

The Sector Skills Council for the Audio Visual Industries

skillset



Employment Census 2002:

The results of the Third Census of the Audio Visual Industries



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FOR BUSINESS



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Part One Executive Summary

- The Census was distributed to every company for which records were available, for completion on 26 June 2002.
- The third Census achieved its highest response to date, with a total of 844 companies responding. Complete coverage was retained in the broadcast TV and cinema exhibition sectors, with substantial increases in the response from the interactive media and facilities sectors. The response remained relatively low in commercials and decreased in the corporate production sector.

Employment Trends

- The 2002 Census estimates a total of around 150,000 people to have been working on Census Day, around a quarter of whom were freelance. This figure excludes the significant number of freelancers who were not working on that particular day, but are part of the skilled labour force available to the industry. The usage of freelancers varies greatly by sector, ranging from none in cinema exhibition to virtually the whole workforce in film production.
- Employment levels have remained relatively stable in broadcast TV (around 25,000), broadcast radio (around 21,000), and independent production (around 13,000) between 2000-2002. It should be noted however, that a number of major employers in these areas have announced considerable job cuts since Census Day (26 June).
- The proportion of freelancers in radio increased between 2001 and 2002.
- Employment decreased slightly in cable and satellite TV between 2001 and 2002.
- Previous versions of the census counted people working in 'facilities' but did not break them down into sub-sectors. In 2002, figures are available separately for studios/equipment hire (around 3,300), post-production (around 4,600) and effects (around 300). Overall employment in this sector as a whole decreased considerably between 2000 and 2001, a trend which has continued in 2002 but to a lesser extent.
- The commercials sector, which is predominantly freelance, has seen relative stability in terms of the small number of people permanently employed, but major fluctuations in use of freelancers. Following a major drop between 2000 and 2001, the number used in 2002 has increased, but not to anywhere near the level in 2000.
- Only around 1,500 people were recorded as working on film productions on Census Day, reflecting the small number of films actually in production at that point. The snapshot methodology used in the Census is less appropriate for film production than other sectors, and these figures should accordingly be treated with caution (Skillset and the Film Council are currently working together to develop a more appropriate and effective methodology). Looking at the Office for National Statistics estimate of employment in motion picture and video production from Summer 2002 (around 33,000), and deducting sectors within that wider group such as commercials and corporate video (using 2002 Census data), the implication is of up to 10,000 people working in film production when production levels demand.
- Employment levels in corporate production fell considerably between 2001 and 2002 from 3,700 to 3,200.

- Figures are available for the first time on sub-sectors within the interactive media industry, with around 15,200 working in web design companies, 8,000 in computer games (development and production), and around 23,000 in CD Rom production and other types of interactive media. The apparent major increase in the size of this industry between 2000 and 2001 was due to a widening of the scope of the survey rather than a real rise.

Representation of Women

- Overall, there has been no change in the percentage representation of women employees in the industry since 2001, remaining at 38%. However, the proportion of female freelancers has increased considerably from 34% to 42%. This might be partly attributable to the increasing scope of the survey and inclusion of some areas where women are better represented, but it may also reflect a real increase in the proportions of women entering the industry in freelance roles, being a fairly consistent pattern across most sectors.
- The proportion of women working in each sector varies greatly, ranging from around a quarter of employees in interactive media and facilities to around a half in broadcast TV and radio. Representation of women is higher in public service TV (54%) than in commercial TV (45%).
- There are also major differences in the proportions of women working in different occupational groups, down at only around one in ten in camera, lighting, sound, special effects and broadcast engineering. There are few occupational groups where women comprise the majority of the workforce. They include make up and hairdressing (93%), costume and wardrobe (82%) and production (55%).

Representation of Ethnic Minorities

- Between 2000-2002, there has been a substantial increase in the representation of ethnic minorities in the industry, rising from 5.4% to 8.6% among employees, and from 6.4% to 7.3% among freelancers. The increase is most marked in broadcast TV and radio, where for example, levels among employees have increased from 6.3% to 7.9% and 6.9% to 7.8% over two years.
- Closer inspection of the situation in the TV industry reveals major differences between the public and commercial sectors, with 9.7% of the former and 3.8% of the latter comprising ethnic minorities. This may reflect the demographics of the geographical areas in which organisations are based. Although these figures still compare unfavourably with the rest of the economy (11% of Great Britain's workforce are ethnic minorities, and 38% of London's), they represent a major shift in a positive direction.
- Developments in some other sectors undermine these advances in broadcast TV and radio. Specifically, the sectors which have been hit hardest over the past two years, where downsizing has resulted, have witnessed major drops in the proportions of ethnic minorities: in commercials for example, between 2001 – 2002, the percentage of ethnic minorities decreased from 4.7% of employees to 0.3%, and from 6.9% of freelancers to 0%, while in facilities, the percentage representation among employees fell from 6.9% to 4.5%.

Representation of Disabled People

- Overall, the proportion of disabled employees in the industry remains unchanged since 2001, at 0.8%. However, representation among freelancers working on the day increased from 0.3% to 0.8%.

Part Two Introduction

Background

One of the first initiatives to stem from the Audio-Visual Industries Training Group (AVITG) in 2000 was the establishment of a system for regular, yearly monitoring of the size and shape of the audio-visual industries in terms of the people employed and freelancers used. 19 May 2000 thus saw the industry's first ever employment census, with every company in the UK industry targeted. Following the success of the first exercise, a key recommendation of the AVITG was that it should become formally recognised as an annual event in the industry calendar to allow for trends and developments to be closely monitored.

This report presents the findings of the third Skillset Census. Since 2000, a number of advances have been made in the design, distribution and methodology, with new sectors targeted and separate forms developed for some sectors to ease completion. The result has been a considerable increase in coverage and response since 2000.

Companies were asked to indicate how many people they employed and how many freelancers they used in particular occupational groups and job roles on 26 June 2002. A copy of the main census form is enclosed in the appendix.

Coverage and Response

The census was distributed during early-mid June. For the first time, in 2002 a central company database was set up at Skillset, combining all available sources, including trade association membership databases, screen agency records and published directories. A total of 7,000 forms were distributed through this means. In addition, a copy of the form was inserted in copies of Broadcast and Televisual magazines in the week prior to Census Day, in an attempt to target companies not belonging to trade associations, and not in published directories. The total response was 844. It is difficult, or in some cases impossible to calculate exact response rates in each sector due for example to a lack of reliable and up-to-date information on numbers of companies in some sectors, particularly in interactive media. However, the number of responses received in each sector is shown in **Figure 1**.

The considerable variations in the response and coverage of each sector reflect a number of factors including:

- The degree to which sectors are represented by trade or other associations and the availability of membership databases from these organizations.
- The level of support of any such organisations in publicising, promoting and 'owning' the census.
- The capacity of organisations within different sectors to complete the census (for example, as a function of company size and culture).
- The volume of work entailed by organisations to complete the census (also partly a function of company size).

Figure 1 Response and Estimated Coverage by Sector

Sector	Response
Animation	17
Broadcast Radio	102
Broadcast Television	28
Cable and Satellite	11
Commercials	17
Corporate Production	25
Facilities (Studio/Equipment Hire/Post-production/Special Effects)	63
Independent Production	231
Interactive Media (on-line/web design/computer games/CD Rom and other)	130
Films in Production	4
Cinema Exhibition	159
Other	57
Total	844

The estimated percentage coverage of each sector has been used to generate estimates of the entire workforce in each sector, and in the industry as a whole, from the responses received, through the calculation of 'weighting factors'. For example, if the estimated coverage of the response for one sector was 50% of the workforce, then the employment figures for that sector would be doubled to generate estimates for the whole sector. The same weighting methodology has been used in all three years of the Census to date to allow for valid comparisons to be made over time. In all cases, figures have been rounded to the nearest 100.

It should be noted that the reliability of the estimated coverage varies for each sector, largely for the reasons listed above. In the majority of sectors, estimates can be considered accurate to within calculable margins of error. However, the coverage, and therefore the estimates for the interactive media sector in particular should be treated with caution due to the lack of up-to-date information on the number and complexion of companies within this fast-changing sector.

Finally, the nature of film production means that the 'snapshot' methodology of hitting the industry on one day does not provide a reliable estimate of the total labour force involved in making films, because of the extent to which production levels fluctuate over time (although it does provide a useful broad indication of employment levels when the number of productions taking place on the day is considered in the context of activity levels over the whole year). The census methodology is less problematic in the other sectors of film, which are less freelance-dependent, and where activity levels are more stable.

Analysis and Presentation

The remainder of this report is set out in three main sections as follows:

- Part Three:** Overall Size and Shape of the Industry
- Part Four:** Representation of Women
- Part Five:** Representation of Ethnic Minorities
- Part Six:** Representation of Disabled People
- Part Seven:** Appendix - The Census Questionnaire

Acknowledgments

The census was developed by Skillset's Research Committee. Its membership during the period in which the census was developed and conducted comprised:

Andy Egan, BECTU
Carol Varlaam, independent consultant (Chair)
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Skillset would like to thank all participating companies for continuing to provide a representative picture of employment trends over time in the audio-visual industries.

Further copies of this report may be ordered or downloaded from Skillset's website:
www.skillset.org

Part Three Overall Size and Shape of the Industry

Figure 2 shows the number of people working in each sector of the industry on 26 June 2002. In the whole industry, there was an estimated total of 151,000, of whom around a quarter were freelance. Information on freelance working patterns from other Skillset research¹ suggests that up to around another 50,000 freelancers exist in the workforce but were not working on Census Day, making a total workforce in the region of 200,000. Broadcast television is the largest single sector, employing nearly 25,000 people; however, CD Rom and other interactive media now employs over 23,000 people, with a further 15,200 working in on-line/web design work, and 8,000 in computer games development and production, making a total of over 46,000 in the combined interactive media areas.

Figure 2 Employment in the Industry by Sector (Employees and Freelances)

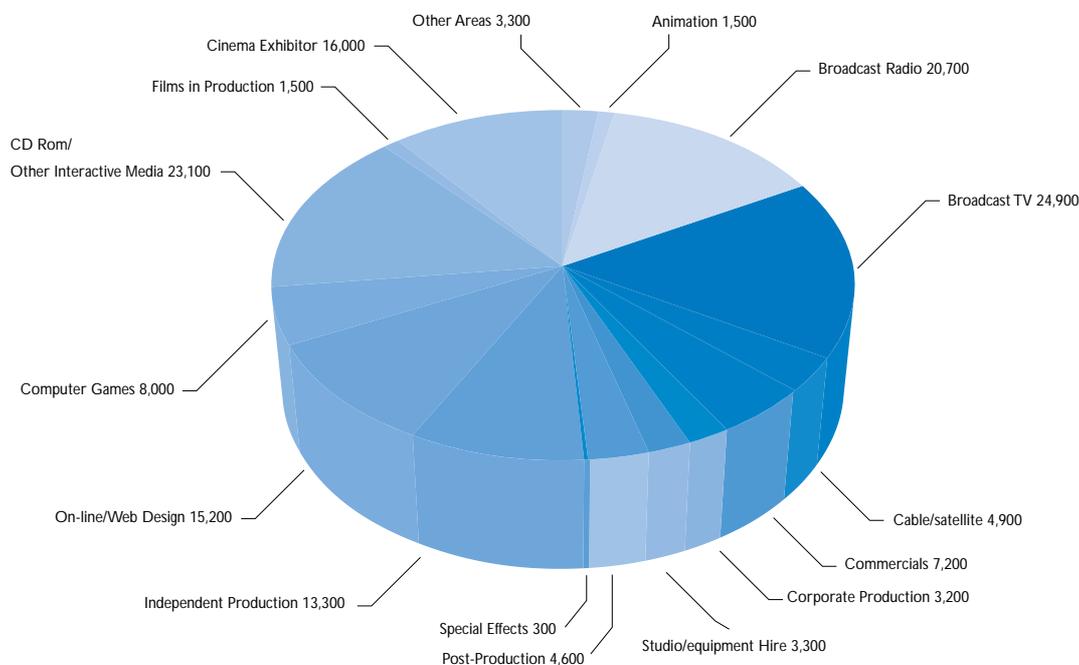


Figure 3 shows the total number of employees and freelances in each occupational group on 26 June 2002. Apart from combined 'other' (generic) occupational groups (ranging from senior management to cleaning and catering staff), the largest key occupational group is interactive media, employing around 25,000 people, followed by producing and production, each employing just over 13,000, and journalism and sport employing 10,000.

Figure 4 illustrates the percentage of the workforce who are freelance in each occupational group. Freelancers make up over half of the workforce in a number of occupational groups, including: make up and hairdressing (91%), costume/wardrobe (80%), camera (65%), lighting (59%), and animation (52%). At the other end of the spectrum, less than 10% of the workforce is freelance in television broadcasting (7%), broadcast engineering (5%), and transmission (1%). The full range of roles and job titles within each occupational group is listed on the census form in the appendix.

Figure 3 Total Numbers of Employees and Freelancers in Each Occupational Group

Occupational Group	Employees	Freelancers	Total
Producing	6,300	6,000	13,300
Production	7,200	6,200	13,400
Journalism and Sport	8,600	1,400	10,000
Radio Broadcasting	2,200	1,900	4,100
Television Broadcasting	4,300	300	4,600
Programme Distribution	300	*	300
Transmission	500	*	500
Broadcast Engineering	2,100	100	2,200
Studio Operations	1,600	600	2,200
Interactive Media	21,800	3,100	24,900
Animation	1,000	1,100	2,100
Art and Design	1,800	1,700	3,500
Camera	900	1,700	2,600
Costume/Wardrobe	200	800	1,000
Library/Archives	1,200	200	1,400
Lighting	700	1,000	1,700
Make Up and Hairdressing	100	1,000	1,100
Post-Production	5,300	1,900	7,200
Sound	700	600	1,300
Special Physical Effects	100	100	200
Runners	700	600	1,300
Cinema Projectionists	1,100	0	1,100
Cinema Box Office /Kiosk/Attendants	11,700	0	11,700
Cinema Cleaners	500	0	500
Cinema Management /Head Office	2,700	0	2,700
Other Occupational Groups	31,900	3,300	35,200
Total	115,000	34,600	150,100²

Figure 5 shows considerable variation in the composition of the workforce by sector. Virtually the entire workforce in film production is freelance, as is the great majority (70%) in commercials, and around a half in independent production (47%). Within the interactive media sector, fewer than one in ten of those working in computer games and CD Rom production/other interactive media are freelance, compared with over a quarter of those in on-line/web design, reflecting considerable differences in employment patterns between the sub-sectors. Around one third of those in broadcast radio and one fifth in broadcast TV were freelance on Census Day, and only 4% of those in cable and satellite.

² Total differs to Figure 2 due to rounding

Figure 4 Percentages of the Workforce Who Are Freelance in Each Occupational Group

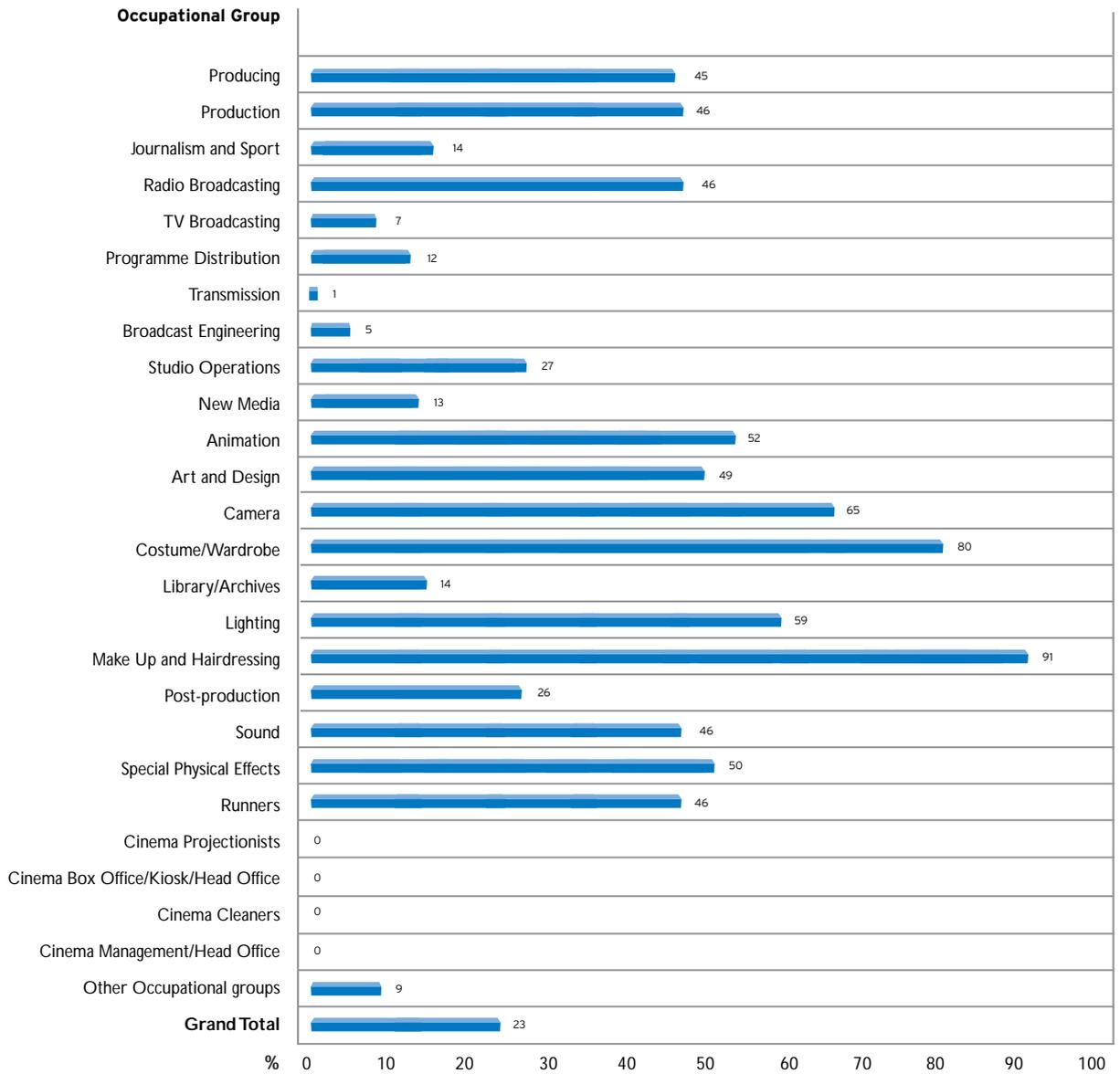


Figure 6 shows the breakdown of the workforce by work base. Just under half the industry works in London (almost entirely in Central and West London) and around one eighth in the South East of England. Less than one fifth works in the other English regions combined.

Figure 5 Percentages of the Workforce Who Are Freelance in Each Sector

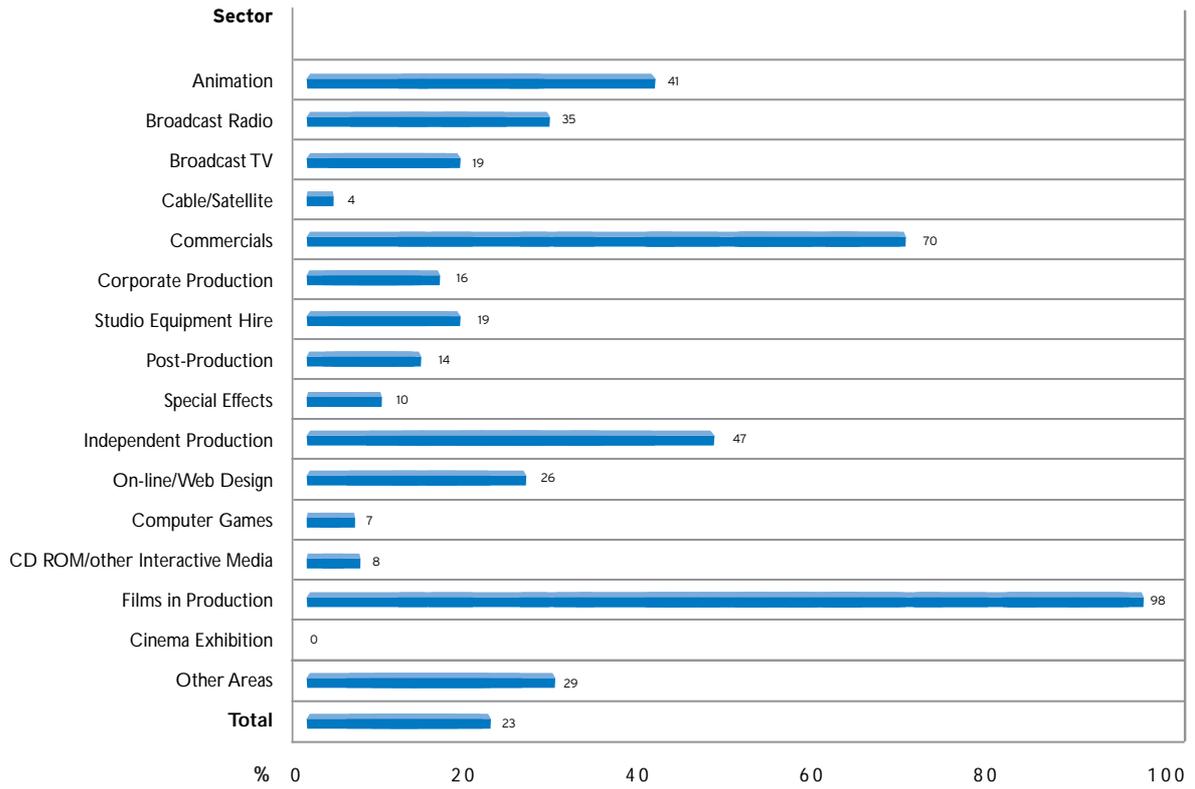
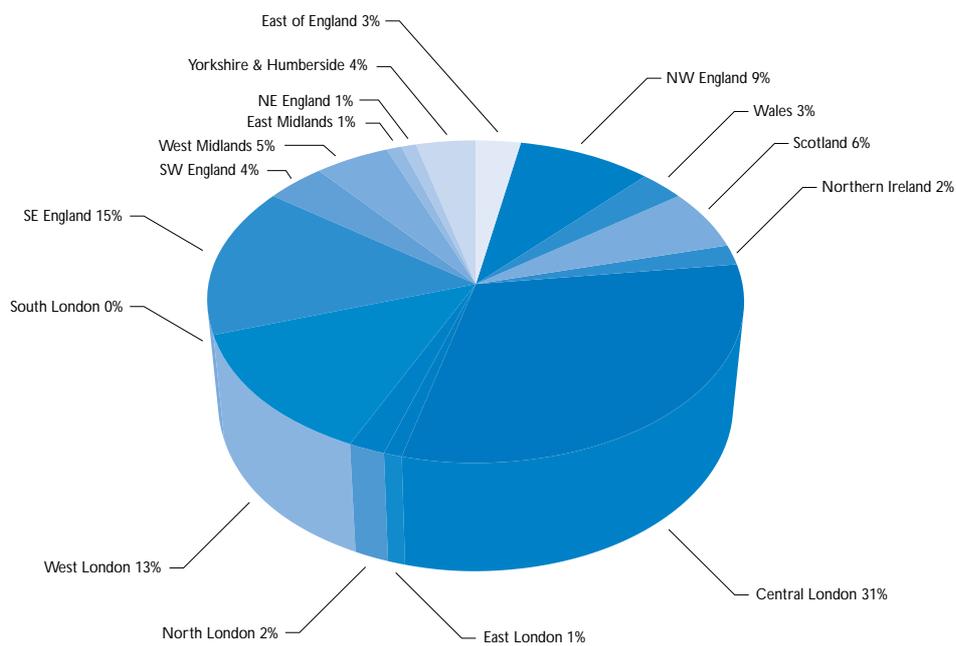


Figure 6 Work Base of the Industry³



³Excludes Cinema Exhibition

Figure 7 shows the totals employed in each sector, and the percentages of freelancers between 2000-2002. Employment levels have remained relatively stable in broadcast TV (around 25,000), broadcast radio (around 21,000), and independent production (around 13,000) between 2000-2002. It should be noted however, that a number of major employers in these areas announced job cuts after Census Day (26 June). The proportion of freelancers in radio increased between 2001 and 2002. Employment decreased slightly in cable and satellite TV between 2001 and 2002.

Previous versions of the census counted people working in 'facilities' but did not break them down into sub-sectors. In 2002, figures are available separately for studios/equipment hire (around 3,300), post-production (around 4,600) and effects (around 300). Overall employment in this sector as a whole decreased considerably between 2000 and 2001, a trend which has continued in 2002 but to a lesser extent.

The commercials sector, which is predominantly freelance, has seen relative stability in terms of the small number of people permanently employed, but major fluctuations in use of freelancers. Following a major drop between 2000 and 2001, the number used in 2002 has increased, but not to anywhere near the level in 2000. Employment levels in corporate production fell considerably between 2001 and 2002 from 3,700 to 3,200.

Figure 7 Totals Employed and Percentages of Freelancers, 2000-2002

	Total Numbers				% Freelance		
	2000	2001	2002	% Change	2000	2001	2002
Animation	1,300	1,600	1,500	8	26	54	41
Broadcast Radio	22,900	20,200	20,700	+2	18	18	35
Broadcast TV	24,100	23,200	24,900	+7	22	23	19
Cable/Satellite	6,100	5,500	4,900	-12	18	4	4
Commercials	10,600	3,200	7,200	+125	82	54	70
Corporate Production	3,600	3,700	3,200	+14	52	42	48
Facilities	13,000	9,000	8,200	-9	55	12	16
(Studio/equipment hire)	n/a	n/a	(3,300)	n/a	n/a	n/a	19
(Post-production)	n/a	n/a	(4,600)	n/a	n/a	n/a	14
(Special Effects)	n/a	n/a	(300)	n/a	n/a	n/a	10
Independent Production	11,600	13,600	13,300	-2	51	49	47
Interactive Media	20,000	42,000	46,200	+10	31	16	14
(On-line)	n/a	n/a	(15,200)	n/a	n/a	n/a	26
(Computer Games)	n/a	n/a	(8,000)	n/a	n/a	n/a	7
(CD Rom and other)	n/a	n/a	(23,100)	n/a	n/a	n/a	8
Films in Production	n/a	1,100	1,500	+44	n/a	98	n/a
Cinema Exhibition	n/a	15,900	16,000	0	n/a	0	0
Other Areas	2,300	2,200	3,300	+50	27	8	29
Total	116,000	141,100	151,000		35	23	23

Part Four Representation of Women

Figure 8 shows the percentages of women in each sector, and the total across the whole industry. On 26 June 2002, women make up nearly two fifths of the industry's workforce (39%). This compares with female representation of 46% of all workers in the UK economy (49% of employees and 27% of freelancers (Labour Market Trends, January 2003).

Women make up less than half the workforce in every sector except broadcast television, where exactly half are women; just under half of those working in broadcast radio are women – 48%. Representation is lowest in studio/equipment hire (14%), films in production (15%) and computer games (16%).

Figure 8 Representation of Women in the Industry in Each Sector

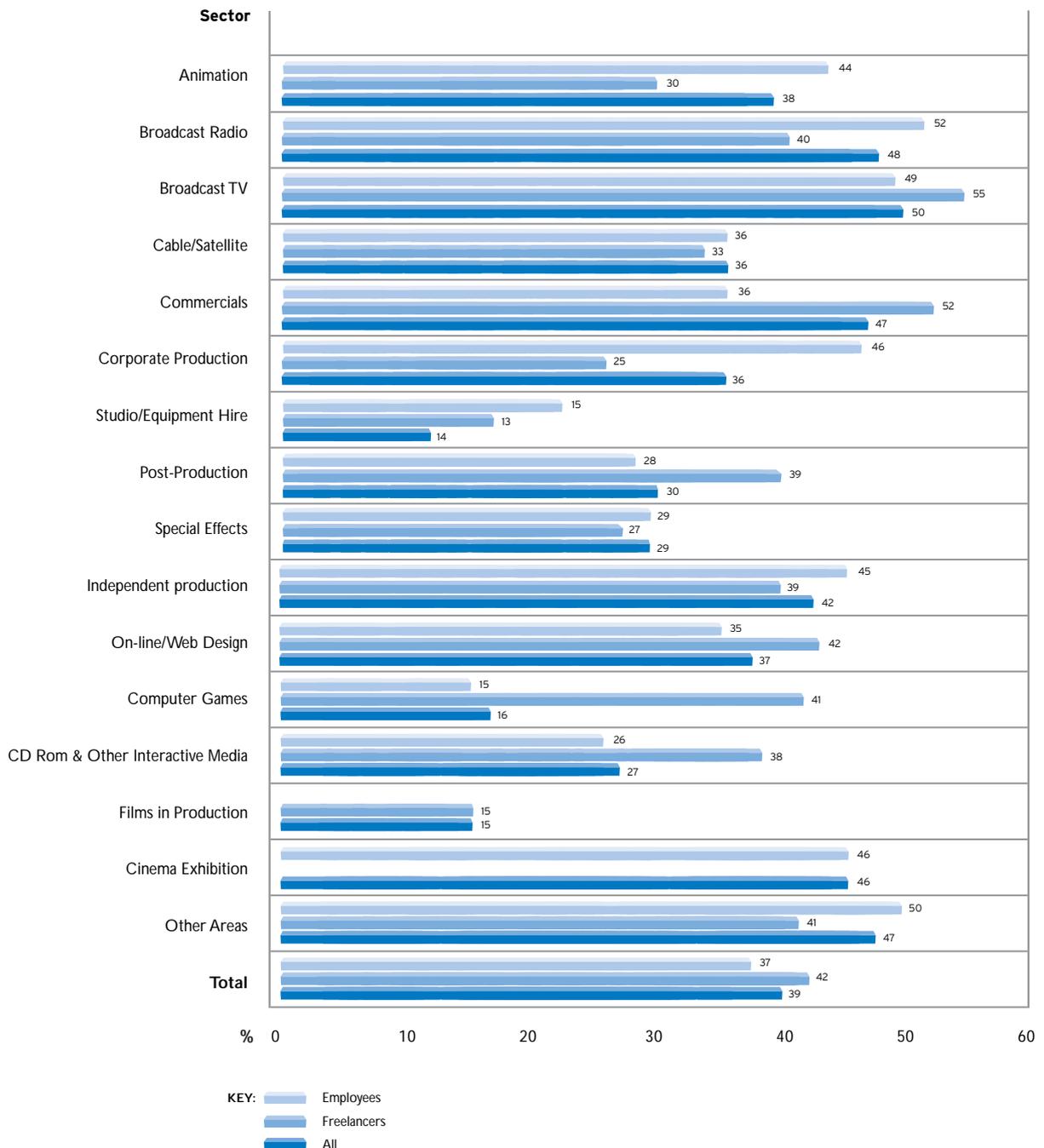


Figure 9 shows the percentage representation of women in each occupational group. Females comprise over half the workforce in only a small number of occupational groups: make-up and hairdressing (93%), costume/wardrobe (82%), cinema cleaners (77%), production and programme distribution (both 55%), TV broadcasting (54%), runners (52%), and library and archives (50%). In all remaining occupational groups, women constitute less than half the labour force. The lowest levels of representation are in lighting (8%), broadcast engineering (9%), cinema projection (9%), camera (10%), and special effects (10%).

Figure 9 Representation of Women in Each Occupational Group

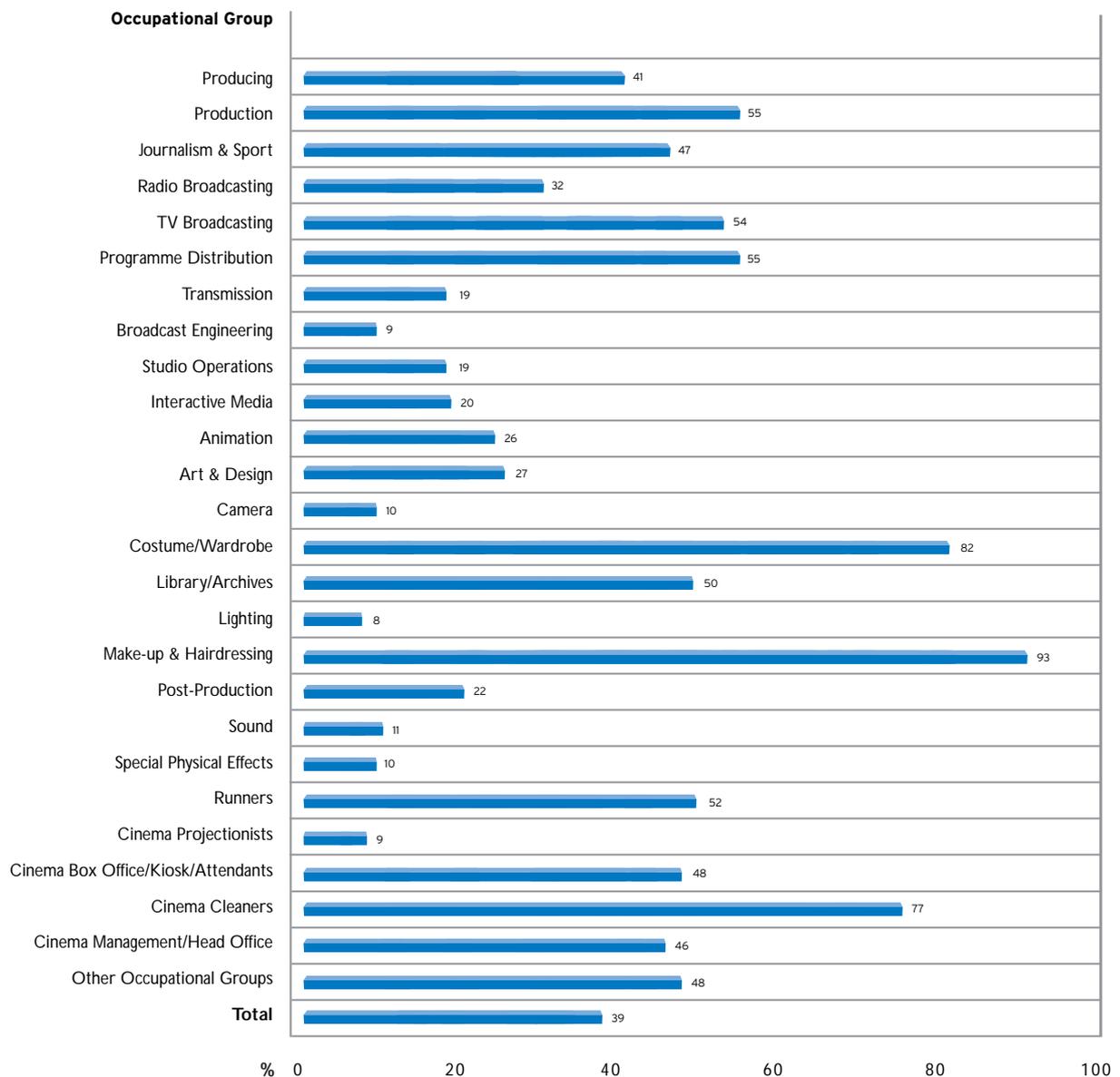


Figure 10 illustrates the percentages of women working in each nation and English region in the industry on Census Day (excluding cinema exhibition), and shows some considerable variations. In the majority of cases, these reflect the composition of the industry in each area. For example, in the South East, where there is a high concentration of interactive media companies which employ fewer than average women (see Figure 8), representation is relatively low, at 32% (compared with the UK average of 39%). Conversely, in areas such as West London and South West England, representation is higher than average at 45% and 44% respectively. These regions contain major concentrations of sectors such as broadcast TV and radio, where there are proportionately more women employed (see Figure 8).

Figure 10 Representation of Women in the Workforce Nationally and Regionally⁴

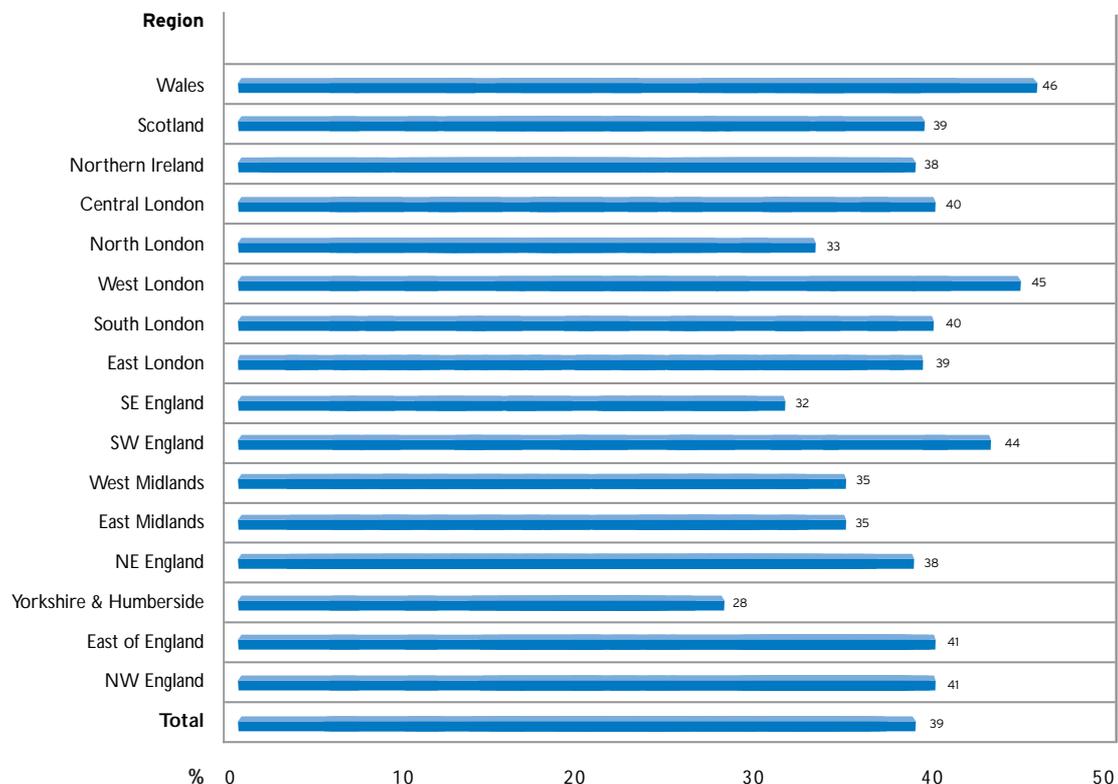


Figure 11 shows the representation of women employees and freelancers in each sector in the three years between 2000-2002. Overall, there has been no change in the percentage representation of women employees in the industry since 2001, remaining at 38%. However, the proportion of female freelancers has increased considerably from 34% to 42%. This might be partly attributable to the increasing scope of the survey and inclusion of some areas where women are better represented, but it may also reflect a real increase in the proportions of women entering the industry in freelance roles, as it is a fairly consistent pattern across most sectors.

⁴Excludes Cinema Exhibition

Figure 11 Percentages of Women Employees and Freelancers in Each Sector, 2000-2002

	Employees			Freelancers		
	2000 %	2001 %	2002 %	2000 %	2001 %	2002 %
Animation	41	47	44	32	32	30
Broadcast Radio	43	44	51	33	26	40
Broadcast TV	48	48	49	53	44	55
Cable/Satellite	41	40	36	24	43	33
Commercials	28	41	36	9	34	52
Corporate Production	30	34	46	27	22	25
Facilities	23	24	23	7	14	26
(Studio/equipment hire)	n/a	n/a	(15)	n/a	n/a	(13)
(Post-production)	n/a	n/a	(28)	n/a	n/a	(39)
(Special Effects)	n/a	n/a	(29)	n/a	n/a	(27)
Independent production	47	44	45	41	44	39
Interactive Media	36	35	26	30	29	41
(On-line)	n/a	n/a	(35)	n/a	n/a	(42)
(Computer Games)	n/a	n/a	(15)	n/a	n/a	(41)
(CD Rom and other)	n/a	n/a	(26)	n/a	n/a	(38)
Films in Production	n/a	n/a	n/a	n/a	n/a	15
Cinema Exhibition	n/a	43	46	n/a	n/a	n/a
Other Areas	46	42	49	26	28	41
Total	41	38	38	26	34	42

Part Five Representation of Ethnic Minorities

Figure 12 illustrates the percentage employment of ethnic minorities in the industry as a whole and in each sector. In total, 8.2% of the industry are ethnic minorities – 8.6% of employees and 7.4% of freelancers. The proportion of ethnic minorities is highest in cinema exhibition (16%), cable and satellite (16%), and on-line/web design (11%). Broadcast television and broadcast radio employ around 8% ethnic minorities each. Representation is lowest in the commercials sector (0.1%), and films in production (1%), with levels of around 3-4% in animation, corporate production, post-production, independent production and computer games. The latter shows a very different profile to the rest of the interactive media sector, wherein 10% or more of the workforce are ethnic minorities.

Figure 12 Percentages of Ethnic Minorities in the Industry in Each Sector

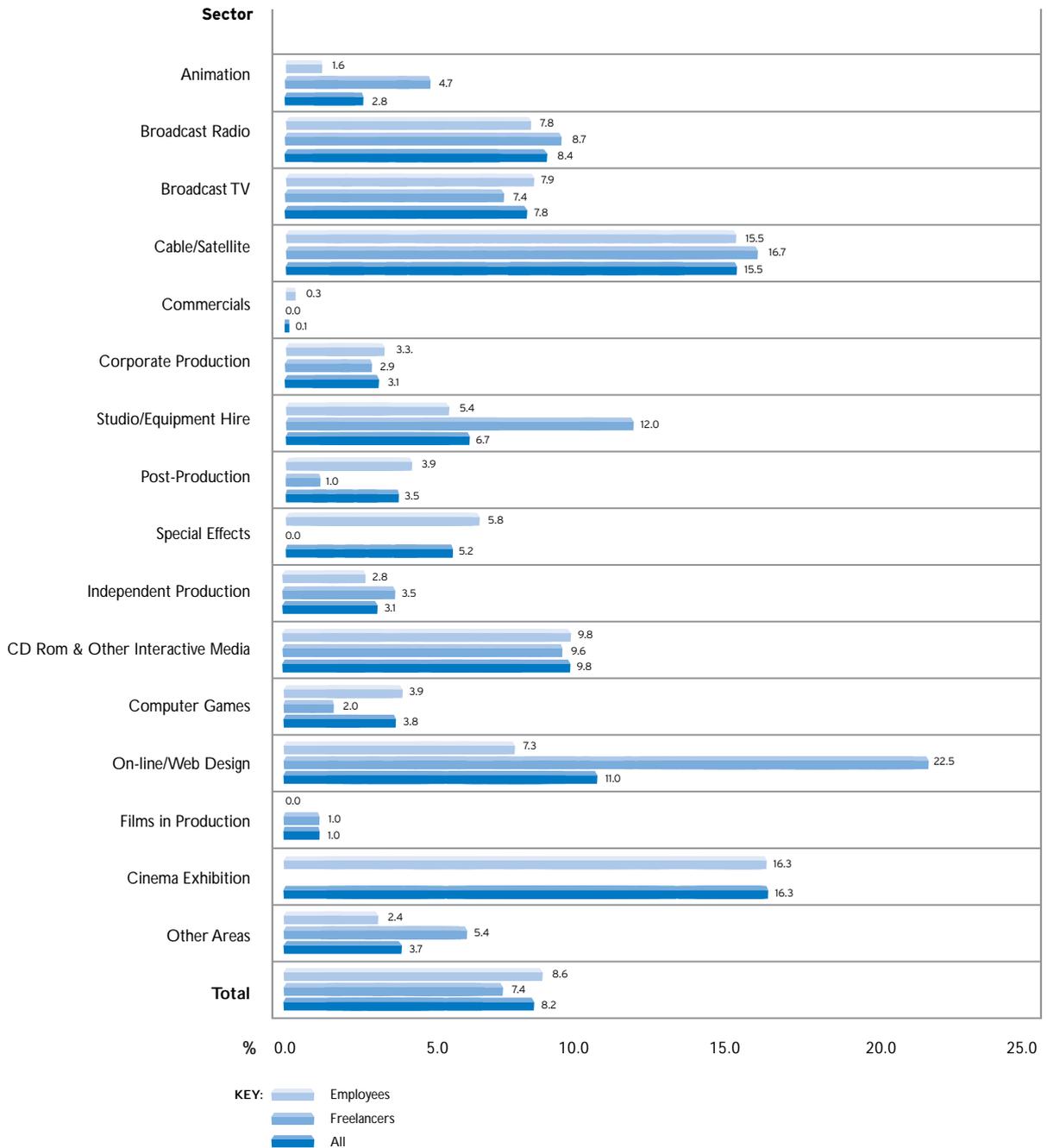


Figure 13 reveals considerable differences between occupational groups in representation of ethnic minorities, in part reflecting the sectoral difference shown in **Figure 12**. For example, the highest proportions of ethnic minorities are employed cleaning cinemas (22%), and elsewhere in the cinema (18%). Within production and technical roles, the highest levels are in journalism and sport (12%), where they are most visible. Behind camera representation is lower – for example 5% in camera and sound, and 7% in lighting. Apart from special effects (in which few people are employed), employment of ethnic minorities is lowest in the two most female-dominated occupational groups – make-up/hairdressing, and costume/wardrobe – both at under 3%.

Figure 13 Representation of Ethnic Minorities by Occupational Group

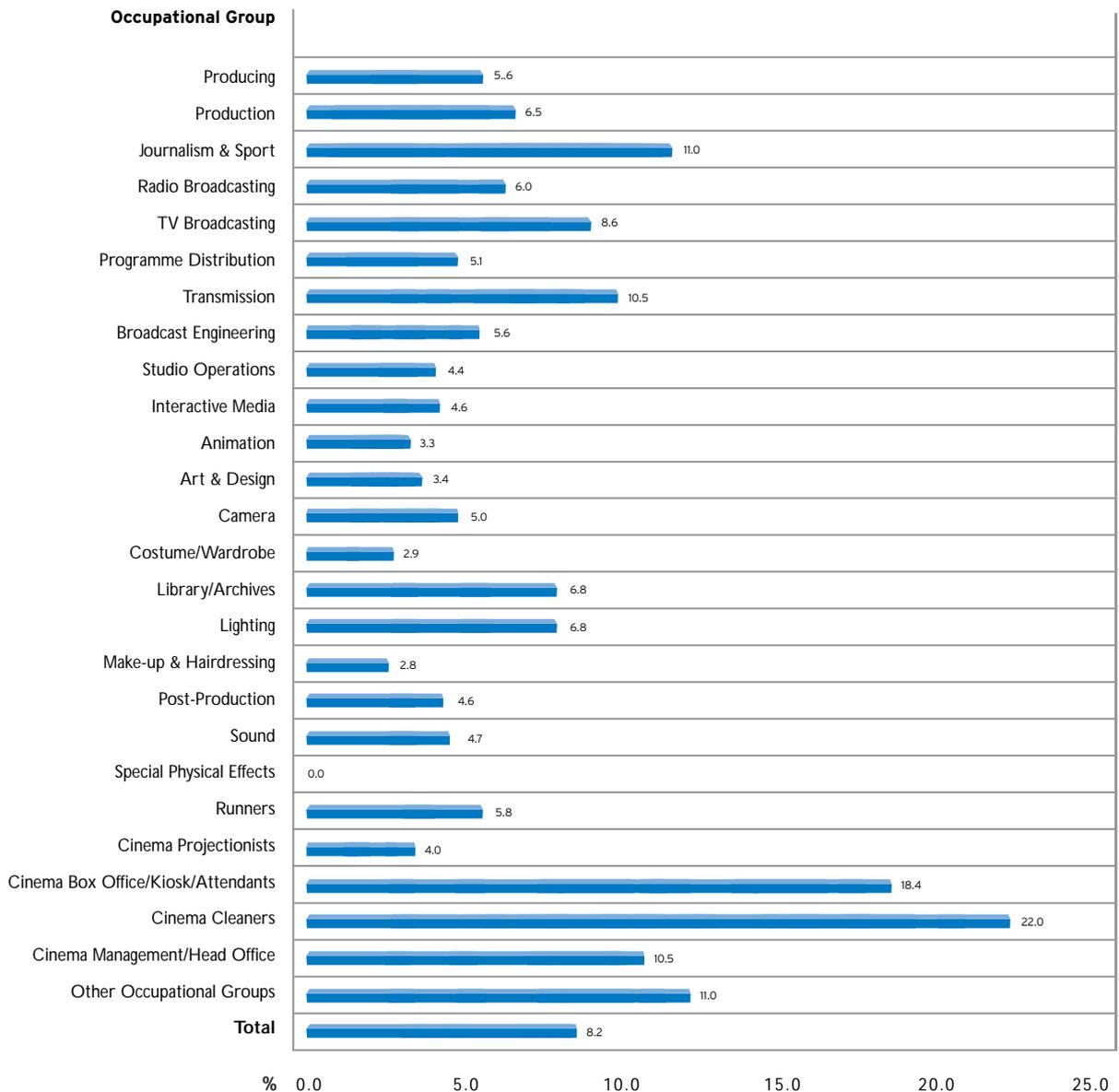
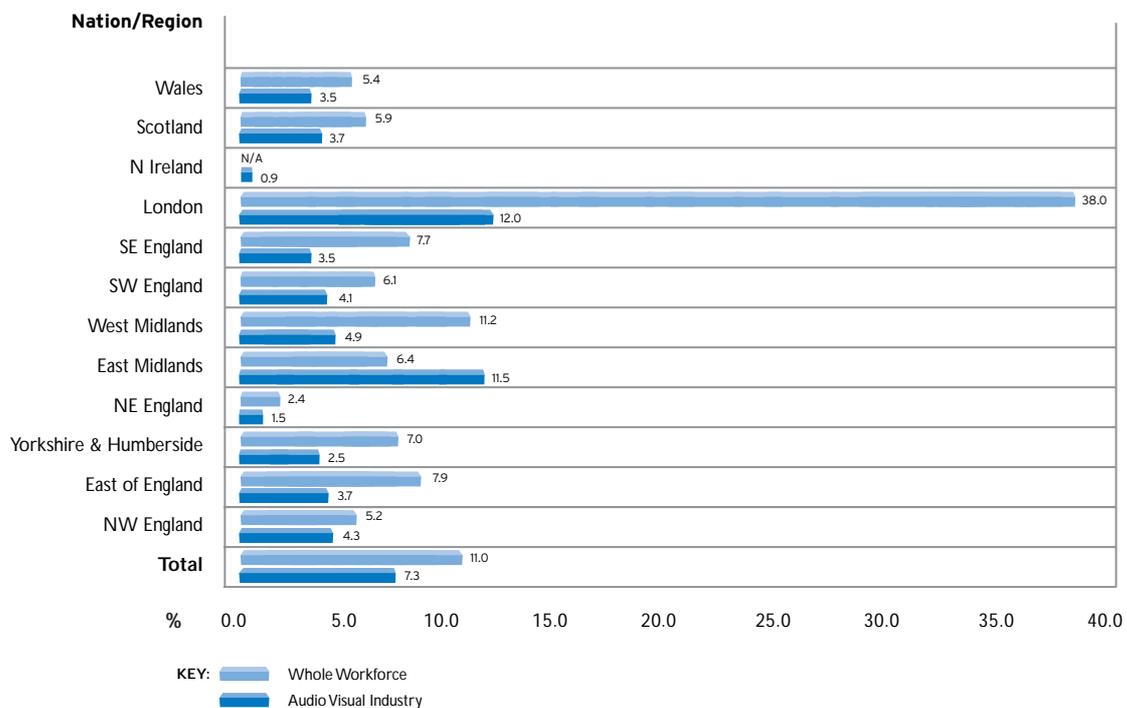


Figure 14 shows the percentages of the industry who are ethnic minorities in each nation and English region (excluding cinema exhibition), and the percentage of the population of working age in that nation or region (GB only, Labour Force Survey, Autumn 2002). The industry's employment nationally appears to reflect the composition of the population, with around 7% of both estimated to be of ethnic minority origin. However, there are two factors which undermine this overall picture. First, around half the industry is based in London (see Figure 6), where proportions of ethnic minorities are much higher than average – around 38%. Yet in London, only 12% of people in the industry are ethnic minorities. Second, within each of the other nations and regions, it is known that the audio-visual industries tend to cluster in and around urban centers, where proportions of ethnic minorities will in general be higher than the overall figure for that nation or region. For example, in South West England, 4.1% of the industry are ethnic minorities compared with 1.5% of the population of working age. However, it is known that much of the industry in the South West is based in Bristol, which has a much higher percentage of ethnic minorities than the average for the whole region.

Figure 14 Representation of Ethnic Minorities Nationally and Regionally⁵



⁵Excludes Cinema Exhibition

Figure 15 Percentages of Ethnic Minority Employees and Freelancers in Each Sector, 2000-2002

	Employees			Freelancers		
	2000 %	2001 %	2002 %	2000 %	2001 %	2002 %
Animation	2.8	3.5	1.6	1.8	1.6	4.7
Broadcast Radio	6.9	4.6	7.8	8.4	3.1	8.7
Broadcast TV	6.3	6.4	7.9	6.7	5.5	7.4
Cable/Satellite	5.8	15.4	15.5	5.9	12.0	16.7
Commercials	5.3	4.7	0.3	1.6	6.9	0.0
Corporate Production	2.9	2.1	3.3	1.1	3.6	2.9
Facilities	6.6	6.9	4.5	13.6	0.5	6.5
(Studio/equipment hire)	(n/a)	(n/a)	5.4	(n/a)	(n/a)	12.1
(Post-production)	(n/a)	(n/a)	3.9	(n/a)	(n/a)	1.1
(Special Effects)	(n/a)	(n/a)	5.8	(n/a)	(n/a)	0.0
Independent production	4.0	4.4	2.8	5.5	5.2	3.5
Interactive Media	5.4	9.5	8.0	6.7	5.7	16.8
(On-line)	(n/a)	(n/a)	7.3	(n/a)	(n/a)	22.1
(Computer Games)	(n/a)	(n/a)	3.9	(n/a)	(n/a)	2.0
(CD Rom and other)	(n/a)	(n/a)	9.8	(n/a)	(n/a)	9.6
Films in Production	n/a	n/a	n/a	n/a	n/a	n/a
Cinema Exhibition	n/a	n/a	16.3	n/a	n/a	n/a
Other Areas	5.5	5.2	2.4	7.1	8.3	5.4
Total	5.4	7.5	8.6	6.4	4.9	7.3

Figure 15 shows the employment of ethnic minorities between 2000-2002. Between the three years, there has been a substantial increase in the representation of ethnic minorities in the industry, rising from 5.4% to 8.6% among employees, and from 6.4% to 7.3% among freelancers. The increase is most marked in broadcast TV and radio, where representation among employees has increased from 6.3% to 7.9% and 6.9% to 7.8% respectively over two years. Although as noted above, these figures still compare unfavourably with the rest of the economy (11% of the population working in GB and 38% in London are ethnic minorities), they represent a major shift in a positive direction.

Developments in some other sectors partly undermine these advances in broadcast TV and radio. Specifically, the sectors which have been hit hardest over the past two years, where downsizing has resulted, have witnessed major drops in the proportions of ethnic minorities: in commercials for example, between 2001 – 2002, the percentage of ethnic minorities decreased from 4.7% of employees to 0.3%, and from 6.9% of freelancers to 0%, while in facilities, the percentage representation among employees fell from 6.9% to 4.5%.

Part Six Representation of Disabled People in the Industry

Figure 16 shows the percentages of disabled employees and freelancers across the whole industry and in each sector, between 2000-2002. Overall, the proportion of disabled employees in the industry remains unchanged since 2001, at 0.8%. However, representation among freelancers working on the day increased from 0.3% to 0.8%.

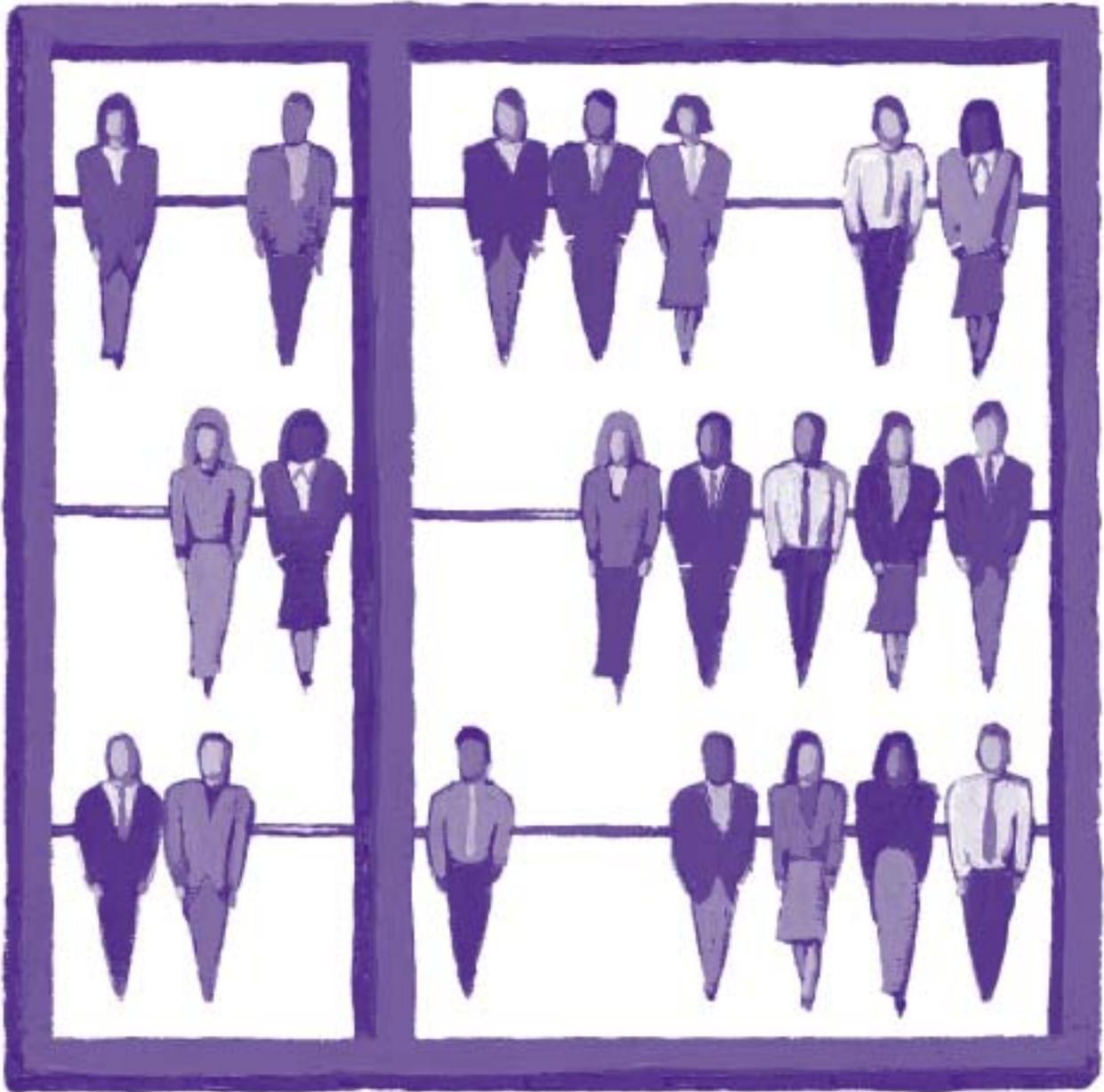
Figure 16 Representation of Disabled People by Sector, 2000-2002

	Employees			Freelancers		
	2000 %	2001 %	2002 %	2000 %	2001 %	2002 %
Animation	0.8	2.9	0.0	0.6	0.0	1.2
Broadcast Radio	1.4	0.8	1.2	0.6	0.3	1.8
Broadcast TV	1.1	1.1	1.2	0.7	0.4	0.6
Cable/Satellite	0.0	0.2	0.2	0.1	0.9	0.0
Commercials	0.0	0.0	0.0	0.0	0.0	0.0
Corporate Production	0.6	2.5	1.3	0.0	0.0	0.7
Facilities	1.3	1.2	0.9	0.0	0.0	0.1
(Studio/equipment hire)	(n/a)	2.1	(n/a)	(n/a)	(n/a)	0.2
(Post-production)	(n/a)	(n/a)	0.2	(n/a)	(n/a)	0.0
(Special Effects)	(n/a)	(n/a)	0.0	(n/a)	(n/a)	0.0
Independent production	0.3	0.5	0.5	0.1	0.6	0.3
Interactive Media	0.8	0.6	0.5	1.3	0.1	1.0
(On-line)	(n/a)	(n/a)	10.3	(n/a)	(n/a)	1.1
(Computer Games)	(n/a)	(n/a)	(n/a)	(n/a)	(n/a)	0.0
(CD Rom and other)	(n/a)	(n/a)	0.5	(n/a)	(n/a)	1.4
Films in Production	n/a	n/a	n/a	n/a	n/a	n/a
Cinema Exhibition	n/a	n/a	0.5	n/a	n/a	n/a
Other Areas	0.5	0.0	2.4	0.4	0.0	0.4
Total	5.4	7.5	8.6	6.4	4.9	7.3

STAND UP AND BE COUNTED

June 26th 2002

The third census of the industry



Census available on-line at www.skillsetcensus.org

skillset

IMPORTANT - PLEASE READ

This is the third census of our Interactive Media, Computer Games, TV, Film, Corporate and Radio industries. Following the success of the first exercise in 2000, the Census is now an annual event - with the full backing of the industry. From now on, we will be able to track how the industry is changing over time, and map areas of growth, decline and transition. Please complete this Census form on or as near as possible to Census Day, Wednesday 26 June 2002. If you need any assistance, please call the Census Hotline on 020 7534 5303.

This form is also available on-line at www.skillsetcensus.org

skills
FOR BUSINESS

HOW TO COMPLETE THE CENSUS

1. Please complete the form on Census Day (**26 June 2002**) or as soon as possible thereafter and return it to Neil Flintham at Skillset by **26 July 2002**. Please either use the attached pre-paid envelope or address an envelope to: Skillset FREEPOST 38 LON14834, London, W1E 5DP. You do not need to use a stamp. The Census is being distributed via several channels: if you receive more than one copy of the form, please ensure that only one version is completed for each region in which your organisation is active (see point 11, below).
2. Any information you provide us on the Census form will be treated in absolute confidence and will be aggregated so that it is not attributable to a particular company. We are asking for your contact details only so that we know in which sector and region you operate, and so that we can get in touch if there is anything we want to clarify about what you have told us.
3. Please enter the number of staff you employ and the number of freelances on your payroll whom you use on **Wednesday 26 June 2002**. Please include all those who work for you for any part of the day, for whatever length of time.
4. Employees are classified as those on contracts of 365 days or more and freelances are those on your payroll on contracts of 364 days or less, including those on Schedule D status. Please include only those based in the United Kingdom and any UK nationals who are working overseas on **Wednesday 26 June 2002**.
5. **You may find it helpful to read the whole form before ascribing individuals to occupational groups.** Where the name of an occupational group corresponds with your company's main sector of operation (eg. animation or radio broadcasting), do not necessarily assume that all of your staff/freelances will be categorised within this group.
6. We know that the way people work nowadays is complex and that some people work in occupations which are difficult to define or classify, or may work across more than one occupation. Please count **once only** all people working for you on **Wednesday 26 June 2002**, in whichever category you think best describes their role.
7. Don't forget to include yourself, especially if you are a small or one-person operation.
8. If you do not employ or use anyone in any particular category, just leave the box blank.
9. We are also asking you how many of the people you employ or use in each category are women, how many you consider are from ethnic minorities and how many you consider are disabled. We understand that it can sometimes be difficult to judge these issues, but we are seeking broad estimates based on your discretion. Some of the main areas of potential disability might include: visual, hearing, speech, co-ordination and mobility. Please supply as much information as you can on these areas. If you don't have it, just put an 'X' in these boxes.
10. If you have any queries about completing the Census, please contact **Neil Flintham** at Skillset (**tel: 020 7534 5303; e-mail: neilf@skillset.org**), who will be pleased to assist.
11. If your organisation has bases in more than one nation or region please complete a separate form for each nation or region (see overleaf). Further copies of the form may be obtained from Neil Flintham (neilf@skillset.org).

CONTENTS

The Census asks for the number of people working in roles within the following occupational groups:

**Producing
Production**

Journalism & Sport

Radio Broadcasting

Television Broadcasting

Programme Distribution

Transmission

Broadcast Engineering

Studio Operations

Interactive Media

Animation

Art & Design

Camera

Costume/Wardrobe

Library/Archives

Lighting

Make Up & Hairdressing

Post-Production

Sound

Special Physical Effects

Runners

All Other Occupational Groups

Appendix

Occupational Groups	Role	Examples of Job Titles
Producing	Animation	Producer
	Commercials	Producer
	Corporate	Producer
	Feature Film	Executive Producer, Producer, Development Executive
	New Media	Producer
	Radio	Executive Producer, Senior Producer, Producer, Commercials Producer, Trailers Producer, Editorial Head of Department
	Television	Executive Producer, Series Producer, Senior Producer, Producer, Development Executive, Promotions / Trailers Producer
Production	Archive Research	Researcher
	Direction	Director, 1st Assistant Director, 2nd Assistant Director, 3rd Assistant Director
	Production	Production Assistant, Researcher, Continuity, Development Assistant, Radio Reporter (not news)
	Production Management	Assistant Producer, Casting Manager, Floor Manager, Location Manager, Production Manager, Production Accountant
	Scriptwriting	Script Editor, Scriptwriter
Journalism & Sport	Editorial	Editor, News Editor
	Newsgathering & Presentation	Reporter, Correspondent, Broadcast Journalist, Commentator, Presenter
	Production	Producer, Director
Radio Broadcasting	Sports Reporter / Presenter	Commentator, Sports Journalist, Presenter
	Audience Research	Research Manager, Analyst, Market Researcher, Strategy Manager
	Station / Channel Control Management	Controller, Station Manager, Station Director, Launch Director
	Commissioning	Commissioning Editor, Development Executive
	Media Sales	Ad Sales Manager, Sponsorship Executive, Commercials Operations Assistant, Sales Executive / Manager
	Presentation	Editor, Producer, Continuity Announcer, Presenter, Pres Editor, Pres Operator
	Scheduling	Scheduler, Planning Assistant, Network Assistant
Television Broadcasting	Acquisitions	Acquisitions Manager, Acquisitions Assistant
	Audience Research	BARB Analyst, Market Researcher, Research Manager, Research Executive
	Channel Control	Controller, Channel Manager, Channel Editor
	Commissioning	Commissioning Editor, Development Executive
	Media Sales	Ad Sales Manager, Sponsorship Executive, Commercial Operations Assistant
	Presentation	Editor, Producer, Continuity, Announcer, Pres Operator
	Satellite & Cable Distribution / Network Development	Affiliate Sales Manager, Decoder Coordinator, Affiliate Marketing Executive
	Satellite & Cable Network Operations	Network Operations Manager, Broadcast Engineer, Operations Assistant, Anyone responsible for the satellite signal
	Scheduling	Scheduler, Planning Assistant, Network Assistant
	Signing	Signer
	Subtitling	Subtitler, Stenographer, Languageing
Programme Distribution	Management	Director of International Relations, Sales Director, Head of Licensing
	Operations	Acquisitions Assistant, Licensing Assistant, Programme Co-ordinator
Transmission	Management	Head of Design, Head of Maintenance, Head of Department
	Operations	Engineer, Technician, Electrician, Rigger
Broadcast Engineering	Operations	Studio Engineer, VT Engineer, Outside Broadcasting, Technical Operators
	Plant and Maintenance	Electronic Maintenance Engineer, Electrical Maintenance Engineer, Plant Engineer, Service Engineer
	Project Engineering	Design Draughtsman, Project Design Engineer
Studio Operations	Videotape Operation	VT Operator, Autocue Operator
	Vision Control	Director, Vision Controller
	Vision Mixing	Vision Mixer
	Sound Recording & Reproduction	Studio Manager (Radio), Sound Supervisor

Appendix

Occupational Groups	Role	Examples of Job Titles
Interactive Media	Planning, Pre-Production Production/Implementation Content Creative Technical Design Media Sales Marketing & Promotion Quality Assurance	Consultant, Strategist, Producer, Information Architect Programmer, Site-builder, Production Assistant Copywriter, Web Editor, Asset Researcher Creative Director, Graphic Designer, Interface Designer Technical Director, Database Designer, Interaction Designer, Systems Analyst Ad Sales Manager Search Engine Specialist, Marketing Managers Usability Tester, Proofreader, Account Handler
Animation	Design Production Realisation	Animation Designer, Animation Director, Layout Artist, Storyboard Artist, Character Designer Background Painter, Cel Painter, Model Maker, Rostrum Camera Operator Animation Assistant, In-betweener, Key Animator, Special Effects Animator
Art & Design	Artist Graphic Design Operator Production Design Props Set Crafts Set Design	Lettering Artist, Scenic Artist, Sketch Artist Graphic Designer Graphics Technician Art Director, Production Designer Buyer, Set Dresser, Property Master / Mistress Construction Manager, Painter, Carpenter, Plasterer, Rigger Art Director, Set Designer
Camera	Design Production	Director of Photography Camera Director, Camera Operator, Clapper Loader, Focus Puller, Grip, Stills Photographer
Costume/Wardrobe	Design Dressing Making Stores/Supply	Chief Costume Designer, Costume Designer, Costume Stylist Senior Dresser, Wardrobe Assistant, Wardrobe Supervisor Costume Maker, Dressmaker Costume Stock Operative, Wardrobe Assistant
Library/Archives	Library/Archives	Archive Librarian, Archivist, Film Librarian, Music Librarian
Lighting	Design Operations Setting/Placing	Lighting Director Console Operator Lighting Assistant, Production Electrician, Rigger
Make Up & Hairdressing	Design Hairdressing Make Up Stores	Chief Hairdresser, Make Up Designer Hairdresser, Hairdressing Assistant, Wigmaking Assistant Make Up Artist, Make Up Assistant, Special Effects Make Up Artist Make Up Stores Assistant
Post-Production	Audio Bookings Editing Engineering Graphics/Special Effects New Media Facilities Production VT	Senior Dubbing Mixer, Assistant Dubbing Mixer, Dubbing Technician, Sound Editor, Sound Engineer Bookings Manager, Bookings Assistant, Facilities Manager, Client Liaison Manager Film Editor, Assistant Film Editor, Tape Editor, Technical Assistant, Non-linear Editor Chief Engineer, Assistant Engineer, Junior Engineer Graphic Designer (various grades), DVE Operator New Media Technician, Compressionist Producer, Supervisor Senior VT Operator, Junior VT Operator
Sound	Sound Recording & Reproduction	Boom Operator, Sound Assistant, Sound Recordist
Special Physical Effects	Design Manufacture Operations	Special Effects Designer Pyrotechnics Technician, Special Effects Model Maker Special Effects Operator
Runner	Runner	All entry-level Running jobs
All Other Occupational Groups	General Management Sales & Marketing Human Resources IT Finance Legal Press & PR Admin/Secretarial Premises Operations	Chief Executive, Board of Management, Other Senior Managers Sales Manager, Marketing Manager Training Manager, Personnel Officer Programmer Accountant Solicitor Press Officer PA, Secretary, Admin Assistant Caterer, Cleaner, Security Officer

ABOUT YOUR ORGANISATION

Before completing the Census, please provide the following information about your company so that we can get in touch if we need to clarify any of the information you provide and to help us analyse it by activity, media and region.

Company name: Contact name:
 Tel no: Fax no:
 E-mail address: Postcode:

What is your organisation's MAIN area of activity? (✓ one only. Please enter an 'X' against any other areas in which you work.)

Terrestrial Broadcast (Commercial)	<input type="checkbox"/>	Distribution (Other, please specify)	<input type="checkbox"/>
Terrestrial Broadcast (Public)	<input type="checkbox"/>	Animation	<input type="checkbox"/>
Terrestrial Broadcast (RSL/Community)	<input type="checkbox"/>	Post-production	<input type="checkbox"/>
Cable and Satellite Broadcast	<input type="checkbox"/>	Digital Special Effects	<input type="checkbox"/>
Internet Broadcast	<input type="checkbox"/>	Facilities (Studios/Equipment Hire)	<input type="checkbox"/>
Transmission	<input type="checkbox"/>	Online (eg website design, development, consultancy)	<input type="checkbox"/>
Independent Production	<input type="checkbox"/>	Computer Games	<input type="checkbox"/>
Studio Production	<input type="checkbox"/>	Other Multimedia (eg CD Rom Production)	<input type="checkbox"/>
Other Production	<input type="checkbox"/>	Commercials Production	<input type="checkbox"/>
Distribution (Theatrical)	<input type="checkbox"/>	Other, please specify	<input type="checkbox"/>

In which of the following media do you operate? (✓any which apply)

Television	<input type="checkbox"/>	Interactive Media	<input type="checkbox"/>
Radio	<input type="checkbox"/>	Business to Business/Corporate	<input type="checkbox"/>
Film	<input type="checkbox"/>		

Please indicate below in which nation or region you are based. If you operate throughout more than one nation or region, please complete a separate copy of the form for each, and indicate below which nation or region this form covers:

Wales	<input type="checkbox"/>	North East of England	<input type="checkbox"/>
Scotland	<input type="checkbox"/>	Northumberland/Tyne & Wear/County Durham	
Northern Ireland	<input type="checkbox"/>	Tees Valley	
Central London	<input type="checkbox"/>	Yorkshire & the Humber	<input type="checkbox"/>
City of Westminster, Kensington and Chelsea, Lambeth, Wandsworth, Southwark, Camden, Islington		North Yorkshire/West Yorkshire/Humberside	
East London	<input type="checkbox"/>	South Yorkshire	
Hackney, Redbridge, Havering, Barking and Dagenham, Newham, Tower Hamlets, City of London, Bexley, Greenwich, Lewisham		East of England	<input type="checkbox"/>
North London	<input type="checkbox"/>	Norfolk/Cambridgeshire/Suffolk/Bedfordshire	
Barnet, Enfield, Haringey, Waltham Forest		Hertfordshire/Essex	
South London	<input type="checkbox"/>	North West of England	<input type="checkbox"/>
Richmond-Upon-Thames, Kingston-Upon-Thames, Merton, Sutton, Croydon, Bromley		Cumbria/Lancashire/Greater Manchester	
West London	<input type="checkbox"/>	Merseyside/Halton/Cheshire/Warrington	
Hillingdon, Harrow, Brent, Ealing, Hounslow, Hammersmith, Fulham			
South East of England (excluding London)	<input type="checkbox"/>		
Oxfordshire/Buckinghamshire/Milton Keynes			
Bracknell Forest/West Berkshire/Reading			
Slough/Windsor & Maidenhead/Wokingham			
Surrey/Kent/Medway/East Sussex/West Sussex			
Brighton & Hove/Hampshire/Isle of Wight			
Portsmouth/Southampton			
South West of England	<input type="checkbox"/>		
Gloucestershire/Wiltshire/Swindon			
Former Avon/Somerset/Bournemouth/Dorset/Poole			
Devon/Cornwall			
West Midlands	<input type="checkbox"/>		
Shropshire/Staffordshire			
The Black Country/Coventry/Warwickshire			
Herefordshire/Worcestershire			
East Midlands	<input type="checkbox"/>		
Derbyshire/Nottinghamshire/Lincolnshire/Rutland			
Leicestershire/Northamptonshire			



COMMENTS

Do you have any comments on the suitability of the form for your company?:

Occupational Groups	Role	Employees (inc. contracts of 365 days or more)				Freelances (inc. contracts of 364 days or less and Schedule D)			
		Total Number	Number of Females	Number of Ethnic Minorities	Number of Disabled	Total Number	Number of Females	Number of Ethnic Minorities	Number of Disabled
1. Producing	Animation								
	Commercials								
	Corporate								
	Feature Film								
	New Media								
	Radio								
	Television								
2. Production	Archive Research								
	Direction								
	Production								
	Production Management								
	Scriptwriting								
3. Journalism & Sport	Editorial								
	Newsgathering / Presentation								
	Production								
	Sport Reporting / Presentation								
4. Radio Broadcasting	Audience Research								
	Station / Channel Control								
	Management								
	Commissioning								
	Media Sales								
	Presentation								
	Scheduling								
5. Television Broadcasting	Acquisitions								
	Audience Research								
	Channel Control								
	Commissioning								
	Media Sales								
	Presentation								
	Satellite & Cable Distribution /								
	Network Development								
	Satellite & Cable Network								
	Operations								
	Scheduling								
	Signing								
	Subtitling								

Occupational Groups	Role	Employees (inc. contracts of 365 days or more)				Freelances (inc. contracts of 364 days or less and Schedule D)				
		Total Number	Number of Females	Number of Ethnic Minorities	Number of Disabled	Total Number	Number of Females	Number of Ethnic Minorities	Number of Disabled	
15. Library / Archives	Library / Archives									
	Archive Research									
16. Lighting	Design									
	Operations									
	Setting / Placing									
17. Make Up & Hairdressing	Design									
	Hairdressing									
	Make Up									
	Stores									
18. Post - Production	Audio									
	Bookings									
	Editing									
	Engineering									
	Graphics / Special Effects									
	New Media Facilities									
	Production									
	VT									
19. Sound	Sound Recording & Reproduction									
20. Special Physical Effects	Design									
	Manufacture									
	Operations									
21. Runner	Runner									
22. All Other Occupational Groups	General Management									
	Sales & Marketing (inc. Media Sales & Marketing in Television Broadcasting or Radio Broadcasting)									
	Human Resources									
	IT									
	Finances									
	Legal									
	Press & PR									
	Secretarial / Admin									
	Premises Operations									
	TOTAL*									

* Please ensure that the total figures entered in the final row equal the sum of entries in each column; individuals should be entered once only.

**THANK YOU FOR COMPLETING THE CENSUS. PLEASE NOW RETURN IT TO:
Skillset, FREEPOST 38 LON 14834 London W1F 5DP**

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