competitive and half identify 'promoting projects and services' as their greatest skill need. The greatest obstacle identified was cost.

A more detailed summary of the research findings is provided in Chapter 4 of this report.

1. INTRODUCTION

This is the final report of the Survey of New Media Freelancers, commissioned by the Cultural Human Resources Council of Canada. The purpose of the study was to better understand the composition of the new media freelance workforce and their skill needs. Another purpose of the survey was to provide information for a large study profiling employment in screen-based industries that has been commissioned by Women in Film and Television – Toronto (WIFT-T).

EKOS Research Associates assumed overall responsibility for the study and, specifically, was responsible for the design of the survey instrument, the analysis of the survey, and the writing of the final report. Delvinia Interactive Inc. was jointly responsible for the design of the instrument and was solely responsible for recruitment for and administration of the web-based survey.

1.1 ISSUES ADDRESSED

The specific issues addressed by the study comprise the following:

- ***Profile of new media freelancers:*** Composition by age, sex, education, and region.
- ***New media activities:*** Nature of new media activities engaged in and role performed.
- ***Hours and income:*** Amount earned from and hours spent in new media activity.
- ***Amount/nature of new media education and training:*** Level and amount of new media education and training.
- ***Sources/methods of education and training:*** Where and how the education and training are taken.
- ***Costs/financing of education and training:*** Amount spent on education and training, whether others have contributed.
- ***Perceived adequacy of new media skills:*** Perceived adequacy of skills with respect to advancement.
- ***Interest in and obstacles to education and training:*** Degree of interest in and obstacles to acquiring education or training in new media skills.

1.2 METHODOLOGY

a) Instrument Design

The first step was to develop and obtain approval for an outline of issues to be covered in the survey as per the Request for Proposals and patterned on the new media employers that is being conducted for the WIFT-T study of employment in screen-based industries. Once approval was obtained for the outline, a draft survey questionnaire was designed and submitted for approval to CHRC and the New Media Steering Committee (NMSC). Following revisions to the instrument in response to comments provided by CHRC and the NMSC, the final instrument was translated into a web-based version and into French for purposes of the survey.

b) Survey Recruitment Strategy

An important aspect of this study was the recruitment of survey respondents, since no comprehensive sample frame of new media freelancers exists. The elements of the survey recruitment strategy are as follows:

- Obtaining cooperation from regional associations to inform freelance association members of survey;
- Developing messaging that created a “buzz” about survey;
- Using a “viral” approach, whereby respondents were encouraged to get other freelancers to complete the survey; and
- Offering a special Apple monitor, or \$1,000 cash, as incentive for participating in survey.

c) Survey Administration and Response

In the second week of March 2004, an e-mail invitation to participate in the survey was developed and provided to 80 participating professional freelance associations that had agreed to pass the survey invitation to their members. The invitation letter described the importance of the survey, mentioned the prize that would be awarded to one of the respondents, and provided the web address of the survey questionnaire. The survey took place over the period March 10 to March 31, 2004. A reminder was sent March 16, 2004. In June and July of 2004, the survey was re-started for three weeks in order to increase representation from Quebec and the Atlantic provinces.

Details on the survey response are provided in Exhibit 1.1. Of the 2,757 respondents who “touched” the survey, 1,189 were filtered out because they were not residents of Canada or they were employers of others and not freelancers on their own. Another 788 were filtered out because they were

employees and not freelancers. Of the 780 remaining freelancers who passed the screening criteria, 158 did not complete the survey, leaving a total of 622, on whose responses this survey is based. They represent a quarter (23 per cent) of those who started the survey.

EXHIBIT 1.1 Response to CHRC Survey of New Media Freelancers, March 2004

Response Item	Number	Per Cent of Total
Total number of individuals who "touched" the survey	2,757	100
<i>Less:</i> No. who were screened out (non- resident of Canada, or an employer)	1,189	43
<i>Less:</i> Number who were screened out as employees	788	29
Number of freelancers who started the survey	780	--
<i>Less:</i> Number who dropped out (incomplete)	158	6
Number who completed survey	622	23

Based on an estimated population of 8,165 new media freelancers,¹ the error associated with a survey sample of 622 responses is " 3.8 per cent, assuming a random distribution among respondents. This suggests there is a high degree of confidence that the survey estimates are representative of reality.

d) Plan of Report

In the next two chapters, survey results are presented profiling new media freelancers (Chapter 2) and their education and training (Chapter 3). For each issue, the main finding is presented first, followed by the detailed results and any inter-regional variation that was observed. Note that in exhibits where percentage distributions are presented, percentages do not necessarily add to 100 percent due to rounding. There is a final chapter highlighting the main findings of the report (Chapter 4).

¹ Based on Delvinia's annual survey of interactive new media producers, 2004

2. PROFILE OF NEW MEDIA FREELANCERS AND THEIR ACTIVITY

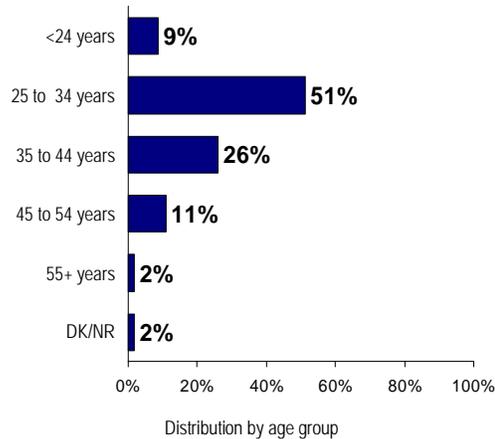
Issues addressed in this chapter include: a profile for freelancers; tenure, retention of copyright, sources of employment and income; employment earnings, hours worked and location of work; number, length, and concentration of projects; as well as types of projects and employment roles.

2.1 PROFILE OF FREELANCERS

- **Age: New media freelancers are a fairly young workforce (Exhibit 2.1).**
 - ◇ Approximately one-half of freelancers (51 per cent) are between 25-34 years of age.
 - This is considerably higher than this age group's share of the total employment (22 per cent), according to the 2003 Labour Force Survey (LFS, Statistics Canada).²
 - ◇ Conversely, 12 per cent are 45 years of age or older.
 - This is considerably lower than their 29 per cent share of national employment in this age group.

² Statistics Canada, Canadian Statistics Page, <http://www.statcan.ca/english/Pgdb/>

EXHIBIT 2.1 Age



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CHRC New Media Freelancer Survey, 2004

- **Gender:** The new media freelancer workforce is fairly evenly split between women and men.
 - ◇ Slightly less than one-half of freelancers (42 per cent) are female. Female representation is lowest in the Prairies (32 per cent).
 - ✦ This represents slightly less than women's share of national employment (47 per cent - LFS).³

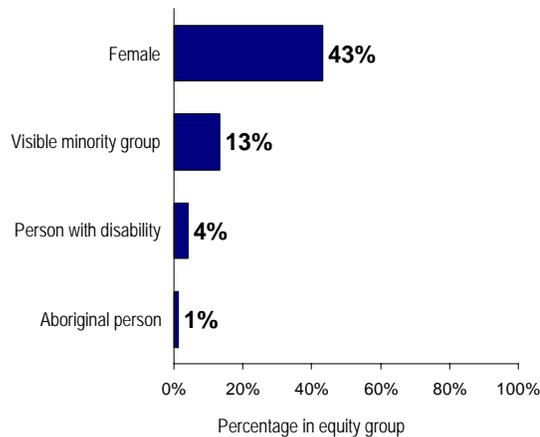
- **Equity group:** Aboriginal and disability equity groups are under-represented among freelancers (Exhibit 2.2).
 - ◇ Roughly one in one hundred (one per cent) media freelancers is an Aboriginal person.
 - ✦ Comparatively speaking, Aboriginal people represent three per cent of the national labour force, according to the 2001 Census (Statistics Canada).⁴
 - ◇ Five per cent are people with a disability.
 - ✦ Comparatively, 10 per cent of the national labour force are people with a disability.

³ Statistics Canada, Canadian Statistics Page, <http://www.statcan.ca/english/Pgdb/>

⁴ Statistics Canada, Census Page, <http://www12.statcan.ca/english/census01/home/index.cfm>

- ◇ However, 14 per cent of new media freelancers are members of a visible minority group.
 - This is greater than their share of the national labour force (13 per cent).
 - The proportion of new media freelancers who are members of a visible minority group is lower in the Prairies (five per cent) and Quebec (three per cent).

EXHIBIT 2.2 Equity Groups



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CHRC New Media Freelancer Survey, 2004

- **Region: A majority of new media freelancers live in Ontario.**
 - ◇ Over half of these freelancers (55 per cent) live in Ontario.
 - ◇ A little over a fifth (22 per cent) of new media freelancers live in British Columbia, and 16 per cent live on the Prairies.
 - ◇ Just six per cent live in Quebec and eight per cent in the Atlantic region.

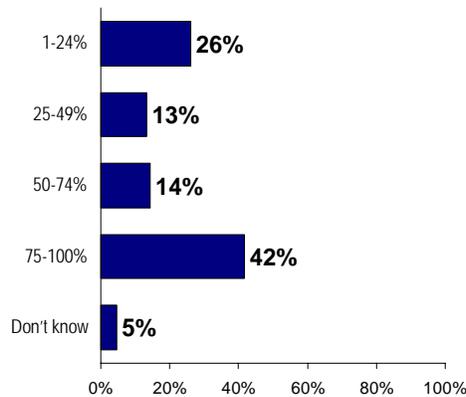
- **Education: New media freelancers are highly educated.**
 - ◇ About a half of freelancers (49 per cent) have a university degree of some sort, or some type of professional credentials. Thirty per cent have an under-graduate degree only and 14 per cent a graduate degree. About one third (33 per cent) have a college diploma.
 - The share of freelancers with at least a university degree is much higher than the share of total national employment with a university degree or higher (22 per cent), according to the 2001 Census (Statistics Canada).
 - ◇ Similarly, only one-quarter (26 per cent) have no post-secondary credentials of any kind, with 22 per cent having only a high-school diploma, and six per cent having completed only some high school.
 - This is lower than the share of total employment with no post-secondary credentials (39 per cent).

2.2 TENURE, RETENTION OF COPYRIGHT, HOW HIRED, AND DEPENDENCE

- **New media freelancers are fairly new to the new media freelance field.**
 - ◇ Over one-half (56 per cent) have been involved in the field for less than three years: one-quarter (25 per cent) have been involved for less than a year and one-third (32 per cent) for 1-3 years.
- **Freelancers don't typically retain copyright in the content they produce.**
 - ◇ Over one-half (54 per cent) said less than 10 per cent of their earnings results from producing new media content in which they retained a copyright.
 - ◇ Only nine per cent said that at least 80 per cent of their earnings come from content for which they hold the copyright; this proportion is twice as high (18 per cent) in the Prairies.
- **Freelancers are usually hired directly by their clients.**
 - ◇ Two-thirds (67 per cent) said they are hired mostly by their client directly.
 - ◇ Only 14 per cent said they are hired indirectly through another agency.
 - ◇ 16 per cent of freelancers reported a near equal balance of direct (client) and indirect (other agency) contracts.

- Freelancers' dependence on freelance activity for income varies considerably (Exhibit 2.3).
 - ◇ Four in ten freelancers (40 per cent) said at least three-quarters of their earnings come from new media freelancing.
 - ◇ 27 per cent said less than one-quarter of their earnings come from this source.

EXHIBIT 2.3 Dependence on Freelance Earnings



Distribution according to percentage of earnings from new media freelancing



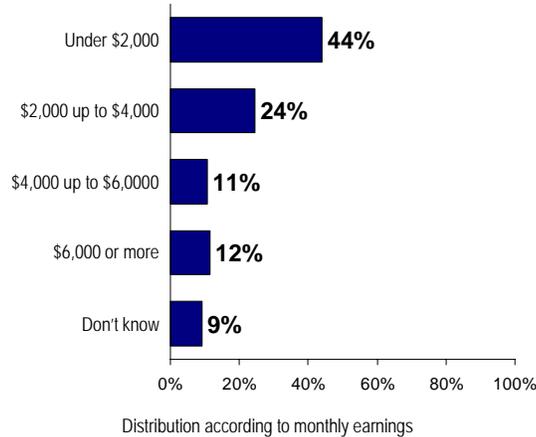
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CHRC New Media Freelancer Survey, 2004

2.3 EARNINGS, HOURS, AND LOCATION

- A majority of freelancers earn less than \$4,000 a month from new media freelance work (Exhibit 2.4).
 - ◇ Almost one-half of new media freelancers (45 per cent) earn less than \$2,000 a month from new media freelance work (see Exhibit 2.4).
 - This proportion is higher in British Columbia/Territories (53 per cent).
 - ◇ Another 24 per cent earn \$2,000 to \$4,000 a month.
 - ◇ The proportion of freelancers earning \$6,000 to \$8,000 a month is higher in Quebec (14 per cent, compared to three per cent overall).

EXHIBIT 2.4 Earnings (Monthly)



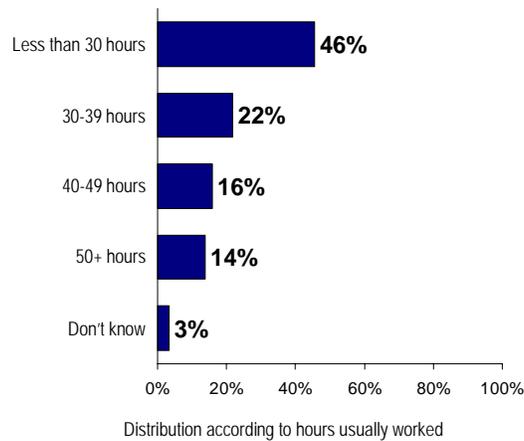
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Associates Inc.

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CHRC New Media Freelancer Survey, 2004

- Close to one-half of new media freelancers work on a part-time basis (Exhibit 2.5).
 - ◇ About one-half (46 per cent) usually spend less than 30 hours a week working on new media freelance activity (defined as part-time work).
 - ◇ One in seven (14 per cent) usually work more than 50 hours a week.

EXHIBIT 2.5 Hours of Work Per Week



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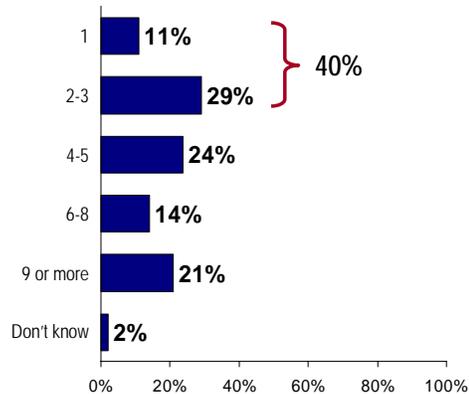
CHRC New Media Freelancer Survey, 2004

- **Most of freelancers' clients are local.**
 - ◇ Over two-thirds (68 per cent) said their clients are mainly located locally.
 - This proportion is higher in the Greater Toronto Area (GTA; 78 per cent).
 - 22 per cent of freelancers in Ontario said that their clients are located primarily within the province (compared to 16 per cent overall).
 - ◇ Only 15 per cent said their clients are located outside their province/territory of residence or out of the country.
 - This proportion is higher in the Prairies (24 per cent).
- **The vast majority of freelancers work at home.**
 - ◇ Over four in five freelancers (82 per cent) work out of their home.
 - ◇ One in five (18 per cent) work out of their client's office (27 per cent in the GTA, only 4 per cent in Atlantic Canada) and one in eight (12 per cent) work in a rented office, studio, or workshop (26 per cent in Quebec).

2.4 PROJECTS: NUMBER, LENGTH, AND CONCENTRATION

- **Freelancers vary considerably in terms of the number of projects they work on during a year (Exhibit 2.6).**
 - ◇ Over the last year, 40 per cent of freelancers reported three or fewer contracts, while 21 per cent had nine or more.

EXHIBIT 2.6 Number of Projects



Distribution according to number of new media projects



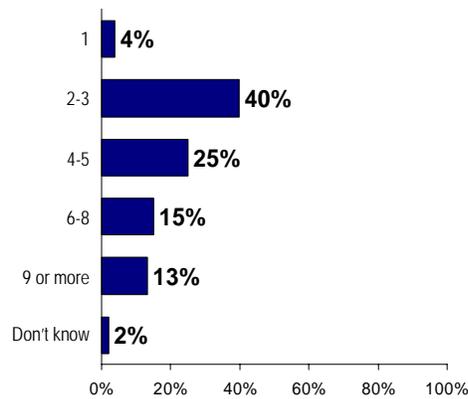
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CHRC New Media Freelancer Survey, 2004

- **Freelancers work on only a few projects at a time.**
 - ◇ Currently, 29 per cent are currently working on just one project, and 43 per cent on two or three projects.
- **Most contracts last less than 6 months.**
 - ◇ Over last year, nearly half (44 per cent) said their contracts typically lasted less than a month, while a similar proportion (41 per cent) reported contracts that lasted from one to six months.
 - The proportion of one to six-month contracts is higher in British Columbia/Territories (52 per cent) and lower in Ontario (37 per cent).
 - The proportion of one week or less contracts was much higher in Atlantic Canada (21 per cent vs. 9 per cent nationally)
 - ◇ The *current* contract length reported by freelancers (compared to that of the past year) is nearly identical (43 per cent said the duration of their contracts is less than a month and 41 per cent said one to six months).
- **Freelancers' activity tends to be concentrated with a few different clients (Exhibit 2.7).**
 - ◇ Over last year, 44 per cent of freelancers have had less than four different clients.

- ◇ One-quarter (26 per cent) have had four to five different clients and 15 per cent had six to eight.
 - Freelancers in the GTA are more likely to have had four to five clients in the past year (33 per cent).

EXHIBIT 2.7 Number of Different Clients



Distribution according to number of different clients that projects are with



n=552

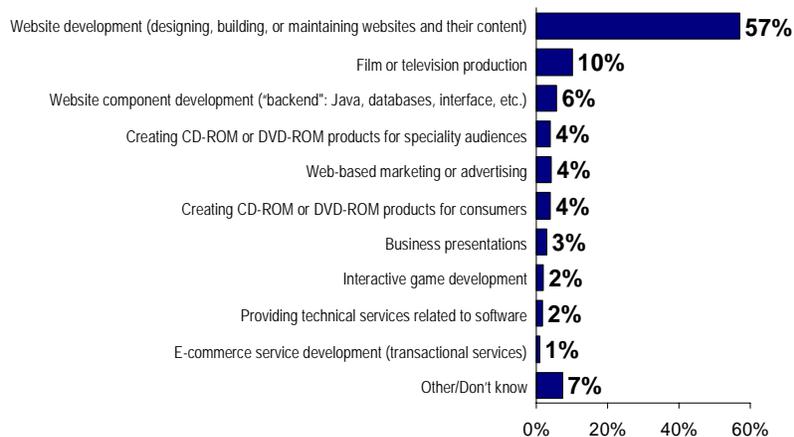
CHRC New Media Freelancer Survey, 2004

- Freelancers are fairly evenly split between those whose earnings are concentrated with a few clients and those whose earnings are evenly spread across a number of clients.
 - ◇ Approximately half (52 per cent) said that their earnings were mainly concentrated with one to two clients.
 - ◇ Four in ten (39 per cent) said that their earnings are spread out evenly among a number of clients.
 - This proportion is higher in Quebec (58 per cent).

2.5 TYPE OF PROJECTS AND ROLES

- **Website development is the primary type of freelance project work (Exhibit 2.8).**
 - ◇ Over one-half of new media freelancers (57 per cent) indicated that website development is the primary focus of their work (designing, building, and maintaining websites).
 - ◇ Other types of work indicated by far fewer freelancers included film and television production (10 per cent), website component development (six per cent), CD-/DVD-ROM products for specialty audiences (four per cent), and web-based marketing and advertising (four per cent).
 - The proportion of work involving CD-/DVD-ROM products for specialty audiences is higher in Quebec (14 per cent).
 - The proportion of work involving film or TV production is higher in Atlantic Canada (19 per cent).

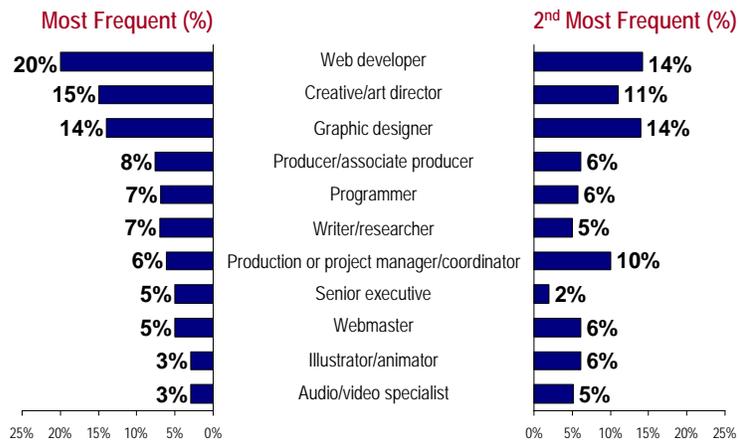
EXHIBIT 2.8
Type of Projects



Distribution according to primary type of project work

- The roles freelancers most frequently perform in their projects are web-developer, creative/art director, and graphic designer.
 - ◇ Other roles are indicated in Exhibit 2.9.
 - The proportion of web developers and writer/researchers is higher in the Prairies (29 and 16 per cent, respectively).

EXHIBIT 2.9 Freelancers' Roles



Distribution according to most frequent and second most frequent role assumed in new media projects
Only those activities identified by 5% or more of respondents are shown.
Only one mention



n=622

CHRC New Media Freelancer Survey, 2004

3. NEW MEDIA TRAINING AND COMPETENCIES

New media education is addressed in this chapter. Specifically, the incidence of training, intensity certification, location and method of training, sources of financing, perception of training, required skills, and obstacles to training.

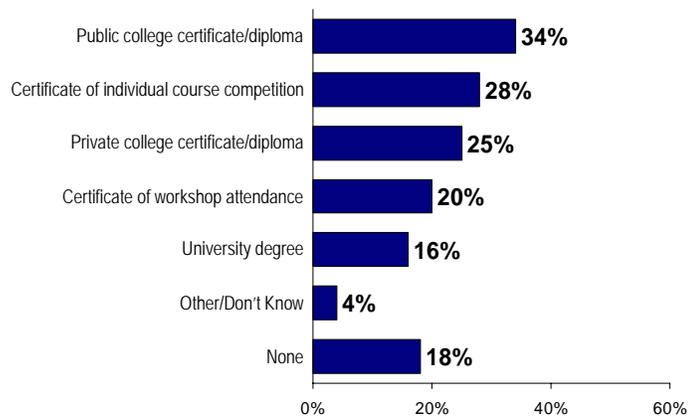
3.1 NEW MEDIA EDUCATION: INCIDENCE, INTENSITY AND CERTIFICATION

- **Over three-quarters of freelancers (77 per cent) have participated in some form of new media education or training in their lifetime.**
- **Half of the freelancers have taken five or fewer new media courses in their lifetime.**
 - ◇ Three in ten (29 per cent) said they took three to five courses and 22 per cent have taken one or two new media courses.
 - Freelancers in British Columbia/Territories report taking a higher number of new media courses (19 per cent said 20 or more, compared to 13 per cent overall).
 - ◇ Over one-quarter said that they have participated in more than 10 courses.
- **About two-thirds of freelancers (70 per cent) have not participated in formal new media education or training in the last year.**
 - ◇ The incidence of new media training the past year is higher in British Columbia/Territories (39 per cent).
- **Freelancers received varying amounts of new training over the last year.**
 - ◇ One-third of freelancers received one to five days of new training in the past year and four in ten (41 per cent) received more than four weeks of training.
 - The proportion of freelancers taking less than one day of training is higher in Ontario (25 per cent, compared to nine per cent overall). Those in British Columbia/Territories were more

likely to have received more than four weeks of training (60 per cent).

- **Freelancers have a wide range of accreditation for their new media training and education (Exhibit 3.1).**
 - ◇ About one-third (34 per cent) said that they possess a public college certificate.
 - This proportion is lower in British Columbia/Territories (24 per cent).
 - ◇ Freelancers also frequently mentioned possession of a certificate of individual course completion (28 per cent) and a private college certificate (25 per cent).
 - The proportion possessing a certificate of individual course completion is higher in the GTA (38 per cent).
 - ◇ Certificates of workshop attendance (20 per cent) and university degrees (16 per cent) were mentioned somewhat less frequently by freelancers.
 - ◇ Only 18 per cent of freelancers said they had **no** new media certification.

EXHIBIT 3.1 New Media Certification

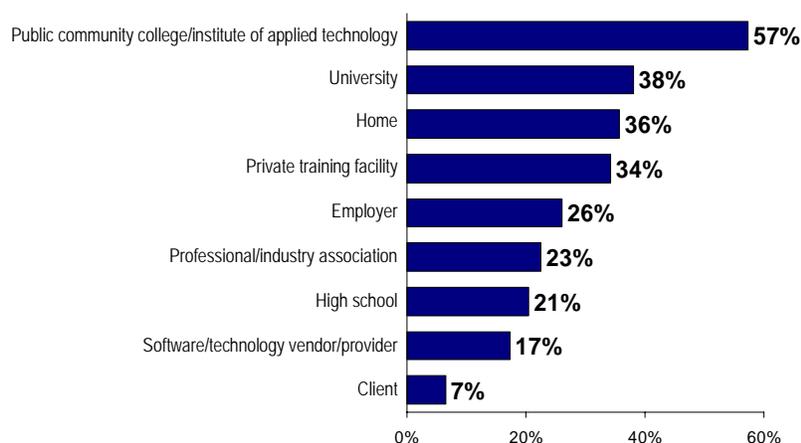


Percentage indicating certification level (multiple responses: percentages add to >100%)
n=479 freelancers who received new media training in their lifetime

3.2 LOCATION AND METHOD OF NEW MEDIA TRAINING

- Freelancers have received new media training in multiple locations, but primarily in a public community college (Exhibit 3.2).
 - ◇ 57 per cent said they received their new media training in a public college or applied technology institute.
 - This proportion is higher in the Prairies (68 per cent) and Ontario (65 per cent), but lower in British Columbia/Territories (36 per cent).
 - ◇ Approximately one-third received their training at university (38 per cent), at home (36 per cent), or at a private training facility (34 per cent).
 - The proportion who received their training at home is higher in the Prairies (46 per cent).
 - ◇ Roughly one-quarter said they were trained by their employer (26 per cent) or a professional/industry association (23 per cent).
 - The proportion who were trained by their employer is higher in the GTA (37 per cent)
 - ◇ Relatively few freelancers (seven per cent) said that they got new media training from their client.

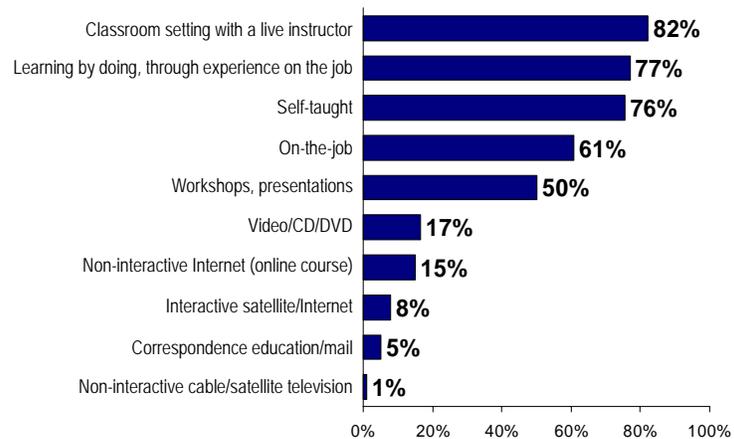
EXHIBIT 3.2
Location of New Media Training



Percentage indicating location of new media training received (multiple responses: percentages add to >100%)
n=479 freelancers who received new media training in their lifetime.

- Regarding the methods of instruction, most freelancers have received training in a variety of ways, but primarily in a classroom setting, experience on the job (learning by doing), and being self-taught (Exhibit 3.3).
 - ◇ At least three-quarters of freelancers said they had used these methods to acquire new media training.
 - The proportion of freelancers who were self-taught and learned by doing (through experience on the job) is higher in Ontario (82 per cent for each) and lower in British Columbia/Territories (68 and 67 per cent, respectively)
 - The proportion of freelancers who participated in correspondence education was higher in Atlantic Canada (18 per cent).
 - ◇ On-the-job training and workshops were also common methods of instruction.
 - ◇ Interactive satellite/Internet, correspondence, and non-interactive cable/satellite are rarely utilized methods employed by freelancers to receive new media training.
 - ◇ New media training by way of video, CD, or DVD is more common in the Prairies (25 per cent).

EXHIBIT 3.3 Method of Instruction for New Media Training



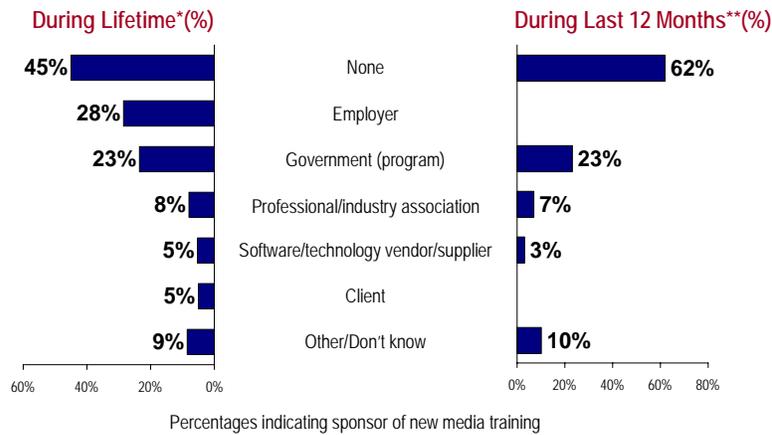
Percentage indicating methods of new media training received (multiple responses: percentages add to >100%)
n=479 freelancers who received new media training in their lifetime.

3.3 FINANCING OF NEW MEDIA TRAINING

- **Almost all freelancers have contributed out of their own pocket to their new media training in their lifetime.**
 - ◇ Nine in ten (90 per cent) freelancers have, at least to some extent, financed their own new media training.
 - ◇ Almost half (46 per cent) have contributed \$5,000 or more of their own money.
 - Freelancers in British Columbia/Territories are more likely to report contributions of more than \$10,000 (34 per cent, compared to 26 per cent overall). Those in the GTA are more likely to report contributions of \$2,000 to \$5,000 (28 per cent, compared to 19 per cent overall).

- **Almost half of freelancers have not received any support from others for their new media training during their lifetime (Exhibit 3.4).**
 - ◇ Nearly half (45 per cent) have received no support from others for new media training.
 - ◇ Employers (28 per cent) and government (23 per cent) have been the predominant sponsors of new media training for freelancers over their lifetime.
 - ◇ Other potential sponsors mentioned by less than a tenth of freelancers include professional/industry association (eight per cent), software supplier (five per cent), and client (five per cent).

EXHIBIT 3.4 Sponsors of New Media Training



* n=479 freelancers who received new media training in their lifetime.

** n=135 freelancers who received support for new media training in the last year outside an employer or client.



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Respondents could indicate more than one sponsor:
percentages add to >100%

CHRC New Media Freelancer Survey, 2004

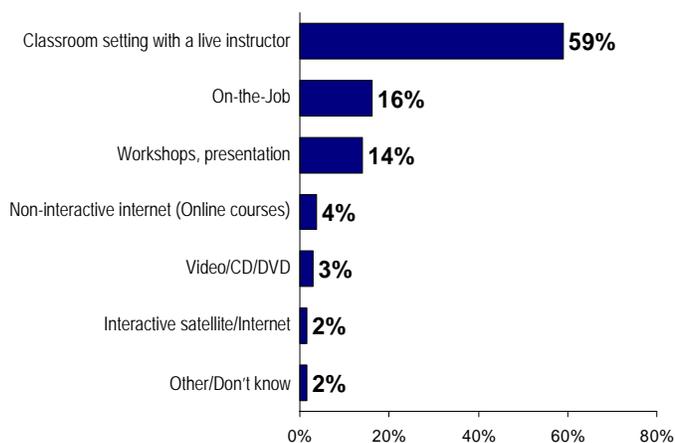
- **Over half of freelancers have not received any support from others for their new media training during the last 12 months (Exhibit 3.4)**
 - ◇ Two-thirds (62 per cent) received no support last year for their new media training.
 - ◇ Government has been the predominant sponsor of new media training for freelancers in the past year (24 per cent).

- **Only 14 per cent of freelancers have received contributions to their new media training from an employer or client during the previous 12 months.**
 - ◇ This proportion is higher in Ontario (28 per cent) and lower in British Columbia/Territories (three per cent).
 - ◇ One-third of those who received employer support received \$100-\$500 and another one-third received over \$2,000 in contributions.

3.4 PERCEPTIONS OF NEW MEDIA TRAINING

- Over the last 12 months, a classroom setting with a live instructor has been, by far, the preferred method of new media training (Exhibit 3.5).
 - ◇ Three fifths of freelancers (59 per cent) identified classroom instruction as their preferred method of training.
 - ◇ On-the-job training (16 per cent) and workshops/presentations (14 per cent) are far less popular among freelancers.

EXHIBIT 3.5
Preferred Methods of New Media Training



Distribution according to preferred method (one response)

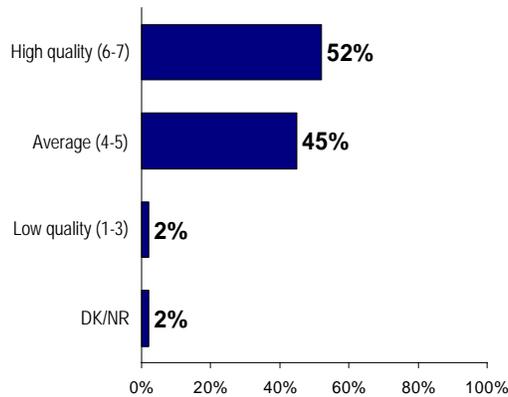
n=135 freelancers who received new media training
in the past year

CHRC New Media Freelancer Survey, 2004



- Just over half of freelancers believe the new media training to be of high quality (Exhibit 3.6).
 - ◇ About half (52 per cent) said the new media training they received was of high quality, and 45 per cent said it was of average quality.
 - ◇ Only two per cent said the quality was low.

EXHIBIT 3.6
Perceived Quality of New Media Training



Distribution according to response on 7-point scale
n=135 freelancers who received new media training
in the past year



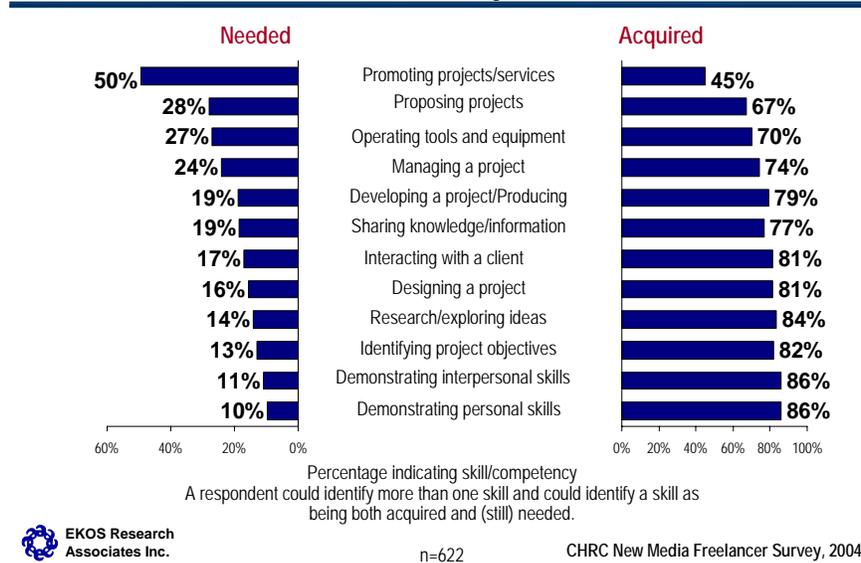
CHRC New Media Freelancer Survey, 2004

3.5 NEW MEDIA COMPETENCIES (SKILLS)

- Promoting projects and services is by far new media freelancers' greatest skill need (Exhibit 3.7).
 - ◇ Half of freelancers (50 per cent) identified this competency as the one they need most.
 - ◇ Other competencies needed by freelancers include proposing projects (28 per cent), operating tools and equipment (26 per cent), and managing projects (24 per cent).
 - ◇ Freelancers consider themselves to be fairly well positioned in terms of their Interpersonal and personal skills (11 per cent or fewer mentioned these competencies).

- The rank order of skills acquired through training is almost the exact opposite of skills in need (Exhibit 3.7).
 - ◊ At least two-thirds of freelancers indicated that they have had to acquire all but one of the new media competencies listed. The one exception is in the area of promoting projects/services (46 per cent).

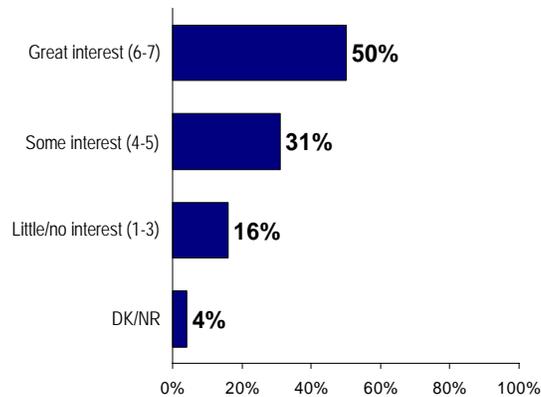
EXHIBIT 3.7 New Media Competencies



3.6 NEW MEDIA TRAINING: BARRIERS, NEED AND INTEREST

- Overall, freelancers do not strongly believe that lack of skills or competencies is a barrier to finding work.
 - ◊ 15 per cent said it was a great impediment, 42 per cent thought it was somewhat of a barrier, and 27 per cent believed it was no, or only a small, obstacle to finding work.
- Almost all freelancers have an interest in taking additional new media training to remain competitive or advance (Exhibit 3.8).
 - ◊ Half (50 per cent) reported a great interest in additional training, and a further one-third (31 per cent) have some interest.

EXHIBIT 3.8 Interest in New Media Training



Distribution according to response on 7-point scale



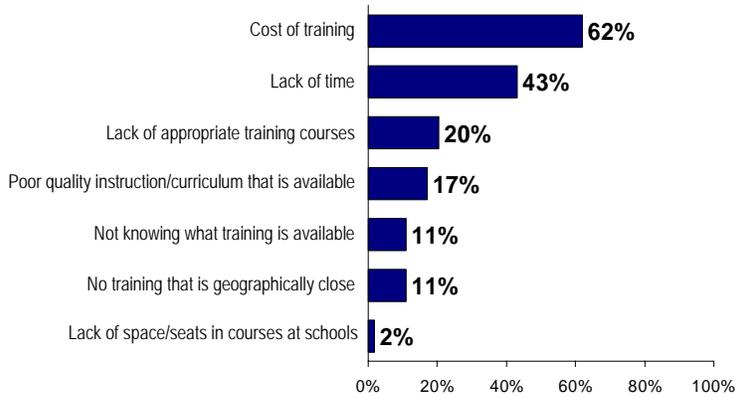
n=622

CHRC New Media Freelancer Survey, 2004

- **Almost all freelancers said that they needed at least one hour of training and about half said they needed five days or less of new media training.**
 - ◇ Only 10 per cent felt that they do not need any new training.
 - ◇ Four in ten said they needed one to 40 hours of training.
 - ◇ 15 per cent said they needed more than four weeks of new media training.
 - This proportion is higher in British Columbia/Territories (22 per cent).

- **The greatest training obstacle, by far, was identified as its cost (Exhibit 3.9).**
 - ◇ Two-thirds (62 per cent) said cost was a great barrier to additional new media training and almost half (43 per cent) identified lack of time as the main hurdle.
 - ◇ Lack of appropriate courses (20 per cent) and poor quality instruction or curriculum (14 per cent) were also identified as noticeable obstacles to training.
 - ◇ Lack of available space in the training course was not seen as a significant obstacle to training (cited by only two per cent of freelancers).
 - ◇ Atlantic Canadians were less likely to cite lack of time (23 per cent), and more likely to cite no training that is geographically close (27 per cent) as major obstacles.

EXHIBIT 3.9 Perceived Obstacles to Training



Respondents asked to respond on 7-point scale, from 1=to no extent, up to 7=to a great extent. Shown here is the proportion indicating 6 or 7 = to a large extent. Computations exclude those not responding to the question or responding with "don't know" (percentage = 6-14% don't knows).



EKOS Research
Associates Inc.

n=622

CHRC New Media Freelancer Survey, 2004

4. MAIN FINDINGS

The main findings of the survey of 622 new media freelancers are as follows.

4.1 DEMOGRAPHIC PROFILE

- New media freelancers are a fairly young workforce, with only 12 per cent older than 45 years of age, compared to 29 per cent in the national workforce.
- The new media freelancer workforce is fairly evenly split between women and men, with women representing only slightly less than their share of the national workforce.
- Aboriginal and disability equity groups represent a very small share of the new media freelance workforce and are under-represented, compared to their share of the national workforce.
- Visible minorities' share of the new media freelancer workforce is similar to their share of the national workforce (about 13 per cent).
- A majority of new media freelancers live in Ontario, with a heavy concentration in the Greater Toronto Area.
- New media freelancers are highly educated, with 49 per cent having a university degree, compared to 20 per cent in the national workforce.

4.2 TENURE, RETENTION OF COPYRIGHT, HOW HIRED, AND DEPENDENCE

- New media freelancers are fairly new to the new media freelance field, with 56 per cent entering the field four years or ago or less.
- Freelancers do not typically retain copyright in the content they produce.
- Freelancers are usually hired directly by their clients, with 83 per cent being hired mostly by their client directly, or equally by a client directly and through an agency.
- Freelancers' dependence on freelance activity for income varies considerably, with 40 per cent saying at least three-quarters of their earnings comes from new media freelancing, and 27 per cent saying one-quarter comes from this activity.

4.3 EARNINGS, HOURS, AND LOCATION

- Two-thirds of new media freelancers earn less than \$4,000 a month from new media freelance work.
- Almost half of new media freelancers work on their new media freelance activities on a part-time basis.
- Most of freelancers' clients are local, with over two-thirds saying their clients are mainly local.
- The vast majority of freelancers work at home, with about four in five saying they work out of their home, 18 per cent working out of their client's office, and 12 per cent out of rented facilities.

4.4 PROJECTS: NUMBER, LENGTH, AND CONCENTRATION

- Freelancers vary considerably in terms of number of projects they work on during a year, with 40 per cent reporting three or fewer projects and 21 per cent nine or more.
- Freelancers typically work on only a few projects at a time.
- Most new media freelancers' contracts last less than six months, with 44 per cent saying less than a month and 41 per cent saying 1-6 months.
- Freelancers' activity tends to be concentrated with a few different clients, with 44 per cent saying they have less than four different clients.
- Freelancers are fairly evenly split between those whose earnings from new media freelance work are concentrated with a few clients and those whose earnings are evenly spread across a number of clients.

4.5 TYPE OF PROJECTS AND ROLES

- Website development is the dominant type of freelance project work, with 57 per cent saying this was their primary activity, and 10 per cent indicating any other one particular primary activity.
- The roles freelancers most frequently perform in their projects are web-developer, creative/art director, and graphic designer.

4.6 NEW MEDIA EDUCATION: INCIDENCE, INTENSITY AND CERTIFICATION

- Almost four in five of freelancers (77 per cent) have participated in some form of new media education or training in their lifetime.
- Freelancers vary widely in terms of the amount of training taken in their lifetime, with one-half having taken five or fewer new media courses, and one-quarter having taken more than 10 courses.
- About two-thirds (70 per cent) have not participated in formal new media education or training *in the last year*, with participation tending to be higher in British Columbia.
- The amount of new media training received over the last year varied considerably, with one-third receiving 1-5 days and 41 per cent receiving more than four weeks.
- Freelancers have a wide range of new media accreditation, with large proportions indicating public college certificate, certificate of individual course completion, and private college certificate.

4.7 LOCATION AND METHOD OF NEW MEDIA TRAINING

- Freelancers have received new media training in multiple locations, but primarily in a public community college, with 57 per cent saying a public college, though one-third indicated university as the location.
- Freelancers have received training in a variety of ways, but primarily in a classroom setting, through experience on the job (learning by doing), and by being self-taught.

4.8 FINANCING OF NEW MEDIA TRAINING

- Almost all freelancers have contributed out of their own pocket to their new media training in their lifetime, with 46 per cent contributing \$5,000 or more.
- Almost half of freelancers have not received any support from others for their new media training during their lifetime.
- Over half of freelancers have *not* received any support from others for their new media training *during the last 12 months*.

- Only 14 per cent of freelancers have received contributions to their new media training from an employer or client during the previous 12 months, with those in Ontario more likely to receive employer or client contribution and those in BC less likely.

4.9 PERCEPTIONS OF NEW MEDIA TRAINING

- Over the last 12 months, a classroom setting with a live instructor has been, by far, the preferred method of new media training, with 59 per cent preferring this approach.
- Just over half of freelancers believe the new media training to be of high quality, and another 39 per cent said it was of moderate quality.

4.10 NEW MEDIA COMPETENCIES (SKILLS)

- Promoting projects and services is by far new media freelancers' greatest skill need, with one-half indicating this skill need, and 24-28 per cent indicating each of the skills of proposing projects, operating tools and equipment, and managing a project.
- Not surprisingly, the rank order of skills acquired through new media training is almost the exact opposite of skills in need, with almost half saying the skill of promoting projects and services was acquired through training, and much smaller proportions mentioning the other skills.

4.11 NEW MEDIA TRAINING: BARRIERS, NEED AND INTEREST

- Overall, freelancers do not strongly believe that lack of skills or competencies is a barrier to finding work, with 30 per cent saying it was a great impediment and 27 per cent saying it was not an impediment.
- Almost all freelancers have an interest in taking additional new media training to remain competitive or advance in their careers.
- Almost all freelancers (91 per cent) said that they needed at least one hour of training and about half said they needed five days or less of new media training.
- The greatest training obstacle, by far, was identified by new media freelancers as its cost, with almost two-thirds indicating this as an obstacle, and about half indicating lack of time.