

**British Film Institute
Television Industry Tracking Study**

Third Report - May 1999



BFI Centre for Audience and Industry Research

EXECUTIVE SUMMARY

- **Jobs & Gender** - A higher percentage of Producers and Directors were women (41% of women, 39% of men) and a higher percentage of freelancers were women compared with men (48% of women, 39% of men). However, men were more likely to be in Managerial and Executive Producer roles, and more likely to be Company Owners than women.
- **Families & Gender** - Women working in television were found to be far less likely to have children than men. The latest figures show that over half of the women have no children compared with only a quarter of the men. When looking at those aged over forty, 56 per cent of women over forty have no children compared with only 15 per cent of men of this age with no children.
- **Income** - In the latest questionnaire almost a third of respondents (30%) earned between £30,000 and £50,000 per annum and 21% earned over £50,000. However, almost half of all respondents (48%) earned under £30,000, with 23% earning under £20,000. Freelancers earned less than staff with the majority of freelancers in the £10,000 to £20,000 bracket, compared with the majority of those with staff jobs earning in the £30,000 to £50,000 bracket. More people in London and the South East earned under £10,000 than those elsewhere, but more were also earning over £70,000 compared with those elsewhere.
- **Income & Age** - For those in the 31-40 year age bracket, incomes have polarised somewhat over time. The percentage earning incomes in the middle income brackets has slowly reduced and the percentages earning less than £10,000 or over £70,000 have increased.
- **Income & Gender** - Women earned significantly less than men in the survey. In the final questionnaire, 13% of women earned less than £10,000 compared with 4% of men. At the other end of the scale, 2% of women earned over £70,000 compared with 15% of men. A significant difference still remained when excluding all those not in full time employment. In addition, these differences were found to be still apparent when looking at incomes within specific job groups. Female Producers and Directors still earned less than their male counterparts, even when controlled for age and full time or part time employment status. For example, 35% of the women earned less than £20,000 as Producers/Directors, compared with 16% of men.
- **Unpaid Work** - In the final questionnaire, 63% of all freelancers stated that they had worked unpaid at some point in the last year. Half of these had worked unpaid for over a month, and for anything up to a year.
- **Other Sources of Income** - 53% of all respondents earned income from other sources outside television work and for 30% of these, this other income source constituted over half of their total income. The most common source of alternative income was from teaching or lecturing.
- **Hours** - The number of hours worked by respondents during the course of the survey slowly reduced. Those working over 50 hours in a week reduced from 47% to 36%, but 17% of respondents were still working over 60 hours a week. Men, 41-50 year olds, Freelancers, Managers and Londoners were the groups most likely to work longer hours.
- **Short-term contracts** - 83% of those with experience of short term contracts found that this work 'made their income unpredictable', 78% found it 'made career planning difficult' and 54% had 'had to accept lower income rates'. In addition, 82% had found it 'hard to take sick leave'. 36% felt that short-term contract work 'made them cautious

about new ideas in their work', and 50% felt short term contracts had 'made them uncertain about continuing a career in television'. On the other hand 73% of those with experience of short term contracts felt it had 'enabled them to gain a taste of other genres' and 40% had 'gained more time with their families'.

- **Preferred workplace** - When asked what type of workplace they would prefer to work in, the majority (56%) of respondents indicated they would prefer to be working as staff. 29% indicated a preference for freelance work and 10% indicated a preference for work outside TV altogether. Those in post production and technical roles were those most likely to state a preference for freelance work.
- **Work values** - Respondents were asked to rate a set of work values in terms of the degree to which they 'liked' or 'disliked' these values. The values rated most highly throughout the survey were 'achievement', 'responsibility', 'relationship with peers', 'independence', 'creativity' and 'intellectual stimulation'. 'Uncertainty' was the only value to receive a negative rating.
- **Uncertainty** - In analysing respondents' strategies to deal with uncertainty, it was found that TV workers responded by attempting to find stable work; by building and maintaining networks within the industry; and by looking for alternative income sources. 41% of respondents had 'stayed in the same job', 72% had 'sought commissions for long running series'. 72% had 'maintained work contacts' and 63% had 'worked with people they knew'. 60% had 'sought income from non-TV sectors'.
- **Finding Work** - In each questionnaire, 'personal contacts' was recorded as respondents' most important method of finding work. In the final questionnaire 50% of respondents stated 'personal contacts' as their most important method, compared with only 5% in 'response to advertisements'. Recruiters also predominantly used 'personal and work contacts' to find staff (66%).
- **Skill Shortages** - 57% of recruiters declared they had experienced shortages of skilled staff, mainly in the post production and technical roles, but also for Producers and Directors and Production Support. The majority experiencing shortages complained of a 'lack of skilled/experienced people available in certain job types' and a 'lack of trusted/known people' available. A significant percentage also said that 'commissions and contracts at short notice made it hard to find suitable staff'.
- **Training Type** - The majority of training undertaken, both formal and on-the-job, in the previous six months before each questionnaire wave, was in computers and new technology (e.g. 29% formal and 52% on-the-job in Diary 8) and in business management (e.g. 26% formal and 16% on-the-job in Diary 8). Only 4% had had any formal Producer or Director training, and only 7% on-the-job training in Producing or Directing, in the six months prior to the final questionnaire.
- **Training requirements** - When asked if there was any training that TV workers in the survey wanted but had not received - 43% said there was. When asked for the reasons why they hadn't received the training they had wanted, the majority indicated pressures of time (44%). A further 11% felt the costs were too high and 10% that the courses they wanted were not available to them.
- **Stimulating Creativity** - When asked what factors respondents felt were 'most important' in stimulating creativity in the work place, 'working with talented individuals' was rated the highest (59%). Other factors rated highly in helping to stimulate creativity were 'trust', 'working as a team', 'effective leadership', 'effective management', 'exchange of ideas', 'sufficient time', and 'responsiveness to ideas'. 'Competitiveness' was rated the least important factor in stimulating creativity.

- **Work Environment Experiences** - Many of the aspects rated highly in stimulating creativity were also those experienced the most by respondents in their current work. 'Working in a team', 'working with talented individuals', 'trust', 'exchange of ideas' and 'responsiveness to ideas' were all experienced by over half of the respondents. However, 'sufficient time', 'effective management' and 'leadership' were each experienced by less than 40% of respondents, despite being rated highly as important for stimulating creativity.
- **Quality** - 70% of respondents felt that the quality of television programmes had worsened over the last four years. Only 10% felt that quality had improved in that time. The majority of comments on falling standards in quality attributed it to shrinking budgets.
- **Budgets** - The areas felt to be most affected by budget cuts were; the 'Scale of Shooting' (74%), 'Research and Development' (60%), 'Staff Pay' (59%) and 'Post Production' (50%).
- **Standards** - 55% of all respondents felt that ethical standards were lower than four years ago, compared with only 4% who felt that they were higher. 49% of respondents felt that standards of accuracy were lower, compared with 7% who felt that they were higher. Views on technical standards were more divided; 40% of respondents felt that technical standards were lower compared with 27% who felt they were higher and 26% who felt they had stayed the same. For creative standards the picture was similar: 37% felt they were lower than four years ago compared with 22% who felt they were higher. Almost a third indicated that they felt standards of creativity had stayed the same. Older respondents were more likely to view standards as having declined. Of all those working in factual programming, over half had experienced pressures at odds with how they felt contributors should be treated, and a similar number had experienced pressures at odds with maintaining accuracy.
- **Accuracy** - When asked about the importance of accuracy in specific factual genres, over 90% of those working in factual programmes felt that accuracy was 'most important' in Current Affairs programmes. Only three quarters of the respondents felt that accuracy was 'most important' in Documentaries, and less than half felt the same about Studio Debates. Docu-Soaps and Infotainment programmes were regarded as the least important genres when it comes to maintaining accuracy, only just over a third of respondents felt it was 'most important' in these genres. The older age groups rated the importance of accuracy in these genres highest compared with other age groups.

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1. Introduction

1.1 The Project

Change has been a defining characteristic of many areas of the television industry in recent years. Regulation, technological advances, and structural reorganisation, together with increased competition have resulted in new ways of working for the UK's production personnel. The BFI began its longitudinal Television Industry Tracking Study in 1994 to investigate how these changing conditions may have affected individual careers in production.

The objectives of the BFI's four year study were:

- to analyse the impact on individual television careers of the structural, organisational and technological changes of recent years, with increasing competition and downward pressures on costs;
- to collect and analyse data about the production personnel, their working conditions and their creative environment; and to make observations about the creative consequences.

The BFI study, has been based on data collected from a panel of 436 production personnel, drawn from all age groups, a range of sectors, programme genres, and programme making centres in the UK. In 1997 a new sample of under 30s was recruited to provide fresh evidence of the conditions of entry for young people to the TV industry.

The data consist of an initial questionnaire in March 1994 followed by two diary/questionnaire waves a year, finishing in May 1998. Responses have been a mix of codable quantitative and discursive qualitative data and questions have covered education, training, employment, personal life, and a range of production, creative and business issues. Some core questions have been asked at every diary wave, others have been repeated at intervals, some production issues have been considered only once, but in some detail. The longitudinal aspect of the project has enabled a degree of interactivity between responses given and questions asked at subsequent waves.

1.2 The Report

This is the third report presenting results from the main sample in the Television Industry Tracking Study and is largely based on quantitative data from the final three diary/questionnaire waves (May 1997, November 1997, May 1998). Where we have asked repeated questions over the course of the project enabling us to track attitudes or conditions of work, this report takes into account data from all eight diary/questionnaire waves. The initial questionnaire is referred to as Q1 for the purposes of the tables and figures and each diary/questionnaire wave may be referred to as Diary 1, Diary 2 etc., or abbreviated where appropriate to D1, D2 etc. in the tables and figures. For some topics, tables and figures are presented to illustrate the data, and for others the data is summarised in the text. Further information on the data presented here is available on request from the BFI Centre for Audience and Industry Research. The main findings from previous interim reports (1995, 1997)¹ can be found in Appendix A and B.

¹ The First Interim Report contained data from the initial questionnaire and the two subsequent diary questionnaires, up to May 1995. The Second Interim Report looked at data from the third, fourth and fifth diary questionnaires, completed between November 1995 and November 1996.

1.3 Further Papers and Reports

Papers produced by the research so far have included:

- J. Willis and S. Dex, 'Mothers Returning to TV Production Work: Equal Opportunities in a Flexible Labour Market', Research Papers in Management Studies, University of Cambridge, The Judge Institute of Management Studies (1999)
- S. Dex, J. Willis, R. Paterson and E. Sheppard, 'Workers' Strategies in Uncertain Labour Markets: Analysis of the Effects of Casualisation in the Television Industry', Research Papers in Management Studies, University of Cambridge, The Judge Institute of Management Studies (paper given at the Work Employment and Society Conference, Cambridge, 1998)
- E. Sheppard and S. Dex, 'Analysis of Attrition in the Longitudinal Television Industry Tracking Survey', (unpublished report, BFI 1998)
- R. Paterson, 'Work Histories in Television', (paper given at the International Labour Process Conference, Royal Holloway College, Egham, in March 1999)
- N. Pettigrew, J. Willis, & R. Paterson, 'British Film Institute Television Industry Tracking Study: The First Year - An Interim Report', London: British Film Institute (1995)
- N. Pettigrew, J. Willis, R. Paterson & S. Dex, 'British Film Institute Television Industry Tracking Study: Second Interim Report', London: British Film Institute (1997)
- S. Dex and C. Smith, 'Training in the Television Industry' (unpublished paper, 1999)

Further studies are in progress and a book is forthcoming.

1.4 Acknowledgements

The research was initiated by the BFI in 1994 and was partly supported by a grant from the Hoso Bunka Foundation. Subsequently, the industry training body for broadcasting, film and video, Skillset, contributed support for the project in 1995/6 with a grant to the BFI. From April 1997 a major research award from the Economic and Social Research Council funded the ongoing research project at the BFI and at the University of Cambridge Judge Institute of Management Studies (Contract R 000 23 7131).

The BFI would like to acknowledge the goodwill and support of respondents who so generously gave up time during busy and often stressful working weeks to complete the diary/questionnaires twice a year, for four years. Their efforts have been considerable, and the data they have produced, invaluable.

The statistical analysis was carried out by Elaine Sheppard and the report was compiled by Elaine Sheppard, Janet Willis, Richard Paterson and Shirley Dex. The statistical analysis for previous reports was conducted by Nick Pettigrew.

2. Method and Sample Characteristics

2.1 The Sample

The initial sample of 533 television workers was generated from lists supplied by broadcasters, the register of PACT (Producers Alliance for Cinema and Television) and BFI contacts. A number of those recruited were also taken from a self-selected sample from the 1988 One Day in the Life of Television Project in which television workers recorded their working experiences of one day, along with members of the public, who wrote about their viewing. Although not a random sample, the panel generated was regarded as representative of the range of creative production jobs in television, of the spread of workers between broadcasting companies, independent television companies and freelance workers, and of the issues faced by such workers. The panel members were aged between 21 and 65 in 1994; 56 per cent were men and 44 per cent were women. Panel members are represented in all sectors of the industry, and in the regions as well as in London and the South East. Job ranges included Executive and Managerial posts, Producers and Directors, Researchers and Production support, Writers Journalists and Designers, as well as Camera, Lighting, Sound and Post Production workers.

2.2 The Questionnaires

An initial questionnaire (Q1) was posted in March 1994 to the sample of 533 television workers. This questionnaire was designed to obtain detailed background information on education, career history, training, current job and work values. In November 1994, the first Diary wave (D1) was distributed. This time respondents were asked to complete a work diary for a specified day, giving an account of the work they had done on that day, interaction with other workers and contacts, decisions made, breaks taken etc. Respondents were also asked to give some idea of the background to their projects, the time involved in their work tasks and their feelings and reactions towards the days' work. As well as the diary, respondents were asked to complete a questionnaire. Within each questionnaire there was a core of questions repeated each time such as job title, employment status, hours worked, training etc. A number of questions were asked several times at intervals over the course of the study in order to track changes; for example questions on family and child care, work values, income etc. In addition, sets of questions around particular production issues were asked at one survey wave only. The diary/questionnaires were sent out to the panel members at regular six monthly intervals, with the last one (D8) distributed in May 1998; a total of eight plus the initial questionnaire in all.

2.3 Response rates

The response rate to the initial questionnaire was 82 per cent. Although the response rates have fallen somewhat at each diary wave, the survey response rates remained good, and, between the initial questionnaire and the final diary, the overall response rate has dropped by only 15 per cent (see table 1 below). 36 per cent of the initial sample completed the first questionnaire and all eight subsequent diary questionnaires.

Table 1

Response rates										
	Initial Sample	Questionnaire 1 March-94	Diary 1 Nov-94	Diary 2 May-95	Diary 3 Nov-95	Diary 4 May-96	Diary 5 Nov-96	Diary 6 May-97	Diary 7 Nov-97	Diary 8 May-98
Response Rate %	-	82	80	78	75	71	67	67	66	67
No. of Responses	533	436	349	341	328	311	293	292	290	294

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2.4 Characteristics of The Sample

From the outset of the survey in March 1994, and at stages throughout the project, detailed background questions have been asked of respondents covering: gender, age, job, contract type, company type, income, location, marital and parental status, aspects of their home life, training received, work values etc. The aim of gathering this kind of information was to build a profile of the sample as a whole, to track changes over time, and to aid a further understanding of individual context and of factors which may have affected responses to survey questions.

2.5 Age

The panel consisted of respondents aged between 21 and 65 in March 1994. At the start of the survey, 21 per cent of the respondents to the first questionnaire were aged between 21 and 30 years². However, the percentage of young people responding fell during the course of the survey to 13 per cent at the end (see table 2 below).

Table 2

Age bands	Q1 %	D1 %	D2%	D3 %	D4 %	D5 %	D6 %	D7 %	D8 %
21-30 year olds	21.1	16.4	17.4	16.6	15.9	15.1	14.6	13.3	12.8
31-40 year olds	31.0	31.7	30.2	31.6	31.5	30.6	30.3	30.4	28.7
41-50 year olds	31.4	33.4	34.7	33.4	34.7	35.4	36.2	36.0	38.1
51+ year olds	16.5	18.4	17.7	18.4	17.9	18.9	18.8	20.3	20.4
Total	N=436	N=347	N=334	N=326	N=308	N=291	N=287	N=286	N=289

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Although the response rates for the panel as a whole remained high, an attrition analysis of the retained sample compared with those who were lost was carried out. This revealed a greater loss of young people in the survey compared with the sample as a whole. However, no other groups were found to be significantly affected in terms of response rates. The reduced numbers of young people in the sample should therefore be taken into account when comparing data relating to age across the course of the survey. However, the stability of the other basic data over time, ensures that for the most part, a longitudinal analysis can be conducted, using the responses from each diary wave.

In response to the declining numbers of young people in the survey, and in order to re-examine the working conditions of new entrants to the industry, a new age cohort of 50 young people aged between 21 and 30 years was recruited to the Tracking Study in November 1996. This new young age cohort was sent a questionnaire gathering basic data, similar to the initial questionnaire which was sent to the main sample in March 1994, but also covering some of the issues dealt with in the main survey between 1994 and 1996. In May 1997, November 1997 and May 1998, the new young age cohort was sent the same questionnaire as the main sample.

The majority of data presented in this report uses the main sample for analysis, where use has been made of the new young age cohort data, this has been clearly indicated.

2.6 Gender

The proportion of men to women in the sample (56 per cent to 44 per cent at the start) has fluctuated only slightly over the course of the survey but remains roughly similar throughout. In the final questionnaire, the percentages were 58 per cent men and 42 per

² Age groups are those established at the beginning of the survey i.e. those in the 21-30 year group are those who were aged between 21 and 30 in May 1994 when the first questionnaire was sent out.

cent women. Even though there are more men than women in the sample, there are more younger women in the sample than younger men. For example, in the latest questionnaire, the 21-30 year age group consisted of 38 per cent men and 62 per cent women, whereas the 41-50 age group consisted of 69 per cent men and 31 per cent women. Although the number of young people as a whole has dropped in their response rate, the proportions of women to men in each age group have remained fairly steady.

2.7 Location

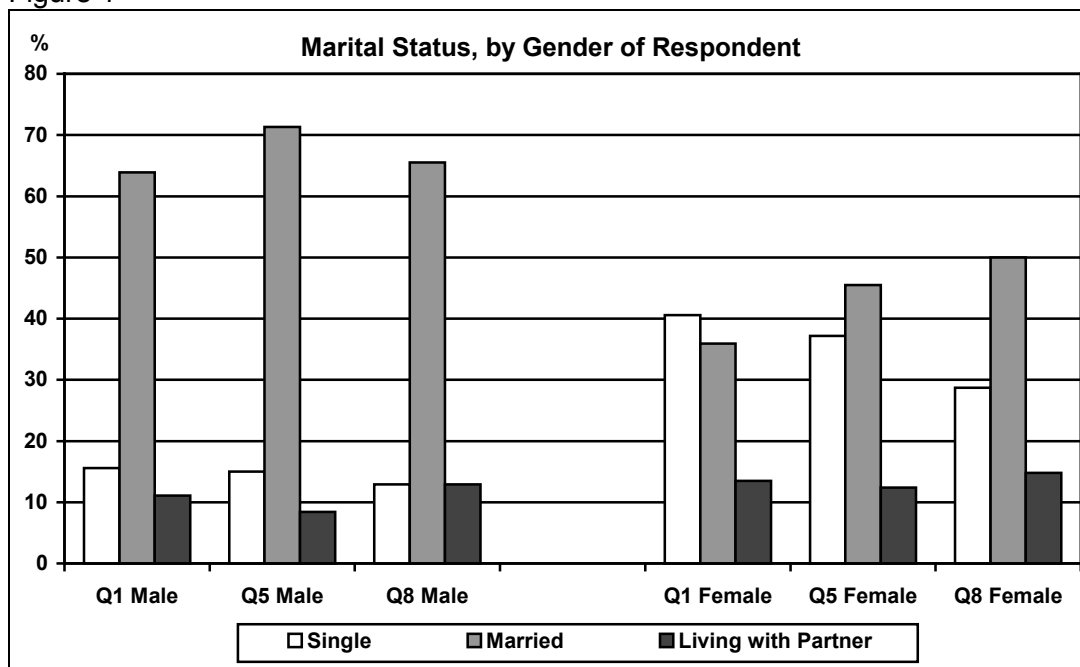
As of the latest questionnaire, sixty per cent of the sample live in the London and South East region and this profile has remained fairly steady over the course of the survey. Outside London and the South East, the regions of the West (Bristol area), the Midlands, Scotland and Wales have the highest concentration of respondents.

2.8 Marital Status

In order to gain a profile of respondents' home life, a series of questions was asked at various stages throughout the survey concerning partners, children, leisure time etc. In the first questionnaire (March 1994), in Diary 5 (November 1996), and in Diary 8 (May 1998), respondents were asked about their marital status. The percentage of respondents who are married or living with a partner has increased slightly over time. At the start, 52 per cent were married and 12 per cent were living with a partner. The latest data, from Diary 8, showed that 59 per cent of respondents were married and 14 per cent were living with a partner. Twenty per cent of respondents were single.

However, the data from the latest questionnaire shows that, despite increases over time, the women are far more likely to be single than the men. The percentage of women who were married has increased from 36 per cent at the start of the survey to 50 per cent at the end, whereas the percentage of men who were married has fluctuated but overall, increased by only two per cent. Although the gap has narrowed between women and men, the difference in marital status has remained significant and at Diary eight, 29 per cent of women were single compared with 13 per cent of men. See figure 1 below.

Figure 1

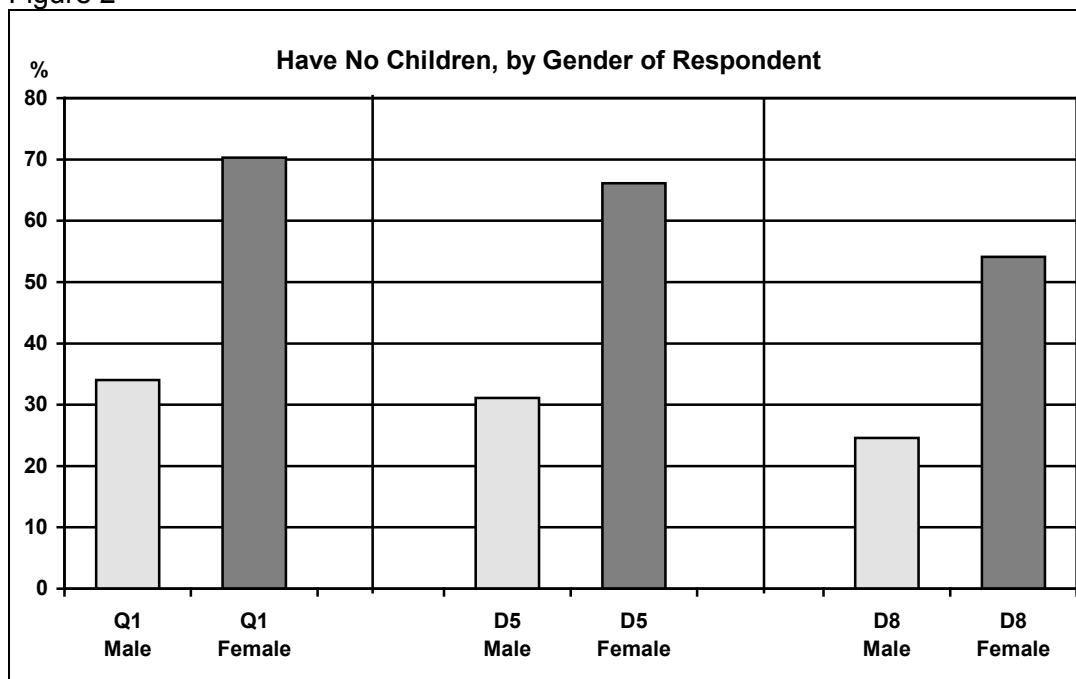


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2.9 Children

The percentage of respondents with children has increased over the survey from 50 per cent at the start in 1994 to over 63 per cent in 1998. As was found in previous waves of the research project, women respondents are far less likely to have children than the men. The gap has narrowed since the first questionnaire as respondents have got older; the percentage of men with children has increased by 9 per cent compared with an increase of 20 per cent for the women. However the latest figures still show a significant difference between the sexes. Whilst only a quarter of the men have no children, the same is true of over half of the women (54 per cent). See figure 2 below.

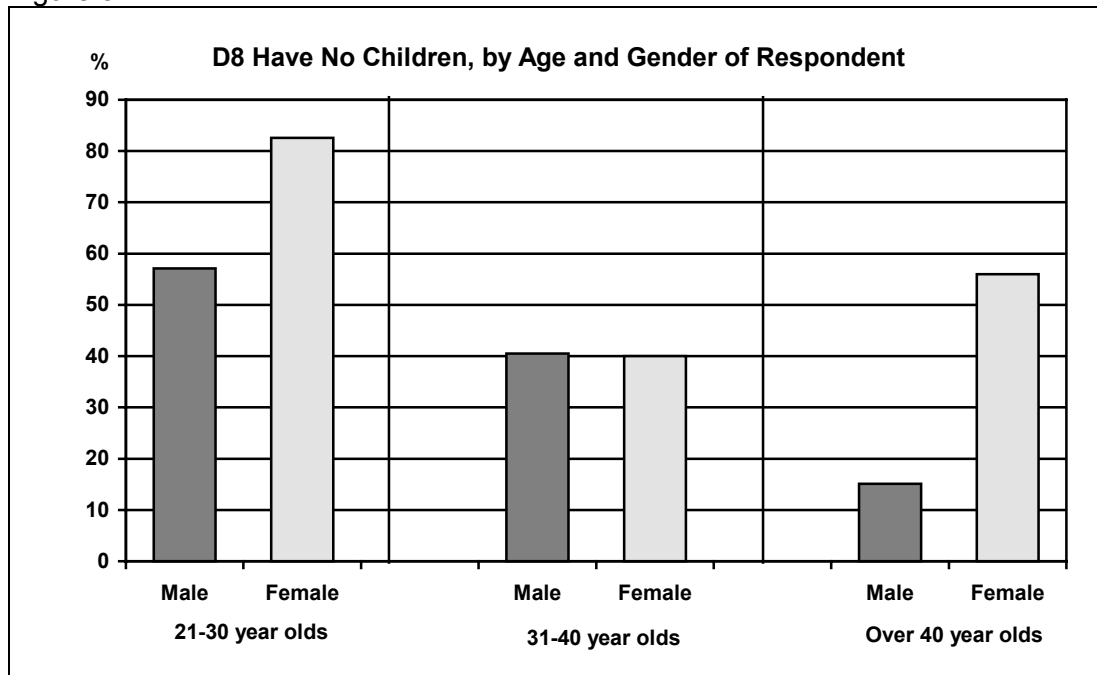
Figure 2



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The fact that women working in television are less likely than men to have children could have been thought to be influenced by the age profile of the sample as there are more younger women in our sample than men. However, the latest figures show that 83 per cent of women in the 21-30 year age group have no children compared with only 57 per cent of 21-30 year old men. For those in the 30-40 year age group, in the final questionnaire similar proportions of men and women at this age had children. However, when looking at those in the 40 plus age group, 56 per cent of women over forty have no children compared with only 15 per cent of men of this age with no children. See figure 3 below.

Figure 3



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It is possible that women in their twenties are less likely to have children if they feel that their career progression might be jeopardised by starting a family too early. The fact that many older women in this sample do not have children may be because they have decided that having a successful TV career is difficult to achieve with the demands of a family. The smaller percentage of women over 40 in the industry also supports this suggestion.

3. Employment Patterns

At the start of each questionnaire respondents were asked to provide details of their current workplace, this included their job title, company worked for, and contract type (such as freelance, staff etc.).

3.1 Company

The various work places listed by respondents were coded and then classified for analysis into three main groups of: the BBC, ITV companies and the independent sector. Respondents who stated that they were working freelance but did not specify an organisation currently worked for, were simply classified as 'freelance - unspecified'. During the course of the survey, the numbers working for each company type did not change significantly. Those working for the BBC during the course of the survey ranged between 19 and 23 per cent. Those working for ITV companies fell slightly during the course of the survey from 17 per cent to 14 per cent. Those working for independents fluctuated between 33 per cent and 40 per cent during the survey.

3.2 Job Group

The proportions of different types of job held by respondents fluctuated but did not change significantly over the course of the survey. For example, the percentage of Managers and Executive Producers in the sample rose slightly from 14 per cent to 21 per cent. The percentage of Producers and Directors fluctuated between 39 per cent and 46 per cent. The percentage of Researchers in the sample fell from 6 per cent to 1 per cent and the number of Production Support and Clerical staff also fell from 13 per cent to 7 per cent. The percentage of Post Production staff fluctuated between 7 per cent and 6 per cent and Camera/Lighting/Sound staff fluctuated between 9 per cent and 5 per cent.

3.3 Job Group and Age

The age distribution between job groups shows that the majority of Managers and Executive Producers fell within the 41-50 age group whereas the majority of Producers and Directors fell within the 31-40 age group. The majority of those in Production Support, Research and Clerical roles tended to be aged between 21-30 or over 50.

3.4 Job Group and Gender

Sex differences were found when looking at particular job groups. As can be seen from table 3 below, as of the latest questionnaire similar proportions of women in the sample were working as Producers or Directors, although there were slightly more women Producers or Directors than men. More women than men were working in Production Support roles. Men were more likely to fill Managerial/Executive Producer roles and Post Production or technical jobs than women.

Table 3

D8 Job Group by Gender	Male %	Female %	Total %
Managerial/Executive Producer	26.3	13.0	20.7
Producers/Directors	39.2	40.7	39.8
Production Support/Research/Clerical	2.3	15.4	7.8
Post Production/Technical	18.1	2.4	11.6
Writers/Artists/Journalists/Other	14.0	28.5	20.1
Total	N=171	N=123	N=294

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There were some changes over time, particularly amongst the women in terms of job groups. The percentage of women working in Managerial and Executive roles rose during the survey, from 6 per cent to 13 per cent, however, the percentage of men in this group also rose, by 6 per cent, to 26 per cent. The percentage of women working in Production Support roles fell from 35 per cent to 15 per cent and the percentage of men in such roles fell from 9 per cent to 2 per cent.

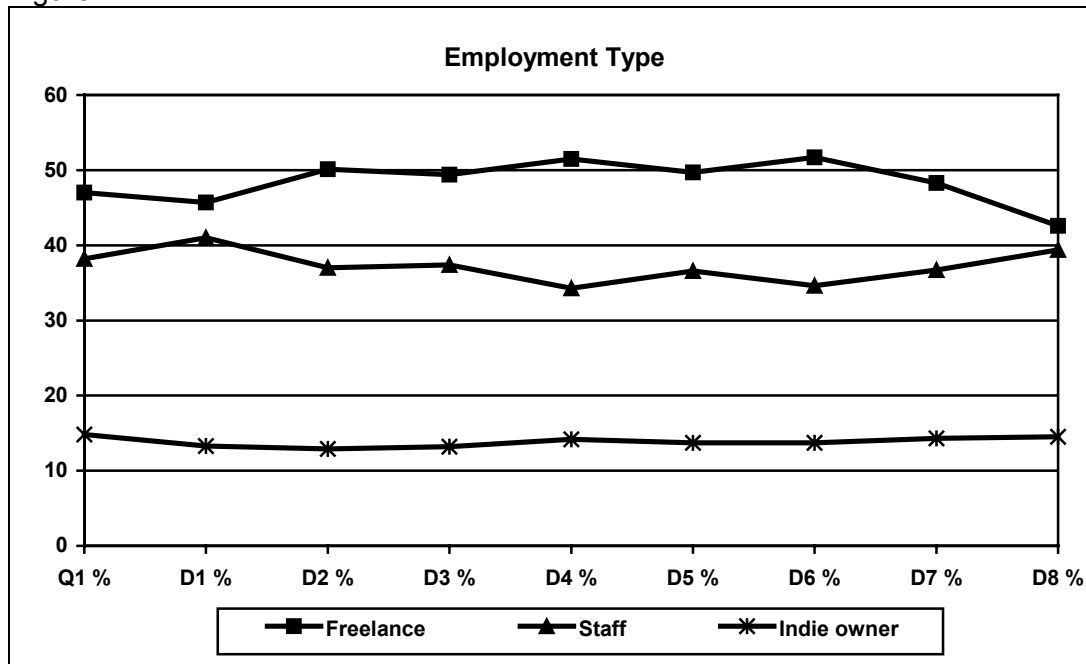
3.5 Employment Type

Along with company type, respondents were also categorised in terms of their employment or contract type. Respondents were grouped together into five categories: 1) Freelance - defined by Skillset as those working on contracts of less than one year; 2) Independent Staff – those working as staff or with contracts longer than one year for an independent production company; 3) Broadcaster Staff - those with staff jobs or contracts longer than one year, within the BBC or an ITV company; 4) Independent Owner - i.e. Managing Directors or Chief Executives of independent companies; 5) Independent Freelance - those respondents working as freelance but also operating in the name of a small independent company on occasion and therefore having some attributes of both freelancers and independent owners. To aid analysis, for the purposes of this report, on some occasions these categories have been condensed further, for example into groups of Freelance (including independent freelancers), Staff (both BBC, ITV and independent staff) and Owners. The proportion of respondents in each category has fluctuated a little, although not significantly, at each diary wave and there are no strong patterns of changes within the types.

In 1994, Skillset estimated that between 50-54 per cent of TV industry workers were freelancers³. Taking both the freelance and independent freelance categories together, our sample in May 1994 contained 47 per cent freelance workers, with 38 per cent staff and 15 per cent independent owners. The percentage of our respondents who were working on a freelance basis increased in the period between May 1995 and May 1997, peaking at 52% in May 1996 and in May 1997. During that time the percentage of respondents working on staff contracts fell accordingly to a low of 34 per cent in May 1996. In the final two questionnaires, however, the percentage of respondents working freelance appeared to drop again to 48 per cent in November 1997 and then to 43 per cent in May 1998. See figure 4 below.

³ Skillset (1994) *Employment Patterns and Training Needs 1993/4 - Freelance and Set Crafts Research* London: Skillset

Figure 4



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3.6 Contracts and Gender

A greater proportion of women in the sample were found to be working freelance compared with men. At the start of the survey, 51 per cent of women and 44 per cent of men were working freelance. In May 1997 the difference peaked at 60 per cent to 45 per cent, and in the last questionnaire (May 1998), 39 per cent of men were working freelance, compared with 48 per cent of women. Although only 15 per cent of the sample were independent company owners, the men were twice as likely to be owners than women; 18 per cent to 9 per cent respectively.

4. Income

At four stages throughout the survey period, respondents were asked how much they'd earned in the previous financial year. Respondents were asked this in the initial questionnaire (March 1994), in Diary 4 (May 1996), Diary 6 (May 1997) and Diary 8 (May 1998). Some fluctuations can be seen in the income profile of respondents at each diary wave (see table 4 below). The percentage of respondents earning low incomes in the survey appeared to be on the increase in the May 1997 questionnaire; over 10 per cent of the sample were earning less than £10,000 per annum. However this reduced again to 8 per cent by the May 1998 questionnaire. The numbers earning under £20,000 in our survey have generally decreased over time. However, approaching a quarter of the sample are still earning under £20,000. At the other extreme those earning over £50,000 have increased from 10 per cent in May 1994 to over 21 per cent in May 1998.

Table 4

All Respondents Income				
	Q1 – March 94 %	D4 – May 96 %	D6 – May 97 %	D8 – May 98 %
Less than £10,000	8.4	8.3	10.8	7.6
£10,001-£20,000	22.7	21.5	15.6	15.5
£20,001-£30,000	27.3	26.2	28.5	25.2
£30,001-£50,000	31.3	29.5	26.4	30.3
£50,001-£70,000	7.5	6.6	11.1	11.7
£70,000 +	2.8	7.9	7.6	9.7
Total	N=428	N=302	N=288	N=290

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4.1 Income and Age

Further changes in income over the course of the survey can be seen when income is broken down into the different age bands. For those who were aged 21-30 at the start of the survey, the majority (47 per cent) earned between £10,000-£20,000 per annum. By May 1996, 37 per cent were earning in this bracket and those earning between £20,000-£30,000 had increased to 31 per cent. By May 1997, the majority (38 per cent) in this age group was in the £20,000-£30,000 income bracket. In the final questionnaire, in May 1998, the majority was still earning between £20,000-£30,000, but those earning between £30,000-£50,000 had increased by 20 per cent from an initial 4 per cent in May 1994. See table 5 below. Those who were aged between 21 and 30 at the start of the survey, can therefore be seen to have increased their income averages over the four-year period.

Table 5

21-30 Year Olds Income				
	Q1 – May 94 %	D4 – May 96 %	D6 – May 97 %	D8 – May 98 %
Less than £10,000	24.4	10.2	16.7	13.5
£10,001-£20,000	46.7	36.7	23.8	18.9
£20,001-£30,000	23.3	30.6	38.1	35.1
£30,001-£50,000	4.4	14.3	16.7	24.3
£50,001-£70,000	1.1	0.0	0.0	8.1
£70,000 +	0.0	2.0	2.4	0.0
Total	N=90	N=46	N=41	N=37

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An additional sample of 50 younger respondents (aged between 21 and 30 in 1997) were

surveyed from the end of 1997 to provide updated information on the position of young people and new entrants into the TV industry. When looking at their income it was found that their salaries were considerably lower than the young people in the main sample. In the questionnaire sent to the new young sample in November 1996, almost all respondents were earning less than £20,000 per annum: 43 per cent were earning less than £10,000. When surveyed again in May 1997, many of the new young sample had increased their income rates, however, 70 per cent were still earning between £10,000-£20,000 and 23 per cent were still earning less than £10,000. In the final questionnaire, in May 1998, only 10 per cent of this group were still earning less than £10,000, although over 70 per cent were still earning between £10,000-£20,000. A proportion of this new age group had managed to move up to higher income brackets - 14 per cent of this age group were now in the £20,000-£30,000 income bracket and 5 per cent had moved up to the £30,000-£50,000 income bracket. See table 6 below.

Table 6

New Young Sample Income			
	NYS Q - Nov 96 %	D6 – May 97 %	D8 – May 98 %
Less than £10,000	42.9	23.3	9.5
£10,001-£20,000	53.1	70.0	71.4
£20,001-£30,000	4.1	6.7	14.3
£30,001-£50,000	-	-	4.8
£50,001-£70,000	-	-	-
£70,000 +	-	-	-
Total	N=49	N=30	N=21

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For those who were in the 31-40 year age group at the start of the survey, incomes appear to have polarised somewhat over time. In the first questionnaire the majority of incomes for this age group were within the £20,000-£30,000 and the £30,000-£50,000 ranges (38 per cent and 36 per cent respectively). The proportions of respondents earning incomes in these brackets has slowly reduced over time. The percentages of those earning less than £10,000 per annum has increased a little over 4 years, and those earning over £50,000 has also increased.

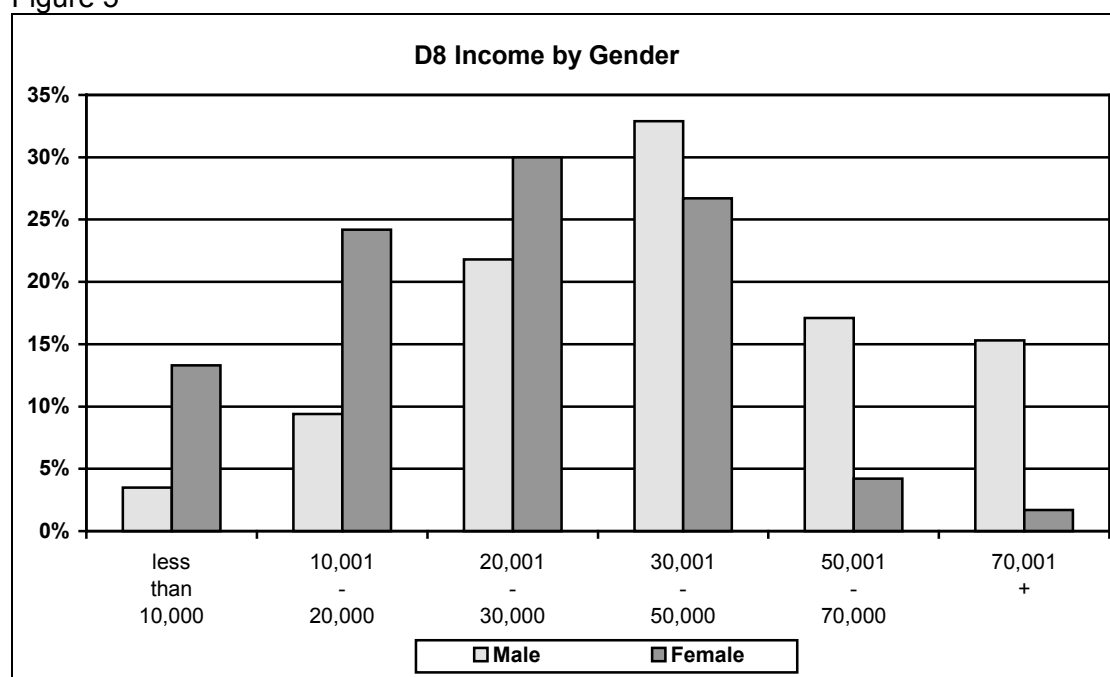
4.2 Income and Gender

In the survey it was found that women tend to earn significantly less than men. Although the income rates have grown for both men and women during the course of the survey, men's incomes have increased to a greater extent than the women's incomes, and women's incomes have remained significantly lower than men's throughout. For example, the percentage of men earning over £50,000 per annum in the sample grew by 16 per cent over the four years of the survey, whereas the percentage of women in that income bracket grew by only 3 per cent in the survey period. At the other end of the scale, the percentages of men earning less than £20,000 almost halved over the last four years yet the percentages of women earning less than £20,000 fell by only 1 per cent between 1994 and 1998.

Evidence from the final questionnaire illustrates the differences in income rates between men and women in the TV industry. Looking at the low income brackets, over 13 per cent of women respondents earned less than £10,000 compared with only 4 per cent of the men. In the high income brackets, women were barely represented: over 15 per cent of men earned £70,000 or more compared with only 2 per cent of women. Women's incomes can be seen to peak at a lower level than for the men. The majority of women's incomes fell within the £20,000-£30,000 bracket whereas the majority of men's incomes

fell within the £30,000-£50,000 bracket. See figure 5 below. There are more younger women in the sample than younger men, and more women working part time than men and this could have been seen as a factor in lowering the income rate for women in the sample. However, although slightly reduced, the differences in men's and women's incomes are still significant when controlled both for age and for nature of employment (i.e. full time or part time, unemployment etc.). For example when all those working part time, unemployed, on maternity leave, etc. in the month prior to the final questionnaire were excluded, 29 per cent of the women were still earning less than £20,000 per annum compared with only 9 per cent of the men.

Figure 5



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Income differences were still found between the sexes, even when taking into account the different job groups occupied predominantly by men and women. When looking at each job group separately, women still earn less than men. For example looking at Producers and Directors only, where women slightly outnumbered men in our sample, women were still earning significantly less than the men. Though the majority of both men and women Producers and Directors earned between £30,000-£50,000, there were more men earning these salaries than women (39 per cent compared with 33 per cent). As with the sample of women as a whole there were more women in the lower income brackets (e.g. 14 per cent of women and 6 per cent of men earning less than £10,000), and more men in the higher income brackets (e.g. 25 per cent of men earning over £50,000 compared with only 4% of women). Again the differences in income levels were still found when controlled for age of respondent and employment type.

4.3 Income and Job/Employment Type

The freelancers and those on short term contracts in the sample, throughout the survey consistently appear in the lower income brackets compared with staff, although their incomes increased somewhat, relative to staff, during the course of the survey. In May 1994 and May 1996, the highest percentage of freelancers earned £10,000-£20,000 per annum. In May 1997 and May 1998, this rose to between £20,000 and £30,000. Although the incomes of independent owners and those with staff jobs have increased over time, the majority continued to earn between £30,000-£50,000 throughout the four years of the

survey. For the last diary, when looking at the high and low income levels, only 2 per cent of staff earned less than £10,000 compared with 13 per cent of freelancers. Only 6 per cent of staff, compared with 22 per cent of freelancers, earned between £10,000-£20,000. 28 per cent of staff had incomes exceeding £50,000 compared with only 10 per cent of the freelancers. See table 7 below.

Table 7

D8 Income by Employment Type			
	Freelance %	Staff %	Owner %
Less than £10,000	12.8	1.8	2.4
£10,001-£20,000	22.2	6.4	12.2
£20,001-£30,000	28.2	28.2	12.2
£30,001-£50,000	26.5	35.5	31.7
£50,001-£70,000	6.0	18.2	17.1
£70,000 +	4.3	10.0	24.4
Total	N=117	N=110	N=41

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Annual Income levels for freelancers were also more unpredictable and irregular than for those with staff jobs and, unlike most with staff jobs, were heavily affected by periods of non-work. For example, those commanding a high income rate but with gaps between contracts during a year, showed a lower average annual income compared with those with steady staff jobs on a similar rate.

4.4 Income and Location

When income was broken down by where the respondents were working and living, differences could be seen between those who lived in London and the South East, and those who lived elsewhere. For those living outside London and the South East, incomes tended to be focused in the £20,000-£30,000 and £30,000-£50,000 brackets. However, for those living in London and the South East, although the majority were still within these middle brackets, a greater proportion were earning extremes of high and low incomes. For most of the course of the survey, more respondents living in London and the South East were earning under £10,000 per annum than those elsewhere (9 per cent compared with 5 per cent), and a greater proportion were earning over £50,000 compared with those elsewhere (27 per cent compared with 14 per cent).

4.5 Negotiating Rates

In Diary 6 we asked respondents whether they had experienced any changes in their income rate over the previous year. Nearly 38 per cent of the respondents indicated that they had been able to push up the rate for the jobs they had done in the previous year. On the other hand 42 per cent of respondents indicated that they had been offered or had been obliged to work for lower than their usual rate. This indicates a great deal of fluctuation in the incomes of respondents during one year. Those who had had to lower their rates were asked to indicate the main reasons for this. A variety of responses were given, some accepting lower rates through choice, such as pursuing an 'interesting job' (49 per cent) and 'making useful contacts' (44 per cent); others due to necessity, such as 'needing the income' (44 per cent), or working on a 'low budget programme' (47 per cent). Many respondents gave more than one reason and therefore the percentages given total more than 100 per cent. Several of those who had accepted lower rates because they needed the income also indicated that they had taken lower rates for some of the other reasons such as 'interesting job' and 'to make useful contacts' etc.

4.6 Working Unpaid

Many freelancers in the survey indicated in their diaries and questionnaires that, not only did they go for periods without any work, and take work on lower rates, but that work was often undertaken without any payment at all. In May 1998 (Diary 8), all freelance respondents were asked if they had undertaken any work in the last year that was unpaid. Sixty three per cent of the freelancers stated that they had worked unpaid at some point in the last year. Producers and Directors were found to be those most likely to have worked unpaid during the previous year.

The majority of freelancers undertaking unpaid work were researching and developing ideas (83 per cent), whether it be commissioned or speculative development work. In addition, 38 per cent of freelancers had undertaken a fixed fee project which had run over time, and had therefore been paid for less weeks than they actually worked. Sixteen per cent of freelancers had worked unpaid in various other circumstances, for example favours for friends, work for charitable organisations etc. See table 8 below. Many of the freelancers responding had worked unpaid in more than one of the circumstances described and the figures therefore, overlap.

Table 8

D8 Worked Unpaid - multiple response		
	Count	% of Cases
Unpaid researching & developing ideas	82	82.8
Unpaid - paid fixed fee & worked over	38	38.4
Unpaid - other circumstances	16	16.2
	-----	-----
Total	N=136	137.4
195 missing cases; 99 valid cases		

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Exactly half of all the responses recorded an unpaid working time of four weeks or less. Thirty per cent of the responses indicated they had worked between one and two months unpaid, and 21 per cent of the responses showed an unpaid working time of anything from more than two months to a whole year.

4.7 Other Sources of Income

It became apparent throughout the course of the survey that many members of the panel, and freelancers in particular, were diversifying their sources of income and work. Many indicated in their diaries that they were using their skills, gained through television work, to find work in other, non-television fields, some as a small addition to their annual income, some seeing other sectors as increasingly their main income source. In Diary 6 we asked all respondents if they earned all their income from television work. Over half (53 per cent) of respondents stated that they supplemented their income from other sources. Of all those who did supplement their TV income, for the majority of them (57 per cent), the extra income from other sources constituted less than a quarter of their income in total. However 30 per cent of those with income from sources other than TV indicated that this work constituted over half of their total income (see table 9 below). This represents 13 per cent of the panel as a whole finding over half of their income from other sources and constitutes a significant proportion of people working in television who do not want to or are not able to rely wholly on a TV income.

Table 9

D6 Proportion of Income Drawn from Other Sources		
	Frequency	Per cent
Less than 25 per cent	72	56.7

Between 25 and 50 per cent	17	13.4
More than 50 per cent	38	29.9
Total	127	100.0
Not applicable	154	
Not answered	11	
Total – all	N=292	

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In the subsequent Diary (November 1997) respondents were asked about the specific issue of uncertainty in TV work. Here 60 per cent of respondents stated that they had sought income from non-TV sources, in response to uncertainty.

Freelancers and company owners were found to be those most likely to seek external income. Sixty five per cent of independent owners and 60 per cent of all freelancers in the survey were gaining income from other sources than television. This compared with only 22 per cent of those with staff jobs.

When respondents were asked to indicate what kinds of work they were diversifying into, a variety of responses were given, and many diversified into more than one area, although much of the work stated was media related. For example, of all those earning income from other sources, the most popular source of other income was teaching or lecturing (38 per cent). In most cases, respondents indicated that this was teaching media and TV related subjects. Other popular sources of additional income included, corporate video work, and media consultancy. See table 10 below.

Table 10

D6 Other Sources of Income		
	Count	% of Cases
Teaching/lecturing	50	37.6
Corporate video	34	25.6
Consultancy	34	25.6
Writing Books	25	18.8
Print journalism	23	17.3
Radio	21	15.8
Multimedia	16	12.0
Commercials	12	9.0
Other	44	33.1
	-----	-----
Total responses	N=259	194.7
159 missing cases; 133 valid cases		

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5. Conditions of Employment

In each questionnaire respondents were asked to indicate their work status on a grid for each month in the previous six months. For example, in the final questionnaire (May 1998), respondents were asked about the period of November 1997 to April 1998 and asked to state whether they were employed, self employed, unemployed etc. for each month. In the final questionnaire, taking an average result over the six months period, 58 per cent were employed or employed by their own company, 24 per cent were self employed. 6 per cent were self employed but not working, 4 per cent were working part-time and 4 per cent were unemployed. The employment status of the respondents for this six monthly period at each diary wave fluctuated a little over the course of the survey, although there were no significant increases or decreases in the overall employment of respondents over the four years. Managers and Executive Producers were more likely to be in full employment and less likely to be self employed compared with Producers and Directors. Those working in Production Support/Research roles, and women were those most likely to be working part time across the previous six monthly period.

5.1 Hours

In each diary wave, respondents were asked to estimate how many hours and days they had worked in the previous seven days. In the final questionnaire (Diary 8, May 1998), 36 per cent of the sample stated they had worked 50 hours or more in the previous week and 17 per cent were working over 60 hours. These levels of working hours would have exceeded the 48 hour limit of the new EC Working Time Directive which came into force in the UK some months later, on October 1st 1998.

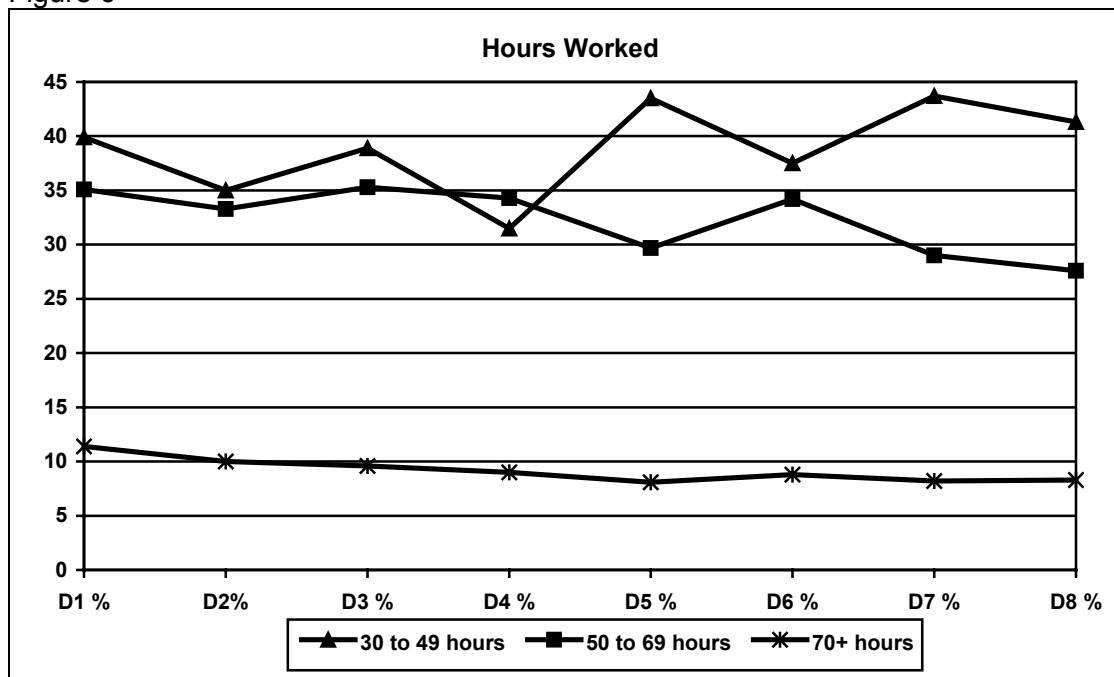
Many diarists throughout the course of the survey have commented about the long hours involved in television work and the impact this has had on their working and home lives. Those with young families particularly have commented on the detrimental effects of the long working hours. For others the long working hours that they have encountered in the past have influenced their decisions about career choices and the television industry in general.

For some respondents, the long working hours they had experienced, were felt to be attributable to decreasing budgets and increasing pressures of time. For others, the nature of the industry was seen to encourage a culture of long working days.

In the first questionnaire, respondents were asked to estimate the number of hours they worked per week on average. In subsequent questionnaires, respondents were asked to state the total hours worked in the week prior to the diary date. This was felt to be a more accurate measure of actual hours worked by all respondents and so figure 6 below shows the results from Diary 1 onwards.

Despite the persistent long working hours apparent in the industry, over the course of the survey the percentage of respondents working long hours appears to be on the decrease. Those working over 50 hours has reduced from 47 per cent in Diary 1 (November 1994) to 36 per cent in Diary 8 (May 1998). See figure 6 below.

Figure 6



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Those found to be working the longest hours as far as age is concerned, were those in the 41-50 year old age group. In the latest questionnaire, 44 per cent of the 41-50 year olds were working over 50 hours in the previous week, compared with 28 per cent of the 31-40 year olds and 33 per cent of the 21-30 year olds.

Those living in London and the South East, appear also to be working longer hours than their counterparts elsewhere in the country, especially when looking at the longest hours. In Diary 8, 11 per cent of those living in London and the South East were working over 70 hours compared with 5 per cent of those living elsewhere. A greater percentage of those living outside London and the South East appear to be working part-time hours i.e. 1 to 29 hours (11 per cent compared with 6 per cent of those in London and the South East) either through choice or through lack of consistent work.

5.2 Location

Over 40 per cent of the sample lived and worked outside London and the South East. However, the television industry is largely London based, making options for work in other areas often more limited, and the impact on living arrangements more pronounced. We asked all respondents if, over the last four years, they had experienced any difficulties getting regular television work because of where they lived. Over a quarter (28 per cent) of respondents agreed that they had experienced difficulties getting work because of where they lived. When asked to describe the difficulties they had encountered, over half of all respondents stated that they had had to live and work away from home in order to get television work. Thirty nine per cent of respondents had had to commute long distances for television work and just under a quarter of respondents had had to find non-TV work because of their location. Many of the respondents to this question had experienced more than one of these difficulties. See table 11 below.

Table 11

D8 Problems Due to Location		
	Count	% of Cases
Had difficulties, but took no action	7	10.4
Had to commute long distances	26	38.8
Had to live & work away from home	35	52.2
Had to move house or area to get TV work	5	7.5
Had to work from home	10	14.9
Had to find non-TV work	16	23.9
Other difficulties due to location	3	4.5
	-----	-----
Total responses	N=102	152.2
227 missing cases; 67 valid cases		

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The majority of those who had experienced difficulties getting work due to their location were found to be those living outside London and the South East. Under 20 per cent of those living in London and the South East indicated experiencing difficulties, compared with 43 per cent of those living elsewhere.

5.3 Job Role Changes

In Diary 6 respondents were asked if they had noticed any changes in their current job in the last year, looking specifically at whether they had taken on more or less work in their job. Sixty per cent of the sample had experienced some form of change in that time.

Respondents were asked whether they had taken on additional roles, tasks or responsibilities, and whether they had done so out of choice or had been expected to by their company. Of those who had experienced some changes, 59 per cent said they had chosen to take on additional tasks. In addition, 56 per cent felt they had been expected to take on other tasks by their company. Fifty two per cent of respondents had chosen to take on more responsibilities and 52 per cent had been required to do so. Thirty seven per cent of respondents had chosen to perform an additional role and 31 per cent had been expected to perform an additional role as part of their work.

When investigated further, of all those who felt they had been *required* to take on additional tasks, almost two thirds also indicated that they had *chosen* to take on more tasks. This was also found to be the case when looking at those taking on additional roles or additional responsibilities. It may be difficult in many cases to draw a distinct line between taking on more work through choice, or out of necessity. For example, some may have had their work-load increased but at the same time feel that they were gaining skills and experiences that would aid them in future work opportunities. Despite this, the numbers stating that they had been expected to take on additional work is still high, as 38 per cent of respondents indicated taking on either extra roles, tasks or responsibilities.

5.4 Short Term Contracts

Freelancing and short term contract work has become a defining element of television work for many in the industry. Because of its significance in shaping the lives and work of so many in the sample, a series of questions were framed in the November 1997 questionnaire, aimed solely at those who had experience of working on a freelance or short term contract basis. These questions encompassed aspects of their work life, home life and general perspective on the nature of short term contract work. Respondents were given a series of statements relating to short term contract work and asked to indicate how strongly they agreed or disagreed with them. Table 12 below shows the percentage of respondents who agreed, or strongly agreed with the statements.

Table 12

D7 Short Term Contracts		
	Agree %	Total N
Enabled me to make a range of contacts	88.8	99
Enabled me to get a range of experiences in companies/areas	86.0	102
Made my income unpredictable and uneven	83.2	94
Meant I didn't have adequate maternity/paternity provision	82.6	46
Meant it's been hard to take time off when ill	81.9	107
Made career planning difficult	77.8	99
Given me a taste of different TV genres	73.1	101
Enabled me to take time off between jobs	63.5	107
Made finding new work difficult	59.8	104
Made me accept lower rates to ensure continuous employment	54.0	82
Made me uncertain about a long term career in TV	50.0	93
Made it difficult to find work relationships I can trust	41.6	100
Enabled me to devote more time to my family/partner	40.0	100
Made me cautious about new ideas in my creative work	36.4	101
Enabled me to make more informed choices about my career	35.4	104
Made me accept less skilled jobs to secure employment	31.7	100
Enabled me to earn more	28.8	99
Made me prepared to put aside ambitions for secure posts	24.4	95

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One aspect of freelance work that was continually raised as a problem by respondents, was the inability to plan their careers in a strategic way, or to receive the security and stability they associate with permanent employment. Sixty per cent of those who had worked on short term contracts agreed that it made finding new work difficult for them. When asked if short term contract work made career planning difficult, 78 per cent of the respondents either agreed or strongly agreed with the statement.

Over 83 per cent of the respondents agreed or strongly agreed that working on short term contracts had made their income unpredictable. Over half of those who had experience of short term contract work (54 per cent) agreed that they had had to accept lower rates in order to ensure continuous employment.

The search for secure work had led almost a third (32 per cent) of those who had worked on short-term contracts to take jobs below their skills or experience to secure regular employment and almost a quarter (24 per cent) agreed that they had had to put aside current ambitions to secure regular employment.

Eighty two per cent of those who had worked on short term contracts agreed that this kind of work had meant it had been hard to take time off when they were ill. In the question regarding maternity and paternity provision whilst on short-term contracts, of those to whom it was applicable, 83 per cent agreed that it had not been adequate.

However, for some, working freelance had been a positive choice: a chance to enjoy the flexibility offered, and in some cases, higher incomes where demand for workers exceeded supply. For others, however, short term contracts and freelance work was seen as a less desirable option. Redundancy, insufficient work available, and a reluctance by employers to offer permanent posts have been cited by members of the panel as reasons for feeling unable to avoid or even being “forced into” short term contract employment.

Those who were unable to see a way of breaking in to more secure or lucrative TV work, considered whether or not to continue pursuing a career in the TV industry. Of those who had worked on short term contracts, 50 per cent of them agreed that it had made them uncertain about a career in TV.

Some in the sample expressed the view that fewer and fewer employers were willing to take risks with ideas or to innovate. When asked, over a third (36 per cent) agreed that short term contract work had made them cautious about new ideas in their creative work.

On the plus side however, for some, short term contract work provided an opportunity to gain a range of experiences at work: 73 per cent agreed that short term contract work had given them a taste of other genres. In addition, 40 per cent of those who had been on short term contracts agreed that it had enabled them to devote more time to their family or partner.

5.5 Preferred Work Type

In the context of analysing the nature of contracts in TV work, we sought to ascertain the degree to which respondents were happy with their current contract status, and asked what their preferred work place/contract type might be. Respondents were given several options, and for the purposes of this report their responses have been amalgamated into three basic response types: freelance, staff, job outside TV. Over half of the respondents expressed a preference for staff jobs (56 per cent). Just over 10 per cent of the responses indicated a desire to leave TV altogether (see table 13 below).

Table 13

D7 Preferred Work Type – grouped		
	Count	% of Responses
Freelance	82	28.5
Staff	161	55.9
Job Outside TV	31	10.8
Other	14	4.9
Total responses	N=288	100
15 missing cases; 275 valid cases		

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When this question was broken down by type of respondent, it appeared that those currently in staff jobs were more likely to indicate their current position as their preference compared with those in freelance work. Seventy six per cent of respondents in staff jobs indicated a staff job as their preferred contract type, whereas just over half of freelancers indicated that they would prefer *not* to be working freelance – 37 per cent would prefer to be staff, and 12 per cent would prefer not to be working in television at all. See table 14.

Table 14

D7 Preferred Work Type – grouped, by contract type					
	Currently freelance %	Currently Staff %	Currently Owner %	Currently Other %	Total %
Prefer freelance	48.6	10.8	10.0	0.0	28.9
Prefer staff	37.0	75.5	75.0	50.0	56.3
Prefer job outside TV	11.6	6.9	10.0	25.0	9.9
Other	2.9	6.9	5.0	25.0	4.9
Total	N=138	N=102	N=40	N=4	N=284

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Looking at the different job types involved, it is those working in the Post Production and Technical roles who appear most satisfied with working freelance compared with, for example, Producers and Directors. When taking freelancers only, 73 per cent of the Post Production/Technical workers indicated a preference for freelance work, compared with 40 per cent of freelance Producers/Directors preferring freelance work.

5.6 Work Values

In the first questionnaire and at yearly intervals, respondents have been asked to indicate their positive or negative attitudes towards a variety of specified work values.

Respondents were presented with a list of words aimed at describing various aspects of work, and asked to indicate to what degree they liked or disliked them in their current job on a scale of -5 (dislike a lot) to +5 (like a lot). When looking at the mean responses for each topic, the same values over the course of the survey have repeatedly achieved high scores. The values that have been rated most highly throughout the survey, are those of 'achievement', 'responsibility', 'relationship with peers', 'independence', 'creativity', and 'intellectual stimulation'. Even those values which have received low average scores throughout the survey, for example 'conditions of work' and 'relationship with management', have still remained consistently on the positive side of the scale. See table 15 below.

The ratings respondents have given these values have fluctuated over the course of the survey. It appears that, for the majority of the values listed, the mean scores got lower at each diary wave. Although some of the scores went up slightly for the final diary, they were still mostly lower than their 1994 scores. For example, 'achievement' in May 1994 received a mean score of 3.9 and then reduced the following year to 3.3 and then to 3.1, then 3.0, but in the final year went up to 3.2. The overall decline amongst the panel in liking crucial aspects of their work may be one indication of decreasing job satisfaction.

Table 15

D8 Work Values Questions – mean responses (on scale of -5 to +5)					
	Q1 - May 94 Mean	D1 - Nov 94 Mean	D4 - May 96 Mean	D6 - May 97 Mean	D8 - May 98 Mean
Status	1.6	1.9	2.0	1.9	2.2
Money	2.2	1.7	2.0	1.9	2.1
Achievement	3.9	3.3	3.1	3.0	3.2
Recognition	2.7	2.3	2.2	2.4	2.4
Responsibility	3.6	3.2	3.1	2.9	3.3
Conditions of Work	1.4	1.0	1.0	1.1	1.3
Relationship with Peers	3.5	3.2	3.2	2.9	3.2
Relationship with mngmt	1.1	0.9	0.9	1.2	1.1
Independence	3.7	3.1	3.0	3.0	3.1
Creativity	4.1	3.3	3.2	3.1	3.3
Uncertainty	-1.9	-1.7	-1.9	-1.8	-1.8
Intellectual stimulation	3.8	3.0	2.8	2.9	3.1
Excitement	3.5	2.8	2.8	2.6	2.7
Personal Growth	3.2	2.2	2.2	2.3	2.1
Valid N listwise	N=367	N=293	N=245	N=209	N=225

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In contrast to all other work values listed, 'uncertainty' stands out as the only one to receive scores in minus numbers. During the course of the survey 'uncertainty' received a mean score of between -1.9 and -1.7. For many respondents their scores for 'uncertainty' fluctuated dramatically depending on their circumstances at the time. During periods of

unemployment or insecure employment respondents tended to score ‘uncertainty’ much lower than during more secure periods.

5.7 Uncertainty

Issues of uncertainty and insecurity were mentioned many times throughout the survey by the panel. Respondents discussed feelings of uncertainty towards their current position in the work force, their future career or business, and the future of television production as a whole.

Whilst most respondents differed in their attitudes towards uncertainty, there was a consensus in accepting the need to find strategies to deal with it in their everyday working lives. In order to investigate further the impact feelings of uncertainty have had on the workforce, a series of questions were posed to respondents concerning uncertainty in TV work and the strategies they had employed to try to combat its effects. When asked if they had ‘remained in the same job’ in response to uncertainty, 41 per cent stated that they had. Seventy two per cent of respondents stated that due to uncertainty, they had ‘sought work on long-running series’.

Another form of combating uncertainty was found to be making and maintaining contacts with people in the industry. Seventy two per cent of respondents had ‘maintained work contacts’ due to uncertainty, and 63 per cent had ‘tried to work with people they knew’. On the employer side, 45 per cent of respondents had ‘offered long-term contracts to valued employees’ due to uncertainty. This echoes other findings: the ways in which respondents found work and the methods by which recruiters recruit i.e. through personal contacts (see section on ‘finding work/recruitment’). This indicates that informal networks are seen as a vital part of obtaining and maintaining a sense of stability within the workforce for the majority of respondents. As indicated in the section on income, many respondents are diversifying their careers by seeking income from other sectors. In this question 60 per cent of the respondents stated that they had ‘sought income and clients from other sectors’ due to uncertainty. See table 16 below.

Table 16

D7 Due to Uncertainty...		
	Yes %	Total N
Sought commission for long running series	71.9	167
Maintained work contacts	71.6	225
Tried to work with people I know	62.6	227
Sought income and clients from other sectors	59.6	166
Avoided working with people not recommended	46.0	198
Sought partner companies	45.9	133
Offered long term contract to valued employee	45.1	133
Remained in same job	40.9	208
Changed to a more stable job	22.5	222
Used agencies to find work	21.2	198
Used agencies to screen employees	13.0	162

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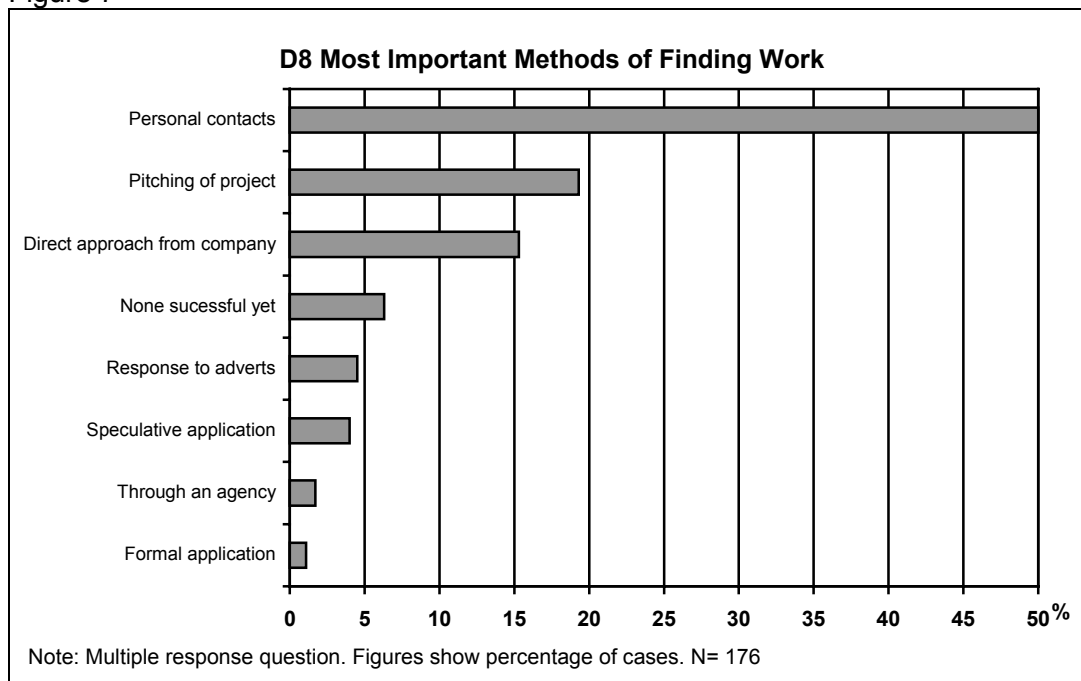
Those most likely to have remained in the same job to combat uncertainty were those in Production Support roles, and in Post Production/Technical roles: over half compared with a third of Managerial/Executive Producers, and Producers/Directors. In addition, those more likely to have remained in same job, were respondents working within the BBC (51 per cent) compared with 36 per cent of those working in the independent sector.

6. Finding Work / Recruitment

6.1 Job Seeking Behaviour

In each diary wave, respondents have been asked about their methods of finding work. The use of 'personal contacts' has consistently been indicated as the 'most important method' of finding work throughout the survey. Over all of the diary questionnaires, between 46 and 61 per cent of the respondents indicated personal contacts as their most important method of finding work. Between only 1 and 5 per cent of all respondents indicated 'response to adverts' as their most important method for finding work. In the final questionnaire, 50 per cent of respondents indicated using 'personal contacts as a main job seeking method', 19 per cent had pitched a project to potential employers as a main job finding method. Only 1 per cent had used formal applications. See figure 7 below. The percentages using each method of finding work overlap as many respondents used more than one method in their search.

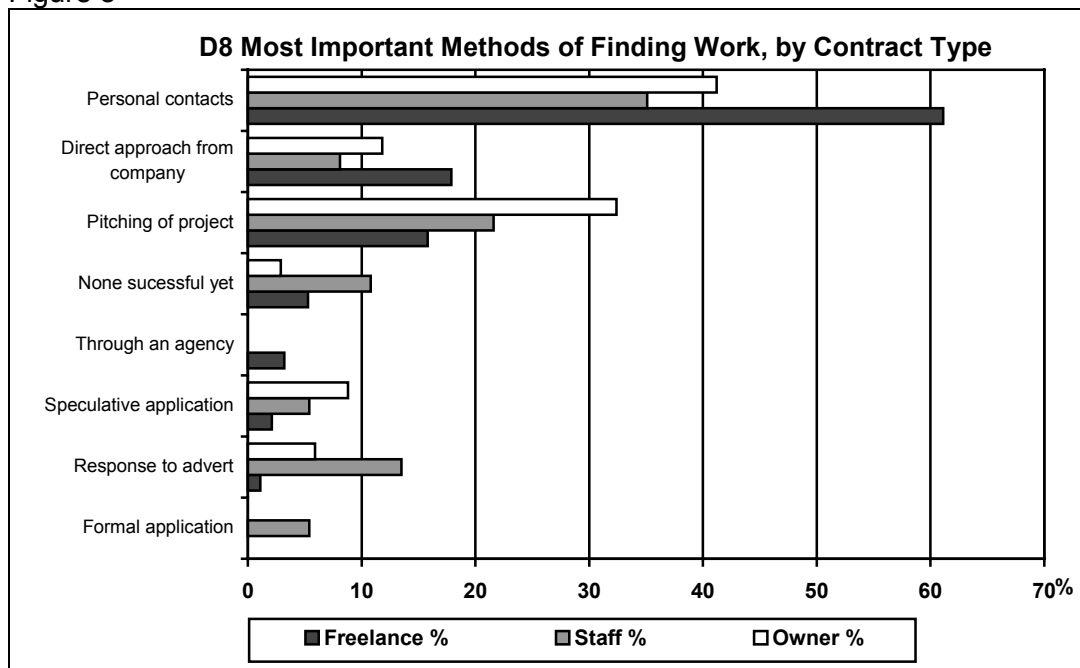
Figure 7



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Throughout the survey, freelancers were found to be more likely to use personal contacts as a method of finding work than those with staff jobs. In the latest questionnaire, 61 per cent of freelancers indicated personal contacts as their main method of finding work, compared with 35 per cent of staff and 41 per cent of independent owners. Although staff still mainly used personal contacts to find work, those with staff jobs were those most likely to use job adverts and formal applications. See figure 8 below.

Figure 8



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In the November 1997 questionnaire, respondents were asked what their sources of information were, when seeking jobs. Again, compared with formal sources of information, the informal contacts network proved to be the primary source of job information. Sixty eight per cent stated work contacts as a main source of information. In comparison, 21 per cent stated that newspaper ads, and 18 per cent that the trade press, were their main sources of information.

6.2 Recruitment

In addition to investigating how people in the television industry find work, we also wished to compare this with the other side of the coin - how recruiters recruit. A similar multiple response question to that on job seeking behaviour was posed in Diary 7 (November 1997), to all recruiters in the survey, about their staff seeking behaviour. Again, informal networks proved to be the predominant method. Two thirds of recruiters in the survey indicated using personal/work contacts, and 44 per cent used personal recommendations as their methods of recruiting staff. All other methods, such as newspaper ads, trade press etc., each took less than 15 per cent of the responses. See table 17 below.

Table 17

D7 Recruitment Method		
	Count	% Cases
Personal/work contacts	93	66.4
Personal recommendations	61	43.6
Newspaper ads	20	14.3
In-house paper/internal ads	20	14.3
Trade press	14	10.0
Agencies	12	8.6
Other - CV's sent in on spec	6	4.3
	-----	-----
Total responses	N=226	161.4
150 missing cases; 140 valid cases		

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6.3 Skill Shortages

Throughout the surveys, a number of employers and those who recruit teams had indicated in their diaries, that they were experiencing difficulties finding skilled people at particular times or for specific projects. We wished to investigate the extent of this problem, the areas most affected, and what employers believed to be the cause. In November 1997, those responsible for recruitment of production teams and staff, were asked if they had experienced shortages of skilled or experienced people in certain areas. Fifty seven per cent of the respondents to this question indicated that they had experienced shortages of skilled people. When asked to indicate in which areas of work they had had difficulty recruiting, the highest number of responses (42 per cent) were in the area of Camera/Lighting/Sound and other technical jobs. Producers and Directors were also frequently cited as an area of difficulty in recruitment (34 per cent).

In May 1998 (Diary 8) we followed up these responses by asking recruiters who had experienced shortages of staff, or difficulties in recruiting staff, what they believed to be the main cause of the difficulties. The recruiters tended to list more than one reason, and the percentage of responses overlap. Roughly equal numbers of recruiters' answers to this question indicated that the problems were due to a 'lack of skilled/experienced people available in certain job types', and a 'lack of trusted/known people available' (62 per cent and 63 per cent respectively). An additional 48 per cent stated that 'commissions/contracts at short notice made it hard to find staff'. See table 18 below.

Table 18

D8 Why Experienced Shortage of Staff		
	Count	% of Cases
Lack of trusted/known people available	80	62.5
Lack of skilled/experienced people available in certain job types	79	61.7
Commissions/contracts at short notice made it hard to find staff	61	47.7
Lack of databases/networks for finding suitable people	34	26.6
Lack of people with multiple skills	28	21.9
Lack of people with the latest technology skills	21	16.4
Type of programme made it hard to find staff	21	16.4
Location of production made it hard to find suitable staff	20	15.6
Other reason for lack of skilled staff	12	9.4
	-----	-----
Total	N=356	278.1
166 missing cases; 128 valid cases		

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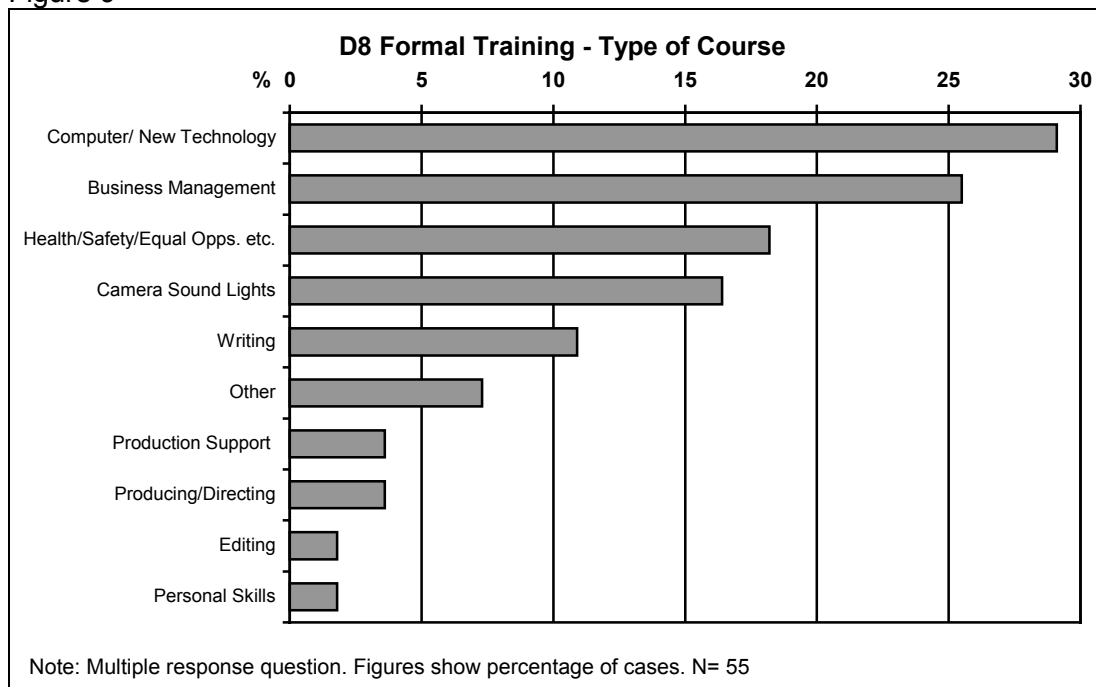
7. Training

In each diary wave, respondents were asked what formal and informal training, if any, they had received in the previous six months. Across all the diaries, the percentage of respondents having received formal training remained fairly steady, fluctuating between 17 and 21 per cent. Those who reported receiving 'on-the-job' training in the previous six months, fluctuated between 7 and 18 per cent across all the diary waves. In the May 1997 diary respondents were asked to report how long their courses had been and where they had done their training. The majority of the formal courses taken were one or two-day courses. Most of these formal courses had been organised by the BBC (43 per cent), 18 per cent had been organised by ITV or independent companies, the remaining 39 per cent had been organised by other agencies.

7.1 Training Type

The bulk of the training undertaken on formal courses tended to be in the use of computers and new technology. This type of training gained the highest percentage of responses for most of the diaries - between 23 and 31 per cent. Other types of training reported regularly were in the areas of business management, health and safety, and camera/lights/sound training - see figure 9 below for the latest data. Even when describing 'on-the-job' training received, the same areas of training were reported. The types of training mostly undertaken, therefore, appear to reflect a need for, or perception of training as task based, or the acquisition of a skill to facilitate their current role, as opposed to training for a new job. Little mention was made of any training received in directing or producing for example.

Figure 9



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The job groups which received the most formal training, as of the latest questionnaire, were found to be those working in Support/Research/Clerical Roles. 35 per cent of these respondents had undertaken some formal training, whereas only 15 per cent of Producers/Directors had done any formal training in the previous six months. Those with

staff jobs were also more likely to have done formal training (29 per cent) compared with freelancers (10 per cent). Those working for independents were least likely to have received formal training - only 10 per cent had received formal training in the last six months compared with 40 per cent of those at ITV companies and 43 per cent of those working at the BBC.

Of all those under 50, the 21-30 year old age group were least likely to have received formal training in the last six months. In the latest questionnaire, 19 per cent of the 21-30 year-olds had received formal training, compared with 22 per cent of the 31-40 year-olds and 24 per cent of the 41-50 year-olds.

7.2 Training Requirements

As a result of seeing the types of training respondents indicated they had received, it was felt that more information was required on whether there was any training that TV workers in the survey wanted but had not received - 43 per cent said there was. However the majority of responses indicated a desire for further practical skills courses such as computer and new technology training, editing, and business training. A desire for producing, or directing training constituted a much smaller percentage of the responses, see table 19 below. Despite this, training came up regularly in comments by diarists; respondents not only wanting career training for themselves, but many also expressing fears that a lack of training for particular posts may put young people at a disadvantage in the future, or may jeopardise the quality of future television production.

Table 19

D6 Training Wanted But Did Not Have		
	Count	% of Cases
Computer/ new technology	38	31.1
Editing	32	26.2
Business management	28	23.0
Camera sound lights	19	15.6
Producing/Directing training	14	11.5
Writing	7	5.7
Other	6	4.9
Health safety equal opps. first aid	6	4.9
Production support training	4	3.3
Personal skills	1	0.8
	-----	-----
Total responses	N=155	127.0
170 missing cases; 122 valid cases		

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When respondents were asked the reasons why they wanted training that they hadn't had, the majority of responses (70 per cent) showed that they wished to consolidate their current skills and a high number (48 per cent) wished to gain another skill. The desire for computer and new technology training is reflected in the high number of responses indicating a need to keep up-to-date with new technology (63 per cent). Only just over a quarter (26 per cent) felt that they wanted training to 'help them get another job or move up'.

When respondents were asked why they hadn't received the training they had wanted, a great variety of responses were given. By far the largest response referred to time pressures (44 per cent), 11 per cent indicated the cost was too high and 10 per cent felt the courses they wanted were not available to them.

8. The Creative Work Place

8.1 Creative Working Environment

Creativity is a fundamental aspect of TV production. In asking respondents to grade particular factors that may be viewed as important for encouraging a creative working environment, we hoped to gain a perspective on what creative workers deemed to be most important.

Respondents were asked to rate the factors on a scale of 1, 'not at all important', to 5, 'most important'. Table 20 below shows the percentage of respondents who rated the factors as 'most important' for encouraging creativity. 'Working with talented individuals' was declared as 'most important' by almost 60 per cent of the respondents. Fifty six per cent of the respondents described 'trust' as a 'most important' aspect, and 54 per cent described 'working as a team' as 'most important'. 'Leadership' and the 'exchange of ideas' also scored highly, with 48 per cent and 45 per cent scoring 5 for these aspects. 'Effective management' and 'sufficient time' were also rated highly, with over 40 per cent allocating them a score of 5.

One of the factors which received a low score for stimulating creativity was 'competitiveness'. Only 7 per cent of respondents rated this as 'most important' and over half gave it a score of only one or two. Company size was also not seen as a particularly important factor in affecting creativity. Only 8 percent of respondents felt that working in a 'small company/department' was 'most important' for encouraging creativity, and only 2 per cent of respondents felt that working in a 'large company/department' was 'most important'. However, several respondents made reference to the advantages of working in a small organisation in their comments.

Table 20

D8 Work Environment - Important Aspects		
	% Scored 5 - 'Most Important'	Total N
Working with talented individuals	59.1	286
Trust between colleagues	56.4	287
Working as a team	54.2	288
Effective leadership	48.0	281
Exchange of ideas	44.6	285
Effective management	43.7	284
Sufficient time	41.4	285
Responsiveness to ideas	40.6	283
Backup	33.0	285
Adaptability to change	27.1	284
High energy	24.9	285
Flexible working conditions	24.8	286
Diversity of expertise available	23.2	284
Good rates of pay	22.1	285
Staff stability	17.5	285
Small company/dept.	7.9	266
Competitiveness	7.4	282
Large company/dept.	2.2	273

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In the majority of cases, the responses to these questions were very similar across the different types of respondents. However, a few variations were found amongst job types, age groups and between the sexes in their responses to particular aspects. Men and

women differed in their attitude towards competitiveness and its role in stimulating creativity. Only 12 per cent of women gave this aspect a score of 4 or 5, compared with 28 per cent of men.

In terms of job types, it was the Managerial/Executive Producer roles that differed the most from the rest of the sample in their responses to these questions. For example, only 13 per cent of Producers and Directors gave a high score of 4 or 5 for 'competitiveness' in relation to creativity, whereas 39 per cent of Managers and Executive Producers gave 'competitiveness' a score of 4 or 5. Just over half (54 per cent) of Managers and Executive Producers gave 'sufficient time' a high score of 4 or 5 in relation to creativity, however, over 80 per cent of respondents in all the other job groups gave 'sufficient time' a score of 4 or 5.

In this section, respondents were also given the opportunity to note other aspects they felt were important, and to describe a working environment they had experienced as being most creative. Many respondents discussed the factors that had been listed in the questionnaire such as the importance of talented individuals and teamwork, whilst others gave examples like "*the freedom to take risks*" and to "*make mistakes*".

8.2 Creative Working Experiences

In addition to asking respondents about the work environments they felt were important for creativity, we also wished to investigate to what extent these aspects had been experienced positively by respondents in their current or most recent job. Over 80 per cent of respondents had experienced 'working in a team' positively in their current or most recent job. 70 per cent of respondents had experienced 'working with talented individuals', and 67 per cent had experienced a positive level of 'trust' between colleagues in their current or most recent job. 65 per cent of respondents stated they'd experienced a positive 'exchange of ideas' in their current job and 52 per cent had experienced a 'responsiveness to ideas' in their current job.

However, only 28 per cent of respondents stated they had experienced 'effective management', and less than 40 per cent of respondents indicated that they'd experienced 'effective leadership' in their current or most recent job even though these had been rated highly as factors in encouraging creativity at work. In addition only just over a quarter (26 per cent) had experienced 'sufficient time' in their current or most recent job. See table 21 below.

Table 21

D8 Work Environment – Aspects Experienced Positively		
	Experienced positively %	Total N
Working as a team	81.0	263
Working with talented individuals	69.6	263
Trust between colleagues	66.5	263
Exchange of ideas	65.4	263
Responsiveness to ideas	51.7	263
High energy	46.0	263
Flexible working conditions	45.6	263
Adaptability to change	41.8	263
Diversity of expertise available	41.1	263
Effective leadership	39.2	263
Backup	37.6	263
Small company/dept.	33.7	264
Staff stability	31.2	263
Good rates of pay	28.5	263
Effective management	27.8	263
Sufficient time	25.9	263
Large company/dept.	18.2	264
Competitiveness	17.9	263

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When examined further, some differences were found between types of respondents in their positive experiences of these factors at work. The majority of differences arose between the different job types, contract types and companies worked for. In almost every case, respondents who had staff positions were more likely to experience the aspects listed positively in the workplace than those working freelance and on short term contracts. Few differences were found between the sexes and ages of respondents.

8.3 Work Environment and Job Type

When breaking down these results by job type, in most cases respondents in the Managerial/Executive Producer category were more likely to have experienced these aspects positively in the workplace than those working in the other job groups. It is interesting to note that those most likely to claim experiencing 'effective management' in their work were those in the managerial roles. Almost half of the Managers and Executive Producers claimed to have experienced 'effective management' compared with only 28 per cent of Producers and Directors, and only 9 per cent of those in the Post Production and Technical jobs. The pattern of experiencing 'effective leadership' fell along similar lines.

8.4 Work Environment and Company Type

When looking at the type of organisation worked for, several differences were revealed between those working for the BBC, the ITV companies and in the independent sector. Many of those working freelance were clustered in the independent. However, differences remain between company types regardless of contract status.

Workers in the independent sector felt that they had experienced more 'effective leadership' and 'effective management' than those in the BBC and ITV companies. For example 40 per cent of those in independent companies had experienced 'effective management' compared with 21 per cent at the BBC and 18 per cent at ITV companies. Working relationships between colleagues as well as with management also appeared to be strong in the independent sector. Three-quarters of those working for independents

said they had experienced 'trust between colleagues' in their work compared with 65 per cent of those at the BBC, although this is still high. Although experiencing 'teamwork' was found to be high in the independent sector (85 per cent) an even greater proportion working for ITV companies (95 per cent) felt they had experienced positive 'teamwork'.

Somewhat surprisingly, those in the independent sector were those found most likely to declare experiencing 'staff stability'. 40 per cent of those in the independent sector reported experiencing 'staff stability' in their work compared with 33 per cent of those at the BBC and less than a quarter of those at ITV companies.

9. Programme Standards

9.1 Programme Quality

Issues of quality and standards have been central to discussions about television and its future directions. Although any definition of quality is, by nature, subjective, it was felt that respondents should be given the opportunity to consider television programme quality in general over the 4 year period of the survey.

Respondents were given a series of statements from 'a lot better' to 'a lot worse'. 70 per cent of all respondents felt that quality of television programmes had worsened; of these 28 per cent felt that quality had got 'a lot worse'. Only 1 per cent of respondents felt that quality had got 'a lot better' in the last four years. See table 22 below.

Table 22

D8 Quality Level		
	Frequency	Per cent
A lot better	3	1.1
A little better	28	9.8
The same	48	16.8
A little worse	118	41.4
A lot worse	80	28.1
Don't know	8	2.8
Total	285	100
Not answered	9	
Total	N=294	

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Different age cohorts responded differently to this question. Although the great majority of respondents in all age groups felt that quality had worsened to some degree, older respondents were more likely to view quality as having become 'a lot worse' over the last four years compared with the younger respondents in the sample. Amongst the over fifties, 84 per cent felt that quality levels had worsened, and over 40 per cent felt it had become 'a lot worse'. For the 21-30 year-olds in the sample, 63 per cent still felt that quality had worsened, however for them, only 11 per cent felt that quality had become 'a lot worse' (see table 23 below). A few respondents commented that they felt four years was too short a time scale to measure the changes in quality, and some felt it had been in process over the last 10 or 20 years.

Table 23

D8 Quality Level, by Age					
	21-30 year olds %	31-40 year olds %	41-50 year olds %	51+ year olds %	Total %
A lot better	0.0	3.7	0.0	0.0	1.1
A little better	14.3	9.9	10.3	5.3	9.6
The same	17.1	21.0	17.8	8.8	16.8
A little worse	51.4	40.7	37.4	43.9	41.4
A lot worse	11.4	19.8	33.6	40.4	28.2
Don't know	5.7	4.9	0.9	1.8	2.9
Total	N=35	N=81	N=107	N=57	N=280

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The varying occupational groups responded differently to the quality question. Those

working as Producers and Directors viewed quality as having worsened the most. 84 per cent of all Producers/Directors felt that quality had worsened, with 37 per cent believing it had become a lot worse. Managers and Executive Producers, however, were the least likely to view quality as having worsened, 56 per cent felt that quality had become worse over the last four years, with only 19 per cent seeing quality as 'a lot worse'. Those in the Writers/Artists/Journalists group were also less likely than others to view quality as having worsened (57 per cent).

Those working for independent production companies were significantly more likely to see quality as having worsened than those working for either the BBC or the ITV companies. Of those working for independents, 80 per cent felt quality had become worse, and a third felt it had become a lot worse. For the BBC and for the ITV companies, although the majority still felt that quality had become worse, the figures were not as high: over 60 per cent felt that quality had worsened; only 14 per cent of those at the BBC felt that quality had become a lot worse. At the other end of the scale, those at the BBC and ITV companies were much more likely to see quality as having improved than those working for independents. 19 per cent of those at the BBC, and 22 per cent of those in ITV companies felt quality had got better over the last four years. See table 24 below.

Table 24

D8 Quality Level, by Company Type						
	BBC %	ITV %	Independent %	Freelance %	Other %	Total %
A lot better	0.0	4.9	0.0	2.6	0.0	1.1
A little better	19.0	17.1	6.3	0.0	8.1	9.8
The same	20.7	9.8	11.7	28.9	21.6	16.8
A little worse	46.6	31.7	46.8	36.8	32.4	41.4
A lot worse	13.8	31.7	33.3	28.9	29.7	28.1
Don't know	0.0	4.9	1.8	2.6	8.1	2.8
Total	N=58	N=41	N=111	N=38	N=37	N=285

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Those working freelance were also more likely to view quality as having deteriorated. One third of freelancers viewed quality as 'a lot worse', compared with a quarter of staff and one seventh of company owners.

9.2 Comments on Programme and Production Quality

The question on quality in general provided only a broad overview of respondents' perspectives on changes in quality levels. Respondents who felt there had been a change in output, one way or the other, therefore, were given the opportunity to explain how and why they felt these changes had taken place. The great majority of comments made by respondents about the changes in quality of television programmes concerned a general deterioration of quality. Many comments referred to a perceived "dumbing-down" of programming or "going for the lowest common denominator". Some felt that much of TV programming was becoming "formulaic" and that broadcasters were less willing to look for the innovative or to take a chance with programming. One Planning Manager for a broadcaster described much of the output as "anodyne, insipid programmes which are depressingly unambitious".

Many felt that it was specific genres which had been particularly affected by lowering standards such as in drama or documentaries. Others felt that the generation of new genres such as 'docu-soaps' and 'lifestyle programmes' and the proliferation of game shows and chat shows had all played a part in reducing the standard of TV output. One Executive Producer commented:

“A more relevant factor is quality of the schedules - there is too great a proportion of low-budget ‘light-content’ lifestyle programming - not enough ‘public service’, quality dramas, entertainment, documentaries etc.”

Some respondents commented that they felt there was a growing divide between a minority of “elite” quality programming, and the bulk of standard, low-budget, low quality programming. In some areas, respondents noted that a reduction in budgets had led to a change in style of programme output, as opposed to attempting to make the same programmes for less. One Development Producer who had worked for a very low budget cable channel in the past but now worked for an independent wrote; *“I have noticed the same cheap, quick, volume programming becoming mainstream on terrestrial channels”*.

A few respondents, particularly those close to post production and technical work, described how they felt technical quality had improved in some respects over the last four years. The introduction of new technology in editing and camera work in particular could be seen as an area where improvements could be made in the quality of programme output. One respondent in a news journalist position commented that *“Despite tighter and tighter budgetary constraints, new technology has improved production quality, and flow of information”*. However, a respondent in a post production role noted that technical quality did not equal overall quality:

“New equipment and technology has increased the overall look of programmes but generally the actual quality of the shows depends on the content. If a programme technically looks good but is uninteresting and shallow it is still a poor programme.”

Those describing changes in technical quality, however, were somewhat divided on whether new technology had led to an improvement or reduction in quality output over the last four years. Several respondents commented on how new equipment, when placed in inexperienced hands could lead to poor results on the screen. One Trainee Producer commented on how the increasing use of DVC by untrained staff has reduced the quality of camera work significantly:

“DVC has lowered production values. It has its place - but is rarely used by competent enough operators. The results will never be as good as with a Beta Crew who have 10 or more years experience.”

Many respondents suggested reasons why a reduction in quality may have come about. Some respondents felt that changes in broadcasting legislation had meant that profits had been put before quality and others noted spiralling ratings wars as a significant factor. However, the issue of decreasing budgets was the one raised most commonly, and most strongly by respondents as forming the major cause of reduced quality levels. The head of a small independent summed up this point stating that; *“Budgets are being increasingly forced down. This has an adverse effect on production values, and on employment.”*

9.3 Budgets

When respondents were asked to describe their experiences of changes in production quality over the past four years, the majority of respondents referred to decreasing budgets affecting all levels of the production process. One independent Producer commented on how reducing budgets had affected staffing levels, and thus quality:

“Budgets are definitely tighter and (almost) inevitably affect outcome. Has led to us not employing as many people on a production as we might otherwise have

done, and this does impinge on quality.”

For many respondents their commitment to television work meant that, although budgets were down, they had a personal responsibility to maintain the quality of output. For some, this has meant longer hours and greater stress, for less money. One Executive Producer at an independent wrote;

“Cost cutting has meant that there is less pre and post production time in schedules, but this has been countered in terms of on-screen quality by developments and improvements in technology and the fact that everyone works - has to work - so much harder and for longer hours.”

For freelancers, and very small independent companies, the burden is often heavier and with greater personal impact. One freelance Producer/Director wrote that due to shrinking budgets she had ended up *“sponsoring the budget”* with her own time. Similarly, another Producer/Director for a small independent felt that his company was *“subsidising the series to ensure it was of the highest quality.”*

9.4 Areas of Production With Reduced Budgets

We asked respondents who had experienced a lowering of programme budgets since 1994, in what areas of production they had experienced budget cuts. Almost three-quarters (74 per cent) of the respondents to this question felt that the ‘scale of shooting’ on productions had been affected by budget cuts over the last four years. Sixty per cent of the respondents believed that ‘research and development’ had been affected by budget cuts, and 59 per cent felt that ‘staff pay’ had been cut. In addition, half of the respondents to this question felt that ‘post production’ had been affected by cuts in budgets over the last four years. See table 25 below.

Table 25

D8 Areas Decreasing Budgets Have Affected		
	Count	% of Cases
Scale of shooting	172	74.1
Research & development	139	59.9
Staff pay	136	58.6
Post production	116	50.0
Equipment	73	31.5
Other factors	41	17.7
Script	38	16.4
Actors	21	9.1
	----	----
Total responses	N=736	317.2
62 missing cases; 232 valid cases		

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The reduction in the scale of shooting over the last few years, respondents have commented, has led in many cases to fewer filming days, fewer takes, and smaller and less experienced crews.

9.5 Standards

In seeking to investigate further how TV workers viewed changes in quality standards over the last four years, four categories were created where standards may be affected. Respondents were asked to indicate whether they felt, over the last four years, standards had changed in terms of, ‘Technical Standards’, ‘Ethical Standards’, ‘Creative Standards’ and ‘Standards of Accuracy’. Respondents were given a scale from 1 (‘standards much

lower') to 5 ('standards much higher') to indicate to what degree they felt standards had changed within these areas.

9.6 Technical Standards

When looking at changes in technical standards, responses were somewhat divided. Almost 40 per cent of respondents allocated a score of 1 or 2, indicating that they felt standards were lower and 11 per cent felt that standards were 'much lower' than four years ago. However, over a quarter of respondents (26 per cent) gave a score of 4 or 5 indicating that they felt standards were higher than four years ago. See table 26 below.

Table 26

D8 Change in Technical Standards		
	Frequency	Per cent
Scored 1 - standards much lower	29	10.5
Scored 2	80	28.9
Scored 3	71	25.6
Scored 4	55	19.9
Scored 5 - standards much higher	18	6.5
Don't know/hard to judge	24	8.7
Total	277	100
Not answered	17	
Total - all	N=294	

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The lack of uniformity in responses to this question indicate that although there have been technological advances during this time, not all respondents are convinced that this has automatically led to an improvement in standards. This mixed response is perhaps further evidence that many respondents feel that new technology is of little benefit without sufficient time for production, personnel and training.

Those working in post production and technical roles were more likely to have felt there had been a lowering of technical standards over the last four years than those in other positions in TV production. Forty seven per cent of Post Production and Technical staff indicated that standards were lower (scored 1 or 2) compared with 33 per cent in the Managerial/Executive Producer group. However, as with the sample as a whole, the Post Production/Technical group were also split in their responses to changes in technical standards. Twenty one per cent of the Post Production/Technical staff still felt that technical standards had become higher over the last four years.

Those working at the BBC appeared more likely to feel that technical standards were lower than those working for the ITV companies, and those in the independent sector were least likely to see technical standards as having dropped. Forty eight per cent of those at the BBC in our sample gave technical standards a score of 1 or 2 (lower standards), whereas 37 per cent of those in the independent sector gave technical standards a score of 1 or 2.

Older respondents were more likely to see technical standards as having become lower in the last four years than younger respondents: 48 per cent of the over fifties, compared with 31 per cent of 21-30 year olds. However, more of the younger respondents indicated they felt standards were unchanged, or felt unable to determine either way. Thirty seven per cent of the 21-30 year-olds indicated a score of three (standards neither higher nor lower) and 14 per cent answered 'don't know/hard to judge' for this question.

9.7 Creative Standards

When looking at changes in creative standards, many respondents indicated that they felt less dramatic changes had taken place over the last four years. Almost a third of respondents gave a score of 3, indicating that they felt standards of creativity had become neither higher nor lower over the last four years. A further 29 per cent of respondents gave a score of 2 indicating that they felt standards were somewhat lower. However, 21 per cent gave a score of 4 indicating that they felt creative standards were somewhat higher. Few respondents indicated that they felt creative standards were either 'much lower' or 'much higher' in this question. See table 27 below.

Table 27

D8 Change in Creative Standards		
	Frequency	Per cent
Scored 1 - standards much lower	23	8.4
Scored 2	79	28.7
Scored 3	89	32.4
Scored 4	58	21.1
Scored 5 - standards much higher	5	1.8
Don't know/hard to judge	21	7.6
Total	275	100
Not answered	19	
Total - all	N=294	

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Respondents did differ in how they viewed changes in creative standards over the last four years depending on their job type, employment sector and age. Almost half of the Producers and Directors (47 per cent) felt that standards of creativity were lower (score 1 or 2) and only 19 per cent felt they were higher (score 4 or 5). Less than a quarter of Managers and Executive Producers (24 per cent) felt that standards were lower (score 1 or 2) and 29 per cent felt that standards of creativity were higher (score 4 or 5).

Those working in the independent sector were also more likely to have seen creative standards as getting lower - 41 per cent of them gave a score of 1 or 2 for this question. However, only a quarter of those in the ITV companies, and 27 per cent of those at the BBC gave creative standards a score of 1 or 2.

Once again, those in the older age groups were more likely to have felt there to have been a deterioration in standards over the last four years. Forty six per cent of those in the over 50 age group, and 42 per cent of the 41-15 year-olds indicated that they felt creative standards had become lower (score 1 or 2). In contrast 30 per cent of the 31-40 year-olds and 26 per cent of the 21-30 year-olds felt that creative standards had lowered over the last four years.

9.8 Standards of Accuracy

When asking respondents if they felt that there had been a change in standards of accuracy over the last four years, just under half of all respondents felt that there had been a change for the worse (scored 1 or 2), only 7 per cent felt there had been a change for the better (scored 4 or 5). See table 28 below.

Table 28

D8 Change in Standards of Accuracy

	Frequency	Per cent
Scored 1 - standards much lower	32	11.7
Scored 2	101	36.9
Scored 3	78	28.5
Scored 4	17	6.2
Scored 5 - standards much higher	2	0.7
Don't know/hard to judge	44	16.1
Total	274	100
Not answered	20	
Total - all	N=294	

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In terms of job types, in contrast to the other issues of standards, it was the Managers and Executive Producers who felt the most that standards of accuracy had become worse. Fifty five per cent of Managers and Executive Producers felt that standards of accuracy had become worse (scored 01 or 2) compared with 48 per cent of Producers and Directors.

9.9 Ethical Standards

The change in ethical standards was the factor that the greatest number of respondents felt had deteriorated of all the four categories presented. Fifty five per cent of respondents stated that they felt that ethical standards had become lower over the last four years. Less than 5 per cent of respondents felt that ethical standards over the last four years were in any way higher. See table 29 below.

Table 29

D8 Change in Ethical Standards		
	Frequency	Per cent
Scored 1 - standards much lower	49	17.9
Scored 2	101	37.0
Scored 3	78	28.6
Scored 4	10	3.7
Scored 5 - standards much higher	1	0.4
Don't know/hard to judge	34	12.5
Total	273	100
Not answered	21	
Total – all	N=294	

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Those most likely to feel that ethical standards were lower over the last four years were those working in Post Production in the survey - two-thirds of them felt that standards had become lower (scored 1 or 2). Those in the Producers/Directors job group and those in the Production Support/Research/Clerical job group were also highly likely to view ethical standards as having become lower - around 60 per cent of both groups gave a score of 1 or 2 for this question. Although the response was not as strong, still over half (54 per cent) of Managerial/Executive Producers felt that ethical standards were lower than four years ago.

Those working for independent companies were significantly more likely to have seen ethical standards as having deteriorated compared with those working within the BBC

and ITV companies. Over three quarters (68 per cent) of those working for independents felt that standards were lower and gave a score of 1 or 2, whereas less than half of those in the ITV companies and 41 per cent of those at the BBC felt the same.

When looking at changes in ethical standards, again the older age groups (i.e. those in their 40s and 50s) were the most likely to have seen a deterioration of standards over the last four years. Fifty eight per cent of the 41-50 year age group felt that ethical standards had deteriorated and 75 per cent of the over 50s felt the same.

In the case of technical, creative or accuracy standards, the younger age groups were the least likely to have seen a drop in standards. This is not the case for ethical standards however. Over half (51 per cent) of those in 21-30 year age group reported noticing a reduction in ethical standards over the last four years.

9.10 Pressures in Factual Programming - Dealing With Contributors

In addition to looking at views on changes in ethical standards and standards of accuracy, we wished to investigate the numbers of respondents who had experienced pressures in these areas. Respondents who had worked in factual programming were asked to indicate whether they had experienced pressures at work to achieve an exciting/controversial/entertaining programme that they felt was at odds with how contributors should be treated, and whether they had experienced pressures at odds with accuracy for the same reasons.

Over half (53 per cent) of those working in factual programming stated that they had experienced pressures at odds with how they believed contributors should be treated. It is not known whether this is an increase on earlier years, however, it demonstrates that the values of many production workers and the values of the productions they work on are regularly in conflict.

When looking at who had experienced such pressures, in this case, it was those in the 21-30 year old age group who were found to be most likely to have experienced pressures at odds with how they believed contributors should be treated. Sixty three per cent of the 21-30 year-olds in factual programming said they had experienced these pressures, compared with only 38 per cent of the over fifties who had experienced this. This may again be attributable to the fact that younger people are more likely to be dealing with contributors on a regular basis and having to negotiate such problems.

9.11 Pressures in Factual Programming - Maintaining Accuracy

As with pressures on how contributors should be treated, over half of those who worked in factual programming (52 per cent) had experienced pressures to achieve an exciting, controversial or entertaining programme that they felt were at odds with maintaining accuracy. Of those who had experienced pressures that were at odds with maintaining accuracy, it was the older age groups who had experienced this the most. Fifty six per cent of the 41-50 year olds and of the over fifties had experienced pressures at odds with maintaining accuracy compared with 42 per cent of the 21-30 year-olds and 49 per cent of the 31-40 year olds.

As with the issue the treatment of contributors, those working in the independent sector (54 per cent) were the ones most likely to have experienced pressures at odds with maintaining accuracy, compared with 45 per cent of ITV based respondents and 44 per cent of those at the BBC. Those working freelance were also the ones most likely to have experienced such pressures (57 per cent) compared with 45 per cent of staff and owners.

Producers and Directors were also more likely to have experienced pressures that were

at odds with accuracy in order to achieve an exciting, controversial or entertaining programme (57 per cent) compared with 46 per cent of Managers/Executive Producers and 42 per cent of Production Support/Research/Clerical Staff.

When devising questions for inclusion in the final questionnaire it was felt that questions relating to issues of ethics and accuracy in factual programming should be included as they were becoming important areas of debate in the television industry. These questions were timely as the controversy surrounding the Carlton documentary "The Connection" surfaced as the questionnaire was being completed by respondents. Several respondents, prompted by these questions, took the opportunity to comment on this issue specifically, and on the dilemmas that it raised. Some respondents felt that bowing to pressures for exciting and entertaining programmes had become almost habitual within factual programming, whereas others felt the programmes that had come to light were the exception rather than the rule.

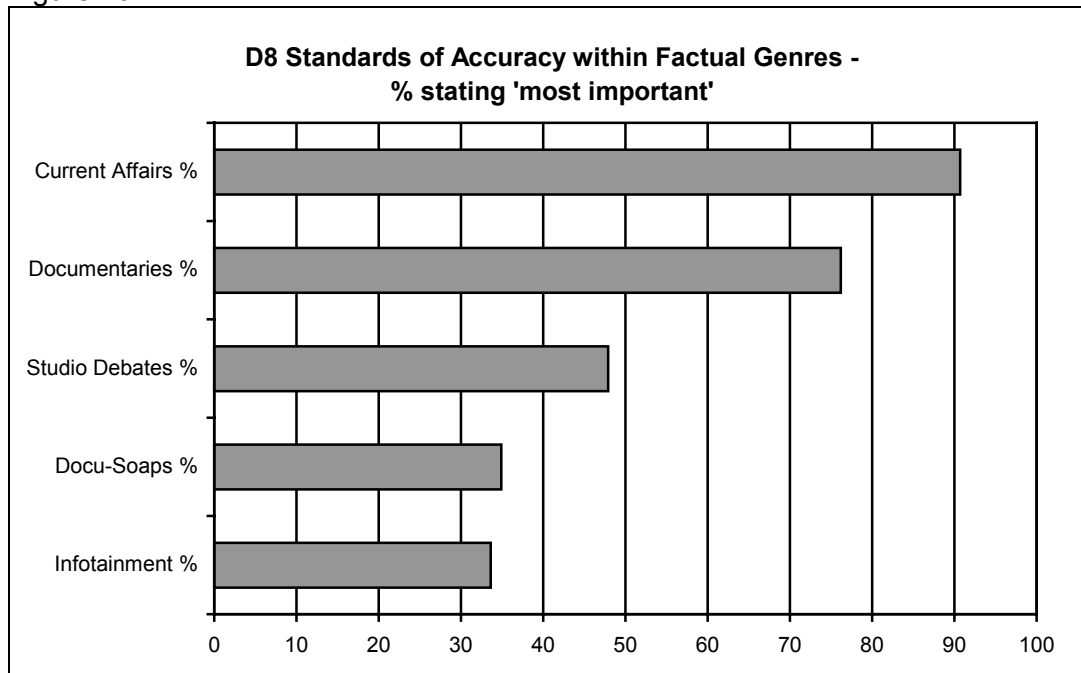
9.12 Accuracy in Factual Programming

It could be argued that the extent to which standards of accuracy are maintained within factual programming is dependent on the degree to which programme makers view its importance within the genre. If the programme-makers themselves do not believe that complete accuracy is of utmost importance in factual programming then their endeavors to maintain it will not be wholehearted. We asked those of the respondents who were working in factual programming, to what degree they thought it important for specific programme types to be completely accurate. Respondents were asked to rank on a scale from 1 ('not at all important') to 5 ('most important') the factual genres of: Documentaries, Current Affairs Programmes, Studio Debates, Docu-Soaps, and Infotainment Programmes.

For Documentaries, 76 per cent of those who had worked in factual programming felt that complete accuracy was 'most important' (score 5). However, 22 per cent felt that accuracy was not necessarily 'most important' and gave it a score of between 1 and 4. Current Affairs programmes achieved a higher score, with 91 per cent giving them a score of 5 ('most important'). Just less than half (48 per cent), however, felt that complete accuracy was 'most important' for Studio Debates - a genre which has come into question recently over the lack of honesty of some contributors and whether the facts had been overlooked in the search for sensationalism.

For the relatively new genre of docu-soaps, and one also in the headlines over issues of ethics and accuracy, only 35 per cent felt that complete accuracy was 'most important'. Similarly, only 34 per cent felt that it was 'most important' for infotainment programmes to be completely accurate. Figure 10 below shows the percentage of those seeing accuracy as 'most important' within each genre.

Figure 10



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Echoing other findings in this section on standards, it is the older age groups who tend to see standards of accuracy in all the factual genres as being 'most important' to a greater extent than the younger age groups. For Current Affairs programmes, 96 per cent of the over 50s felt that accuracy was 'most important' compared with 85 per cent of the 21-30 year group. With Documentaries, 89 per cent of the over fifties felt that accuracy was 'most important' compared with 73 per cent of the 21-30s. However, those in the 31-40 year age group were the least likely to view accuracy as 'most important' in Documentaries (66 per cent). For Studio Debates the differences were more marked, with 67 per cent of the over 50s seeing accuracy as 'most important for this genre, compared with only 15 per cent of the 21-30 year age group. These differences of views between age groups regarding accuracy in factual programming may be an indicator of changing standards.

Although few other differences were found between types of respondents on this question, interestingly, on the question of standards of accuracy in Documentaries, more respondents from the ITV companies felt that complete accuracy was 'most important' (90 per cent), than respondents from the BBC (76 per cent) or from independent companies (69 per cent).

Respondents' comments varied greatly in relation to accuracy in factual programming. Whilst some felt that accuracy should always be the main goal of those in factual programming, others felt that the issues were not always clear. Whilst one Director for an independent wrote; *"completely accurate - this is all down to interpretation"*, a Producer for another independent lamented that there was now *"less commitment to the value of truth or its subtleties"*. The same Producer felt that the need for entertainment had become *"blurred"* with the issue of making factual programmes. One respondent, a Producer and small independent Company Director commented that he felt that all programmes were *"selective accounts of reality... and use powerful techniques of manipulation"*. He felt that *"audiences are becoming more sophisticated at recognising and appreciating these techniques"*.

APPENDIX A

BFI Television Industry Tracking Study - Executive Summary of the First Interim Report

Results based on statistical data collected in the first year of the study, including the initial questionnaire in March 1994, the first diary questionnaire in November 1994 and the second diary questionnaire in May 1995. Some of the main findings at this stage are:

- Thirty per cent of the whole sample got their first job through personal contacts, and thirty eight per cent of the 21-30 year olds got their first job this way. Twenty two per cent of the 21-30 year olds got their first job by a speculative application. Thirty nine per cent of the 41-50 year olds got their first job by formal application compared with just under a quarter of the 21-30 year olds.
- Thirty five per cent of the sample got their current job through personal contacts and twenty two per cent got their current job by a direct approach from a company or commissioning executive. Forty four per cent of the 21-30 year olds got their current job using personal contacts.
- Just under a quarter of the women (23 per cent) started their career in television in secretarial or clerical positions compared with four per cent of the men. In addition twenty three per cent of the women started in a production support capacity (for example as a Production Assistant) compared with six per cent of the men. Nineteen per cent of the men started in a Producer/Director role compared with eight per cent of the women. Men were also more likely to have started in technical areas such as Camera/Lighting/Sound and post production than women.
- Twenty per cent of the 41-50 year olds entered the industry after 1980, and just under a quarter of this group were 30 or over when they entered the industry. Types of work prior to employment in television included print journalism, secretarial posts, teaching, theatre, radio, and film.
- Nearly three quarters of the whole sample received higher education and this increases to 88 per cent for the 21-30 age group. Just under a quarter of the 21-30 year olds with higher education, did either media studies, film and television studies, or communication studies. Sixty four per cent of those with higher education have a BA, and eleven per cent have a BSc. However only four per cent of the 21-30 year olds have a BSc.
- Thirty seven per cent of the whole sample attended an independent secondary school and these figures are identical for the 21-30 age band.
- Women are much more likely to be single than men. Twenty nine per cent of women over 40 are single compared with four per cent of men.
- Fifty three per cent of the women over 40 do not have children compared with fifteen per cent of the men.
- About a third of those who were not single had partners working in television. In addition approximately a third of those with one or more children over 18, had at least one child working in television.
- Twenty four per cent of the 21-30 year olds earn less than £10,000 a year.
- Sixty five per cent of the 21-30 year olds are freelance and the majority live in London and the South East.

- Just over a third of the sample work 60 or more hours a week on average and nearly half of the 41-50 year olds work 60 or more hours a week.
- Similarly nearly half of the independent owners in the sample work 60 or more hours a week. Six per cent of the sample said they work 80 or more hours a week.
- A quarter of the overall sample earned less in 94/95 than they did in 93/94. A third of freelances earned less in 94/95 than they did in 93/94.
- Around twenty per cent of the sample had received formal training in the previous six month period and these were much more likely to be permanent members of staff working for a broadcasting company.
- Just over half of the independent company owners felt they needed business or management training.
- Respondents were asked to rate a series of aspects of work they like or dislike in television. The lowest rated were uncertainty, conditions of work, and relationship with management. The highest rated were creativity, achievement, and intellectual stimulation.

APPENDIX B

BFI Television Industry Tracking Study - Executive Summary of the Second Interim Report

Results based on statistical data and some qualitative data collected from the third, fourth and fifth diary questionnaires between November 1995 and November 1996. Some data covering repeated questions from the start of the project in March 1994 are also covered. It should be noted that in the second interim report, where changes over the course of the survey are investigated, only results from the core sample of respondents (those who completed all the questionnaires so far) are represented. Some of the main findings at this stage were:

- The proportion of Freelances increased in every diary wave, with the exception of the last wave, so it may be that the proportion of Freelances is levelling off.
- In every diary wave Personal Contacts were the most important method the panel used to seek and obtain work. In the most recent diary exactly half of the panel used this method. Only twelve per cent of the panel used a Formal Application/Interview.
- Over half the panel (54 per cent) thought that low budget programmes (defined as £5,000 an hour or less) would be an important part of their work over the next two years. Forty one per cent of the 21-30 year olds had worked on low budget programmes in comparison with sixteen per cent of the 31-40 year olds.
- Over half the 21-30 year olds had been on work experience in comparison with none of the over 51 year olds.
- Forty one per cent of the panel said their stress levels had increased in the previous six months, forty per cent said it had stayed the same and nineteen per cent said it had decreased.
- The three most stressful areas of work for the panel were Time, Working Hours and Uncertainty. Broadcaster Staff found Relationship with Management, Resource/Finance Systems and Red Tape more stressful than any other groups. Forty five per cent of the panel said stressful situations were sometimes a spur to creative work.
- The panel were asked to comment on their health, and the majority of statements referred to health being affected by stress.
- Eighteen per cent of the panel had made enquires about leaving the television industry or had definite plans to leave. The most likely alternative careers suggested by the panel were writing, teaching and working in other media sectors.
- Seven per cent of the panel earned less than £10,000 in the year to May 1994, and this increased to eight per cent in the year to May 1996. At the other end of the scale, four per cent earned more than £70,000 in 1994, and this increased to eight per cent in 1996.
- The proportion of 21-30 year olds who earned less than £10,000 a year in 1994 had dropped from just under a quarter to eleven per cent in 1996, suggesting that once young people establish themselves in the industry their earnings increase. However for the new young age cohort entering the industry, forty three per cent earned less than £10,000 a year.
- Respondents were asked to rate a series of aspects of work they like or dislike about their current job in television in three diary waves. The lowest ranking work values for

the sample have remained Uncertainty, Relationship with Management, and Conditions of Work.

- In the sixth wave diary, twenty nine per cent of the Independent Owners worked 60 or more hours a week in comparison with twenty three per cent of the Broadcaster Staff and twenty one per cent of the Freelances.
- Over a quarter of the Freelances and Broadcaster Staff rated Back up/Support poor in comparison with eleven per cent of the Independent Owners.
- Forty six per cent of Independent Owners had a clear idea of the future plans of programme commissioners, in comparison with eight per cent of the Freelances. Just under two fifths of Independent Owners always or often developed programme proposals with their own money.
- Where applicable, thirty seven per cent reported that they had developed or adjusted a programme as a result of audience research or focus groups. Just over a third felt they had had an idea appropriated.
- Eighteen per cent of the panel had worked in Corporate Video in the last six months and twelve per cent had worked in Multimedia.
- The number of respondents from the new young panel who belonged to a union or television related organisation was extremely small.



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