

EMPLOYMENT CENSUS 2004: THE RESULTS OF THE FIFTH CENSUS OF THE AUDIO VISUAL INDUSTRIES



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PART ONE EXECUTIVE SUMMARY

- The Census was distributed to every company for which records were available in the sectors covered, for completion on 30 June 2004. The form was also made available for completion online, and for the first time non-respondents were telephoned and requested to provide an indication of overall employment of employees and freelancers.
- The sectors covered included: television, radio, animation, facilities, interactive media, commercials, corporate production, and all film sectors apart from production. Photo imaging and performers were also excluded from the Census as they operate differently from the sectors covered, and along with film production, are covered by separate research approaches. In future, information from all of these sources will be combined to create an overview of the entire audio visual industries. This will be available on Skillset's website at www.skillset.org.
- The Census also excludes freelancers not working on Census Day because of the snapshot methodology employed of counting those working on one day.
- The 2004 Census achieved the highest response to date with a total of 2,878 companies responding (including postal, online and telephone responses combined).

EMPLOYMENT TRENDS

- This year's Census estimates around 160,000 people to have been working on Census Day in the sectors covered, with employment levels remaining relatively stable since 2003. Information from other Skillset research on those sectors excluded, and freelance working patterns indicates a total industry in scope to Skillset of over 400,000.
- Broadcast TV has experienced a marginal decrease in employment from 25,000 in 2003 to 23,700. The merger of the ITV companies took place between the 2003 and 2004 Census surveys, but the 2004 Census preceded the announcement of planned cuts in employment within both the BBC and ITV later in 2004.
- The interactive media sector (encompassing web and internet, electronic games and offline multimedia) is still the largest audio visual sector and is now showing signs of consolidation, stability and maturation following an initial period of rapid growth and then turmoil in the aftermath of the 'dotcom' crash.
- Employment in commercials has continued to decline, while corporate production has remained stable between 2003 and 2004 for the first time in several years. Both of these sectors employed around 3,000 people on Census Day.
- In total, around a quarter of the workforce were working freelance on Census Day. It is estimated that up to half the actual available labour pool is freelance, including those who were not working on Census Day.
- Levels of freelancing vary greatly by sector and occupation. In areas not directly involved in production such as cinema exhibition and film distribution, the whole workforce is permanently employed. In the three interactive media sectors, 10-20% of the workforce was freelance on Census Day. This rises to 20-25% in television and radio, and up to 40-60% in independent production, animation, special effects, commercials and corporate production.
- Over half the industry works in London, and around two thirds in London and the South East combined. The remainder are distributed fairly evenly throughout the UK.

REPRESENTATION OF WOMEN

- The overall representation of women has remained unchanged since 2003, at 38%.
- Representation varies greatly between sectors. In a small number of areas, women make up half or more of the workforce, including broadcast TV, cable and satellite TV and film distribution. However, in the majority of cases they are a minority. Levels of representation are lowest in electronic games (8%), processing labs (7%), facilities (22%), post production (26%) and offline multimedia (26%).
- There are also major differences in representation by occupational group, ranging from 93% in make up and hairdressing and 74% in costume/wardrobe to one tenth or less of the workforce in camera, lighting, sound and processing labs.

REPRESENTATION OF ETHNIC MINORITIES

- Reported representation of ethnic minorities has decreased slightly since 2003 from 7.4% to 7.0%. By comparison, 8% of the population of working age in the UK¹, and 35% of those in inner London (where half the industry is based) are ethnic minorities¹.
- Levels of employment of ethnic minorities are above average in broadcast TV, broadcast radio, animation, web and internet, cinema exhibition and film distribution. At the other end of the spectrum, electronic games, offline multimedia, commercials and processing labs all employ less than 4% ethnic minorities.
- There is a very wide range of representation reported between occupational groups. By far the highest level is among cinema cleaners, of whom 24% are from ethnic minorities. The next highest is in journalism and sport, in which 11.4% are ethnic minorities.
- Under 3% of the workforce are ethnic minorities in the following occupations: radio broadcasting, transmission, draw/stop frame animation, camera, costume/wardrobe, special physical effects and processing labs.

REPRESENTATION OF DISABLED PEOPLE

- Overall, the reported proportion of disabled people employed in the industry has increased slightly from 1% in 2003 to 1.3%.

PART TWO INTRODUCTION

BACKGROUND

This report presents the findings of the fifth annual Skillset Census. Since 2000, a number of advances have been made in the design, distribution and methodology, with new sectors targeted, separate forms developed for some sectors to ease completion and the introduction this year of a telephone survey in order to maximise coverage. The result has been a considerable increase in response from the last Census.

Companies were asked to indicate how many people they employed and how many freelancers they used in particular occupational groups and job roles on 30 June 2004, and what proportion were women, ethnic minorities and disabled or from an ethnic minority. A copy of the main Census form is enclosed as an appendix.

SCOPE, METHODOLOGY AND RESPONSE

Census forms were distributed to companies during June, for completion on the last Wednesday in June 2004. A central database of over 13,000 companies was set up at Skillset using a number of available sources including trade association membership lists, screen agency records and other databases. In addition, copies of the form were inserted into subscription copies of Broadcast and Televisual magazines in the week prior to Census Day in order to reach companies who were not members of trade associations or included in published directories. Forms could also be completed online.

As well as generic forms for completion by companies working across more than one sector, separate, simpler forms were designed for companies operating exclusively in interactive media, film distribution, cinema exhibition, and processing laboratories. Additionally, Welsh language forms were distributed to all companies in Wales.

Each company was given two months to complete and return a form. This year, for the first time each company which had not responded by the initial fieldwork closing date was telephoned and asked to provide total employment estimates for the day of the call by their company's main area of activity, type of contract (the number of employees employed on a contract of 365 days or more and the number of freelancers employed on a contract of less than 365 days) and nation/region. This has boosted the response considerably and has provided more robust employment estimates at a sectoral and national/regional level than in previous years. The total response was 2,878. Exact response rates in each sector are difficult to calculate due to the lack of reliable and up to date information on companies in some sectors. However the number of responses received in each sector is shown in Figure 1.

Variations in response and coverage of each sector are due to 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 organisations.
- The level of support of any such organisation in publicising and promoting the Skillset Census.
- The capacity and time available within organisations to complete the Skillset Census form (e.g. company size and culture).

Figure 1 Response and Estimated Coverage by Sector

Response By Sector	Postal/online response TOTAL	Telephone response TOTAL	Overall response TOTAL
Broadcast TV	21	3	24
Cable and Satellite Television	8	20	28
Independent Production (Television)	104	473	577
Broadcast Radio	61	108	169
Animation	36	157	193
Post Production	40	266	306
Digital Special Effects	0	29	29
Facilities (Studio/Equipment Hire)	33	512	548
Web and Internet	32	200	232
Electronic Games	43	72	115
Offline Multimedia	18	152	170
Commercials Production	11	77	88
Corporate Production	16	131	147
Cinema Exhibition	122	0	122
Film Distribution	6	0	6
Processing Laboratories	3	2	5
Other	98	21	119
Total	655	2,223	2,878

The estimated percentage coverage of each sector has been used to generate estimates of the workforce in each sector, and in the industry as a whole, from the responses received, through the calculation of weighting factors. Two weighting factors for each sector were applied: one to identify representation by gender, ethnicity, disability and occupational group from postal and online responses and one to generate overall employment estimates by contract type from the telephone responses. All employment estimates have been rounded to the nearest 100 and all percentages have been rounded to whole numbers. In addition, * is used to indicate a value that is less than 0.5%.

The nature of film production means that the snapshot methodology of recording employment 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. Film production is thus covered within a separate cycle of research, jointly with the UK Film Council. The census methodology is less problematic in other sectors of film, which are less freelance-dependent, and where activity levels are more stable.

Photo imaging and performers, both of which came into Skillset's remit in 2004, are also currently being addressed within different approaches as they effectively operate discretely from the sectors covered by the Census.

In future, the Census will be conducted within a two-yearly cycle, alternating with the Skillset Workforce Survey. This will enable time to be committed to engaging with those sectors where there remains scope for improvement with the response.

ANALYSIS AND PRESENTATION

The remainder of this report is set out in five 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 form

ACKNOWLEDGMENTS

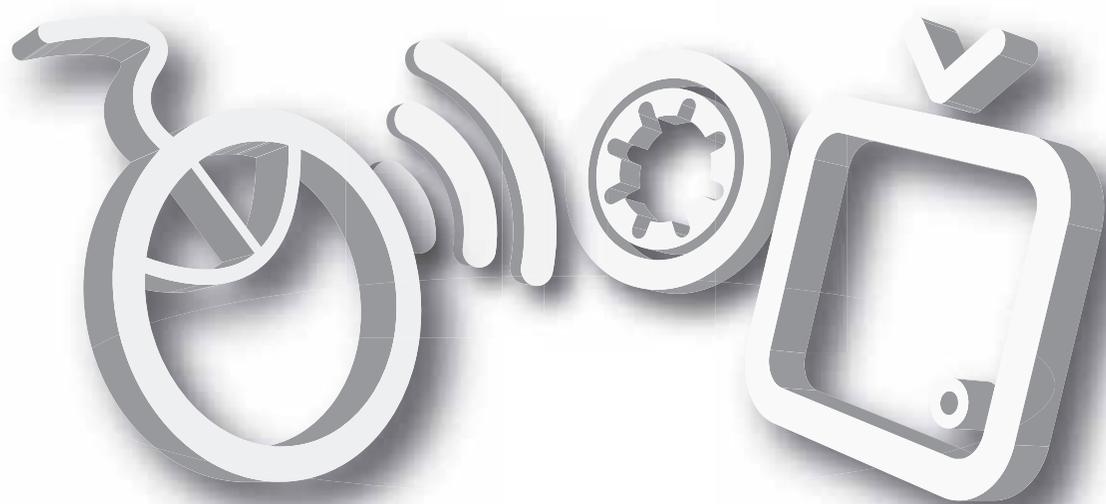
The Census was developed by Skillset's Research Committee. During the period in which the Skillset Census was developed and conducted, the committee comprised the following membership:

Andy Egan, BECTU
 Alison Winter, CRCA
 Carol Varlaam, independent consultant
 Catherine Godward, Skillset
 Cathy Aitchison, independent consultant
 David Steele, UK Film Council
 Jessica Beers, Discovery UK
 Jill McCormick, ITV
 Jonathan Hirsch, independent consultant
 Juliette Brown, ofcom
 Kate O'Connor, Skillset
 Kelly Wiffen, Equity
 Laura Slater, Pact
 Mike Johnson, ofcom
 Neil Flintham, Skillset
 Paula Moses, Skillset
 Sara Holly, BBC
 Simon Brown, DCMS

The data entry and analysis was managed by Qualasys limited.

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 at: www.skillset.org



PART THREE OVERALL SIZE AND SHAPE OF THE INDUSTRY

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

Sector	Total employed
Broadcast Television	23,700
Cable and Satellite Television	6,100
Independent Production (Television)	14,900
Broadcast Radio	22,200
Animation	3,000
Post Production	6,000
Digital Special Effects	700
Facilities (Studio/Equipment Hire)	4,700
Web and Internet	33,900
Electronic Games	9,400
Offline Multimedia	9,800
Commercials Production	3,100
Corporate Production	2,800
Cinema Exhibition	16,500
Film Distribution	500
Processing Laboratories	600
Other	1,900
Total	159,600

Figure 2 shows the number of people employed within each sector of the audio visual industries on 30 June 2004. In the sectors covered by the Census, there was an estimated total of 159,600 people working on Census Day, around a quarter of whom were working on a freelance basis. Information on freelance working patterns from other Skillset research suggests that up to around another 50,000 freelancers are active in the workforce but were not working on Census Day, making a total workforce of around 210,000 in those sectors covered. This figure excludes film production, performers and photo imaging, all of which are accommodated within separate cycles of research. Intelligence from those sectors indicates a total audio visual industry in excess of 400,000 people.

Since 2003, employment levels have remained relatively stable with a 3% increase overall. Interactive media (electronic games, offline multimedia and web and internet) is the largest sector in scope to Skillset and employs around 53,200 people (these figures exclude in-house interactive media specialists employed outside the sector, for example in banks or government departments). Broadcast TV is the second largest sector employing around 23,700 people, with 22,200 working in broadcast radio.

Figure 3 shows the total number of employees and freelancers in each occupational group on 30 June 2004. As in previous years, the largest occupational group is interactive media in which 24,500 people were working (excluding combined 'other' occupational groups, including all generic roles such as IT, sales and marketing and finance). The next largest key occupational groups are producing and production, in which over 30,000 people were working altogether.

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

Occupational Group ²	Employees	Freelancers	Total
Producing	8,800	7,700	16,500
Production	8,100	6,200	14,300
Journalism & Sport	8,800	1,400	10,200
Radio Broadcasting	3,000	1,900	4,900
Television Broadcasting	4,200	1000	5,200
Programme Distribution	400	100	500
Transmission	300	100	400
Broadcast Engineering	2,100	200	2,300
Studio Operations	1,400	500	1,900
Interactive Media	24,500	3,600	28,100
Draw/Stop Frame Animation	100	100	200
2D/3D Computer Animation	1,300	800	2,100
Art & Design	1,600	700	2,300
Camera	1,000	1,400	2,400
Costume/Wardrobe	100	300	400
Library/Archives	1,500	100	1,600
Lighting	800	400	1,200
Make Up & Hairdressing	100	300	400
Post Production	5,800	1,900	7,700
Sound	900	900	1,800
Special Physical Effects	*	*	*
Runner	800	1,200	2,000
Cinema Projectionists	1,200	0	1,200
Cinema Box Office/Kiosk/Attendants	11,800	0	11,800
Cinema Cleaners	500	0	500
Cinema Management/Head Office/Team leaders	2,900	0	2,900
Film Distribution	500	0	500
Processing Laboratories	600	*	600
All Other Occupational Groups	30,600	4,800	35,500
Total	123,700	35,600	159,400

Figure 4 shows the percentage of people in each occupational group who are employed on a freelance basis. Across all occupational groups, 22% of those working on Census Day this year were freelance. There is considerable variation in freelance usage in different occupations. Freelancers make up over half of the workforce in the following areas: costume/wardrobe (75%), make-up and hairdressing (75%), runner (60%) and camera (58%). Roles with less than 10% employed on a freelance basis are: broadcast engineering (9%) and library and archives (6%). Cinema exhibition, film distribution and processing laboratories roles tend not to employ freelancers at all. It should again be noted that the Census counts only those freelancers working on Census Day and therefore understates the proportion of freelancers in the wider labour force, for each occupation.

² The full range of occupational roles and job titles within each occupational group is listed on the Census form and can be found in the appendix of this report.

Figure 4 PERCENTAGES OF THE WORKFORCE WHO ARE FREELANCE IN EACH OCCUPATIONAL GROUP

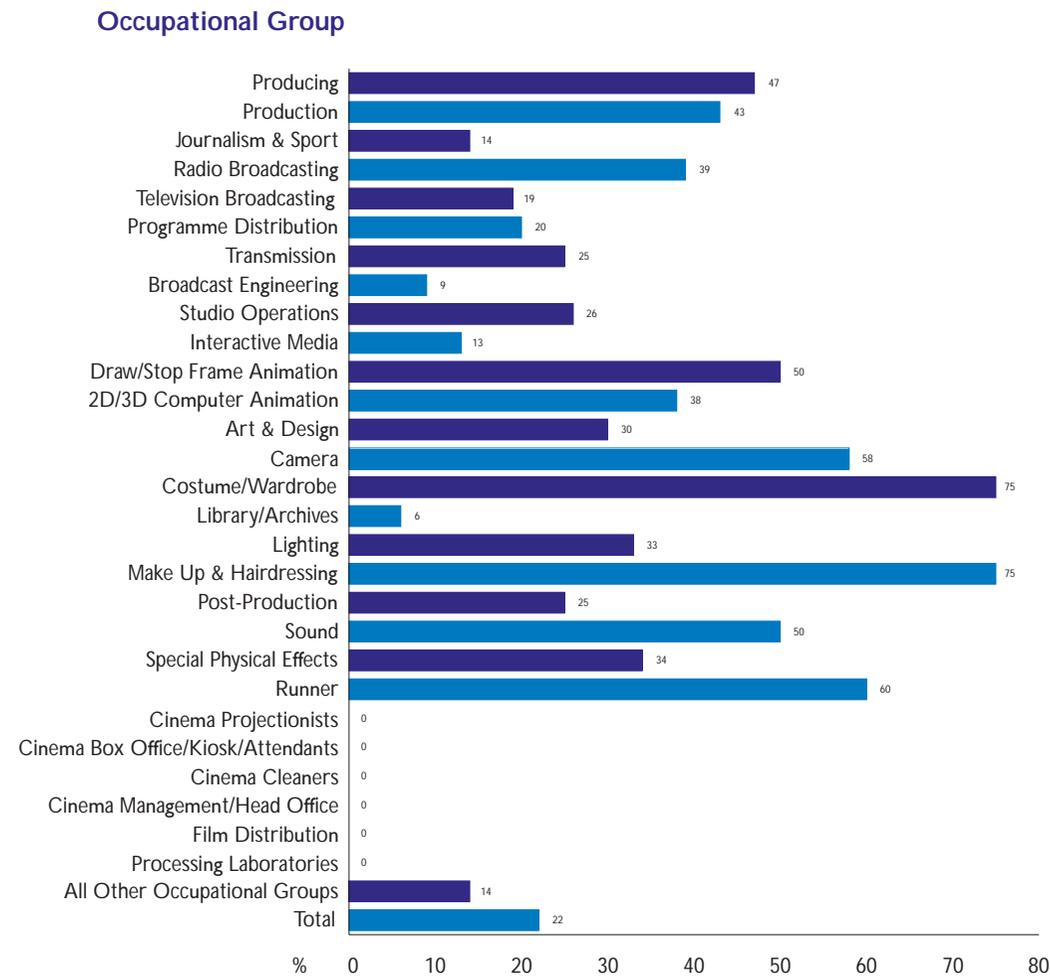


Figure 5 illustrates the variation in freelance usage within the audio visual industries by sector. Almost three fifths (58%) of the independent production workforce are freelancers, around half of those in animation, and just over two fifths in commercials production and digital special effects companies. Around a fifth of the broadcast radio, broadcast TV and the cable and satellite workforce were freelance on Census Day, and between 10 and 20% in the three interactive media sectors.

Figure 5 PERCENTAGES OF THE WORKFORCE WHO ARE FREELANCE IN EACH SECTOR

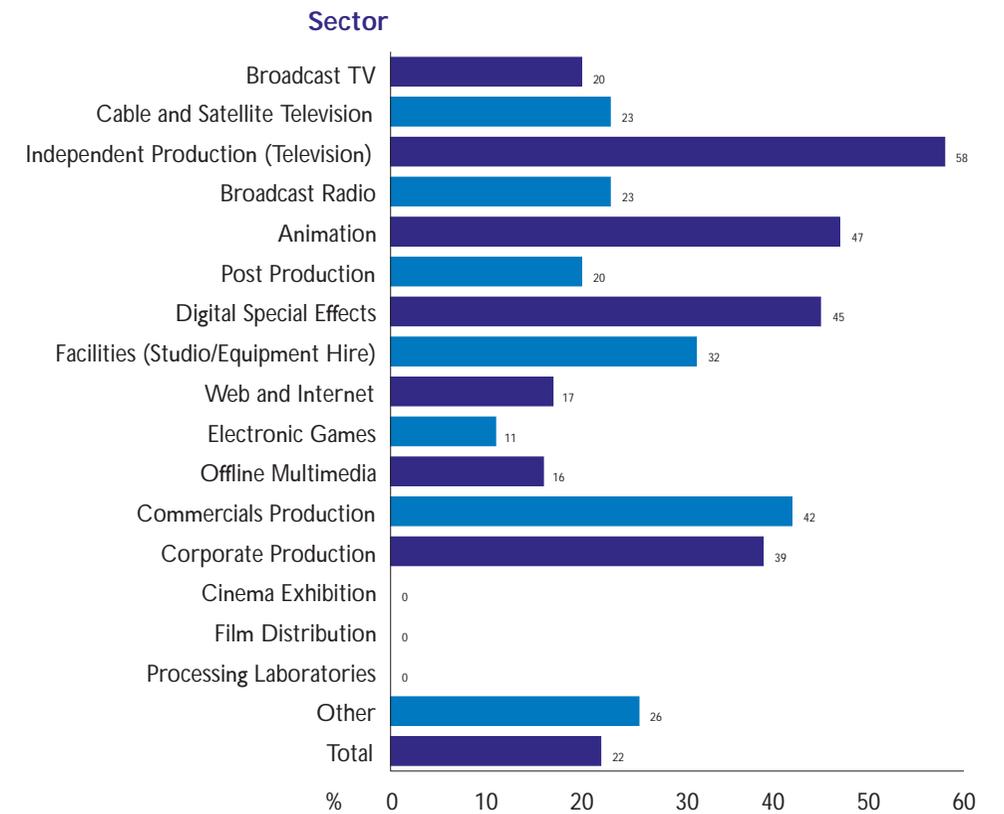
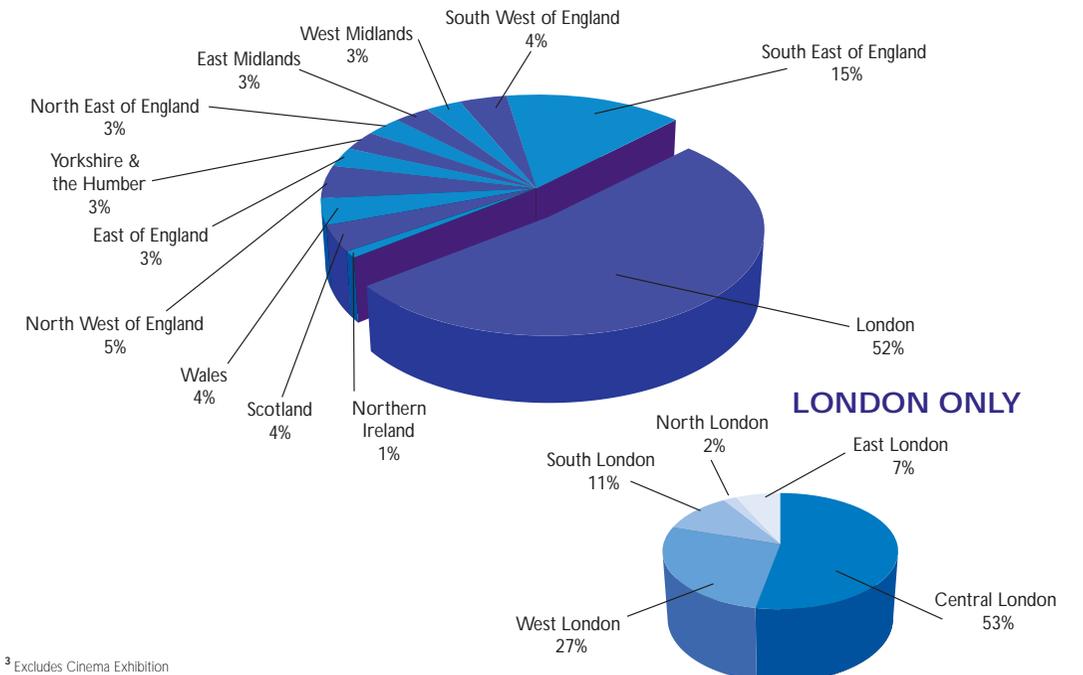


Figure 6 shows the breakdown of the workforce by work base. Two thirds of the industry works in London or the South East and just under a quarter in the other English regions combined. The remaining tenth are employed in Wales, Scotland and Northern Ireland.

Figure 6 WORK BASE OF THE INDUSTRY³



³ Excludes Cinema Exhibition

PART FOUR REPRESENTATION OF WOMEN

Figure 7 shows the percentages of women in each sector. On Census Day, overall representation remained at 38%, exactly the same level as in 2003. This compares with representation of 46% in the whole UK economy (Labour Force Survey, November 2004).

A small number of sectors comprise 50% or more women: broadcast TV (50%), cable and satellite TV (57%) and film distribution (50%). Women make up less than half in all other sectors. Representation is lowest in the electronic games and processing laboratories sectors (8% in each), but post production, facilities, web and internet, offline multimedia, commercials and corporate production all employ less than one third women.

Figure 7 REPRESENTATION OF WOMEN IN THE INDUSTRY IN EACH SECTOR

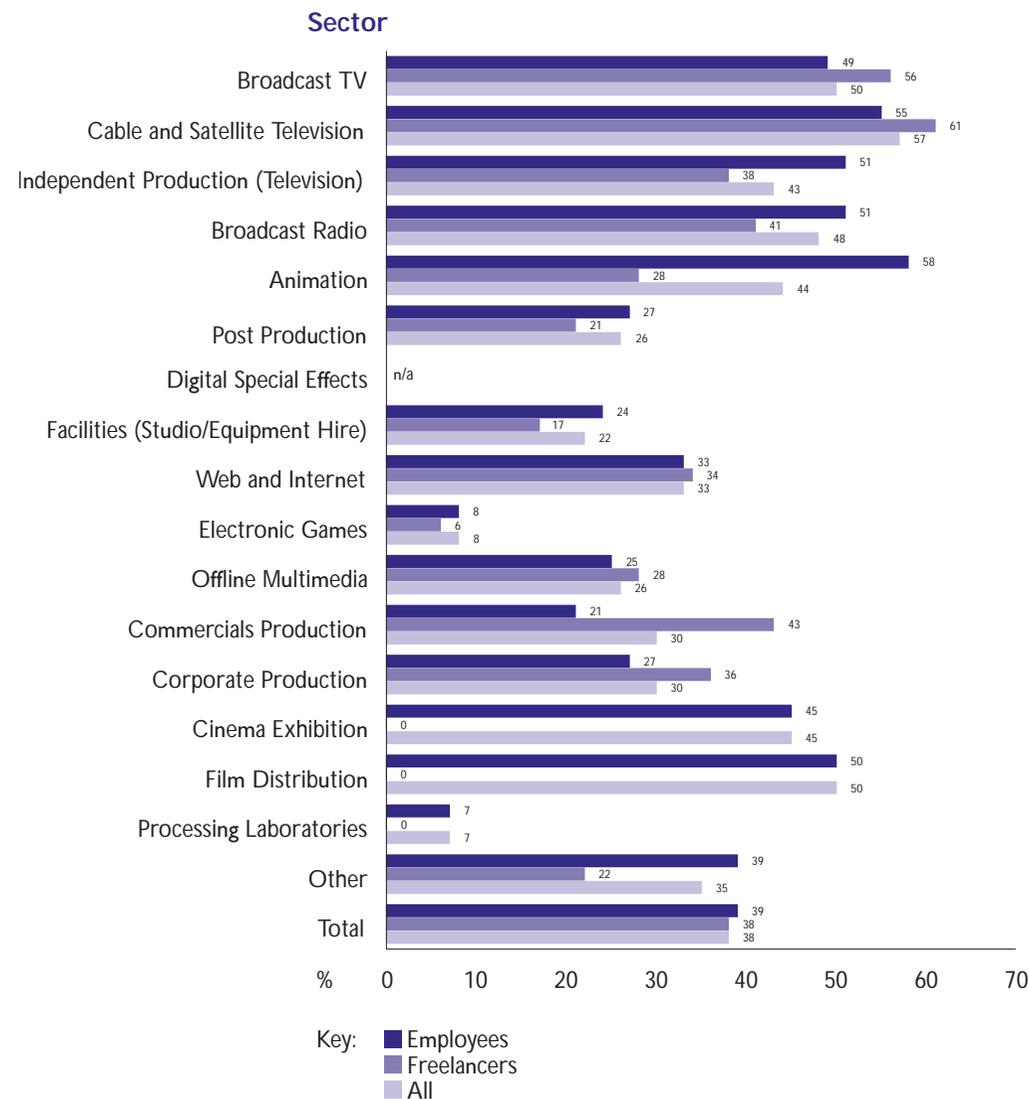


Figure 8 shows the percentage of the workforce who are female in each occupational group. Females comprise half or more of the workforce in: make up and hairdressing (93%), costume/wardrobe (74%), programme distribution (67%), cinema cleaners (65%), production (53%), television broadcasting (52%), film distribution (50%) and combined 'other' or generic occupational groups (50%). In all remaining occupational groups less than half the workforce are women, with representation lowest in broadcast engineering (11%), camera (10%), lighting (9%), sound (9%), cinema projection (10%) and processing laboratories (8%).

Figure 8 REPRESENTATION OF WOMEN IN THE INDUSTRY IN EACH OCCUPATIONAL GROUP

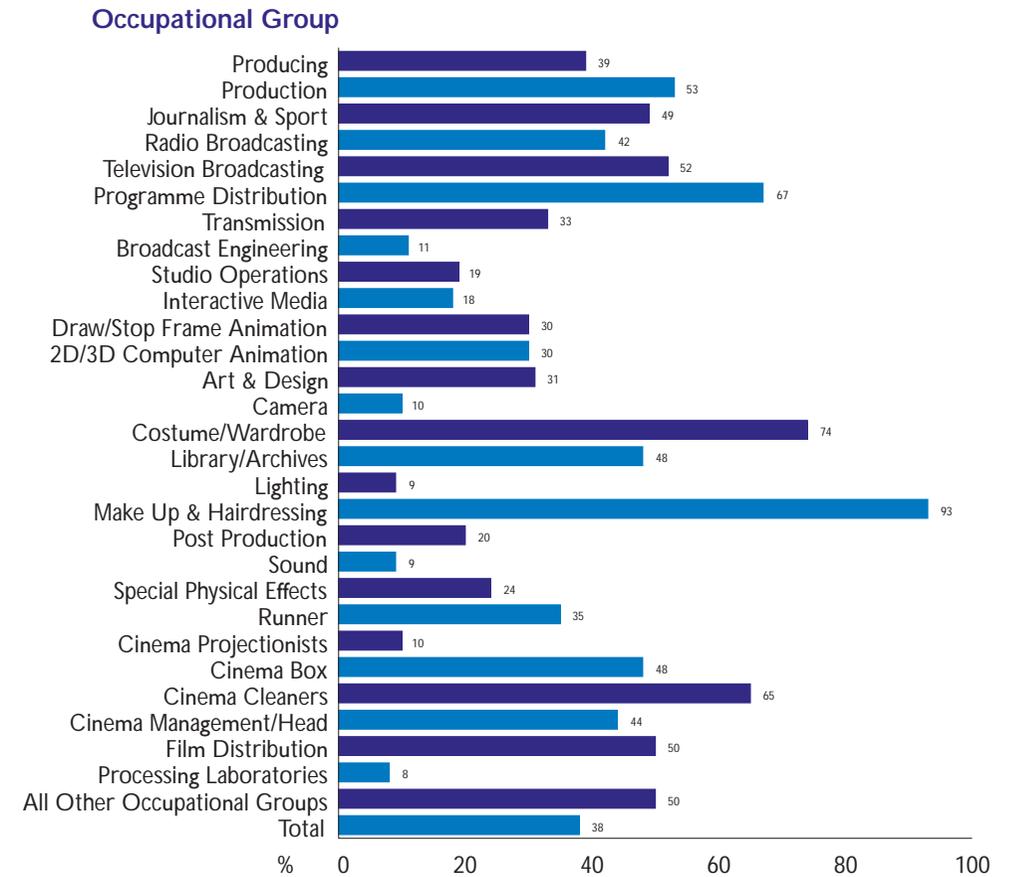
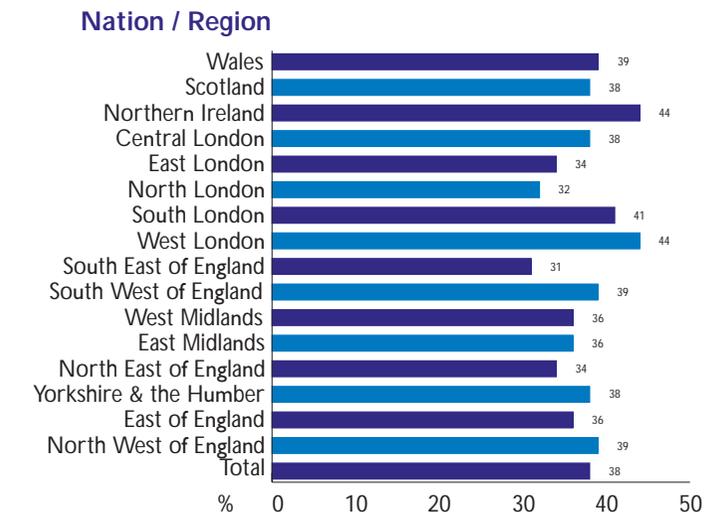


Figure 9 illustrates the percentages of women in the audio visual workforce employed in each nation and English region on Census Day (excluding Cinema Exhibition). Representation is highest in Northern Ireland and West London (both 44%) and lowest in the South East of England at 31%. These patterns are largely an effect of the relative prevalence of different sectors in each region. For example, broadcast TV which has the highest representation of women of all sectors has a very strong presence in West London, while interactive media has major hubs in the South East and employs relatively few women.

Figure 9 REPRESENTATION OF WOMEN IN THE WORKFORCE NATIONALLY AND REGIONALLY⁴



⁴ Excludes cinema exhibition.

PART FIVE REPRESENTATION OF ETHNIC MINORITIES

Figure 10 shows the percentage of the workforce who are ethnic minorities in each sector. Across all the audio visual industries, 7.0% are ethnic minorities compared with 8.0% of the population of working age in the UK and 35% of the population of working age in inner London, in which more than half the industry is based (Labour Force Survey 2002/2003). This represents a minor decrease from 7.4% in 2003 and the reported figure of 8.2% in 2002. These marginal yearly fluctuations are too small to indicate major long-term trends and may well reflect the evolving scope and methodology of the Census, rather than indicating real changes in the composition of the workforce.

The representation of ethnic minorities differs substantially between sectors. Web and internet, animation, cinema exhibition and broadcast TV have the highest levels of employment, all at 9% or more. The geographical concentration of sectors needs to be considered in this context, as the representation of ethnic minorities varies so greatly throughout the UK. Ironically, the above sectors, in which representation is highest, are among those most widely dispersed geographically. Around 5% or less of the workforce are ethnic minorities in independent production, corporate production, post production and commercials, all of which are London-centric, where 38% of the population of working age are ethnic minorities.

Figure 10 PERCENTAGES OF ETHNIC MINORITIES IN THE INDUSTRY IN EACH SECTOR

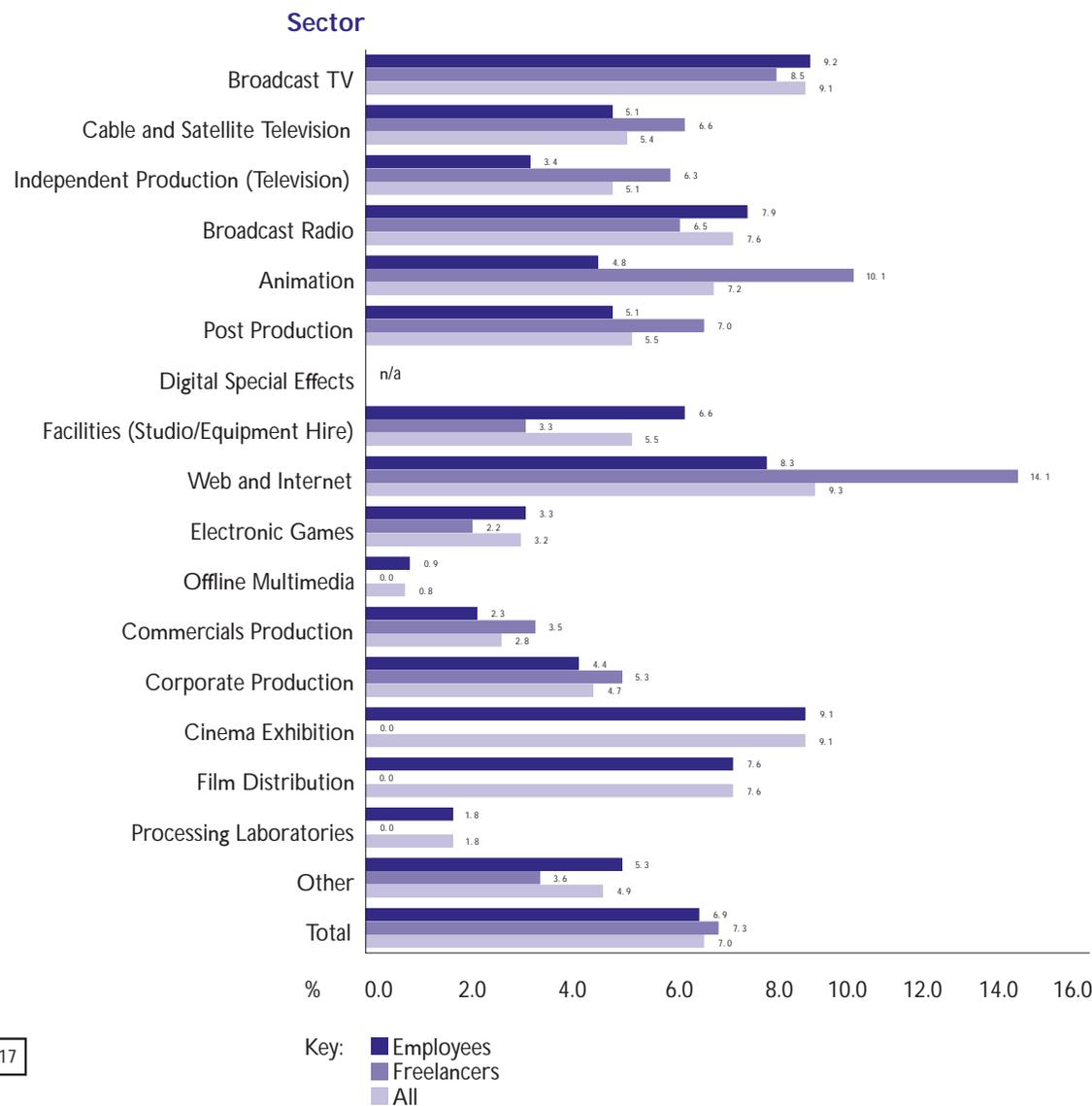


Figure 11 illustrates the proportions of ethnic minorities working across all the audio visual industries and within each occupational group. As in previous years, prevalence of ethnic minorities is highest among cinema cleaners (24.0%) and other roles within cinema exhibition, and in journalism and sport (11.4%). Within less visible production and technical roles, representation varies but, in most cases, falls within a range of 2.5-7.5%.

Figure 11 REPRESENTATION OF ETHNIC MINORITIES BY OCCUPATIONAL GROUP

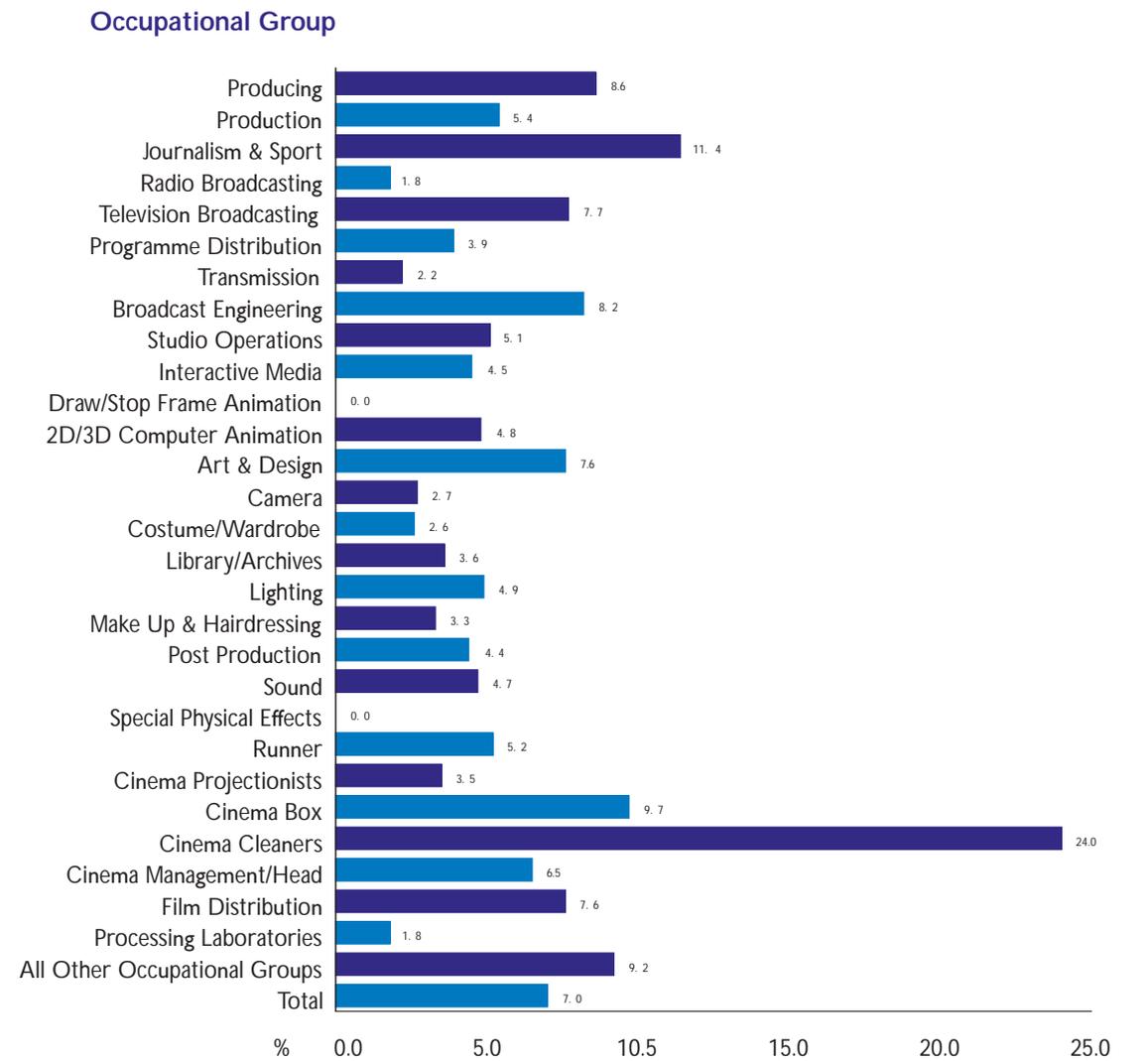
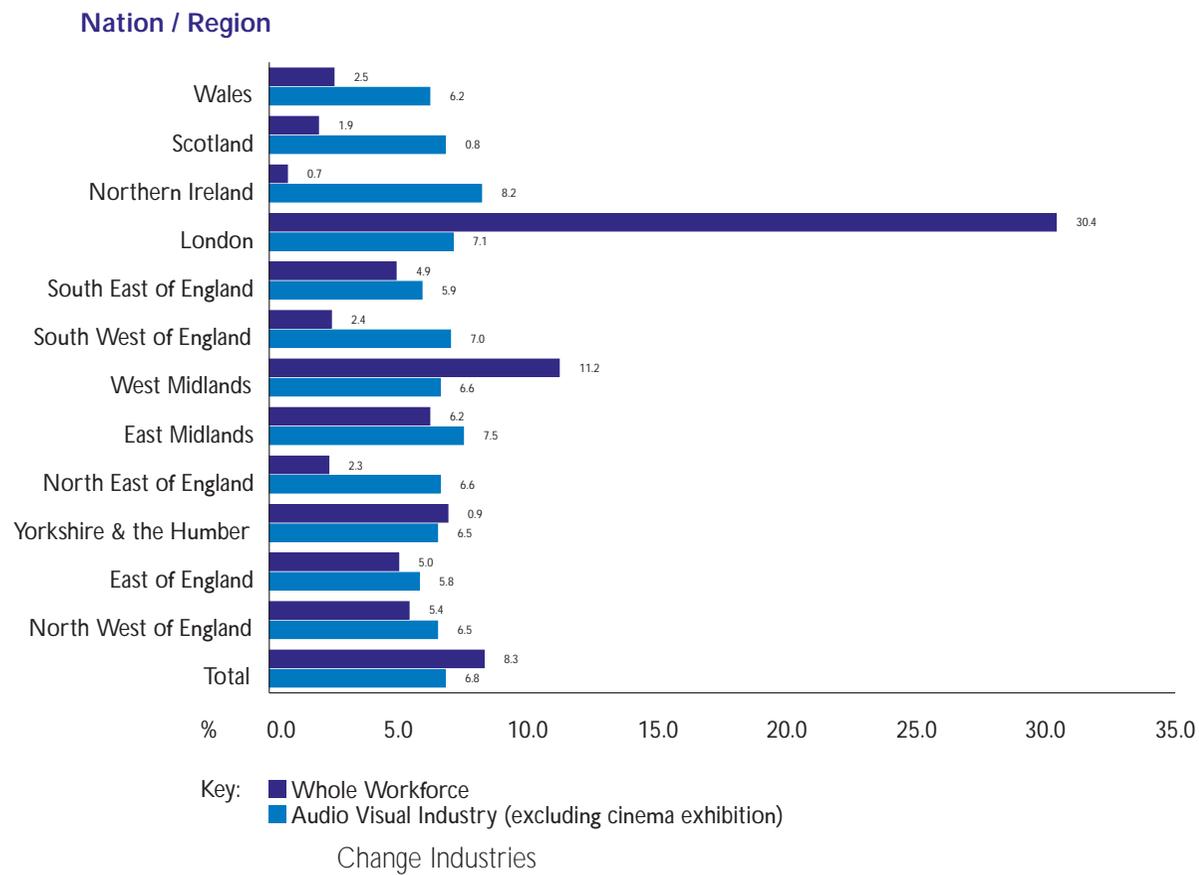


Figure 12 shows the percentages of the audio visual industry workforce who are ethnic minorities within each nation and English region (excluding cinema exhibition), and the percentage of the population of working age in that nation or English region (Labour Force Survey 2002/03). Overall, the levels of employment of ethnic minorities within the audio visual industry largely reflects the percentage of people of working age across the UK who belong to ethnic minorities (7.0% compared with 8.3%). However, the same comparison broken down by nation and English region highlights some variations. For example, ethnic minorities make up 30.4% of the population in London, but only 7.1% of the audio visual industries. In other nations and regions, it is important to bear in mind that the audio visual industries tend to be clustered in and around urban areas, in which there are greater proportions of people from ethnic minorities.

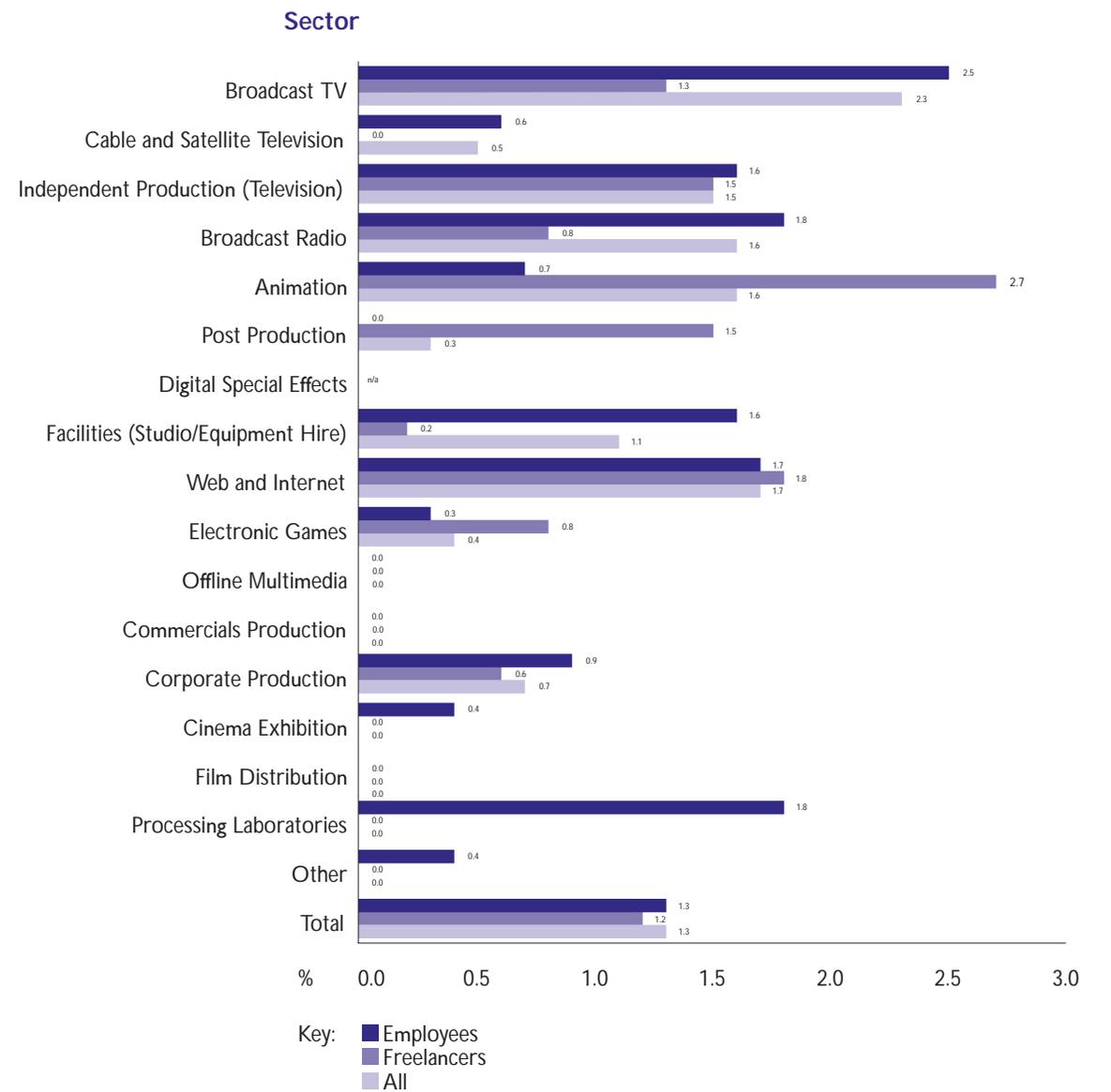
Figure 12 REPRESENTATION OF ETHNIC MINORITIES NATIONALLY AND REGIONALLY⁵



PART SIX REPRESENTATION OF DISABLED PEOPLE

Figure 13 shows the percentages of disabled workers employed within the audio visual industries. Overall, 1.3% of the audio visual industry is disabled, with no significant differences between employees and freelancers. Representation is highest within broadcast TV, web and internet, broadcast radio, and animation.

Figure 13 PERCENTAGES OF DISABLED PEOPLE IN EACH SECTOR



⁵ Excludes cinema exhibition.

Appendix

Occupational Groups	Role	Examples of Job Titles	
Producing	Animation	Producer	
	Commercials	Producer	
Production	Corporate	Producer	
	Feature Film	Development Executive, Executive Producer, Producer	
	New Media	Producer	
	Radio	Commercials Producer, Editorial Head of Department, Executive Producer, Producer, Senior Producer, Trailers Producer	
	Television	Development, Executive, Executive Producer, Producer, Promotions/Trailers Producer, Senior Producer, Series Producer	
	Archive Research	Researcher	
	Direction	1st Assistant Director, 2nd Assistant Director, 3rd Assistant Director, Director	
	Production	Continuity, Development Assistant, Production Assistant, Radio Reporter (not news), Researcher	
	Production Management	Assistant Producer, Casting Manager, Floor Manager, Location Manager, Production Accountant, Production Manager	
	Scriptwriting	Script Editor, Scriptwriter	
Journalism & Sport	Editorial	Editor, News Editor	
	Newsgathering & Presentation	Broadcast Journalist, Commentator, Correspondent, Presenter, Reporter	
	Production	Director, Producer	
	Sports Reporter/Presenter	Commentator, Presenter, Sports Journalist	
Radio Broadcasting	Audience Research	Analyst, Market Researcher, Research Manager, Strategy Manager	
	Commissioning	Commissioning Editor, Development Executive	
	Media Sales	Ad Sales Manager, Commercials Operations Assistant, Sales Executive/Manager Sponsorship Executive	
	Presentation	Continuity Announcer, Editor, Presenter, Pres Editor, Pres Operator, Producer	
	Scheduling	Network Assistant, Planning Assistant, Scheduler	
	Sound Producing	Sound Producer	
	Station/Channel Control Management	Controller, Launch Director, Station Manager, Station Director	
	Television Broadcasting	Acquisitions	Acquisitions Manager, Acquisitions Assistant
		Audience Research	BARB Analyst, Market Researcher, Research Executive, Research Manager
		Channel Control	Channel Editor, Channel Manager, Controller
Commissioning		Commissioning Editor, Development Executive	
Media Sales		Ad Sales Manager, Commercial Operations Assistant, Sponsorship Executive	
Operations		Anyone responsible for the satellite signal	
Presentation		Announcer, Continuity, Editor, Pres Operator, Producer	
Satellite & Cable Distribution/ Network Development		Affiliate Marketing Executive, Affiliate Sales Manager, Decoder Coordinator	
Satellite & Cable Network		Broadcast Engineer, Network Operations Manager, Operations Assistant	
Scheduling		Planning Assistant, Network Assistant, Scheduler	
Programme Distribution	Management	Director of International Relations, Head of Licensing, Sales Director	
	Operations	Acquisitions Assistant, Licensing Assistant, Programme Co-ordinator	
Transmission	Management	Head of Department, Head of Design, Head of Maintenance	
	Operations	Electrician, Engineer, Rigger, Technician	
Broadcast Engineering	Operations	Outside Broadcasting, Studio Engineer, Technical Operators, VT Engineer	
	Plant and Maintenance	Electrical Maintenance Engineer, Plant Engineer, Service Engineer	
	Project Engineering	Design Draughtsman, Project Design Engineer	
Studio Operations	Sound Recording & Reproduction	Sound Supervisor, Studio Manager (Radio)	
	Videolape Operation	Autocue Operator, VT Operator	
	Vision Control	Director, Vision Controller	
	Vision Mixing	Vision Mixer	
Interactive Media	Content	Animator, Asset Researcher, Copywriter, Illustrator, Search Engine Optimiser, Sound/Video Editor, Web Editor	
	Creative	Creative Director, Graphic Designer, Interface Designer	
	Planning, Pre-Production	Consultant, Information Architect, Producer, Strategist	
	Production/Implementation	Asset Optimiser, Production Assistant, Programmer, Site Builder, Sound/Video Compressionist	
	Quality Assurance	Account Handler, Proofreader, Usability Tester	
	Sustainability & Exploitation	Localisation Specialist, Search Engine Specialist, Site Manager, Webmaster	
	Technical Design	Database Designer, Interaction Designer, Systems Analyst, Technical Director	

Appendix

Occupational Groups	Role	Examples of Job Titles
Drawn/Stop Frame Animation	Pre-Production	Character, Set and Prop Builders, Designer (Character, Location and Prop), Layout Artist, Script Editor, Storyboard Artist
	Primary Creative	Art Director/Principal Design, Director, Producer, Writers
	Production	Animation, Background Artists, Compositors, Digital Paint and Trace Artists, D.O.P./Camera
2D/3D Computer Animation	Pre-Production	Designer (Character, Location and Prop), Editor, Storyboard Artist.
	Primary Creative	Art Director/Principal Design, Director, Producer, Writers
	Production	Animator, Composer, Lighting, Modelling, Technical Director, Texture Artist
Art & Design	Artist	Lettering Artist, Scenic Artist, Sketch Artist
	Graphic Design	Graphic Designer
	Operator	Graphics Technician
	Production Design	Art Director, Production Designer
	Props	Buyer, Property Master/Mistress, Set Dresser
	Set Crafts	Carpenter, Construction Manager, Painter, Plasterer, Rigger
	Set Design	Art Director, Set Designer
Camera	Design	Director of Photography
	Production	Camera Director, Camera Operator, Clapper Loader, Focus Puller, Grip, Stills Photographer
Costume/Wardrobe	Design	Chief Costume Designer, Costume Designer, Costume Stylist
	Dressing	Senior Dresser, Wardrobe Assistant, Wardrobe Supervisor
	Making	Costume Maker, Dressmaker
	Stores/Supply	Costume Stock Operative, Wardrobe Assistant
Library/Archives	Library/Archives	Archive Librarian, Archivist, Film Librarian, Music Librarian
Lighting	Design	Lighting Director
	Operations	Console Operator
	Setting/Placing	Lighting Assistant, Production Electrician, Rigger
Make Up & Hairdressing	Design	Chief Hairdresser, Make Up Designer
	Hairdressing	Hairdresser, Hairdressing Assistant, Wigmaking Assistant
	Make Up	Make Up Artist, Make Up Assistant, Special Effects Make Up Artist
	Stores	Make Up Stores Assistant
Post-Production	Audio	Assistant Dubbing Mixer, Dubbing Technician, Senior Dubbing Mixer, Sound Editor, Sound Engineer
	Bookings	Bookings Assistant, Bookings Manager, Client Liaison Manager, Facilities Manager
	Digital Effects	Digital Effects Supervisor, Digital Matte Artist and Digital Compositing Artist
	Editing	Assistant Film Editor, Film Editor, Non-linear Editor, Tape Editor, Technical Assistant
	Engineering	Assistant Engineer, Chief Engineer, Junior Engineer
	Graphics	Graphic Designer (various grades)
	New Media Facilities	Compressionist, New Media Technician
	Production	Producer, Supervisor
	VT	Junior VT Operator, Senior VT Operator
	Sound	Sound Recording & Reproduction
Special Physical Effects	Design	Special Effects Designer
	Manufacture	Pyrotechnics Technician, Special Effects Model Maker
	Operations	Special Effects Operator
Runner	Runner	All entry-level Running jobs
All Other Occupational Groups	Admin/Secretarial	Admin Assistant, PA, Secretary
	Finance	Accountant
	General Management	Board of Management, Chief Executive, Other Senior Managers
	Human Resources	Personnel Officer, Training Manager
	IT	Database Administrator, IT Manager, Network Administrator, Programmer, Server Administrator, Server Architect
	Legal	Solicitor
	Premises Operations	Caterer, Cleaner, Security Officer
	Press & PR	Press Officer
	Sales & Marketing	Marketing Manager, Sales Manager

STAND UP AND BE COUNTED

June 30th 2004

The fifth census of the industry

BBC

itv

4

five

Discovery

S4C

smg
television

UTV

APA
Advertising Producers Association

BECTU

ERCA

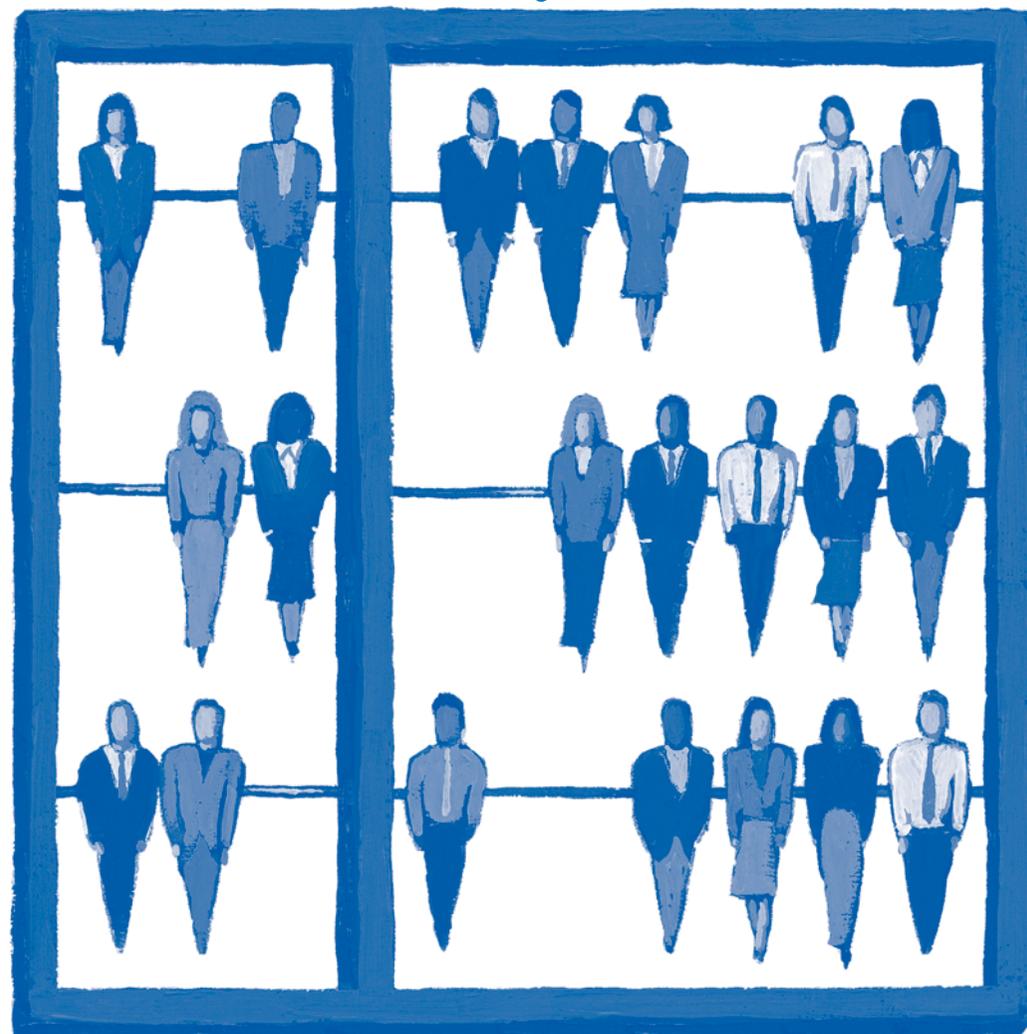
ELSPA

IVCA
Institution of
Communications
Engineers

pact.

TAC

Tie 2



Census available online at www.skillset.org/census

skillset

The Sector Skills Council for the Audio Visual Industries

IMPORTANT - PLEASE READ

This is the fifth census of the audio visual industries. Following the success of the first exercise in 2000, the Census is now an annual event - with the full backing of the industry. The census enables us to track how the industry is changing over time, and map areas of growth, decline and transition. Census 2004 results will be available at www.skillset.org

Please complete this Census form on or as near as possible to Census Day, Wednesday 30th June 2004. If you need any assistance, please call the Census Hotline on 020 7520 5776. This form is also available online at www.skillset.org/census

skills
FOR BUSINESS

HOW TO COMPLETE THE CENSUS

1. Please complete the form on Census Day (30 June 2004) or as soon as possible thereafter and return it by 30 July 2004 to the independent research organisation Qualasys Limited: FREEPOST NAT3137, Suite 333, Lee Valley Technopark, Ashley Road, Tottenham, London, N17 9BR. 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 form 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 freelancers on your payroll whom you use on **Wednesday 30 June 2004**. 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 freelancers 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 30 June 2004**.
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/freelancers 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 30 June 2004**, 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. Disability may cover physical or mental impairments with long term substantial effects on ability to perform day to day activities such as: visual, hearing, speech, co-ordination, mobility and many people who may not usually have considered themselves disabled. 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 **Catherine Godward** at Skillset (**tel: 020 7520 5776; e-mail: catherineg@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 Catherine Godward (catherineg@skillset.org) or you can go to www.skillset.org/census and complete the form online or print hard copies and complete the form manually.

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
Drawing/Stop Frame Animation
2D/3D Computer Generated Animation**

**Art & Design
Camera
Costume/Wardrobe
Library/Archives
Lighting
Make Up & Hairdressing
Post-Production
Sound
Special Physical Effects
Runners
All Other Occupational Groups**

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:

Prior to today had you heard of Skillset? (✓ if yes)

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

<input type="checkbox"/> Terrestrial Television	<input type="checkbox"/> Distribution (Other, please specify)	<input type="checkbox"/>
<input type="checkbox"/> Cable and Satellite Television	<input type="checkbox"/> Animation	<input type="checkbox"/>
<input type="checkbox"/> Independent Production (Television)	<input type="checkbox"/> Post Production	<input type="checkbox"/>
<input type="checkbox"/> RSL Television	<input type="checkbox"/> Digital Special Effects	<input type="checkbox"/>
<input type="checkbox"/> National and Local Radio (Commercial)	<input type="checkbox"/> Facilities (Studio/Equipment Hire)	<input type="checkbox"/>
<input type="checkbox"/> National and Local Radio (Public Service)	<input type="checkbox"/> Web and Internet	<input type="checkbox"/>
<input type="checkbox"/> Independent Production (Radio)	<input type="checkbox"/> Interactive Television	<input type="checkbox"/>
<input type="checkbox"/> Community Radio	<input type="checkbox"/> Electronic Games	<input type="checkbox"/>
<input type="checkbox"/> Studio Production	<input type="checkbox"/> Offline Multimedia (e.g. CD Rom Production)	<input type="checkbox"/>
<input type="checkbox"/> Other Production	<input type="checkbox"/> Commercials Production	<input type="checkbox"/>
<input type="checkbox"/> Distribution (Television)	<input type="checkbox"/> Transmission	<input type="checkbox"/>
<input type="checkbox"/> Distribution (Theatrical)	<input type="checkbox"/> Other, please specify	<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:

<input type="checkbox"/> Wales	<input type="checkbox"/> North East of England Northumberland/Tyne & Wear/County Durham Tees Valley
<input type="checkbox"/> Scotland	<input type="checkbox"/> Yorkshire & the Humber North Yorkshire/West Yorkshire/Humberside South Yorkshire
<input type="checkbox"/> Northern Ireland	<input type="checkbox"/> East of England Norfolk/Cambridgeshire/Suffolk/Bedfordshire Hertfordshire/Essex
<input type="checkbox"/> Central London City of Westminster, Kensington and Chelsea, Lambeth, Wandsworth, Southwark, Camden, Islington	<input type="checkbox"/> North West of England Cumbria/Lancashire/Greater Manchester Merseyside/Halton/Cheshire/Warrington
<input type="checkbox"/> East London Hackney, Redbridge, Havering, Barking and Dagenham, Newham, Tower Hamlets, City of London, Bexley, Greenwich, Lewisham	
<input type="checkbox"/> North London Barnet, Enfield, Haringey, Waltham Forest	
<input type="checkbox"/> South London Richmond-Upon-Thames, Kingston-Upon-Thames, Merton, Sutton, Croydon, Bromley	
<input type="checkbox"/> West London Hillingdon, Harrow, Brent, Ealing, Hounslow, Hammersmith, Fulham	
<input type="checkbox"/> South East of England (excluding London) 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	
<input type="checkbox"/> South West of England Gloucestershire/Wiltshire/Swindon Former Avon/Somerset/Bournemouth/Dorset/Poole Devon/Cornwall	
<input type="checkbox"/> West Midlands Shropshire/Staffordshire The Black Country/Coventry/Warwickshire Herefordshire/Worcestershire	
<input type="checkbox"/> East Midlands 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)			Freelancers (inc. contracts of 364 days or less and Schedule D)		
		Total Number	Number of Females	Number of Ethnic Minorities	Total Number	Number of Females	Number of Ethnic Minorities
1. Producing	Animation						
	Commercials						
	Corporate						
	Feature Film						
	New Media						
	Radio						
2. Production	Television						
	Archive Research						
	Direction						
	Production						
	Production Management						
	Scriptwriting						
3. Journalism & Sport	Editorial						
	News gathering / Presentation						
	Production						
	Sport Reporting / Presentation						
4. Radio Broadcasting	Audience Research						
	Commissioning						
	Media Sales						
	Presentation						
	Scheduling						
	Sound Producing						
	Station / Channel Control Programme Management						
5. Television Broadcasting	Acquisitions						
	Audience Research						
	Channel Control						
	Commissioning						
	Media Sales						
	Presentation						
	Satellite & Cable Distribution / Network Development Satellite & Cable Network Operations						
6. Programme Distribution	Scheduling						
	Signing						
	Subtitling						
7. Transmission	Management Operations						
	Management Operations						

Occupational Groups	Role	Employees (inc. contracts of 365 days or more)				Freelancers (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
8. Broadcast Engineering	Operations								
	Plant & Maintenance Project Engineering								
9. Studio Operations	Sound Recording & Reproduction								
	Videotape Operation								
	Vision Control								
	Vision Mixing								
10. Interactive Media	Content								
	Creative								
	Planning, Pre-Production								
	Production/Implementation								
	Quality Assurance								
	Sustainability & Exploitation Technical Design								
11. Drawn/Stop Frame Animation	Pre-Production								
	Primary Creative Production								
12. 2D/3D Computer Generated Animation	Pre-Production								
	Primary Creative Production								
13. Art & Design	Arist								
	Graphic Design								
	Operator								
	Production Design								
	Props								
	Set Crafts Set Design								
14. Camera	Design								
	Production								
15. Costume / Wardrobe	Design								
	Dressing								
	Making								
	Stores / Supply								

Occupational Groups	Role	Employees (inc. contracts of 365 days or more)				Freelancers (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
16. Library / Archives	Archive Research								
	Library / Archives								
17. Lighting	Design								
	Operations Seating / Placing								
18. Make Up & Hairdressing	Design								
	Hairdressing								
	Make Up								
	Stores								
19. Post-Production	Audio								
	Bookings								
	Digital Effects								
	Editing								
	Engineering								
	Graphics								
	New Media Facilities Production VT								
20. Sound	Sound Recording & Reproduction								
21. Special Physical Effects	Design								
	Manufacture Operations								
22. Runner	Runner								
23. All Other Occupational Groups	Finances								
	General Management								
	Human Resources								
	IT								
	Premises Operations Press & PR								
	Sales & Marketing (inc. Media Sales & Marketing in Television8 Broadcasting or Radio Broadcasting) Secretarial / Admin								
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 :

Qualays Limited: FREEPOST NAT3137, Suite 333, Lee Valley Technopark, Tottenham, London, N17 9BR.



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