49PIXELS

SURVEYING THE DIGITAL MEDIA ECONOMY IN CANADA

49PX

CONTENTS

WHAT IS 49PIXELS?
The purpose of this project is to quantify the Canadian digital media industry. Currently, we don't have a thorough understanding of the size and scope of our industry; we have no optics into the number of digital media service providers operate within Canada or their characteristics (number of employees, location, revenue, etc). What's also unclear is the size of the workforce; there's no reliable and readily available data around the working habits, salaries, and skills of producers of digital media content.

mesh prize

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Report designed by Stuart Thursby
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PART I
INTRODUCTION & ABOUT

PART I

INTRODUCTION

In May 2010, we took to the stage at the Mesh Conference to launch an initiative designed to understand the size and scope of the Canadian digital economy. With the financial support of Teehan+Lax (http://teehanlax.com) and the Mesh Prize (http://meshprize.org), as well as support of the Mesh Conference organizing team we've spent the past year polling and surveying both Canadian digital agency owners and the workforce to gain a better understanding of the size and scope of our industry and answers the question: "Who are we, and where are we headed?"

In summary

Agency owners are predicting bullish growth in revenue over the previous year; 48.1% of survey respondents indicated that they are projecting significant increases (10-24%) in revenue growth throughout 2011. What is most encouraging is that agency owners also saw significant growth in revenue in 2010 when compared to revenue generated in 2009; 32.5% of survey respondents indicated they saw significant increases (10-24%) during this time period.

Overall, 51.3% of agency owners are satisfied with their revenue generation results in 2011 even though they faced some pretty big challenges, such as business development opportunities and workforce acquisition.

Predictions with respect to undertaken projects are also bullish. 41.2% of survey respondents indicated significant growth in new business (10-24%) in 2011. Agencies are looking to diversify their offerings as well; mobile application development, and social media marketing and/or monitoring were among the most popular offerings that agencies will be looking to add to their services (47.4% and 42%, respectively).

The digital media workforce is doing equally well. 29.6% of survey respondents saw a slight increase (10-24%) in their salary between 2010 and 2011, while 74.8% indicated moderate to high levels of satisfaction with their current employment. However, only 58.6% of survey respondents indicated they felt they were innovating enough; when asked what was the one thing they could change about their employment situation, 45.5% of survey respondents indicated they'd like to have more time to hone their skills, as well as earn a larger income, attend less meetings, and have increased job stability.

One particular answer that struck us as interesting was "*I'd like to have more freedom to use digital technology to its full extent without having to deal with the red tape.*" Frustration with a lack of funding to create digital content, reasonable working conditions, as well as more opportunities to be creative or engage in meaningful work were among some of the other responses submitted.

Overall, the state of our digital economy is strong, but as always, there is room for improvement, both in the areas above as well as those listed in this report.

To that end, I am pleased to announce the release of Canada's first "State of the Digital Media Economy" report. We're intensely proud of this report and we hope that it delivers some much needed insight into the Canadian digital media industry, sparks a dialogue and healthy debate and inspires others to look at ways to improve our industry.

As always, your comments, input and feedback are greatly appreciated.

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PART II
THE COMPANY SURVEY

Will you be looking to establish offices in other Canadian cities over the next year?

When it comes to expanding operations in other cities, our research found that agency owners are predominantly risk-averse this year. As our economy begins to lag behind that of our American counterparts, there is a great deal of hesitation to invest in establishing satellite offices in other Canadian cities. Because of the highly competitive nature of our industry, this hesitancy is well-justified; from those survey respondents who did indicate an interest in establishing offices in other cities, Calgary was the number one choice.

QUERY STATISTICS TOTAL RESPONSES **160**

88.7% NO

11.3% YES

If so, in which provinces are you looking to establish other offices?

It is likely Calgary is being preferred for a number of reasons; in 2010, MacLean's rated Calgary "Canada's Most Wired City" (spending on Internet services)[1], and was also rated Canada's 3rd smartest city[2]. Larger city centers, such as Toronto and Vancouver are being avoided likely because of competition with bigger agency networks (BBDO & Wunderman, for example) or an inability to entice professionals to join a new organization.

QUERY STATISTICS TOTAL RESPONSES **18**

50% ALBERTA

38.9% ONTARIO

38.9% BRITISH COLUMBIA

16.7% NEW BRUNSWICK

11.1% NOVA SCOTIA

11.1% QUEBEC

1 "Canada's Most Wired Cities", 2010
www2.macleans.ca/2010/05/20/smart-cities-2010-canadasmost-wired-cities
2 Canada's Smartest Cities", 2010
www2.macleans.ca/2010/05/20/smart-cities-2010-overallrankings

What are some of the challenges you've faced in building your business?

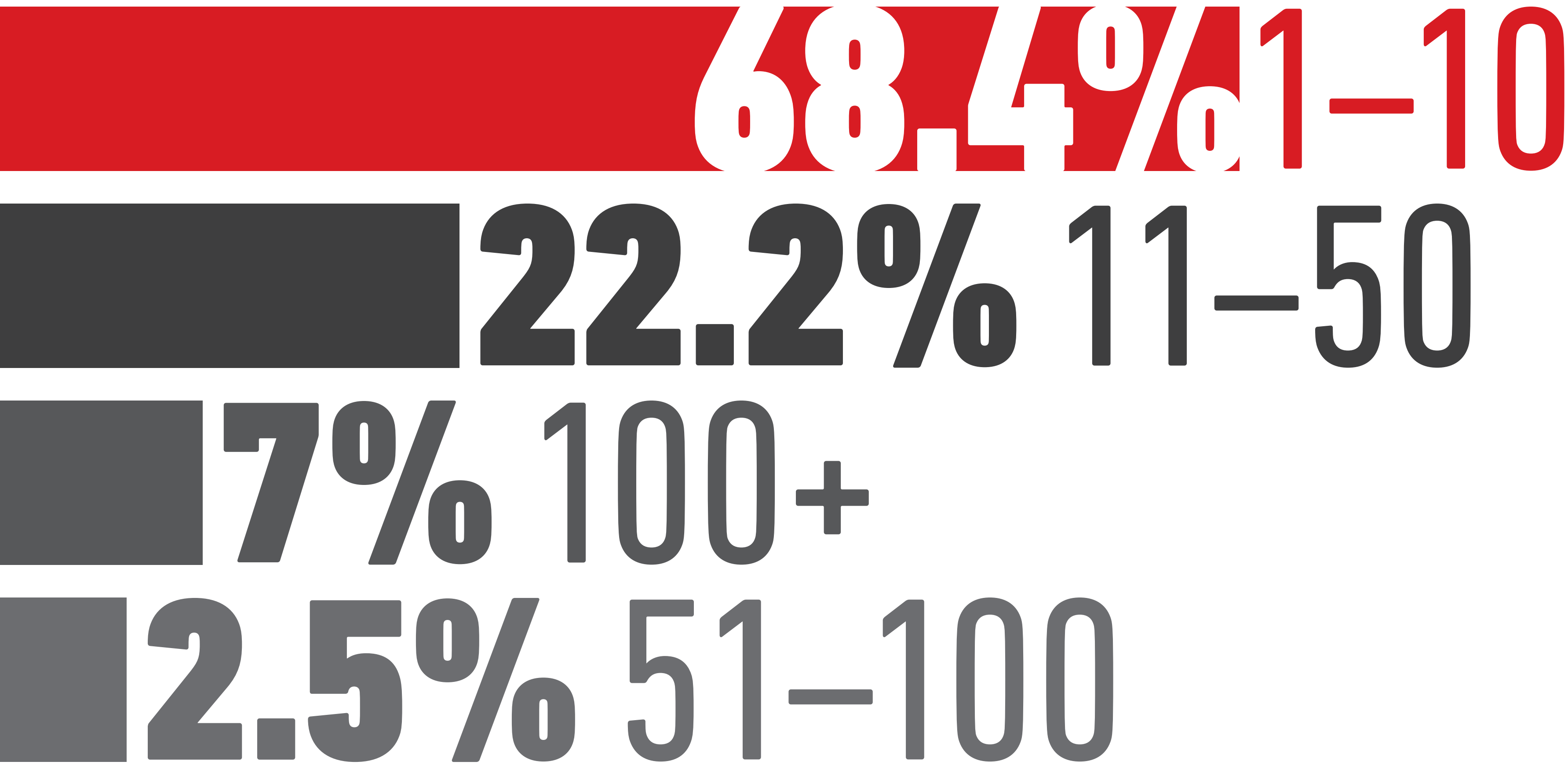
Business development opportunities were the biggest challenges identified by agency owners (44.3%). Given that 68.1% of agency owners identified they employ a labour force size between one and ten industry professionals, it is likely that smaller agencies struggle to attract new business due to the competition they face with larger agencies and their networks. Challenges in workforce acquisition took second place (38%). Finding skilled workers and the funding models to hire those skilled workers was identified as an issue, a trend commonly seen among both startups as well as small businesses. These challenges may be due to larger agencies attracting newly graduated students who want to work for a more established organization, or students who complete their education and start their own companies in favour of entering the workforce.

QUERY STATISTICS TOTAL RESPONSES **158**

How many employees does your organization have?

68.1% of Canadian digital media providers surveyed indicated they employ a labour force between 1 and 10 industry professionals. This comes as no surprise, as the true driver of the Canadian economic engine are these small to medium sized businesses. Canadians are truly an entrepreneurial people; when our economy took a downwards at the tail end of the previous decade, a number of newly unemployed Canadians struck out on their own and opened small businesses, ranging from specialized services such as mobile application development, to establishing full-service agencies.

QUERY STATISTICS TOTAL RESPONSES 158



Thinking about the coming year, how do you expect your headcount to change?

One area in which agency owners are not risk-averse is in the area of hiring. Nearly 75% of agency owners indicated they would be increasing the size of their labour force within the next year. Unsurprisingly, skills in mobile application development are in high demand; 46.8% of agencies are looking to exploit the exploding demand brands have for mobile touch-points.

Social media marketing and monitoring, as well as community management, are also in-demand skills; 44.2% and 32.1% of agencies indicated they will be hiring professionals with expertise in these areas. As brands begin to understand the importance of establishing two-way communication channels over social networks such as Twitter and Facebook, agencies have been watching this upward trend with great interest, and in some cases, establishing specialized business units to exploit the growing demand for expertise in all areas of social media marketing.

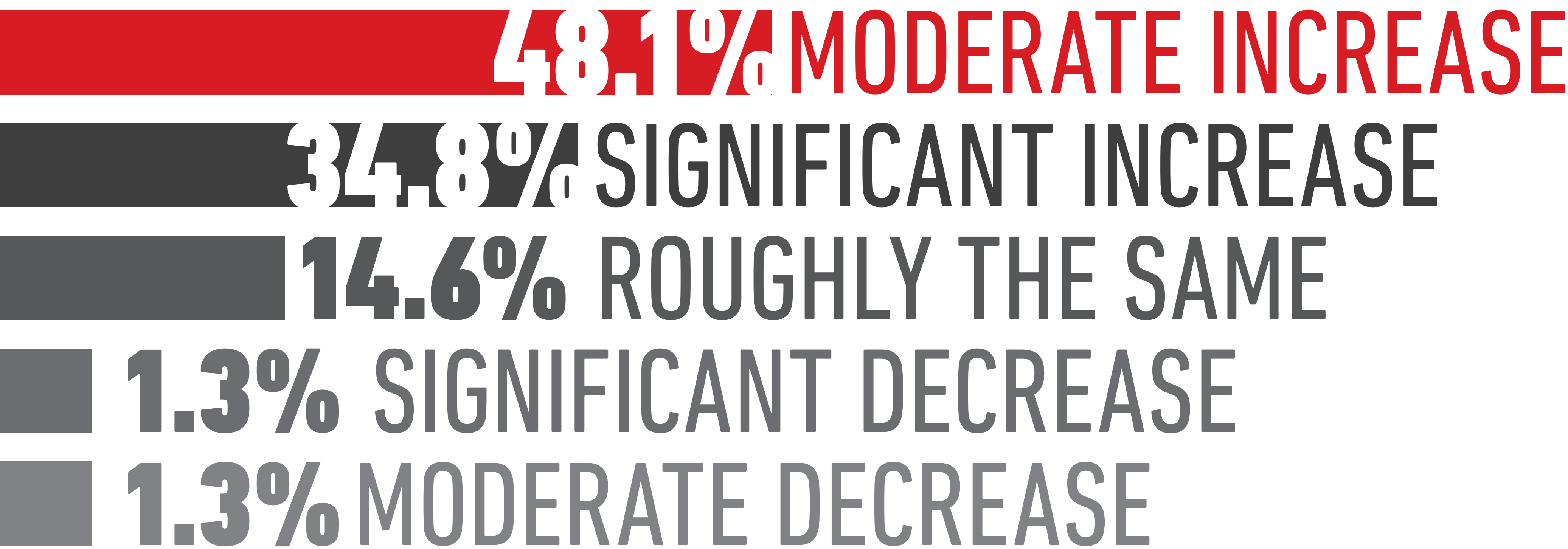
QUERY STATISTICS TOTAL RESPONSES **158**

How do you expect the amount of revenue your organization will generate in 2011 to change?

Revenue projections are bullish this year, with 48.1% of agency owners forecasting revenue growth between 10 and 24%. Given that 68.1% of reporting agencies indicated they have a labour force size between one and 10 employees, this is incredible growth. However, the real litmus test will be to see if this growth can be sustained as our economy begins to lag slightly behind our American counterparts, and if the brain drain of talent to the US continues to trend upwards over the next 3 years and beyond.

QUERY STATISTICS TOTAL RESPONSES 158

SIGNIFICANT DECREASE: DOWN +25% | MODERATE DECREASE: DOWN 10–24% | ROUGHLY THE SAME: ±10% | MODERATE INCREASE: UP 10–24% | SIGNIFICANT INCREASE: UP +25%

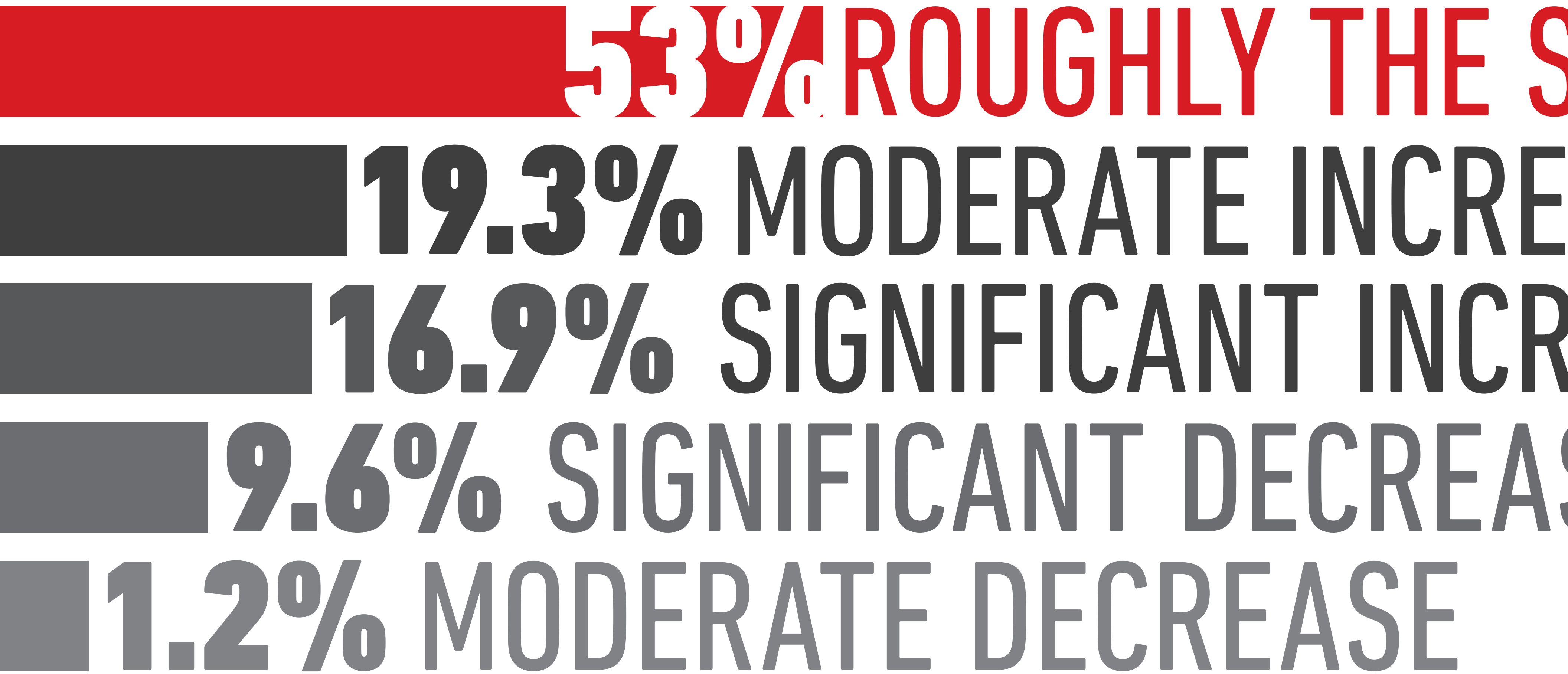


How do you expect your project export count to change in 2011?

55.8% of agency owners indicated they didn't export any projects to other countries in 2010. In 2011, 53% of agency owners projected a significant decrease in exported project counts, likely indicating that smaller agencies are unable to compete with larger agency networks like Wunderman or BBDO with global presences and established connections and credibility in their respective local markets.

QUERY STATISTICS TOTAL RESPONSES 158

SIGNIFICANT DECREASE: DOWN +25% | MODERATE DECREASE: DOWN 10–24% | ROUGHLY THE SAME: ±10% | MODERATE INCREASE: UP 10–24% | SIGNIFICANT INCREASE: UP +25%

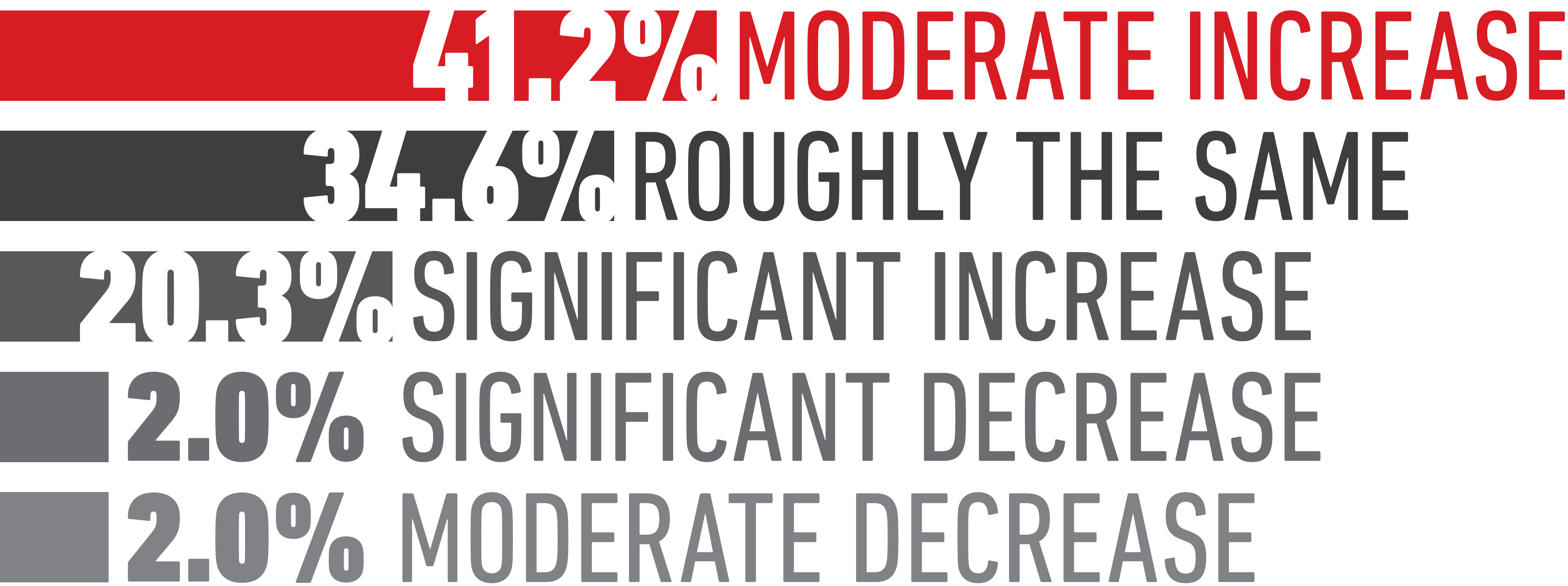


How do you expect the amount of digital projects your organization will undertake in 2011 to change?

In line with some very promising revenue projections, reporting agencies indicated a slight increase in the project export category. 19.3% of reporting agencies have forecasted a 10 to 24% increase in exported projects, while 16.9% indicated a significant increase (25% or more). And much like the revenue projections highlighted on the previous page, these growth projections are promising, as they indicate a growing confidence in the Canadian economy as well as the quality of our industry's output.

QUERY STATISTICS TOTAL RESPONSES 153

SIGNIFICANT DECREASE: DOWN +25% | MODERATE DECREASE: DOWN 10–24% | ROUGHLY THE SAME: ±10% | MODERATE INCREASE: UP 10–24% | SIGNIFICANT INCREASE: UP +25%



Has your organization ever applied for funding or grants?

A large majority of Canadian digital agencies (62.5%) have not applied for funding or grants, citing such reasons as stringent application process and/or funding requirements, or an inability to find the right funding programs. 50.4% of survey respondents indicated that they have no interest in applying or funds, as they fund their projects using their own financial resources. It will be interesting to see if and how this behaviour changes over the next three to five years. Of 37.5% of survey respondents who indicated they have applied for funding, 77.2% have applied for government funding programs (SSHRC, etc), while 29.8% applied for public sector funds (OMDC, CMF, etc) for various projects of a technological, content production or media development nature.

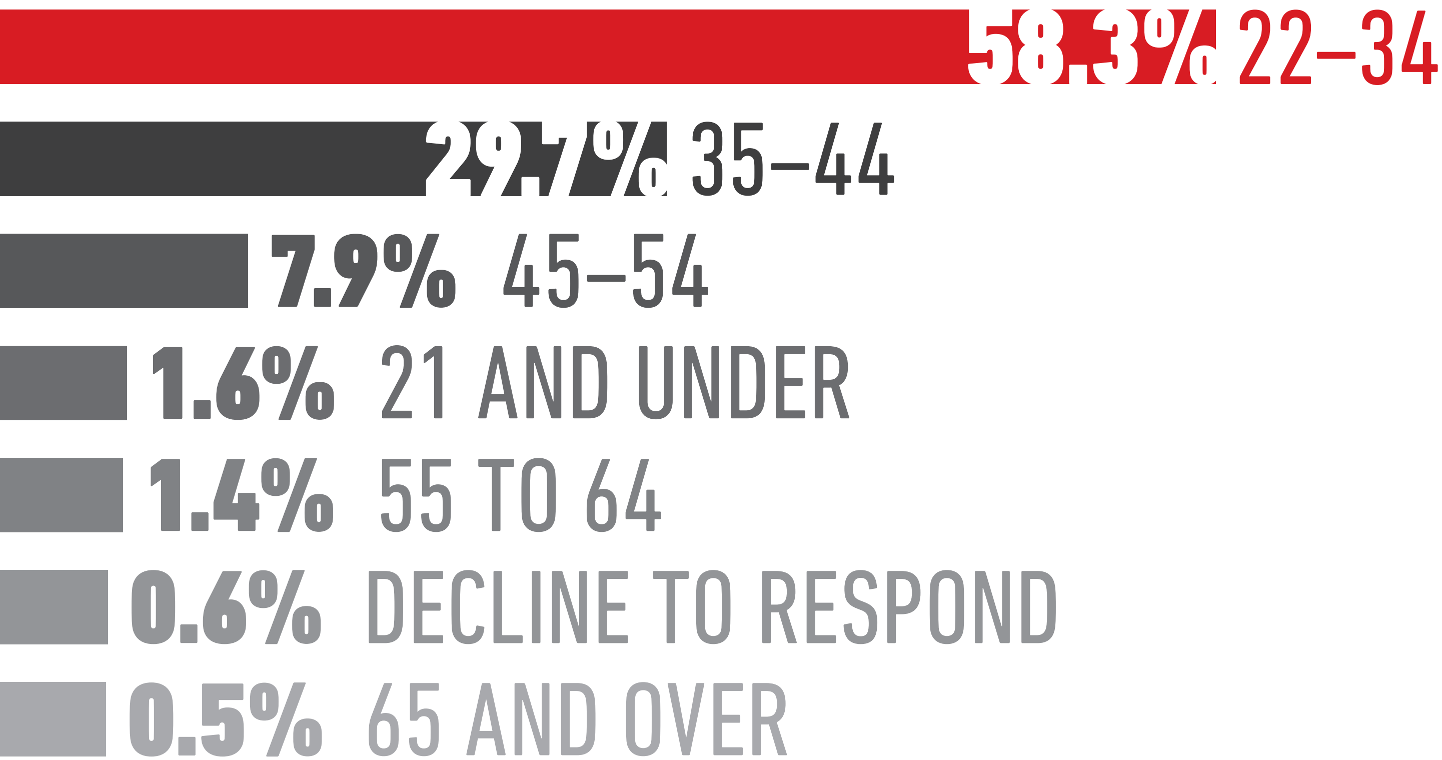
QUERY STATISTICS TOTAL RESPONSES 152

PART III
THE WORKFORCE SURVEY

What is your age in years?

60.2% of the Canadian digital media workforce ranges between the ages of 22 to 34; the average age of an industry professional employed within digital media is 28.2 years old. 63.8% of survey respondents within this age bracket indicated they were women, whereas only 58.3% within this same age bracket indicated they were men. This trend ceased as women entered their mid 30's, suggesting that women have altogether left left the digital media industry or that women are joining the industry upon graduation.

QUERY STATISTICS TOTAL RESPONSES 643



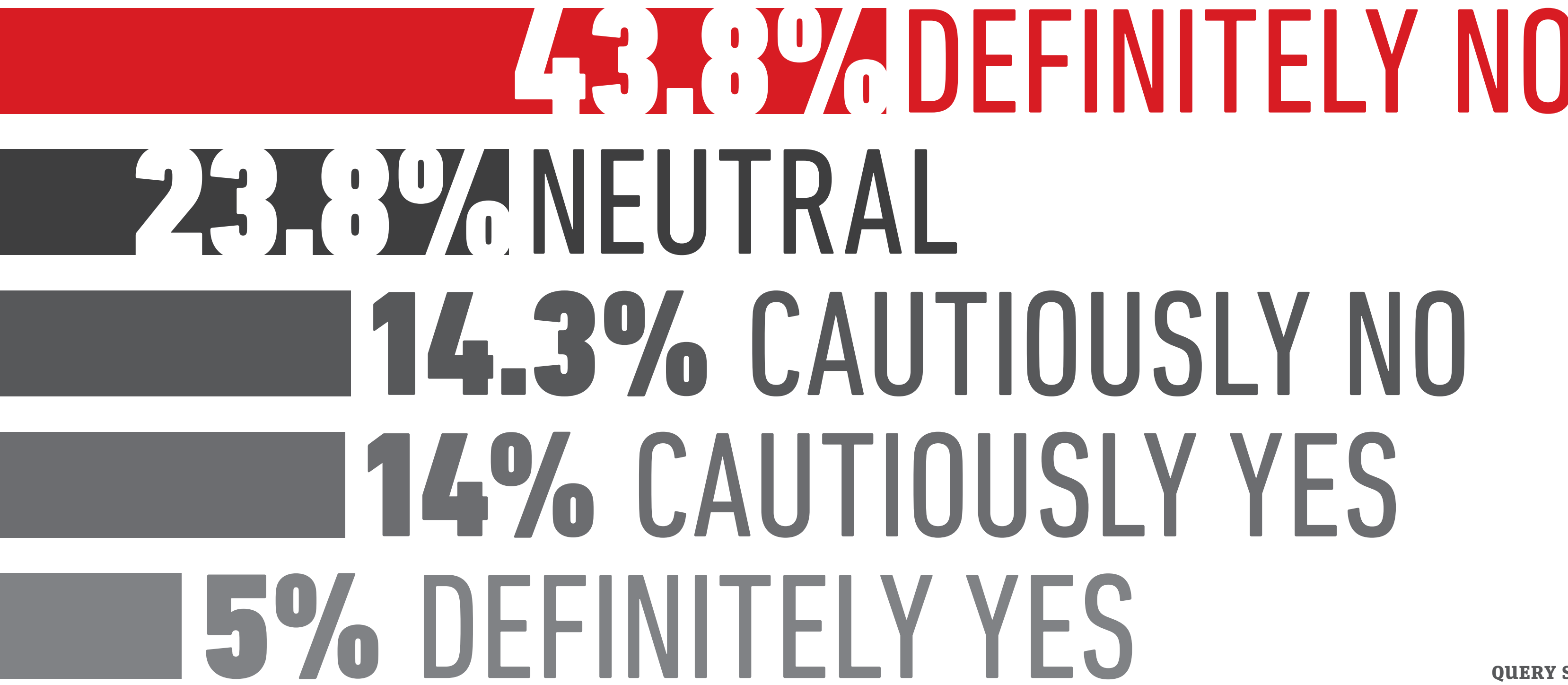
Has bias about your gender impacted the progress of your career?

Technology, like most other industries, still exhibits a great deal of bias towards gender. Our research study measured also collected data against the following bias factors: a) age, b) race, ethnicity or origin, and c) illness, disability or other impediment. 9.2% of women indicated they felt a strong bias about their gender negatively impacted the progression of their career, whereas only 2.1% of men indicated the same perception.

Women indicated stronger negative bias was exhibited towards them in almost every category; 9.9% of women indicated bias with respect to their age. 2.8% of women also indicated a strong negative bias perception with respect to their race, ethnicity or origin. Bias towards men was slightly lower; 7.4% of men indicated a strong negative bias with respect to age. 1.9% of men indicated a strong negative bias with respect to race, ethnicity or origin. Bias with respect to illness, disability or other impediment was the only category in which both men and women were evenly matched (1.5% vs 1.6%, respectively).

However, there are positive insights in these areas. Neutral and positive answers to the question of bias greatly outweighed the negative answers, reinforcing the progressive, liberal qualities of Canadian employers.

Unfortunately, this is overshadowed by the fact that men consistently outpaced women in each category, indicating we have got a long way to go before true gender equality can be found in the workplace.

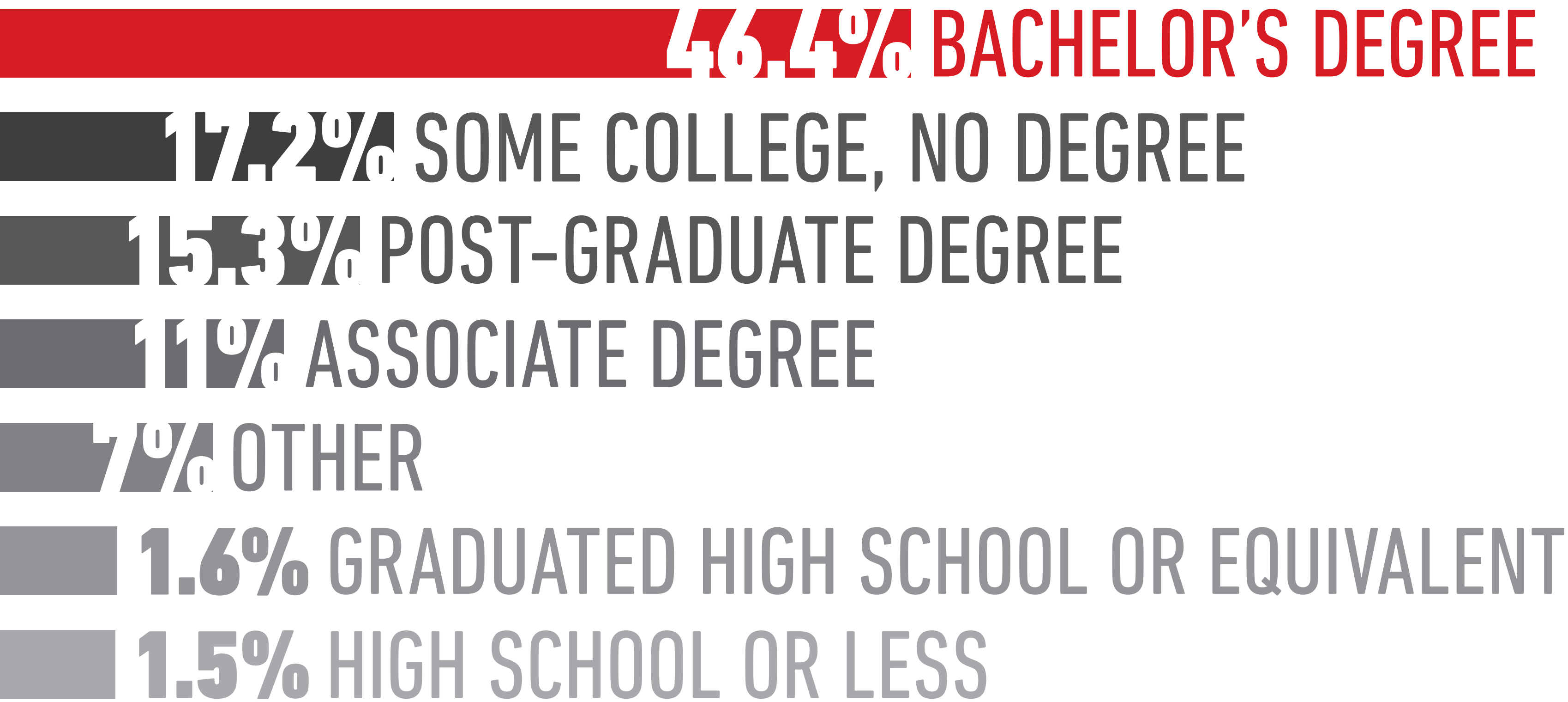


QUERY STATISTICS TOTAL RESPONSES 1028

What is the highest level of education that you have completed?

46.4% of industry professionals indicated that they have acquired a Bachelor's Degree. A large majority of Canadian digital media professionals completed their education in the United States and the United Kingdom (31.2% and 25.8%, respectively).

QUERY STATISTICS TOTAL RESPONSES 643



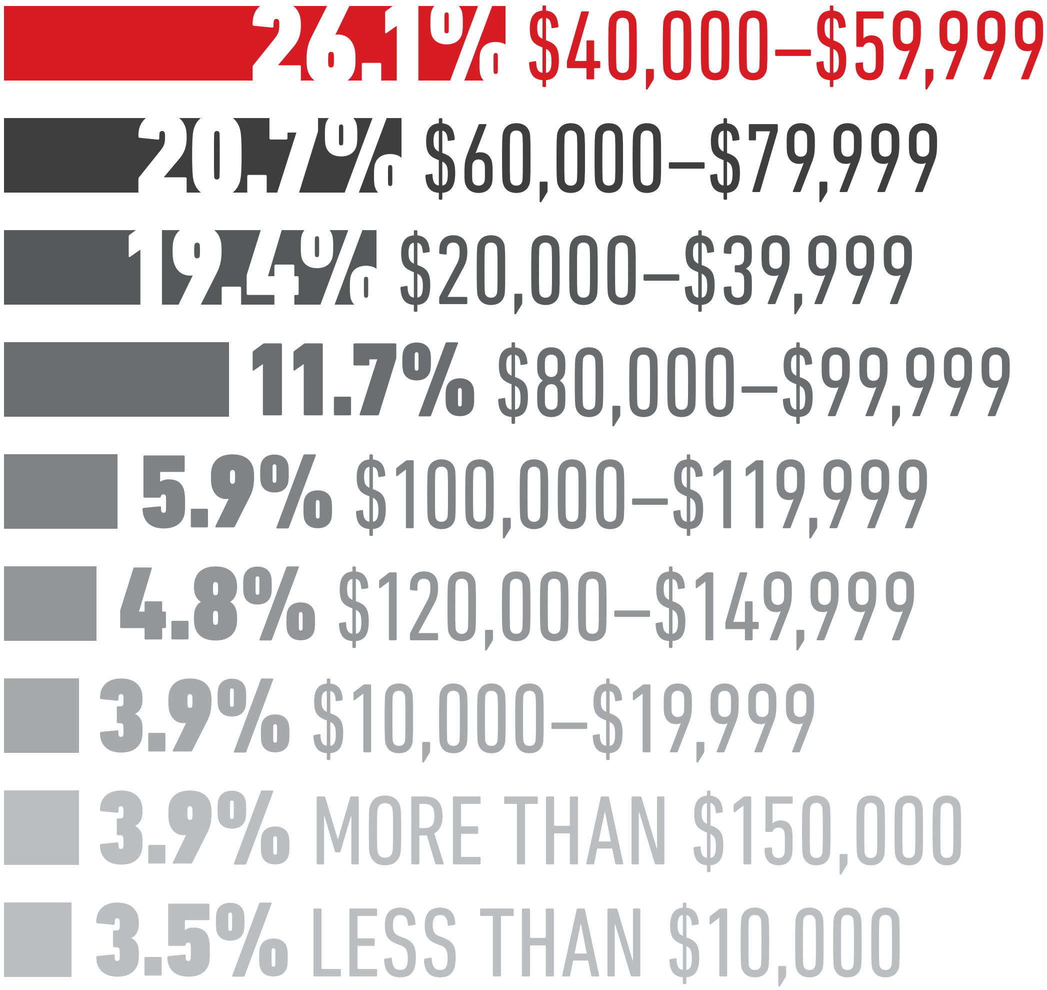
Which of the following best describes your employment situation?

58.9% of survey respondents indicated that they are full-time employees of an advertising, marketing or digital agency. Our research found that while 16.7% of survey respondents worked for companies with 2000 or more employees, men accounted for 63.2% of the total labour force, while women accounted for 51.6%. Similarly, 19.4% of male survey respondents reported in as business owners or partners of a digital agency, while only 9.6% of women indicated the same.

QUERY STATISTICS TOTAL RESPONSES 1058

What was your gross income in 2010?

In 2010, the average Canadian digital media professional earned a yearly salary between $40,000 and $59,999. While there are some glaring differences with respect to bias where it concerns men versus women, 35.5% of women indicated they saw a 10% to 24% increase in salary from 2010 to 2011, whereas only 26.3% of men indicated salary increases in the same range and time span. Most interestingly, more women outpaced men in salary increases in the 1-4%, 11-15%, and 16-20% range. However, more men than women received 5-10% salary increases; the average salary increase from 2010 to 2011 was evenly tied for both men and women at 3.3%.

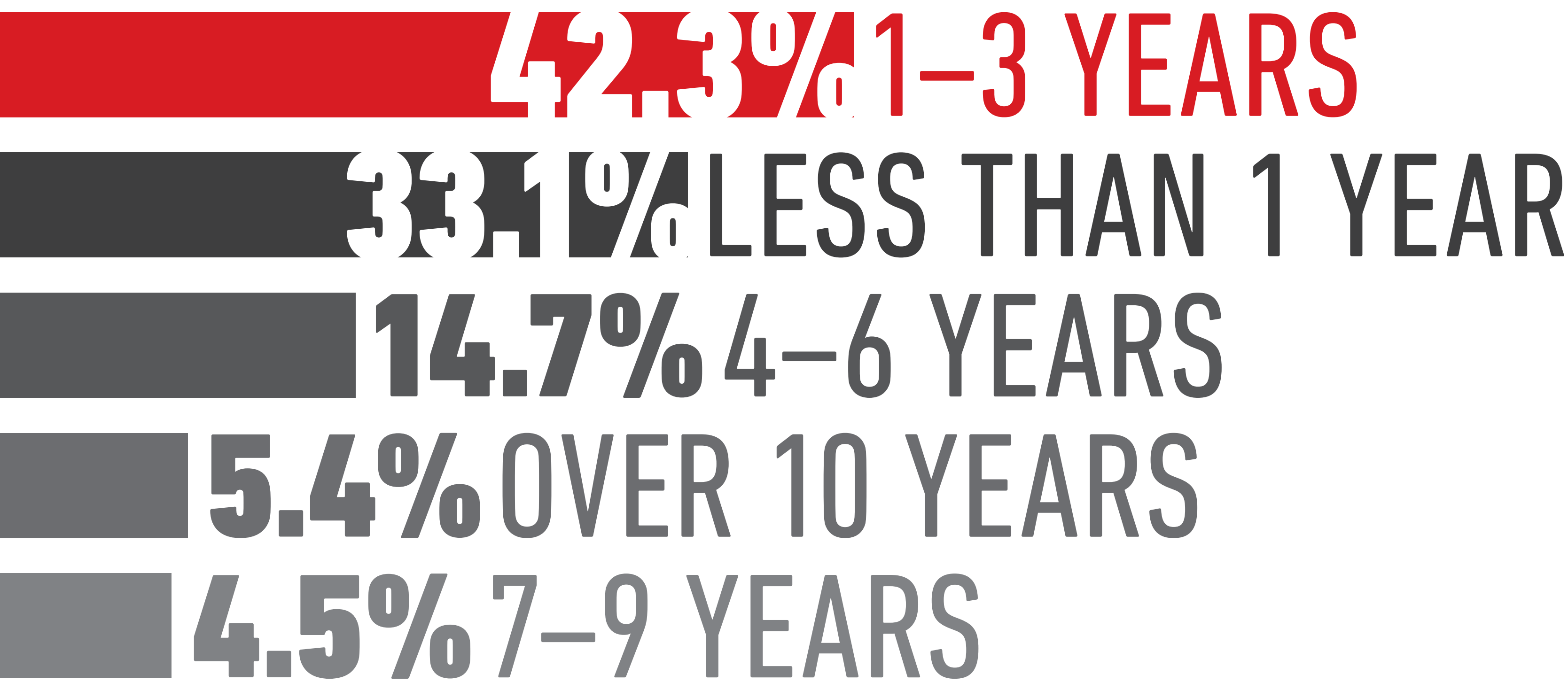


QUERY STATISTICS TOTAL RESPONSES 1046

How many years have you been at your present job?

42.3% of survey respondents indicated that that they have been at their current job between one and three years; this number dropped dramatically at the four-year mark, and continued to progress downwards until the seven-year mark. This could be for any number of reasons; our research found that a younger workforce entering the industry and an influx of workers transitioning to digital from other industries (publishing, etc) are likely causes. 29.3% of digital media professionals came from non-technical backgrounds, such as journalism and broadcasting.

QUERY STATISTICS TOTAL RESPONSES 837



How satisfied are you with your current work situation?

74.8% of survey respondents indicated moderate to high satisfaction with their employment situations, however, 33.2% indicated an intent to move on to a new job at a new organization, while 24.3% expressed a desire to start their own business. 39.2% of survey respondents indicated that they plan to remain where they are, indicating a level of employment satisfaction high enough that they would choose to continue working for their current employer.

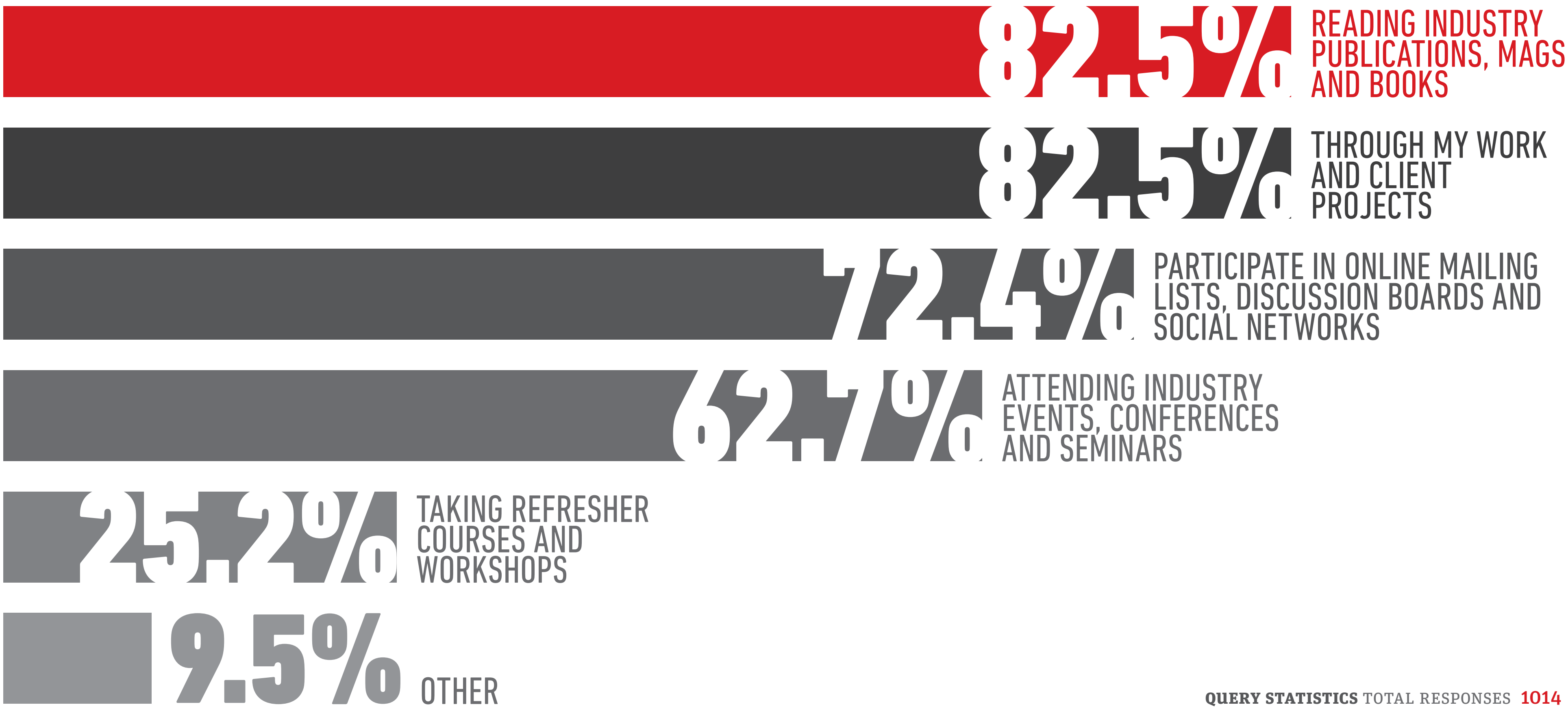
QUERY STATISTICS TOTAL RESPONSES **1014**

How do you stay current with your craft?

82.5% of survey respondents indicated their work or client projects, as well as industry publications, magazines and books, were the number one tools they employed to stay current with their craft.

Educational opportunities, such as workshops and refresher courses played a relatively small part in this (25.2%); with busy schedules and deadlines playing a large part in the day to day operations of a typical agency, employees and employers alike are hesitant to lose a full work day to attend offsite training classes. Digital media professionals find value in industry events, attending between one and five such events on a monthly basis.

Unsurprisingly, social media, digital marketing, measurement and analytics were the focus of a large number of these types of events, followed by user experience (UX) and interaction design. Adobe User Groups, the various DemoCamps, as well as Mesh and Mesh Marketing were mentioned as events attended by industry professionals.



QUERY STATISTICS TOTAL RESPONSES 1014

PART IV
STATISTICS IN FULL

REPORT I **Measuring Canada's Digital Media Ecosystem**
A complete summary of the findings of the Digital Media Ecosystem survey

Which of the following best describes your organization?

ANSWER	COUNT	PERCENTAGE
Freelancer	53	25.1%
Ad/Marketing Agency	36	17.1%
Digital Agency	54	25.6%
Web Startup	13	6.2%
Software Developer	20	9.5%
Vendor/Service Provider	14	6.6%
Other	21	10%
Total Responses	**211**	

Which province do you work in?

ANSWER	COUNT	PERCENTAGE
British Columbia	45	21.3%
Alberta	36	17.1%
Saskatchewan	1	0.5%
Manitoba	11	5.2%
Ontario	102	48.3%
Quebec	2	0.9%
New Brunswick	4	1.9%
Nova Scotia	7	3.3%
Yukon Territory	2	0.9%
Nunavut	1	0.5%
Total Responses	**211**	

Where is your organization's head office located?

ANSWER	COUNT	PERCENTAGE
Canada	155 9	6.9%
United States of America	2	1.3%
Europe	2	1.3%
Australia/New Zealand	1	0.6%
Total Responses	**160**	

How many Canadian locations does your organization have?

ANSWER	COUNT	PERCENTAGE
1	129	80.6%
2	14	8.8%
3	7	4.4%
More than 3	10	6.3%
Total Responses	**160**	

In which provinces does your organization have offices?

ANSWER	COUNT	PERCENTAGE
British Columbia	14	45.2%
Alberta	14	45.2%
Saskatchewan	2	6.5%
Manitoba	2	6.5%
Ontario	23	74.2%
Quebec	10	32.3%
New Brunswick	3	9.7%
Nova Scotia	4	12.9%
Northwest Territories	1	3.2%
Yukon	1	3.2%
Nunavut	1	3.2%
Total Responses	**31**	

Will you be looking to establish offices in other Canadian cities over the next year?

Yes	18	11.3%
No	142	88.8%
Total Responses	**160**	

If so, in which provinces are you looking to establish other offices?

ANSWER	COUNT	PERCENTAGE
British Columbia	7	38.9%
Alberta	9	50%
Ontario	7	38.9%
Quebec	2	11.1%
New Brunswick	3	16.7%
Nova Scotia	2	11.1%
Total Responses	**18**	

Is your organization Canadian owned and operated, or is it owned by a foreign company?

ANSWER	COUNT	PERCENTAGE
We're 100% Canadian owned and operated	151	95%
We're owned by a foreign company	8	5%
Total Responses	**159**	

What does the organizational structure of your company look like?

ANSWER	COUNT	PERCENTAGE
Sole Proprietorship	17	10.8%
Partnership	24	15.2%
Limited Business	2	1.3%
Incorporated	115	72.8%
Total Responses	**158**	

For how many years has your organization been in business?

ANSWER	COUNT	PERCENTAGE
Under 1 year	13	8.2%
1-3 years	30	18.9%
3-5 years	24	15.1%
5-8 years	25	15.7%
8-10 years	15	9.4%
>10 years	52	32.7%
Total Responses	**159**	

For how many years have you been a freelancer?

ANSWER	COUNT	PERCENTAGE
Under 1 year	6	11.3%
1-3 years	12	22.6%
3-5 years	9	17%
> 5 years	26	49.1%
Total Responses	**53**	

Why did you decide to establish your freelance business in your province?

ANSWER	COUNT	PERCENTAGE
Close to talent pool	38	18%
Government tax incentive	13	6.2%
I was here anyway	170	80.6%
Close to clients	43	20.4%
Affordable cost of living	16	7.6%
Other:	21	10%
None of the above	11	5.2%
Total Responses	**211**	

What are some challenges you've faced in building your business?

ANSWER	COUNT	PERCENTAGE
Lack of support from industry organizations	48	30.4%

REPORT I Measuring Canada's Digital Media Ecosystem
A complete summary of the findings of the Digital Media Ecosystem survey

What are some challenges you've faced in building your business? *(cont'd)*

Business development opportunities	70	44.3%
Workforce acquisition	60	38%
Networking opportunities	29	18.4%
Other	30	19%
None of the above	33	20.9%
Total Responses	**158**	

As a freelancer, what are some of the challenges you've faced in growing your client base?

ANSWER	COUNT	PERCENTAGE
Networking and/or visibility opportunities	25	47.2%
Finding new clients	30	56.6%
Finding other partners to work with	15	28.3%
Adequate cashflow	32	60.4%
Other:	4	7.5%
None of the above	3	5.7%
Total Responses	**53**	

How many employees does your organization have?

ANSWER	COUNT	PERCENTAGE
1-10	108	68.4%
11-50	35	22.2%
51-100	4	2.5%
> 100	11	7%
Total Responses	**158**	

On average, how many employees work on a typical project?

ANSWER	COUNT	PERCENTAGE
1-5	127	80.9%
6-10	19	12.1%
11-15	4	2.5%
16-20	1	0.6%
> 20	6	3.8%
Total Responses	**157**	

How long does the average employee stay at your company?

ANSWER	COUNT	PERCENTAGE
Less than 1 year	17	10.8%
1-3 years	67	42.7%
3-5 years	41	26.1%
More than 5 years	32	20.4%
Total Responses	**157**	

In the past year, how has your headcount changed?

ANSWER	COUNT	PERCENTAGE
Decreased	20	12.7%
Stayed the same	54	34.2%
Increased	84	53.2%
Total Responses	**158**	

In the coming year, how do you expect your headcount to change?

ANSWER	COUNT	PERCENTAGE
Decrease	3	1.9%
Stay the same	39	24.7%
Increase	116	73.4%
Total Responses	**158**	

REPORT I Measuring Canada's Digital Media Ecosystem

A complete summary of the findings of the Digital Media Ecosystem survey

Which of the following skills, if any, will you try to acquire in 2011?

ANSWER	COUNT	PERCENTAGE
Blog writing and editing	43	27.6%
Community management	50	32.1%
Digital brand management and measurement	42	26.9%
Digital advertising creative development	47	30.1%
Research and strategic planning	52	33.3%
Social media marketing and monitoring	69	44.2%
Mobile app development	73	46.8%
Rich media development	31	19.9%
Video production	31	19.9%
Video game developers	10	6.4%
Creative	58	37.2%
Programmers and web app developers	87	55.8%
Client-side developers	49	31.4%
Other	17	10.9%
None of the above	7	4.5%
Total Responses	**156**	

In which areas have you had difficulty in attracting and/or retaining skilled workers over the past year?

ANSWER	COUNT
Account Management	1
Account service Strategy Research Analysis	1
All areas. There are not enough skilled people in sw ontario	1
Android Development	1
Art Directors, Designers, Senior Front and Back End Developers	1
Back end development as we now outsource	1
Business Development	1
Can't find agency experience at an affordable price. Can't find younger recruits that are motivated to learn and work. Too many "kids" leaving school and thinking they can start and run an agency with no experience	1
Canadian workers don't realize how their wages are unrealistic in comparison to foreign talent and availabillty.	1
Client-side developers	1
Commissions, lack of quality people to choose from	1
Consultants	1
Corporate & public affairs specialty	1
Creative	1
Creative/art director, competent web developers	1
Creative & Programming	1
Creative talent that are digitally focused and can think strategically	1
Creative, Designers	1
Design, Flash Programming	1
Designers	1
Designers who understand business.	1
Developers Marketers SaaS	1
Developers with mobile experience. Developers with advanced web application programming experience	1

Development Architects	1
Difficulty attracting reliable long term and reasonably priced Canadian design contractors so have had to outsource.	1
Digital designers, Flash Developers	1
Digital marketing analysts	1
Does not apply	1
Drupal CMS developers	1
Everyone is super busy, making it especially difficult to find skilled and responsible developers (front or back end). On the design side, UX staff are even harder to come by. Skilled mobile workers are available, but they're all freelancers right now, choosing to work on a variety of projects they control rather than being beholden to a company or agency.	1
Finding experienced iphone developers is still a challenge	1
Finding funding for venture in order to pay skilled workers!	1
Finding local talent with needed skill set	1
Finding local, qualified workers. Those people are very hard to come by in the Yukon.	1
Flash and client side developers	1
Good execution skills in social media; not just strategy; where are the doers?	1
Good graphic designers are hard to find. And, it's hard to find younger recent graduates who understand social media as they're not teaching the business side to this industry in school. They're still teaching traditional advertising at universities and colleges.	1
Good web-oriented non-flash graphic design	1
Great ACD's	1
Interaction Designers, IA, UX Strategy	1
Interface design	1
Junior-level search engine marketers	1
Lack of funding and revenue in order to retain talent	1
List management/brokers	1
Location is a major challenge, as is the 'small company' stigma	1
Mobile application development	1
Mobile apps development project management	1
Mobile developers	1
N/A	1
Need projects to need workers.	1
No one wants to work for free these days, not even in exchange for letters of recommendation or exposure. We're caught in a vicious circle of not having quite enough to qualify for any funding and not having the time or expertise to develop what will get us to the level of being able to apply for funding.	1
No problem attracting but found it hard to find actual skilled workers that were a good fit for our small team.	1
None	53
None, really. Admin and project management support if anything	1
None. We had to find by ourselves among	1

recruiting agencies and networking.	
Because the economy sucked so badly it was difficult to find the revenue to hire extra help	1
Production	1
Production management, strategy	1
Programmer/web application developers	1
Programmers & quality freelancers in general	1
Programmers, specifically advanced/senior Drupal developers	1
Programmers	3
Programmers/web application developers	2
Programmers/web application developers Rich media development (Flash, Flex, Air)	1
Programming Talent	1
Project management	1
Quality and skilled workers are hard to come by	1
Research and strategic planning Copywriting Sr ADs	1
Sales	1
Sales & marketing	1
Sales, web design	1
Search engine marketing	1
Senior developers, Designers	1
Senior management. Experienced staff	1
Skilled developers	1
Social Media SEO	1
Technical director and all Flash and Server development	1
Technology	1
There are no schools in SK, so the pool of people who are qualified is limited to those who move here.	1
There is a surplus of talent form which to choose from. Finding highly qualified talent remains a problem. Plagiarism in resumes has been a chronic problem.	1
TypePad template designers impossible to find	1
UX designers with front end coding abilities	1
User Experience/Information Architecture	1
Video production	1
We are a Search Engine Marketing agency - our biggest problem is finding skilled marketing talent	1
We can't offer competitive salaries (yet).	1
We've had a hard time finding quality PHP, HTML, CSS programmers who have loads of experience	1
Web developers	2
Web Developers Strategic Social media Thinkers - all the good ones are in the USA	1
Web design and developers.	1
Web developers with specific skill set required	1
Web programming on multiple platforms such as Wordpress or Joomla	1
Yes! Recent grads want to start at the top...	1
Young out of school workers have some skills but very little reliablity	1
1. Critical thinking/problem solving (most recent grads only know how to follow instructions or tutorials) 2. Complex motion design	1
Total Responses	**158**

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Which of the following recruitment methods/tools does your organization use to attract new employees?

ANSWER	COUNT	PERCENTAGE
Word of mouth	128	81.5%
Social media tools	100	63.7%
Recruiting drives	5	3.2%
Job boards	57	36.3%
Professional networks	74	47.1%
All of the above	14	8.9%
Other	15	9.6%
Total Responses	**157**	

In the past year, how much gross revenue did your organization generate? ($CAD)

ANSWER	COUNT	PERCENTAGE
Under $200,000	46	29.3%
$200,001–$500,000	28	17.8%
$500,001 - $1M	19	12.1%
$1M - $2M	16	10.2%
$2M - $5M	10	6.4%
> $5M	11	7%
I prefer not to disclose	27	17.2%
Total Responses	**157**	

In the past year, how much gross revenue did your freelance business generate? ($CAD)

ANSWER	COUNT	PERCENTAGE
Under $25,000	20	37.7%
$25,001 - $50,000	10	18.9%
$50,001 - $100,000	18	34%
> $100,000	2	3.8%
I prefer not to disclose	3	5.7%
Total Responses	**53**	

What percentage was generated by interactive digital media?

ANSWER	COUNT	PERCENTAGE
None	16	7.6%
1 - 25%	33	15.7%
26 - 50%	28	13.3%
51 - 75%	36	17.1%
76 - 100%	97	46.2%
Total Responses	**210**	

Which industries accounted for the bulk of your gross revenues?

ANSWER	COUNT	PERCENTAGE
Agriculture	7	3.3%
Mining	1	0.5%
Construction	9	4.3%
Finance/Insurance	30	14.3%
Real Estate	28	13.3%
Government	33	15.7%
Health Care	27	12.9%
Manufacturing	19	9%
Media & Publishing	59	28.1%
Wholesale & Retail	27	12.9%
Services	62	29.5%
Transportation	5	2.4%
Telecommunications	17	8.1%
Utilities	8	3.8%
Nonprofit	44	21%

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Which industries accounted for the bulk of your gross revenues? *(cont'd)*

Gaming/Entertainment	38	18.1%
Education	23	11%
Other	29	13.8%
None of the above	7	3.3%
Total Responses	**210**	

Which continent does the majority of your revenue come from?

ANSWER	COUNT	PERCENTAGE
North America	202	95.7%
Europe	2	0.9%
Asia-Pacific	1	0.5%
Global *Less than half of our revenues come from any one continent*	6	2.8%
Total Responses	**211**	

Are you projecting an increase or decrease in the amount of revenue your organization will generate in 2011?

ANSWER	COUNT	PERCENTAGE
Significant decrease *Down by 25% or more*	2	1.3%
Slight decrease *Down by 10-24%*	2	1.3%
Roughly the same *Plus or minus 10%*	23	14.6%
Slight increase *Up by 10-24%*	76	48.1%
Significant increase *Up by 25% or more*	55	34.8%
Total Responses	**158**	

Compared to the past year, are you projecting an increase or decrease in the amount of revenue you will generate in 2011?

ANSWER	COUNT	PERCENTAGE
Significant decrease *Down by 25% or more*	3	5.7%
Moderate decrease *Down by 10-24%*	1	1.9%
Roughly the same *Plus or minus 10%*	14	26.4%
Moderate increase *Up by 10-24%*	20	37.7%
Significant increase *Up by 25% or more*	15	28.3%
Total Responses	**59**	

And compared to the past year, did your organization generate more or less revenue in 2010?

ANSWER	COUNT	PERCENTAGE
Significant decrease *Down by 25% or more*	9	5.7%
Moderate decrease *Down by 10-24%*	21	13.4%
Roughly the same *Plus or minus 10%*	30	19.1%
Moderate increase *Up by 10-24%*	51	32.5%
Significant increase *Up by 25% or more*	46	29.3%
Total Responses	**157**	

And compared to the past year, did you generate more or less revenue in 2010?

ANSWER	COUNT	PERCENTAGE
Significant decrease *Down by 25% or more*	2	3.8%
Moderate decrease *Down by 10-24%*	11	20.8%
Roughly the same *Plus or minus 10%*	16	30.2%
Moderate increase *Up by 10-24%*	18	34%
Significant increase *Up by 25% or more*	6	11.3%
Total Responses	**53**	

Overall, how do you feel about your organization's revenue generation results in 2010?

ANSWER	COUNT	PERCENTAGE
We're doing well	81	51.3%
We're doing about the same as usual	26	16.5%
We're not doing quite as well as we would like	37	23.4%
We're in a slump	8	5.1%
We're in trouble	6	3.8%
Total Responses	**158**	

Overall, how do you feel about your revenue generating results in 2010?

ANSWER	COUNT	PERCENTAGE
I'm doing well	11	20.8%
I'm doing about the same as usual	11	20.8%
I'm not doing quite as well as I would like	24	45.3%
I'm in a slump	3	5.7%
I'm in trouble	3	5.7%
I'm closing my doors and looking for full time employment	1	1.9%
Total Responses	**53**	

Last year, how many projects did your organization export to other countries?

ANSWER	COUNT	PERCENTAGE
None	87	55.8%
1-5	46	29.5%
6-10	10	6.4%
11-15	3	1.9%
16-20	2	1.3%
› 20	8	5.1%
Total Responses	**156**	

Last year, how many projects did you export to other countries?

ANSWER	COUNT	PERCENTAGE
None	38	71.7%
1-5	13	24.5%
6-10	1	1.9%
› 20	1	1.9%
Total Responses	**53**	

What were the types of projects your organization exported over the past year?

ANSWER	COUNT	PERCENTAGE
Community management	4	5.8%
Brand management and measurement	5	7.2%
Research/strategic plans	13	18.8%
Social media marketing and/or monitoring	13	18.8%
Mobile app development	8	11.6%
Rich media development	11	15.9%
Game development	5	7.2%
Video production	3	4.3%
Website design/dev	38	55.1%
Visual design	19	27.5%
Other	8	11.6%
None of the above	2	2.9%
Total Responses	**69**	

What was the average amount of revenue your organization generated by these projects? ($CAD)

ANSWER	COUNT	PERCENTAGE
Under $25,000	19	27.5%
$25,001 - $50,000	21	30.4%
$50,001 - $100,000	4	5.8%
$100,001 - $250,000	6	8.7%
$250,001 - $500,000	3	4.3%
$500,001 - $1M	3	4.3%
> $1M	3	4.3%
I prefer not to disclose	10	14.5%
Total Responses	**69**	

What was the average amount of revenue generated by these projects? ($CAD)

ANSWER	COUNT	PERCENTAGE
Under $10,000	11	68.8%
$10,001 - $25,000	2	12.5%
$25,001 - $50,000	1	6.3%
I prefer not to disclose	2	12.5%
Total Responses	**16**	

Thinking about the coming year, how do you expect your project export count to change?

ANSWER	COUNT	PERCENTAGE
Significant decrease *Down by 25% or more*	8	9.6%
Moderate decrease *Down by 10-24%*	1	1.2%
Roughly the same *Plus or minus 10%*	44	53%
Moderate increase *Up by 10-24%*	16	19.3%
Significant increase *Up by 25% or more*	14	16.9%
Total Responses	**83**	

Thinking about the industries your organization typically targets, which industries are the top three?

ANSWER	COUNT	PERCENTAGE
Agriculture	4	2.5%
Mining	1	0.6%
Construction	5	3.2%
Finance/Insurance	28	17.8%

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Thinking about the industries your organization typically targets, which industries are the top three? *(cont'd)*

Real Estate	12	7.6%
Government	28	17.8%
Health Care	25	15.9%
Manufacturing	16	10.2%
Media & Publishing	51	32.5%
Wholesale & Retail	36	22.9%
Services	56	35.7%
Transportation	4	2.5%
Telecommunications	21	13.4%
Utilities	6	3.8%
Nonprofit	32	20.4%
Gaming/Entertainment	39	24.8%
Education	25	15.9%
Other:	27	17.2%
None of the above	6	3.8%
Total Responses	**157**	

Thinking about the industries you typically target, which industries are your top three?

ANSWER	COUNT	PERCENTAGE
Agriculture	1	1.9%
Construction	3	5.7%
Finance	5	9.4%
Insurance	3	5.7%
Real Estate	7	13.2%
Government	6	11.3%
Health Care	6	11.3%
Manufacturing	1	1.9%
Media & Publishing	27	50.9%
Wholesale & Retail	6	11.3%
Services	21	39.6%
Telecommunications	3	5.7%
Utilities	1	1.9%
Nonprofit	18	34%
Gaming/Entertainment	11	20.8%
Education	9	17%
Other	12	22.6%
None of the above	1	1.9%
Total Responses	**53**	

On which areas of the digital media field does your organization currently focus on?

ANSWER	COUNT	PERCENTAGE
Community management	44	28%
Brand management and measurement	54	34.4%
Research/strategic plans	62	39.5%
Social media marketing and/or monitoring	73	46.5%
Mobile app development	52	33.1%
Rich media development	42	26.8%
Game development	19	12.1%
Video production	29	18.5%
Web design and dev	114	72.6%
Visual design	72	45.9%
Other	18	11.5%
None of the above	5	3.2%
Total Responses	**157**	

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On which areas of the digital media field do you focus on?

ANSWER	COUNT	PERCENTAGE
Community management	18	34%
Brand management and measurement	20	37.7%
Research/strategic plans	17	32.1%
Social media marketing and/or monitoring	25	47.2%
Mobile app development	6	11.3%
Rich media development	12	22.6%
Game development	2	3.8%
Video production	10	18.9%
Web design and dev	40	75.5%
Visual design	32	60.4%
Other	8	15.1%
Total Responses	**53**	

In the coming year, which areas of the digital media field would you like to focus more on?

ANSWER	COUNT	PERCENTAGE
Community management	59	28.1%
Brand management and measurement	67	31.9%
Research/strategic plans	78	37.1%
Social media marketing and/or monitoring	86	41%
Mobile app development	105	50%
Rich media development	35	16.7%
Game development	22	10.5%
Video production	42	20%
Web design and dev	85	40.5%
Visual design	52	24.8%
Other	17	8.1%
None of the above	6	2.9%
Total Responses	**210**	

Thinking about the past year, on average how many digital media projects does your organization have active at one time?

ANSWER	COUNT	PERCENTAGE
1-5	78	51%
6-10	43	28.1%
11-20	21	13.7%
› 20	11	7.2%
Total Responses	**153**	

Thinking about the past year, on average how many digital media projects did you have active at one time?

ANSWER	COUNT	PERCENTAGE
1-5	38	76%
6-10	8	16%
11-20	4	8%
Total Responses	**50**	

Compared to the past year, are you projecting an increase or decrease in the amount of digital projects your organization will undertake in 2011?

ANSWER	COUNT	PERCENTAGE
Significant decrease *Down by 25% or more*	3	2%
Moderate decrease *Down by 10-24%*	3	2%

Are you projecting an increase or decrease in the amount of digital projects your organization will undertake in 2011? *(cont'd)*

Roughly the same	53	34.6%
Plus or minus 10%		
Moderate increase	63	41.2%
Up by 10-24%		
Significant increase	31	20.3%
Up by 25% or more		
Total Responses	**153**	

Are you projecting an increase or decrease in the amount of digital projects you hope to undertake in 2011?

ANSWER	COUNT	PERCENTAGE
Significant decrease	2	4%
Down by 25% or more		
Moderate decrease	6	12%
Down by 10-24%		
Roughly the same	21	42%
Plus or minus 10%		
Moderate increase	15	30%
Up by 10-24%		
Significant increase	6	12%
Up by 25% or more		
Total Responses	**50**	

Has your organization ever applied for funding or grants?

ANSWER	COUNT	PERCENTAGE
Yes	57	37.5%
No	95	62.5%
Total Responses	**152**	

If so, which types of programs did your organization apply for?

ANSWER	COUNT	PERCENTAGE
Public sector funds	17	29.8%
Private sector funds	10	17.5%
Government programs	44	77.2%
Other	9	15.8%
Total Responses	**57**	

Have you ever applied for funding or grants?

ANSWER	COUNT	PERCENTAGE
Yes	6	12%
No	44	88%
Total Responses	**50**	

If so, which types of programs did you apply for?

ANSWER	COUNT	PERCENTAGE
Public sector funds	3	50%
Private sector funds	2	33.3%
Government programs	3	50%
Other	3	50
None of the above	1	16.7%
Total Responses	**6**	

If no, why not?

ANSWER	COUNT	PERCENTAGE
Application process or funding requirements too stringent	32	23.4%
Couldn't find the right funding program to fit our needs	47	34.3%
We fund our own projects using our financial resources	69	50.4%

If no, why not? *(cont'd)*

Disbursement too small	8	5.8%
Other	21	15.3%
None of the above	21	15.3%
Total Responses	**137**	

How much funding did you apply for? ($CAD)

ANSWER	COUNT	PERCENTAGE
Under $25,000	12	19%
$25,000 - $50,000	15	23.8%
$50,000 - 100,000	7	11.1%
> $100,000	21	33.3%
I prefer not to disclose	8	12.7%
Total Responses	**63**	

For which types of projects did you apply to receive funding?

ANSWER	COUNT	PERCENTAGE
Content Production	16	25.4%
Media Development	14	22.2%
Arts/Culture	12	19%
Technology	40	63.5%
Other	10	15.9%
Total Responses	**63**	

End of the Company Survey

REPORT II Measuring Canada's Digital Workforce

A complete summary of the findings of the Digital Media Workforce survey

In which province are you located?

ANSWER	COUNT	PERCENTAGE
British Columbia	129	12.2%
Alberta	66	6.3%
Saskatchewan	13	1.2%
Manitoba	43	4.1%
Ontario	711	67.3%
Quebec	32	3%
New Brunswick	6	0.6%
Nova Scotia	47	4.5%
Northwest Territories	6	0.6%
Yukon Territory	3	0.3%
Total Responses	**1056**	

What is your age in years?

ANSWER	COUNT	PERCENTAGE
21 and under	15	1.4%
22 to 34	636	60.2%
35 to 44	289	27.4%
45 to 54	90	8.5%
55 to 64	17	1.6%
65 and over	4	0.4%
Decline to respond	5	0.5%
Total Responses	**1056**	

What is your gender?

ANSWER	COUNT	PERCENTAGE
Male	643	61.6%
Female	401	38.4%
Total Responses	**1044**	

Which of these groups do you most identify with?

ANSWER	COUNT	PERCENTAGE
Asian/Pacific Islander	82	7.8%
Black/African-American	8	0.8%
Middle Eastern	19	1.8%
Hispanic/Latino	8	0.8%
Aboriginal*	3	0.3%
White/European	838	79.5%
Other/Multi-Racial	51	4.8%
Decline to respond	45	4.3%
Total Responses	**1056**	

**First Nations, Inuit and/or Métis*

What is the highest level of education have you completed?

ANSWER	COUNT	PERCENTAGE
High school or less	16	1.5%
Graduated high school*	17	1.6%
Some college, no degree	181	17.2%
Associate degree	116	11%
Bachelor's degree	490	46.4%
Post-graduate degree	161	15.3%
Other	74	7%
Total Responses	**1055**	

**Or equivalent*

Did you complete your education in Canada?

ANSWER	COUNT	PERCENTAGE
Yes	956	91.1%
No	93	8.9%
Total Responses	**1049**	

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If no, in which country did you complete your education?

ANSWER	COUNT	PERCENTAGE
Afghanistan	1	1.1%
Angola	1	1.1%
Armenia	1	1.1%
Australia	9	9.7%
Barbuda	1	1.1%
Botswana	1	1.1%
Brazil	1	1.1%
Bulgaria	1	1.1%
China	1	1.1%
France	2	2.2%
Germany	3	3.2%
India	1	1.1%
Ireland	3	3.2%
Lebanon	1	1.1%
Mexico	2	2.2%
Netherlands	1	1.1%
New Zealand	1	1.1%
Philippines	1	1.1%
Romania	1	1.1%
Serbia	1	1.1%
Singapore	1	1.1%
South Africa	1	1.1%
Sweden	1	1.1%
Taiwan	1	1.1%
United Kingdom	2	25.8%
United States	29	31.2%
Venezuela	2	2.2%
Total Responses	**93**	

Do you use your academic studies in your career?

ANSWER	COUNT	PERCENTAGE
Definitely yes	536	50.8%
Cautiously yes	253	24%
Neutral	139	13.2%
Cautiously no	62	5.9%
Definitely no	65	6.2%
Total Responses	**1055**	

Do you work in the field for which you trained academically?

ANSWER	COUNT	PERCENTAGE
Yes	615	58.4%
No	438	41.6%
Total Responses	**1053**	

Which of the following best describes your employment situation?

ANSWER	COUNT	PERCENTAGE
Business owner/partner	111	10.5%
Full-time employee	712	67.3%
Part-time employee	18	1.7%
Contractor	90	8.5%
Freelancer	127	12%
Total Responses	**1058**	

Which type of organization do you work for?

ANSWER	COUNT	PERCENTAGE
Non-profit organization	43	5.1%
Government agency	39	4.6%
Educational institution	25	3%
Advertising/marketing/ digital agency	495	58.9%

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Which type of organization do you work for? *(cont'd)*

Other for-profit company	238	28.3%
Total Responses	**840**	

Where do you work?

ANSWER	COUNT	PERCENTAGE
Employer's office	787	74.5%
At home	422	40%
Shared office/co-working	83	7.9%
Own office	78	7.4%
Borrowed space/client's	30	2.8%
Other	21	2%
Total Responses	**1056**	

How many people does your company employ?

ANSWER	COUNT	PERCENTAGE
2-5 employees	124	14.8%
6-10 employees	82	9.8%
11-25 employees	124	14.8%
26-50 employees	111	13.3%
51-100 employees	75	9%
101-300 employees	101	12.1%
301-750 employees	42	5%
751-2000 employees	38	4.5%
› 2000 employees	140	16.7%
Total Responses	**1056**	

Which of the following best matches your job title? (Creative)

ANSWER	COUNT	PERCENTAGE
Front-end designer	46	4.4%
Visual designer	52	5%
Interface designer	11	1.1%
Information architect	32	3.1%
User experience designer	43	4.1%
Interaction designer	21	2%
Copywriter	43	4.1%
Art director	35	3.4%
Creative director	59	5.7%
Quality assurance	7	0.7%
Web/app developer	134	12.9%
Mobile app developer	14	1.3%
Rich media developer	13	1.3%
Database developer	3	0.3%
Other	487	46.9%
None of the above	39	3.8%
Total Responses	**1039**	

Which of the following best matches your job title? (Non-Creative)

ANSWER	COUNT	PERCENTAGE
Project Manager	69	13.3%
Studio Manager	9	1.7%
Production Manager	18	3.5%
Engagement Manager	4	0.8%
Account Co-ordinator	12	2.3%
Account Manager	11	2.1%
Account Supervisor	2	0.4%
Account Executive	5	1%
Account Director	19	3.7%
Digital Strategist	100	19.3%
Social Media Strategist	29	5.6%
Social Media Marketer	13	2.5%
Web Analyst	20	3.9%

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Which of the following best matches your job title? (Non-Creative) *(cont'd)*

Business Analyst	10	1.9%
Other	196	37.9%
Total Responses	**517**	

How many years have you been working as a digital media practitioner?

ANSWER	COUNT	PERCENTAGE
Less than 1 year	71	6.7%
1-3 years	246	23.3%
4-6 years	293	27.8%
7-9 years	111	10.5%
› 10 years	34	31.7%
Total Responses	**1055**	

How many years have you been at your present job?

ANSWER	COUNT	PERCENTAGE
Less than 1 year	277	33.1%
1-3 years	354	42.3%
4-6 years	123	14.7%
7-9 years	38	4.5%
› 10 years	45	5.4%
Total Responses	**837**	

How many years have you been working independently?

ANSWER	COUNT	PERCENTAGE
Less than 1 year	43	19.9%
1-3 years	83	38.4%
4-6 years	40	18.5%
7-9 years	17	7.9%
› 10 years	33	15.3%
Total Responses	**216**	

On average, how many hours per week do you work?

ANSWER	COUNT	PERCENTAGE
Less than 20 hours	32	3%
20-29 hours	48	4.6%
30-39 hours	208	19.7%
40-49 hours	510	48.4%
50-59 hours	74	16.5%
› 60 hours	82	7.8%
Total Responses	**1054**	

On average, how many days per week do you work?

ANSWER	COUNT	PERCENTAGE
Less than 3 days a week	19	1.8%
4 days a week	48	4.5%
5 days a week	704	66.6%
› 5 days a week	286	27.1%
Total Responses	**1057**	

How did you enter the digital media industry?

ANSWER	COUNT	PERCENTAGE
Digital media was my first professional job	464	44.1%
Non-tech background	309	29.3%
Career in technology/IT	138	13.1%
Other	142	13.5%
Total Responses	**1053**	

How long ago did you enter the digital media industry?

ANSWER	COUNT	PERCENTAGE
Less than 1 year	76	7.2%
1-3 years	254	24.1%

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How long ago did you enter the digital media industry? *(cont'd)*

4-6 years	274	26%
7-9 years	123	11.7%
> 10 years	325	30.9%
Total Responses	**1052**	

In which industry did you work before digital media?

ANSWER	COUNT	PERCENTAGE
Agriculture	2	0.3%
Construction	2	0.3%
Finance/Insurance	22	3.8%
Real Estate	10	1.7%
Government	18	3.1%
Health Care	15	2.6%
Manufacturing	15	2.6%
Media & Publishing	105	18.2%
Wholesale & Retail	30	5.2%
Services	28	4.9%
Transportation	4	0.7%
Telecommunications	25	4.3%
Utilities	3	0.5%
Nonprofit	21	3.6%
Gaming/Entertainment	17	3%
Education	29	5%
None of the above	79	13.7%
Other	151	26.2%
Total Responses	**576**	

Why did you decide to enter the digital media industry?

ANSWER	COUNT	PERCENTAGE
Looking for a challenge	131	22.8%
Wanted to put academic training to use	28	4.9%
Career change	127	22.1%
Wanted to join the industry in a professional capacity	113	19.7%
Other	176	30.6%
Total Responses	**575**	

Are you happy with your decision?

ANSWER	COUNT	PERCENTAGE
Definitely yes	446	77.4%
Cautiously yes	104	18.1%
Neutral	19	3.3%
Cautiously no	6	1%
Definitely no	1	0.2%
Total Responses	**576**	

Is this your first job within the digital media industry?

Yes	394	37.6%
No	655	62.4%
Total Responses	**1049**	

For how long did you hold this position?

ANSWER	COUNT	PERCENTAGE
Less than 1 year	98	15.3%
1-3 years	380	59.5%
4-6 years	110	17.2%
7-9 years	31	4.9%
> 10 years	20	3.1%
Total Responses	**639**	

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Did you hold this position with your current employer?

Yes	81	12.6%
No	560	87.4%
Total Responses	**641**	

What was your gross income in 2010?

ANSWER	COUNT	PERCENTAGE
Less than $10,000	37	3.5%
$10,000 - $19,999	41	3.9%
$20,000 - $39,999	203	19.4%
$40,000 - $59,999	273	26.1%
$60,000 - $79,999	217	20.7%
$80,000 - $99,999	122	11.7%
$100,000 - $119,999	62	5.9%
$120,000 - $149,999	50	4.8%
› $150,000	41	3.9%
Total Responses	**1046**	

What is your projected gross income in 2011?

ANSWER	COUNT	PERCENTAGE
Roughly the same	136	13%
Less than $10,000	7	0.7%
$10,000 - $19,999	14	1.3%
$20,000 - $39,999	116	11.1%
$40,000 - $59,999	261	25%
$60,000 - $79,999	200	19.2%
$80,000 - $99,999	133	12.7%
$100,000 - $119,999	78	7.5%
$120,000 - $149,999	45	4.3%
› $150,000	54	5.2%
Total Responses	**1044**	

How big was your last pay raise?

ANSWER	COUNT	PERCENTAGE
1-10%	350	62.4%
11-20%	117	20.9%
21-30%	33	5.9%
31-40%	12	2.1%
41-49%	3	0.5%
› 49%	10	1.8%
Decline to respond	20	3.6%
Not applicable	16	2.9%
Total Responses	**561**	

On average, by how much does your salary regularly increase?

ANSWER	COUNT	PERCENTAGE
1-4%	257	46.6%
5-10%	158	28.6%
11-15%	26	4.7%
16-20%	10	1.8%
› 20%	4	0.7%
Decline to respond	97	17.6%
Total Responses	**552**	

How do you price your work?

ANSWER	COUNT	PERCENTAGE
I charge an hourly rate	109	50%
I charge a per-project fee	53	24.3%
I've implemented a value-based model	18	8.3%
Other	38	17.4%
Total Responses	**218**	

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If you have an hourly billing rate, what is it?

ANSWER	COUNT	PERCENTAGE
$11-$20/hour	8	4%
$21-$30/hour	30	15%
$31-$40/hour	21	10.5%
$41-$50/hour	14	7%
$51-$60/hour	27	13.5%
$61-$70/hour	14	7%
> $70/hour	57	28.5%
Decline to respond	29	14.5%
Total Responses	**200**	

How have your rates/fees changed from 2009 to 2010?

ANSWER	COUNT	PERCENTAGE
Significant decrease *Down by 25% or more*	7	3.3%
Moderate decrease *Down by 10-24%*	19	9%
Roughly the same *Plus or minus 10%*	104	49.1%
Moderate increase *Up by 10-24%*	64	30.2%
Significant increase *Up by 25% or more*	18	8.5%
Total Responses	**212**	

Are you projecting any changes in your rates/fees in 2011?

ANSWER	COUNT	PERCENTAGE
Significant decrease *Down by 25% or more*	2	0.9%
Moderate decrease *Down by 10-24%*	7	3.3%
Roughly the same *Plus or minus 10%*	120	56.1%
Moderate increase *Up by 10-24%*	71	33.2%
Significant increase *Up by 25% or more*	14	6.5%
Total Responses	**214**	

How has your salary changed from 2010 to 2011?

ANSWER	COUNT	PERCENTAGE
Significant decrease *Down by 25% or more*	11	1.3%
Moderate decrease *Down by 10-24%*	36	4.4%
Roughly the same *Plus or minus 10%*	436	53%
Moderate increase *Up by 10-24%*	243	29.6%
Significant increase *Up by 25% or more*	96	11.7%
Total Responses	**822**	

What types of benefits do you have as part of your employment?

ANSWER	COUNT	PERCENTAGE
I don't have healthcare coverage through my employer	125	15.5%
Paid vacations	689	85.6%
Paid sick leave	601	74.7%

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What benefits do you have as part of your employment? *(cont'd)*

Dental insurance or group plan	614	76.3%
Medical insurance *Family coverage*	546	67.8%
Life insurance	418	51.9%
Long-term disability insurance	406	50.4%
Short-term disability insurance	387	48.1%
Mileage reimbursement	235	29.2%
Medical insurance *Individual coverage*	341	42.4%
Paid personal time off	269	33.4%
Education/professional development funding	355	44.1%
Parking	159	19.8%
Bonuses	347	43.1%
Professional dues	97	12%
Lounge/relaxation space	195	24.2%
Defined benefit (pension) retirement plan	150	18.6%
Parental leave	273	33.9%
Defined contribution retirement plan	152	18.9%
Employee assistance or wellness program	223	27.7%
Car phone or cell phone	257	31.9%
Exercise facilities	113	14%
Profit sharing	123	15.3%
Company car/allowance	35	4.3%
Stock options	119	14.8%
Other retirement plan	30	3.7%
Child or elder care	11	1.4%
Other	62	7.7%
Total Responses	**805**	

How many personal vacation days do you get per year?

ANSWER	COUNT	PERCENTAGE
1-5	40	4.9%
6-10	150	18.4%
11-15	332	40.6%
> 15	177	21.7%
As many as I need	118	14.4%
Total Responses	**817**	

How many paid/banking holidays do you get per year?

ANSWER	COUNT	PERCENTAGE
1-5	238	29.5%
6-10	327	40.5%
11-15	100	12.4%
> 15	23	2.8%
As many as I need	120	14.9%
Total Responses	**808**	

Which of the following describes your health care situation?

ANSWER	COUNT	PERCENTAGE
I have coverage though my spouse or relative	77	35.8%
I have coverage through a professional organization	11	5.1%

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Which of the following describes your health care situation? *(cont'd)*

I have coverage through a nationalized system	60	27.9%
I pay for my coverage	42	19.5%
I don't have coverage	54	25.1%
Other	6	2.8%
Total Responses	**215**	

Overall, are you satisfied with your benefits package?

ANSWER	COUNT	PERCENTAGE
Very satisfied	324	40%
Somewhat satisfied	288	35.5%
Neutral	127	15.7%
Somewhat dissatisfied	45	5.5%
Very dissatisfied	27	3.3%
Total Responses	**811**	

Has your geographical location impacted your career's progress?

ANSWER	COUNT	PERCENTAGE
Definitely yes	404	39.3%
Cautiously yes	265	25.8%
Neutral	172	16.7%
Cautiously no	84	8.2%
Definitely no	102	9.9%
Total Responses	**1027**	

Has bias about your age impacted the progress of your career?

ANSWER	COUNT	PERCENTAGE
Definitely yes	86	8.4%
Cautiously yes	238	23.1%
Neutral	230	22.4%
Cautiously no	185	18%
Definitely no	252	24.5%
Not applicable	38	3.7%
Total Responses	**1029**	

Has bias about your race, ethnicity, or origin impacted your career?

ANSWER	COUNT	PERCENTAGE
Definitely yes	25	2.4%
Cautiously yes	50	4.9%
Neutral	229	22.4%
Cautiously no	140	13.7%
Definitely no	580	56.6%
Total Responses	**1024**	

Has bias about an illness, disability or other impediment impacted your career?

ANSWER	COUNT	PERCENTAGE
Definitely yes	18	1.7%
Cautiously yes	35	3.4%
Neutral	191	18.6%
Cautiously no	81	7.9%
Definitely no	704	68.4%
Total Responses	**1029**	

How do you stay current with your craft?

ANSWER	COUNT	PERCENTAGE
Attending industry events, conferences, seminars	637	62.7%
Reading industry publications, magazines, books	838	82.5%

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How do you stay current with your craft? *(cont'd)*

Taking refresher courses and workshops	256	25.2%
Through my work and client projects	838	82.5%
Participating in online mailing lists, discussion boards, social networks	736	72.4%
Other	97	9.5%
Total Responses	**1016**	

Have you taken any courses in the past year related to your craft?

Yes	283	27.9%
No	732	72.1%
Total Responses	**1015**	

How many courses/workshops have you taken over the course of the past year?

ANSWER	COUNT	PERCENTAGE
1-5	241	88.3%
6-10	23	8.4%
11-15	6	2.2%
> 15	3	1.1%
Total Responses	**273**	

Do you plan to take any courses/workshops over the next year?

Yes	490	48.6%
No	519	51.4%
Total Responses	**1009**	

How many courses/workshops do you plan to take over the next year?

ANSWER	COUNT	PERCENTAGE
1-5	448	93.3%
6-10	30	6.3%
> 15	2	0.4%
Total Responses	**480**	

How many industry events do you attend on a monthly basis?

ANSWER	COUNT	PERCENTAGE
None	411	40.4%
1-5	578	56.8%
6-10	20	2%%
> 10	8	0.8%
Total Responses	**1017**	

Do you still find your work exciting?

ANSWER	COUNT	PERCENTAGE
Definitely yes	552	54.7%
Cautiously yes	318	31.5%
Neutral	80	7.9%
Cautiously no	51	5.1%
Definitely no	8	0.8%
Total Responses	**1009**	

How satisfied are you with your current work situation?

ANSWER	COUNT	PERCENTAGE
Very satisfied	332	32.7%
Somewhat satisfied	427	42.1%
Neutral	80	7.9%
Somewhat dissatisfied	132	13%

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How satisfied are you with your current work situation? *(cont'd)*

Very dissatisfied	43	4.2%
Total Responses	**1014**	

Do you feel you're innovating enough?

ANSWER	COUNT	PERCENTAGE
Definitely yes	193	19.1%
Cautiously yes	400	39.5%
Neutral	151	14.9%
Cautiously no	198	19.5%
Definitely no	71	7%
Total Responses	**1013**	

If you could change one thing about your work situation, what would it be?

ANSWER	COUNT	PERCENTAGE
Work less hours	256	26.4%
More responsibility	269	27.8%
More time to hone skills	441	45.5%
Other	304	31.4%
Total Responses	**969**	

What is your next career move?

ANSWER	COUNT	PERCENTAGE
Stay where I am	394	39.2%
Learn a new skill	355	35.3%
Move on to a new job at a new organization	334	33.2%
Start my own business	196	19.5%
Change my specialization	135	13.4%
Go back to school/take classes/other educational activity	120	11.9%
Leave the profession	34	3.4%
Other	9	8.9%
Total Responses	**1006**	

PART V
RECOGNITION

PART V: RECOGNITION

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THE END