skillset

FREELANCE SURVEY

2000-2001

NOVEMBER 2001

Executive Summary

The Employment Picture

- A total of 44,000 freelancers are estimated to be working in key sectors of the audio-visual industries on a given day – 35% of the active workforce on that day.

- Around one third of freelancers are women (33%) – a slight drop from 37% in 1993.

- 7.6% are of minority ethnic origin – a considerable increase from 3.0% in 1993.

- The average age of the freelance workforce is 39. 6% are aged under 25, and 7% over 55. The age profile of women is much lower than that of men – 56% are aged 35 or under compared with 36% of men.

- Over a quarter of freelancers hold an undergraduate degree in media studies as a highest qualification, a quarter hold a degree in another subject and 15% a postgraduate degree in a media-related subject.

- Over one third of freelancers earned less than £20,000 in the year leading up to the survey

- Male freelancers earn considerably more than women. For example, 10% of men had earned £50,000 in the previous year, but just 2% of women. 50% had earned less than £20,000 per year compared with 38% of men. This is almost certainly related to the younger age profile of women freelancers.

- The majority of freelancers (60%) live in London or the South East. This compares with the census estimate that 65.5% of the total workforce (including employees) were working in London or the South East on 19 May 2000.

Employment History

- By far the most common means of securing current posts are through people previously worked with (47%) and directly from employers (35%). Only 4% of those surveyed had obtained their current work through responding to advertisements.

Winners and Losers in the Training Game

- Receipt of training in the previous year is strongly related to age: 76% of those aged under 29 had received training, compared with 31% of those over 50.

- Higher earners are also less likely to receive training, except in the very highest bracket. 60% of those earning less than £12,000 per year had had some training, compared with 41% of those on £30,000 - £49,999 and 21% of those on £50,000 to £74,999. However, the figure rises to 63% of those on £75,000 or more.

- The higher a freelancer's highest level of qualification, the more likely they are to have received training – 65% of those with a media-related postgraduate degree compared with 48% of those with technical qualifications and 35% of those with 'other' qualifications (ie non-graduates).

- There are major differences in receipt of training between sectors. Three quarters of those working in new media had training in the past year, and two thirds of those in animation and broadcast radio, but less than half of those in commercials, corporate production, facilities, feature film and independent production.

The Training Experience

- The most common thematic areas covered by training received in the past year were post-production (20%) and IT (17%).

- Less than half of those who had received training had attended formal courses. Around a quarter each had received on the job training and structured self-tuition.

- 41% of training was delivered at no cost, 25% paid for by the trainees themselves, and 15% paid for by employers.

Training Needs

- 69% of freelancers indicated current training needs of some form – an increase from 62% in 1993.

- The most common reasons for wanting training were to keep up to date or improve current work (mentioned by 66% of those with specific training needs), and to develop new technology skills. Development of business skills was cited by 13%, compared with 27% in 1993. Other Skillset research has highlighted this as a major skills gap in the view of many employers, although it may be that this is more applicable to the permanent workforce than to freelancers.

- Those who had received training in the past year were over twice as likely to indicate change in career direction (within the industry) as a reason for needing further training, than those who had received none previously (29% compared with 14%).

- The main subject areas in which freelancers say they need training are: camera, video, web design, post-production and new media.

Access to Training

- Around two thirds (66%) of those with training needs had tried to obtain training or training materials in the area required.

- The most common barriers experienced to receiving the training are that fees are too high (60% - an increase from 54% in 1993) and a lack of awareness of suitable courses (50%, up from 23% in 1993). Potential loss of earnings was also more often quoted as a barrier than in 1993 – up from 28% to 37%.

- Other reasons however, had diminished in significance – assessing the quality of courses was indicated by 40% compared with 47% in 1993, taking time off to attend courses was down from 41% to 31% and employers' unwillingness to pay for training from 31% to 18%.

- The most common sources used for obtaining information on training are the trade press, cited by (70%), trade associations (40%) and trade unions (38%). The use of 'Broadcast' magazine and the BECTU journal to distribute the survey may have impacted on the response to this question.

- Those who had received training in the previous twelve months use a wider range of sources to look for training than those who had not. For example, of those who had received training, exactly half used the internet compared with just 12% of those who had not; 26% used the national or local press compared with 9% of those who had had no training, and 18% used employers compared with 6% of the 'non-trainees.

Introduction

Background

Twelve years have now passed since the Institute of Manpower Studies conducted its groundbreaking research on employment and skills in the television, film and video industries[1]. This report produced the first reliable information on the size and composition of the workforce, current and future skills shortages and training needs within these industries. It also provided the first hard evidence of these industries' increasing reliance on a growing pool of freelancers, and, worryingly, of a widening gulf between the skill levels of permanent employees and freelancers. The reporting of an urgent need for recognised standards of competence and industry-wide co-ordination and co-operation over training was a key factor in the formation of Skillset.

By the time of Skillset's conception in 1993, major shifts in the industrial territory had started to impact on the use of skills: the auction of independent television franchises and subsequent takeovers and amalgamations, implementation of the 25 per cent independent production quota across terrestrial broadcasting and long-term viewing changes brought about by cable and satellite television were just some of the developments combining to influence employment structures in the audio-visual industries. One of Skillset's first tasks was therefore to conduct another survey of freelancers in 1993 to chart the influence of these developments. A follow-up survey was later undertaken in 1998, of respondents to that survey. Both of these projects were crucial in informing Skillset policy, and particularly in helping to identify training priorities during the 1990s.

Since then a number of other factors have come to bear on employment and training issues, brought about by massive changes in the scale and complexion of the audio-visual industries: the huge and rapid growth of the 'new' media sector (exhibiting patterns of working often quite distinct from more 'traditional' sectors); increased fragmentation of the 'traditional' broadcasting sectors; and of course the challenges and opportunities presented by ongoing technological revolution, all carrying major implications for use of skills in the audio-visual industries.

It was against this backdrop that the Audio-Visual Industries Training Group (AVITG) was established by Skillset and the Department for Culture, Media and Sport (DCMS) in 1999, with a remit to 'investigate and report on the current and future skills required in the audio-visual industries and to recommend the training and education needed to develop these skills, so that the UK can compete effectively in the world media marketplace'.

One of the major recommendations of the AVITG is the implementation of an ongoing cycle of national labour market research, comprising three elements. The first, the census, was conducted for the first time in May 2000, and repeated in June 2001. This is now an annual event. The second, the 'Skills for the Millennium Forum', is a panel of employers which meets twice a year to discuss new and emerging skills issues, the findings from which then feed directly into Skillset's investment policy.

The third and final element of the programme is this survey. Essentially a development of the 1993 survey and 1998 follow-up survey, this part of the cycle will now be conducted every two years. It is a vital part of Skillset's research agenda, providing as it does, a voice to the ever-increasing pool of freelancers to express their most urgent needs for training at a time of considerable uncertainty around the future of training in the industry.

This is perfectly summed up in the following extract from the final report of the AVITG:

'Whatever their (employers') differences about how some issues should be tackled, they are unanimous in identifying a current and future problem of developing effective mechanisms for skills development. In particular, training and education opportunities for freelances and short-term contract workers are limited when they are in work, hard to afford when they are out of work………

……….Looking ahead, employment structures in the audio-visual industries will remain fluid. Traditional broadcasters will need to emulate the flexibility of their competitors to stay competitive. In these circumstances, it would be foolhardy to believe the broadcasters – on whose support industry-wide initiatives such as Skillset, the NFTS and FTF depend – will automatically continue funding industry training and education on the current scale as the regulatory benefits they receive from their licences diminish.'

[1] Varlaam, C., Leighton, P., and Blum.S: 'Skillsearch: Television, Film and Video Industry Employment Patterns and Training Needs. Part 1: The Key Facts' and 'The Final Report' (Institute of Manpower Studies, University of Sussex, 1989 and 1990)

Coverage and Response

The survey was distributed during December 2000, and completed by freelancers (defined as those 'on contracts of 365 days or less') between December 2000 and March 2001. The principal distribution channel was via those employers that completed Skillset's 2000 census (using their estimates of their own freelance usage as an indication of how many forms with which to target each employer). A copy of the survey was also carried in non-subscription copies of one week's issue of Broadcast magazine, and the BECTU journal, 'Stage, Screen and Radio'. Although it is not strictly possible to calculate precise response rates due to the use of more than one distribution channel and the reliance on third parties as intermediaries, it is possible to estimate the coverage of freelancers working in each sector, based on the response to Skillset's 2000 Census. **Figure 1** shows the number of returns from freelancers working in each main area, and the percentage of the total freelance workforce that this represents, based on the census results.

Figure 1 Response and Estimated Coverage by Sector

Sector	Response	Est. Total Workforce	Coverage (%)
Animation	18	342	5.3
Broadcast Radio	331	4,939	6.7
Broadcast Television	406	4,274	9.5
Cable and Satellite	72	1,094	6.6
Commercials	123	8,720	1.4
Corporate Production	170	1,840	9.2
Facilities	32	7,110	0.5
Feature Film	112	N/A	N/A
Independent Production	251	5,840	4.3
New Media	46	6,113	0.8
Other	58	719	8.0

The response and coverage in each sector closely reflect the coverage achieved by the 2000 Census, being highest in broadcast television and broadcast radio, cable and satellite, corporate production and independent production. Like the census, the lowest rates of coverage are in commercials, new media and facilities, the latter two of which achieved a response from less than one per cent of the freelance workforce. The same caveats which were issued in relation to the reliability of the information on those sectors for the census apply in equal measure in this context – not least in the case of new media where there is a lack of up to date information on the number and complexion of companies currently in existence. Additionally, although the level of coverage of freelancers in animation is acceptable as a percentage, there is a very small total population in that sector so these figures should also be treated with caution.

The total figures presented in this report were reached by weighting the data from each sector on the basis of the response, compared with the actual size of each sector as recorded in the census.

Analysis and Presentation

The Employment Picture *profiles the characteristics of the freelance workforce, their qualifications and income levels*

Employment History *explores freelance career patterns from initial routes of entry to the industry, to access to current work.*

Winners and Losers in the Training Game *identifies levels of training received in the past year, and explores who is most likely to have received some form of training.*

The Training Experience *addresses the nature of training received – factors such as duration, type of delivery, and funding.*

Training Needs *takes a look at the training needs reported by freelancers, their reasons for wanting it, and the subject areas in which they think it is needed.*

Getting People into Training *explores reported barriers to training, and in particular assesses differences between those in receipt of training in the previous year, and those who had none.*

Appendix A *provides background information on the size and shape of the freelance workforce from Skillset's 2000 Census.*

Appendix B *contains a copy of the survey questionnaire used to capture the data.*

The survey gave respondents the opportunity to provide comments on any of the issues tackled on the questionnaire. A number of thematic issues emerged in analysis of this feedback, and these have been integrated into the text at appropriate points.

Where possible and appropriate, comparison has been made with findings from earlier Skillset research. Any interpretation of apparent differences between the picture in 1993 and 2001 should take into consideration the considerable growth of the industry, including the emergence of the new media sector.

The purpose of this report is to provide an outline of the key messages to emerge from the survey. A full set of the data, and further information on the methodology and response is available on Skillset's website at www.skillset.org.

Acknowledgments

Fieldwork, data validation and analysis: Sara Holly (BBC), Alan Chisnall (independent consultant), Neil Flintham (Skillset)

Report authors: Siobhan O'Regan, Sara Dewson (IES), Neil Flintham (Skillset)

The survey was managed and steered by Skillset's Research Committee, all of whom Skillset would like to thank, especially for their help in designing the survey and developing an effective methodology. During the period in which the survey was conducted, membership of the Committee comprised:

Carol Varlaam, independent consultant (Chair)
Cathy Aitchison, independent consultant
Katie Conley, Carlton
Liz Cooper, Carlton
Andy Egan, BECTU
Neil Flintham, Skillset
Kirsten Furber, Discovery Europe
Tim Harris, DCMS
Jonathan Hirsch, independent new media consultant
Sara Holly, BBC
Mike Johnson, ITC
Gavin Sayer, DCMS
Megan Skinner, British Film Institute
Laura Slater, PACT
Paula Smith, Skillset

Skillset would like to thank all freelancers who took part in the survey for providing us with a detailed and representative picture of their employment in the industry and their training needs. This information will be invaluable in helping us to ensure that those needs are met in future policies and initiatives.

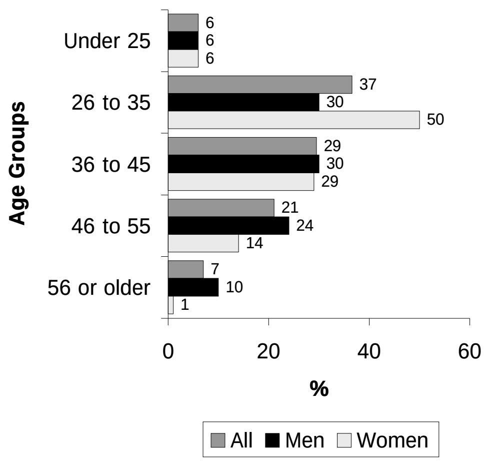
The Employment Picture

One third (33%) of freelancers in the sample are women. This compares with 37% in 1993, and 26% in the 2000 Census. This is in the context of marked changes in the size and scope of the industry since 1993, and differences between the scope of the Census and the Freelance Survey (the former for example excluding film).

The age of respondents ranges from 18 to 71, with an average (mean) age of 39. However as shown in **Figure 2,** the most common age range is 26-35, in which 37% of freelancers fall. There are considerable differences between the age profiles of men and women freelancers, with 56% of women aged 35 or under compared with 36% of men, and 34% of men aged 46 or over compared with 15% of women. Comparison with figures from the 1993 survey indicates that this is mainly due to large numbers of women leaving the workforce in their thirties, rather than an increase in females recently entering the industry. In 1993, 70% of women freelancers were aged under 40. If the majority of those in their thirties had remained in the workforce since then, one would expect a higher proportion of women to be in the age groups over 35 in the 2000 survey.

Just over 1% of freelancers describe themselves as having a disability, compared with 2% in 1993.

Figure 2: Age of Freelancers (%)



A total of 7.6% of freelancers are of minority ethnic origin – a considerable increase from 3% in 1993, and a marginal increase from the census estimate of 6.4% generated in May 2000. The difference between the figure reached by the census seven months previously may be partly attributable to slight differences in the sectoral coverage of the two exercises, and may also indicate a continuation of the real increase already underway in the previous seven years.

There are still relatively few ethnic minorities among the older age groups – for example, only 17% of ethnic minorities are aged over 45 compared with 29% of the white workforce.

It should also be noted that in spite of the considerably increased diversity of the freelance audio-visual workforce since 1993, representation of ethnic minorities still does not reflect the available labour market. Within London (the work base of over half the industry), 24.7% of the population of working age are ethnic minorities – over three times the proportion of those in the freelance audio-visual workforce.

Figure 3: Representation of Ethnic Minorities

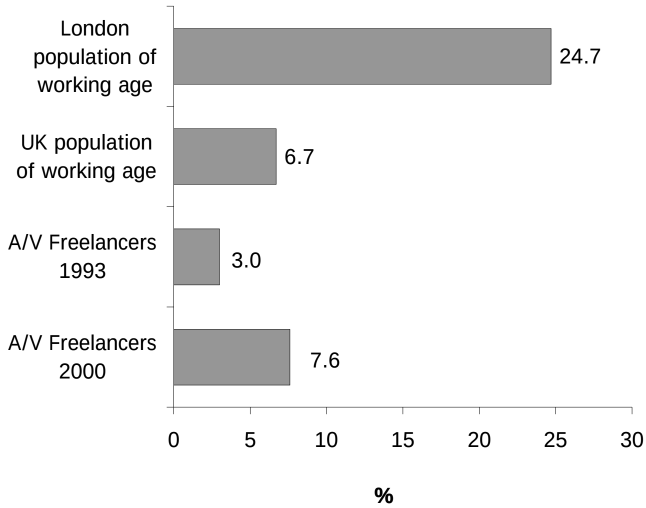
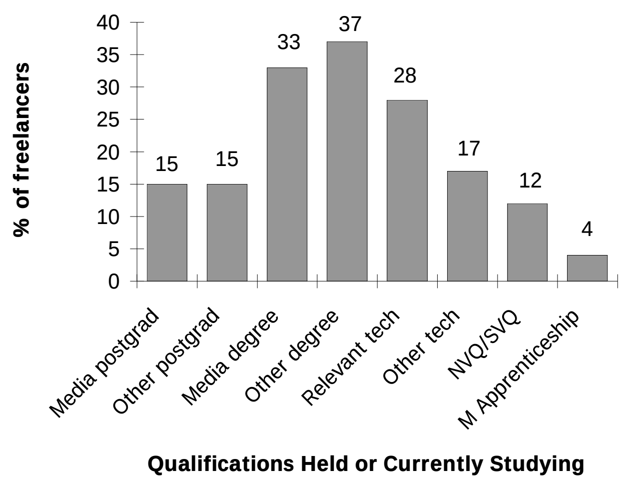


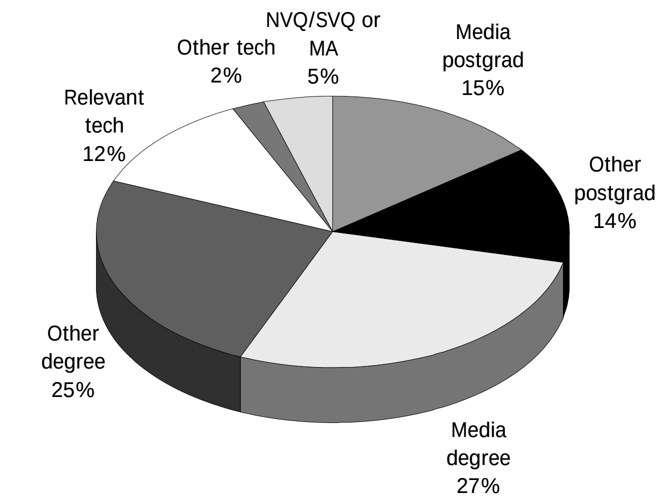
Figure 4 shows the percentage of freelancers who hold or are studying for a range of qualifications (respondents could give more than one answer).

Figure 4: Qualifications Obtained or Studied For



Looking at the *highest* qualifications gained or studied as in **Figure 5**, 29% have (or are studying for) a postgraduate qualification, and a further 52% have already obtained or are currently studying for an undergraduate degree or diploma. Approximately half of both types of degree are in media-related subjects.

Figure 5: Highest Qualification Obtained/Studied



Looking to income levels of freelancers (**Figure 6**), approximately one quarter of freelancers each earned between £12,000 and £19,999, £20,000 and £29,999, and £30,000 and £49,000 per annum. 7% earn in excess of £50,000 or less than £6,000. Camera people are most likely to be amongst the very high earners, with 10% earning £75,000 or more in the past year.

Figure 6: Income of All Freelancers

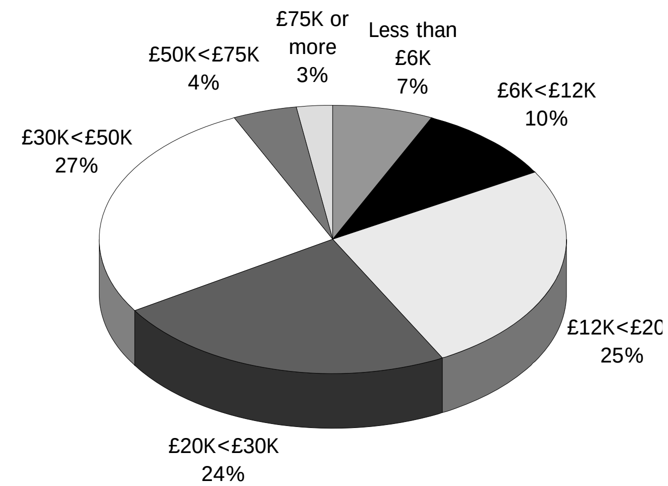
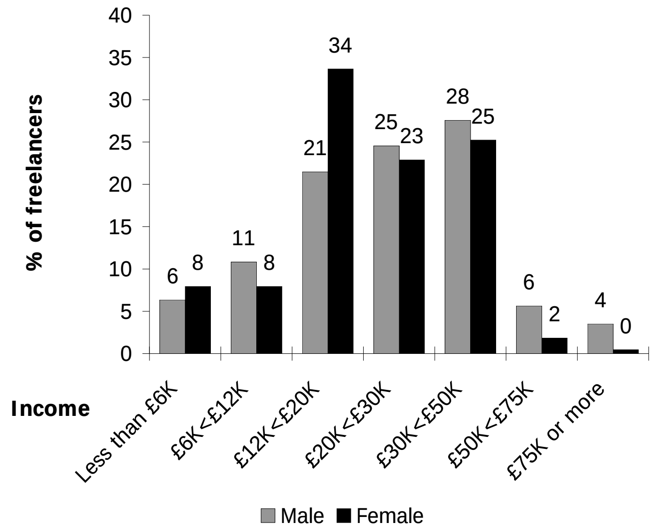


Figure 7 shows the differences between men and women in income brackets of freelancers. There are substantial differences, with men earning considerably higher than women. For example, 10% of men had earned £50,000 or more in the previous year, but just 2% of women. 50% of women had earned less than £20,000 per year, compared with 38% of men. The disparity between earnings of men and women is almost certainly related to the younger age profile of female freelancers (see **Figure 4**).

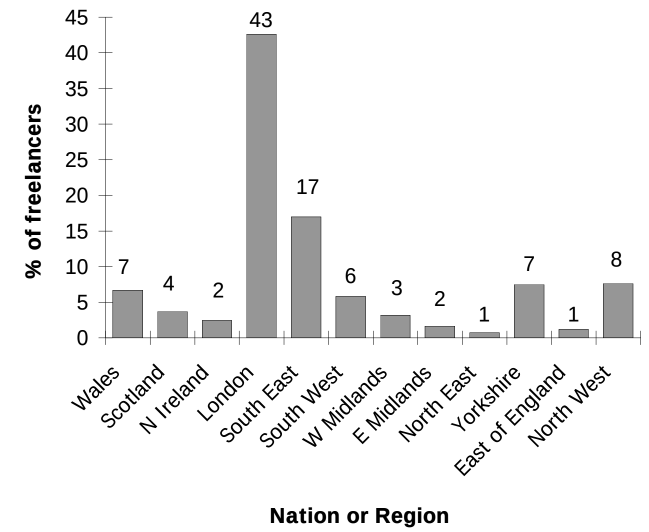
Figure 7: Income by Gender



Perhaps not surprisingly, the audio-visual freelance workforce is largely concentrated in the London area, with 60% residing in London or the South East. This is consistent with the findings from the census which showed that 65.5% of freelancers were working in London or the South East on Census Day.

However, it appears that the industry has decentralised slightly over the past seven years - in 1993, 68% of freelancers lived in London or the South East.

Figure 8: Region of Residence



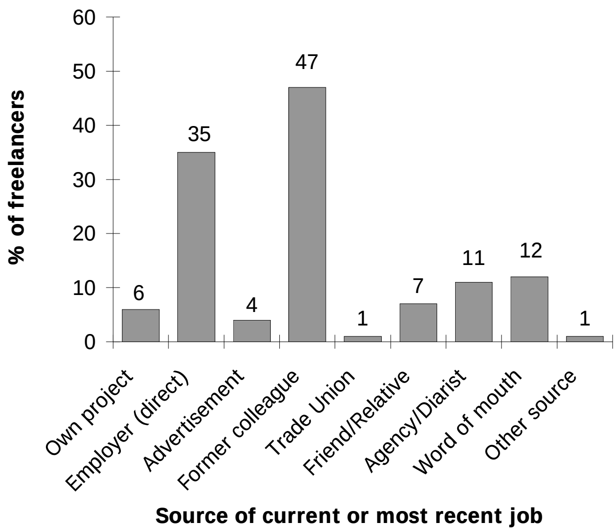
The vast majority of respondents (96%) describe their current or most recent contract as freelance or short contract. Just under 4% had been working on a voluntary, unpaid basis. Other contractual arrangements include 'self-employment' and 'temporary' work.

The most common methods used by freelancers to obtain work are broadly the same as in 1993. Almost half say that they heard about their current or most recent job via someone with whom they had previously worked and over one third saying that they got the job directly from the employer.

The agency or diarist has become more important as a source of work, with the proportion of freelancers getting work via this route more than doubling from 5% to 11%.

Conversely, devising or commissioning one's own work is now less common, falling from 11% to 6%.

Figure 9: Source of Current or Most Recent Job



Experiences of Getting by as Freelancer

Over one third of freelancers surveyed earned less than £20,000 in the year leading up to the survey – this in spite of being one of the most highly qualified workforces in the UK economy and the majority working in or around London– a city increasingly renowned for its high cost of living.

A range of views were offered on rates of pay…….

'I am also employed as a technician in a college to pay bills' (36 year old female AVID editor)

'I earned more as a secretary six years ago (£18k) than I did last year (£15k) as a documentary director (all primetime and terrestrial projects). I'm not surviving as a freelance. It's soul destroying.' (34 year old female director)

'Pay levels, at best, remain static. At worst (especially with 'footage' pay) a great deal more is expected for a great deal less' (42 year old female animation assistant)

'Most of the work I have done since leaving permanent employment has been from grant initiatives. These have funded the short films but have not given sufficient income on which to live. I have to rely on family to support me' (26 year old male director)

'As a freelancer I get frustrated at the rates of pay offered within the 'North' – a huge difference from the 'South'. We are extremely highly qualified and belittled by the North/South divide attitude. I began my freelance career in the South and can assure you the quality of life costs the same in the North. Please standardise freelance rates – the North is not a cheap option.' (51 year old female make-up designer)

…….the hours……..

'It would be nice if the Working Time Directive was actually enforced throughout the industry' (42 year old female costume designer)

'I see good people working for nearly nothing because of greed or lack of budget. Most are on a lower wage than allowed but still work very long hours as only this industry seems to insist on' (52 year old male grip)

.…… and the implications for access to the industry……..

'When you start out in the industry, wages are appallingly low or non-existent. People are so eager to enter and production companies take advantage as they work to tight budgets. This is an unprofessional and undesirable situation as everyone works hard across the board and people are simply not paid enough for the work they do '(32 year old male researcher)

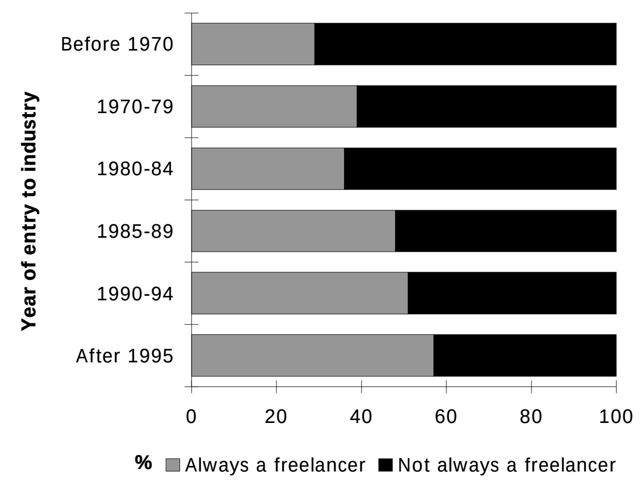
'I think the most common way for people to learn new skills in the industry is to work for nothing or very little and learn on the job. This is an excellent way of learning but is obviously not practical for most people' (25 year old male camera operator)

Employment History

The previous section outlines how freelancers currently experience work in the industry, but what of their employment histories?

The current freelance workforce is fairly evenly split between those who have always worked as freelancers since joining the industry and those who became freelancers later (46% and 54% respectively).

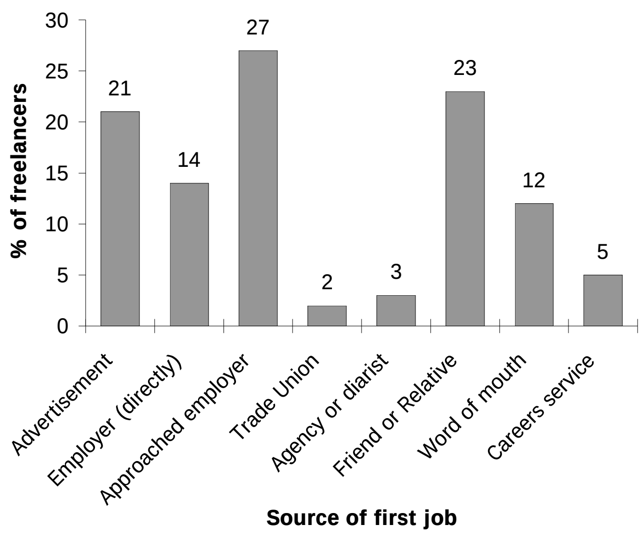
Figure 10: Year of Entry by Employment History



The results from this survey show that those who entered the industry after 1985 are more likely to have always worked in a freelance capacity. This may indicate both an increase in the prevalence of freelance working and a more diverse career history among those who have been in the industry for longer.

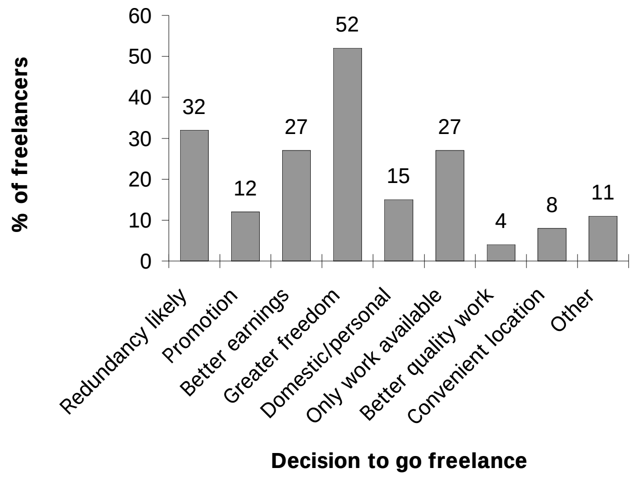
The most common ways that freelancers secured their first job in the industry were by making contact with an employer (27%), via a friend or relative (23%), and by responding to advertisements (21%).

Figure 11: Source of Information about First Job



Most freelancers express more than one reason for having gone freelance. The most common reason is 'for greater freedom', representing 28% of all reasons given and mentioned by just over a half of all respondents. Improved earnings, redundancy and availability of work were other common reasons.

Figure 12: Reasons for Deciding to Go Freelance



The main reasons for becoming freelance have changed little since 1993. Greater freedom and the threat of redundancy remain the two primary forces compelling people into freelance work. However, fewer freelancers today are likely to say that they moved into freelance work in order to gain access to better quality work (a major drop from 26% in 1993 to 4% in 2000). More freelancers in the current survey said they chose freelancing because it was the only work available (a rise from 16% in 1993 to 27% in 2000).

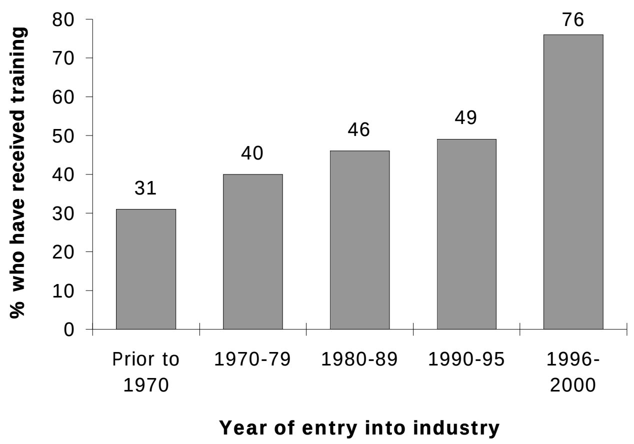
Winners and Losers in the Training Game

Exactly half of all respondents received training in at least one subject area in the last year. This is a considerable rise from 15% in 1993. It should be noted however, that training was defined in broader terms in the 2000 survey, including for example, 'structured self-tuition' as well as traditional forms such as course attendance.

So who is most likely to have received training and who is in danger of being left behind?

A major factor in whether a freelancer receives training is how long they have been in the industry. **Figure 13** shows that those who have entered the industry in the past five years are most likely to have received training in the last 12 months and those who entered the industry prior to 1970 least likely (75% and 31% respectively).

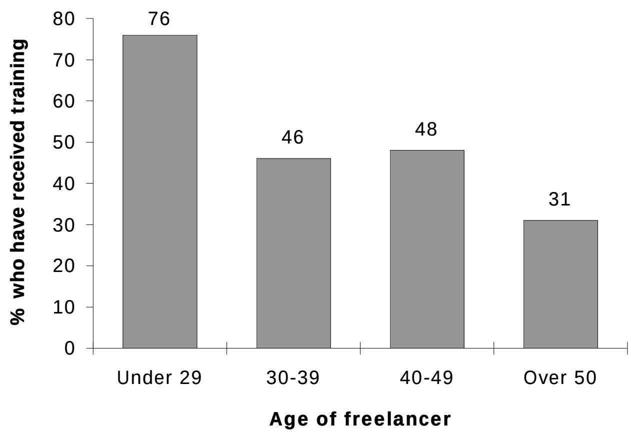
Figure 13: Training by Length of Time in Industry



This result is not just the influence of new graduates referring to their courses. Less than 4% of the sample had joined the industry in either 1999 or 2000, and only one quarter of these had received more than 10 days training. Even when new entrants are excluded, the pattern does not change.

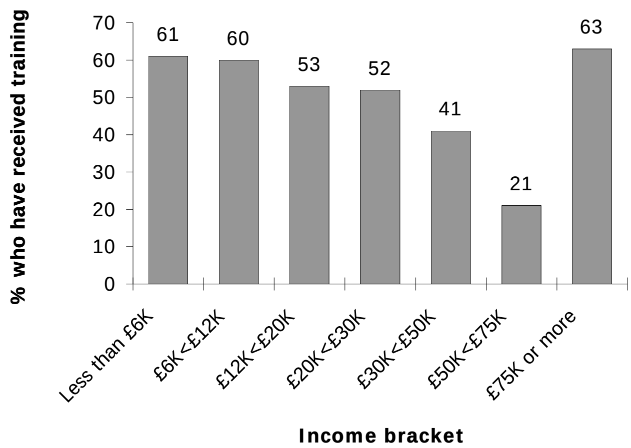
Clearly year of entry to industry is related to age: **Figure 14** illustrates that over three quarters of freelancers aged under 29 had received training in the past year compared with less than one third of those aged over 50.

Figure 14: Training Received by Age



In a similar vein, receipt of training is inversely correlated with income levels – except for the highest income bracket of £75k per annum plus, within which training is most prevalent. Around three-fifths of those on under £12k per annum had received training, compared with only one fifth of those earning £50k-£75k. The percentage in receipt of training then trebles in the highest income bracket, to 63%.

Figure 15: Training by Income



Also, those who have always worked as freelancers are slightly more likely to have had training in the past year than those who became freelancers later (52% compared to 48%). This may be linked to the phenomenon of those who became freelancers later in their careers being older.

However, it is also possible that people who have always been freelancers plan for training more than those who started as employees would. Permanent employees may have been more reliant on their employers to organise or approve training activities and not fully adjusted to taking responsibility for their own development.

A higher proportion of females than males received training in the past year – 53% compared with 49%.

What's Age Got to Do With It? – The Voice of Experience

One of the strongest themes to emerge from comments provided by freelancers was the pervasiveness of ageism in the audio-visual industries. This is reported in the process of trying to secure work…..

'Ageism – I'm too old to work for child employers' (39 year old male sound recordist/mixer engineer)

'I am not able to put my age on my CV – 45 year old women directors do not work often' (45 year old female producer-director)

'Youth wins over experience and track record because rates can be slashed' (48 year old female producer/director)

'I have personally had ageism thrown in my face (by an agency!!!') (51 year old male sound operator)

'I believe that, like Writers' Guild members, etc, in the USA, we should urge our union/guilds to make serious protests concerning age prejudice in the TV/film industry, and to insist on refusal to request or stipulate age details. Litigation should be threatened since such prejudice is as real and all-pervasive as racism' (59 year old male writer/director)

……. and in gaining access to training…….

'Ageism in the industry is common and often a reason not to train' (47 year old female producer)

''Training' tends to be aimed (rightly) at the young. We older folk need access to 'continuing education' in our field. It's very hard to keep up with technology if you're not working, and it becomes a vicious circle' (51 year old male producer)

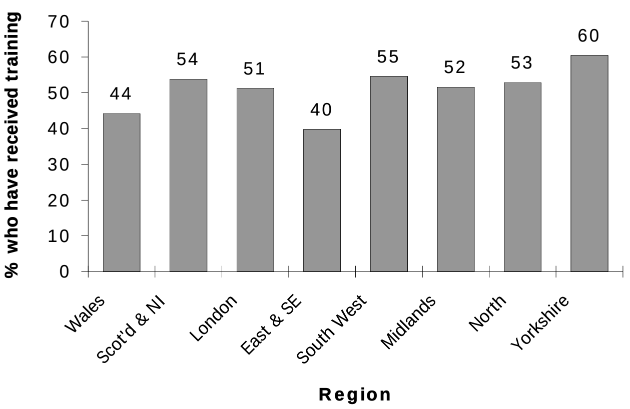
'There does not seem to be much help given to people who have been in the industry for a long time. The assumption being that we do not need any help. Who wants to help a 49 year old technician' (49 year old male lighting camera operator)

'By the time I was 45 I could not afford to take the risk of changing grades to become a Lighting Cameraman without far more practical experience of actually lighting sets, etc. There are many mature professionals stuck in this trap' (49 year old male camera operator)

'It would be good if BECTU would spend some time and attention on the value of its older members such as myself. I was a film editor for 20 years and am now directing. I want to pass on my skills and experience to the younger generation of film makers….'. (46 year old female writer/director)

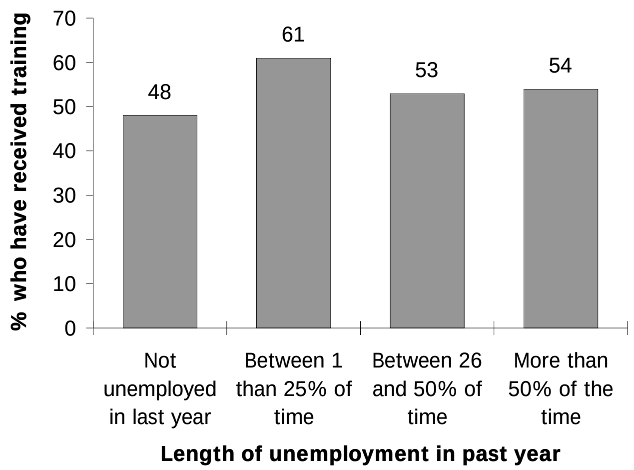
There is little regional variation, with around 50% of the freelancers in most regions having received recent training, and no region being more than ten percentage points above or below the average.

Figure 16: Training by Region



People who have been unemployed in the past year are more likely to have received training, particularly those who have been unemployed for less than three months.

Figure 17: Training by Unemployment Levels



Previous qualification levels are also important in whether people receive training. **Figure 18** shows that the higher a freelancer's highest qualification the more likely it is that they will have received training in the past year.

There are also considerable differences between sectors, as shown in **Figure 19**. Three quarters of freelancers working in the new media sector had received training recently, and two thirds of those in both animation and broadcast radio. Those in feature film, commercials and facilities are least likely to have received training in the past year.

Figure 18: Training by Highest Qualification

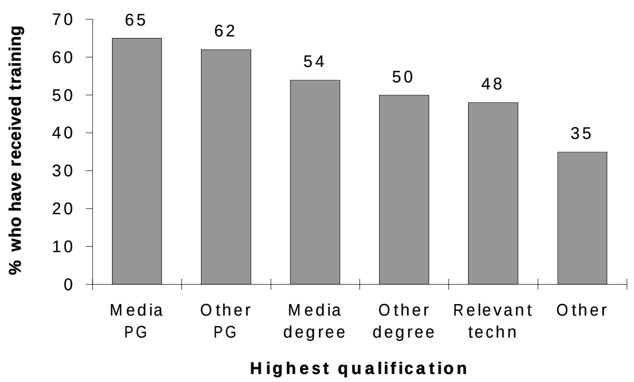
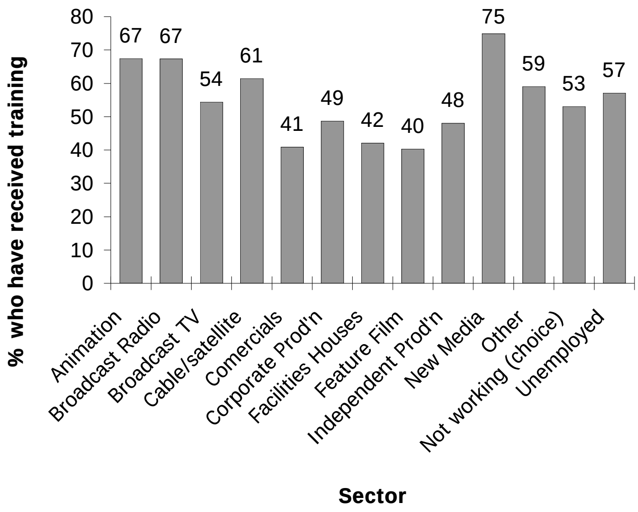
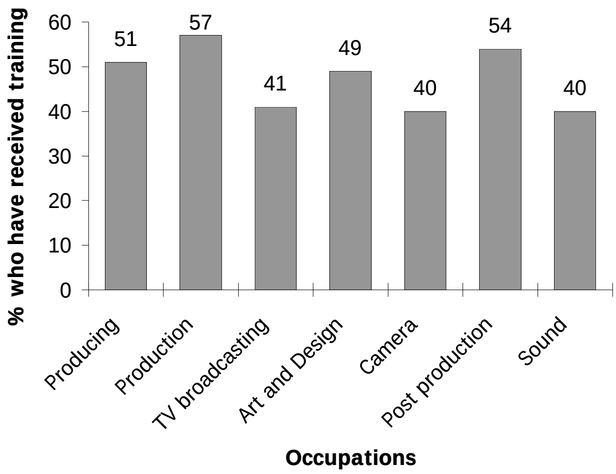


Figure 19: Training by Sector



Amongst the larger groups, production freelancers are most likely to have received training and camera and sound freelancers are least likely (see **Figure 20**).

Figure 20: Training by Occupation



The paradox of flexibility

Evolving work patterns and employer expectations are creating a particular problem for development of skills in the audiovisual industries, as highlighted by the AVITG report. It points out that flexibility of employment patterns, embodied in freelance working does not sit easily with the flexibility required in terms of ability – eg multiskilling and adaptability:

'In one important sense these two dimensions of flexibility are incompatible. Functional flexibility demands ever-increasing levels of skill and versatility (thereby increasing training needs), whereas flexibility of employment is creating a culture of diffusion of responsibility for training, particularly with the increase in freelance working.'

Unfortunately, the problem is not only one of funding. The flexible working practices demanded of freelancers also make it very difficult for them to plan their own training, even if they are willing to fund it themselves:

'Because of non-regular working hours, I find it necessary normally to miss some 50% of potential training appointments. I can work on my own to keep up but very often need to have a more personal mop-up session on a one-to-one basis. That final session or informal tutoring is impossible to arrange normally' (54 year old male production manager)

'I have had four weeks off work – job hopefully in a couple of weeks. How can you ever plan to train when your life can change at the drop of a hat – a commercial may come in or something. It's only in hindsight that you know you had spare time.' (35 year old female assistant art director)

'Can't take time off when working. Can't afford courses when not working! Vicious circle' (37 year old male producer)

'Freelancers have been described as the ultimate flexible workforce. We need training resources to sustain this' (41 year old male sound engineer)

The Training Experience

Moving on from who was receiving training, to the training itself, this section outlines the length, subjects, methods, providers and funding arrangements for training.

Among those who had had one or more training days in the last year, the range was very wide, with a few freelancers recording 300 days and 4% recording that they had spent 100 or more. It is clear that some respondents referred to training which was received in short intense courses (one or two days) while others included every day which involved some structured self-tuition.

Figure 21 shows the number of days that trained freelancers spent in training in the past year. Almost half of those who had received training received five or less days, one in five received between six and ten days, one ten received between 20 and 30 days training and one in ten more than 30 days.

Figure 21: Number of Days Spent Training in Past Year

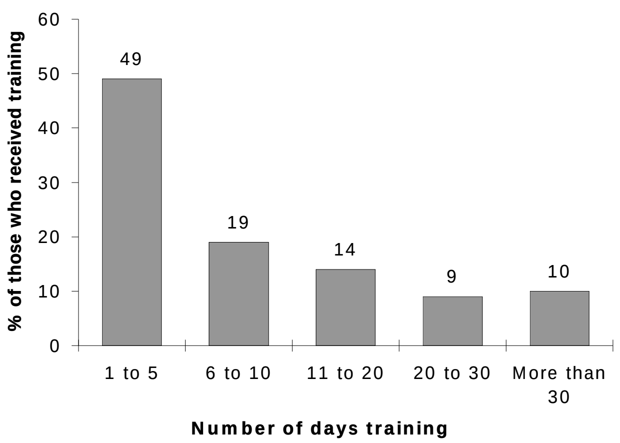


Figure 22 shows the subject areas that freelancers covered in their training, grouped into general themes. The most common subject area was post-production (20%), followed by new media/IT (17%) and camera and lighting (14%).

The most common method of delivery of training was via a formal course, accounting for over two-fifths of delivery. Around a quarter of training was delivered on the job and a similar proportion through structured self-tuition.

Figure 22: General Subject Areas of Training Undertaken in Past Year

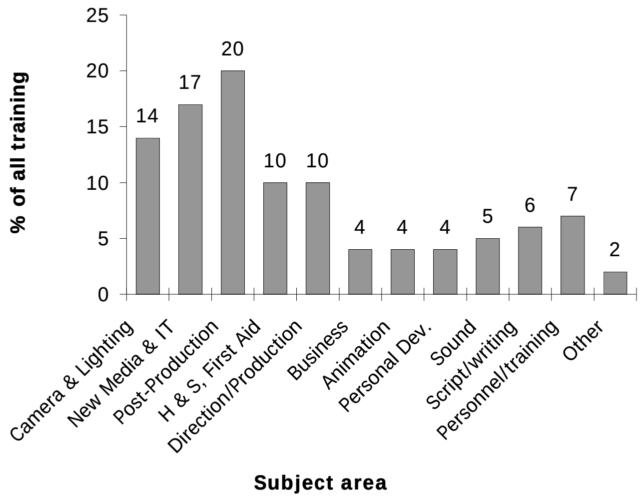
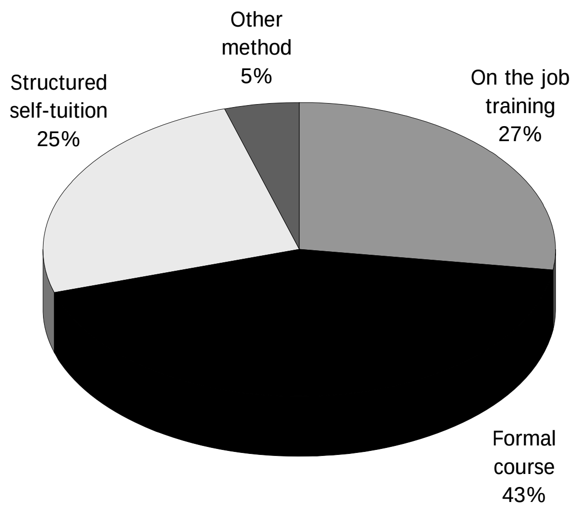


Figure 23: Method of training delivery (% of methods)



Training was provided by public educational bodies, employers, private companies, and by the freelancers themselves in relatively equal proportions.

Over half of trainees (55%) attended at least some training which had no fees, and 42% of all training mentioned was free. Where fees were payable they were most often paid by the freelancer themselves or by their family.

Figure 24: Providers of Training

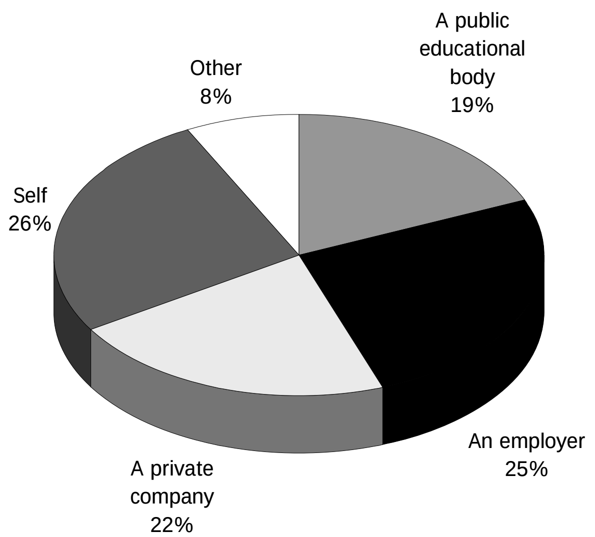
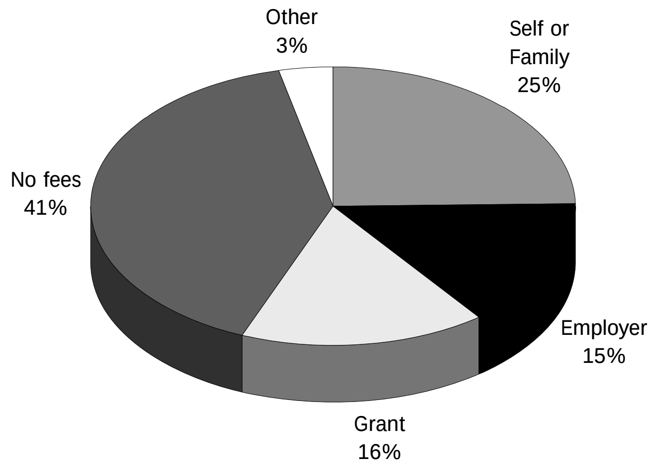


Figure 25: Who Pays the Fees?



Very few freelancers (about 6%) had been on a training attachment or additional 'on the job' training in the past year.

Who Pays?

Although the majority of respondents did not cite employers' unwillingness to pay as a barrier to receiving training, the range of comments submitted pointing out the difference between employer attitudes towards employees and freelancers indicates that some may simply have given up on employers contributing and thus have no such expectation. As illustrated by Figure 23, only 15% of freelancers had received training funded by employers in the past year:

'Employers seem happy to send staff on courses (to a degree) but do not seem to see value in either sending their 'regular' freelancers or involving them in in-house training. Freelancers are expected to have the skills presumably gained at their own cost' (41 year old male senior video editor)

'The employer is not always interested in investing time and money in training freelance staff who will leave at the end of their contract' (32 year old male 2nd assistant director)

'The company that is my main income payer is not at all interested in training freelance staff. Working with them for five year, they have not invested £1 in training freelancers for new technologies. Perhaps Skillset should target companies' (41 year old female video editor)

'Very important to maintain Skillset subsidies for freelancers as employers won't pay.' (37 year old male editor)

'Few employers I've met want to invest in evolving your skills as a freelance and it's too expensive for many individuals on their own' (35 year old male director)

'Freelancers are never invested in and I've been told as such by a few employers.' (25 year old female researcher)

The burden on freelancers to fund their own training is compounded by the loss of earnings incurred by having to take time off work for training:

'Freelancers are in a doubly worse situation than staff as not only do they pay the fees themselves but also earn no money on the days they attend the courses.' (37 year old male video editor)

'High cost of courses coupled with loss of earnings' (49 year old female producer/director)

'It is very difficult to take time away from paid work AND pay for training courses' (49 year old male producer)

Training Needs

69% of all freelancers declared at the time of the survey that they had specific training needs. This is an increase from 62% in 1993.

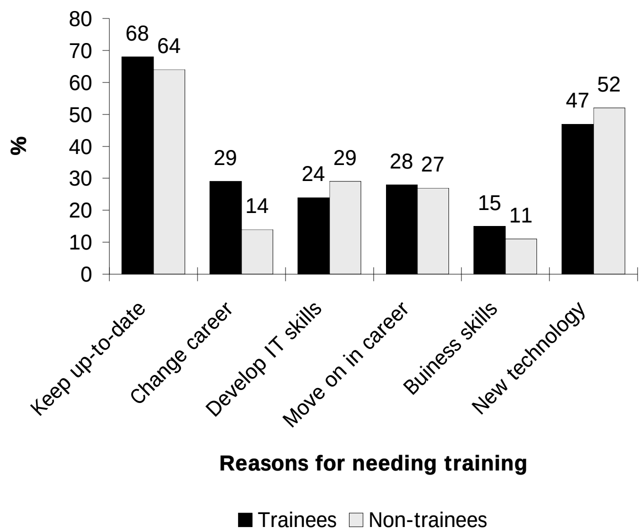
73% of 'trainees' (ie. those who said they had received training in the past year) said they had specific training needs, compared with 64% of 'non-trainees'.

The most common reason for needing training, quoted by around two thirds, is to 'keep up to date'.

There is considerably less emphasis now on IT/computer skills than in 1993, but a new category of 'new technology skills' has been added, which was cited by nearly half those who had training needs.

The development of business skills has also become less important as a reason for taking up training, falling from 27% in 1993 to 13% in 2000.

Figure 26: Reasons for Needing Training by whether Any Training in Previous Year



There was little difference between 'trainees' and 'non-trainees' in the reasons given for needing training. One reason however, does separate the groups – career change. 29% of 'trainees' listed this as a reason for needing training, but only 14% of 'non-trainees'. This may give some insight into the profiles of those who had and had not received training, with the former perhaps more aware or considerate of planning their careers, and thus more effective in having secured training.

The subject areas in which respondents indicated that they wanted training were numerous and wide ranging.

Areas mentioned by more than 5% of respondents were:

- Camera
- Video
- Web design
- Post-production
- New Media skills

The particular areas in which 'non-trainees' were mainly interested in receiving training were:

- Directing
- Post-production
- Video

Demand Areas for Training

Lack of suitable courses was cited as a barrier by over half of those who had tried to obtain some – but in which particular areas is the supply of training failing to meet demand?

A range of specific areas within camera occupations were included in comments supplied:

'Desperate need for training camera department on film, not just video. This is still the pinnacle of the industry and we are losing our highly skilled technicians' (31 year old male focus puller)

'Training in the setting up high digital video cameras is vital (Sony DVW 790), in book form would be ideal' (35 year old male cameraman)

'Affordable workshops helping you to reach the next career level in camera work would be useful' (33 year old male focus puller)

'Shortage of suitable 'short courses' for camera people required to multi-skill – ie which cover camera and lighting and sound for interviews or similar simple corporate shooting requirements' (43 year old female camerawoman)

……. a lack of suitable courses for riggers……

'I feel that Skillset does not provide enough help for riggers, which is a specialist trade' (49 year old male advanced rigger)

'I have found to my dismay that any course in special effects is centred on pyrotechnics. More relevant to myself and others in the industry would be rigging and construction courses' (45 year old male mechanical engineer)

…..and documentary makers…….

'Skillset could help a lot by having single camera location directing courses. You only run DV courses and directing for drama. This does not help those on factual/lifestyle programmes' (34 year old female director)

'I did take part in Screenworks at Glasgow Media Access Centre where I directed a documentary short, but where do I go from here – most of the other schemes available only cater for people interested in directing drama'. (35 year old female TV researcher)

A specific lack of courses to help manage the transition to new media was also a theme:

'I have a background in stills photography but am now working more in new media both as a 'maker' and a producer – while there are many skills one can pick up by self-tuition, I would like to have training in the use of sound and video – recording and editing, but it is hard to get subsidised training in an area that's related but not one's normal area of freelance activity. This seems an area that should be looked at quite closely in the light of the expanding new media and interactive TV sectors' (49 year old female project co-ordinator)

'As a line producer, I am unaware of relevant training which may help me develop skills (ie production managing new media)' (31 year old female production manager)

A particular issue to emerge with training in editing was the lack of suitable opportunities to put into practice skills developed in an appropriate context:

'It is not enough to have a course in new technology, ie AVID editing. What is needed is an opportunity to get up to speed on the equipment without a client wanting the finished product quickly' (45 year old male videotape editor)

'Doing a course such as AVID is expensive and causes problems with loss of earnings but more importantly it is then very difficult to use those skills as a freelancer and one four day course on AVID does not an AVID editor make. Being able to practice skills learned is essential and very difficult to obtain.' (46 year old female videotape editor)

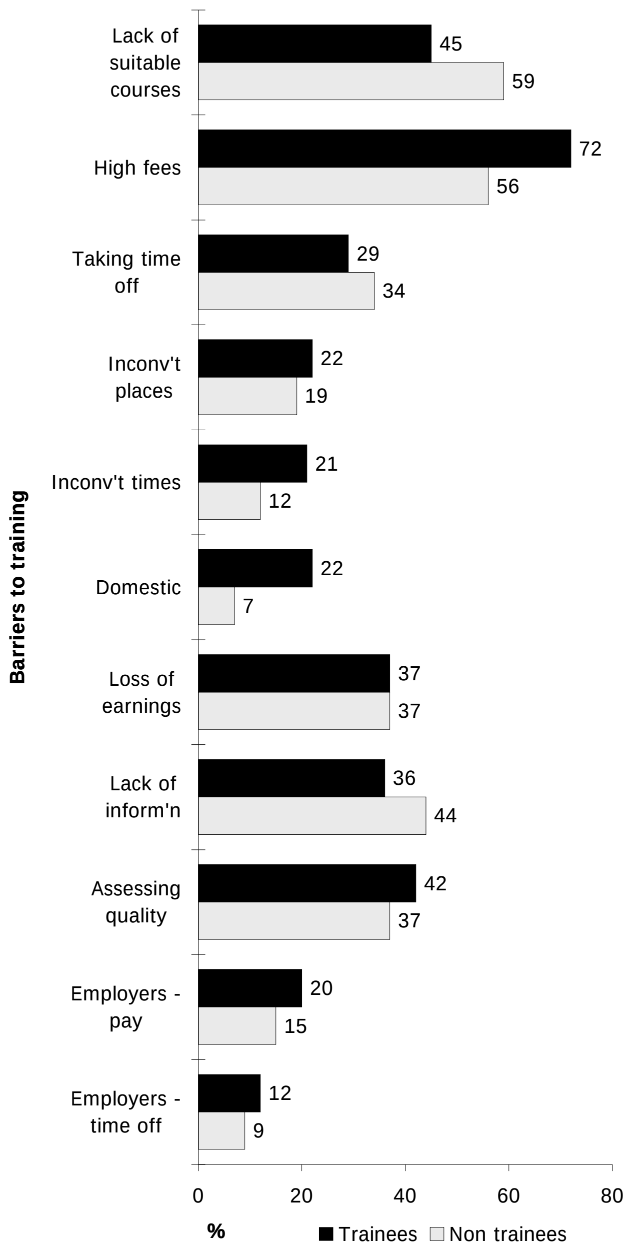
Access to Training

As previously mentioned, non-trainees are only slightly less likely to say that they had specific training needs, so what are the barriers to engaging in training?

Two thirds (66%) of those with specific training needs had tried to obtain training or training materials. Of these, three fifths (60%) reported that the fees were too high and over half indicated a lack of suitable training.

Respondents also indicated experiencing lack of information on courses and difficulty assessing the quality of a course prior to attending. Other common barriers were difficulty taking time off work and loss of earnings.

Figure 27: Barriers to training

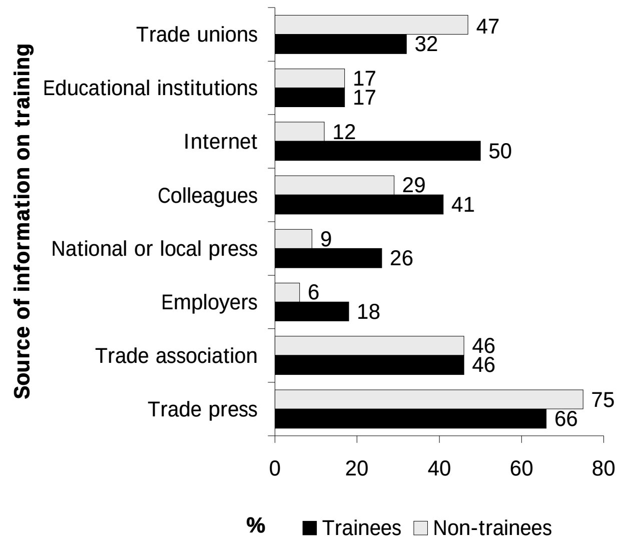


46% of 'non trainees' who had specific learning needs had not tried to obtain training to address those learning needs while the remainder of them had tried to obtain training but were dissuaded by some barrier.

Reasons most often quoted by 'non-trainees' tend to be insurmountable hurdles – most obviously a lack of suitable courses, whereas higher proportions of those who had received training indicated potentially 'negotiable' barriers such as high fees. Of significance, the percentage of those reporting a lack of suitable courses has more than doubled since 1993, from 23% to 50%, while many other barriers seem less of an issue seven years on.

The majority of freelancers (70%) look for training opportunities in the trade press. Trade unions, trade associations and work colleagues were other important sources of information. Over 30% of all freelancers already look on the internet for information on training. It should be noted that the distribution process for the survey (ie inclusion in 'Broadcast' magazine and the BECTU journal may have substantially influenced the response to this question.

Figure 28: Source of information on training



Those who had received training in the previous twelve months use a wider range of sources than those who had not (an average of three per head compared with an average of two per head). Of those who had received training, exactly half used the internet compared with just 12% of those who had not; 26% used the national or local press compared with 9% of those who had had no training, and 18% used employers compared with 6% of the 'non-trainees'.

Some Suggestions for Widening Access to Training

'I think the TV industry needs a formal mentor scheme of some sort, as exists in almost every other industry. It would go some way to combating the isolation of freelance work.' (36 year old male director)

'Companies like AVID or Lightworks would benefit by keeping editors up to date on technology for free because we would promote their products by being competent in them' (36 year old female non-linear editor)

'A register of newcomers such as myself who could possibly be called upon by experienced and established professionals would be useful' (36 year old female make-up artist)

'Trade shows are an excellent free source. Top working companies (eg Framestore, The Mill), could have sponsored open days'. (32 year old male video assistant)

'There seems to be a general confusion among production companies, freelancers and the tax office on the freelance status of jobs in film and TV. The system is confusing and not helpful as freelancers change position from job to job, especially when starting out.' (27 year old female art director)

'I would like to see a method of information about up and coming productions where employment opportunities are advertised' (26 year old male scenic artist)

'I feel there is a need for greater publicity of Skillset training opportunities for the freelance market' (43 year old male cameraman)

'I've spent what earnings I have to invest in skills. How about a loan scheme? Or a funding scheme linked to employers – rather like a bursary?' (25 year old female researcher)

APPENDIX A: BACKGROUND ON THE SIZE AND SHAPE OF THE FREELANCE WORKFORCE – THE 2000 CENSUS

The 2000 census identified a total of around 41,000 freelancers working in the audiovisual industries on 19 May 2000, excluding those in film production. From the freelance survey, a further 3,000 are estimated to be working in film production on a given day, making a total of around 44,000. **Figure A1** shows the numbers working in each sector, and two percentage figures: the proportion of the workforce that is freelance in each sector, and the proportion of all freelancers who work in each sector.

Figure A1: Employment by sector

Sector	Numb er	% of freelance rs in the industry	% of sector which is freelance
Animation	340	1	26
Broadcast Radio	4,940	11	18
Broadcast TV	4,270	10	22
Cable/Satellite	1,090	2	18
Commercials	8,720	20	82
Corporate Production	1,840	4	52
Facilities Houses	7,110	16	55
Feature Films	2,880	7	N/A
Independent Production	5,840	13	51
New Media	6,110	14	31
Other (transmission, teaching)	710	2	27
Total	44,000	100	35

Source: Skillset Census 2000 and Freelance Survey 2000 (figures do not add up exactly to the Total, due to rounding)

The highest numbers of freelancers in absolute terms are in the commercials, facilities houses, and new media sectors, which between them account for half of the whole freelance population. In terms of representation in each sector's workforce, freelancers make up over four fifths of the workforce in the commercials sector, and over half that in facilities, corporate production and independent production.

Figure A2 shows the numbers of freelancers in each occupational group, and the percentage of that group who are freelance rather than on permanent contracts. There are very considerable differences between occupations in the proportions who are freelance. At one extreme, some occupational groups comprise fewer than 10% freelancers. These include television broadcasting, programme distribution, transmission and broadcast engineering. At the other extreme, nearly all employment in some occupations is on a freelance basis - over 70% in camera, costume/wardrobe, lighting, and make up and hairdressing.

Although some of the categories of sector and occupational group are synonymous, each of the sectors listed in **Figure A1** may employ people in any of the occupations listed in **Figure A2**.

Figure A2: Employment by occupation (excluding feature film)

Occupational group	Number	% of freelancers in the industry	% of occupation which is freelance
Producing	3,610	9	36
Production	9,260	21	57
Journalism and Sport	2,010	5	17
Radio Broadcasting	2,950	7	31
Television Broadcasting	240	1	8
Programme Distribution	10	0	4
Transmission	40	0	4
Broadcast Engineering	260	1	10
Studio Operations	210	0	12
New Media	3,540	8	30
Animation	250	1	41
Art and Design	2,050	5	61
Camera	2,430	6	70
Costume/Wardrobe	870	2	93
Library/Archives	170	0	12
Lighting	7,660	17	84
Make Up and Hairdressing	850	2	88
Post-Production	1,600	4	27
Sound	1,540	4	65
Special Physical Effects	230	0	10
Runners	1,580	4	69
Other	2,430	6	10
Total	41,000	100	35

Source: Skillset Census 2000 (Figures do not add up exactly to the Total due to rounding)

APPENDIX B: THE QUESTIONNAIRE

(To be attached)