



IRISH FILM BOARD  
BORD SCANNÁM NA BÉIREANN

# IRISH AUDIOVISUAL CONTENT PRODUCTION SECTOR REVIEW



DECEMBER 2008

PRICEWATERHOUSECOOPERS 

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# Foreword

On behalf of all the Board and staff of Bord Scannán na hÉireann / the Irish Film Board I am delighted to be able to introduce this survey to you. When commissioning this survey we had two particular ideas in mind. First we need up-to-date, accurate and complete information about the industry if we are to develop a strategic response to the changes arising from convergence and technology. Secondly we need to recognise that the traditional lines between film, television and other media have blurred to the extent that most people and companies working in the industry work across a range of production categories including film, television, commercials, animation, music video and on-line content.

This survey, therefore, looks at the broader audiovisual content production industry in order to describe the people working in all forms of content production whether individually, in a company or in a broadcasting organisation. It also examines the resources employed in the making of content and the total value of these activities.

The survey is the first of its kind to look beyond the annual production statistics and examine the companies and individuals who are responsible for producing the content. Its purpose is to provide insight into the dynamics and significant trends in the content production industry.

As an industry survey it has gone well beyond the normal sample level with a very significant level of response from companies and individuals. We believe that regular surveys of this kind will be of increasing value to everyone in the industry, and we have learned much from this first survey that will help in refining and improving both the detail and the insights from future surveys.

Following the publication of this survey the Irish Film Board intends, in the New Year, to sponsor an industry-wide Strategic Forum with the purpose of producing a blueprint for the future development of the industry – a five year plan for Government, for policy makers and for the industry.

We would particularly like to thank all the individuals, enterprises and organisations who responded to the survey and for making the results worthwhile for everyone in the industry.

I would also like to take this opportunity of acknowledging the enormous effort put in to ensuring the completion of the survey by the IFB in particular Teresa McGrane and Patrick O'Neill and also Gillian Eastwood in PricewaterhouseCoopers.

**James Morris**  
**Chairman**  
**Bord Scannán na hÉireann / the Irish Film Board**

# Report Headlines

## **Overall Sector**

The value of the audiovisual content production sector in Ireland is valued at €557.3 million, 0.3% of Gross Domestic Product (GDP), of which the independent sector represents 67% and Broadcasters the remaining 33%.

The sector employs 6,905 individuals, 85% in the independent sector and 15% in Broadcasting, which equates to 5,440 Full-Time Equivalents (FTEs).

An estimated 567 companies operate within the sector comprising production companies, post-production companies and service providers. Findings indicate significant levels of integration amongst the companies with 15% stating they work across all three sub-sectors i.e. production, post-production and service provision.

## **Companies**

Findings suggest a vibrant sector attracting high levels of new entrants particularly in the area of production and post-production.

85% of respondent companies are involved in the area of production – primarily in the documentary/ factual, short-film and feature film genres.

Production companies consider the Irish Film Board to be most important source of development and production funding.

Respondent companies reported producing a total of 1,234 projects in 2007 with a combined gross budget of €241 million – of which €166.4 million was spent in Ireland.

A relatively low level of training (40%) was undertaken by the staff of respondent companies during 2006 and 2007.

## **Freelancers**

Findings suggest a relatively young industry with over 90% under the age of 50 – the majority of which are male.

Personal contacts and relationships, a general interest in the sector and training/ placements were cited as the main entry routes into the sector.

Freelancers report significant levels of cross-over within the sector in terms of the areas worked in with almost one-fifth of respondents working across the areas of creative, production and post-production.

Union and Guild membership is not prevalent within the sector with 76% of freelancers reporting not being a member of a Union and 48% nether a member of a Union or a Guild.

Freelancers reported earnings between €2,500 and €150,000 in 2006 and 2007. The area of post-production has experienced the largest increase in the number of individuals earning €35,000 per annum.

Freelancers are a well educated group with 59% having achieved either a Degree, Master/ Postgraduate Degree or Doctorate/ Post Doctoral Degree – only 2% of freelancers have no formal qualification at all.

Furthermore, 41% of freelancers continue to undertake professional training, the majority of which is job specific.

# Scope and Process

## ***Audiovisual sector review***

Bord Scannán na hÉireann/ the Irish Film Board (IFB) commissioned PricewaterhouseCoopers (PwC) Dublin to undertake a review of the audiovisual content production sector in Ireland. The work was performed over a seven month period commencing January 2008. PwC undertook primary research in the form of a survey of audiovisual companies and freelancers involved in the sector as well as domestic broadcasters. In addition, certain secondary sources of industry data were accessed in order to establish the overall size of the sector i.e. numbers employed and value of the sector in Ireland.

The survey is the first stage of an independent review of the industry. The findings from this stage will inform the second stage of the research programme which will be a large-scale consultation process, led by the IFB, with the view to getting industry buy-in with regard to the strategic development of the industry.

## ***Definition of audiovisual content production sector and digital media companies***

The AV content production sector can be defined as those companies or individuals involved in any of the following production related activities: Writers, Producers, Directors, Screen Talent, Crew, Animators, Film and Television Production Companies and Studios, Commercials and Corporate Video Production Companies, Post Production Companies, Audio Studios, Service Providers, and Digital Content Production Companies.

## ***Objectives of study***

The objective of the study was to inform a new landmark strategic plan for the audiovisual content production sector, the consultation process which is due to commence in early 2009. The output of the research will provide baseline data on the sector to be benchmarked on an annual/ bi-annual basis.

## ***Sample***

The sample for both the company and freelancer surveys was gathered and verified by the IFB using the following sources: IFB company database; crew lists and self-registration website; Film Scan directory; Screen Producers Ireland; Screen Training Ireland; Údarás na Gaeltachta; various databases (Digital Media Forum, Irish Film and Television Network and Media Antennae); Screen Directors Guild; Irish Playwrights and Screenwriters Guild; Filmbase; Galway Film Centre; Cork Film Centre; and various production contact lists.

## ***Methodology***

Questionnaires for the company, freelancer and Broadcasters' surveys were designed by PwC Dublin in consultation with the IFB. PwC's International Survey Unit, based in Belfast, then developed, piloted and administered electronic surveys to both the companies and freelancers. Broadcasters and a number of freelancers (without e-mail addresses) received a postal questionnaire.

# Scope and Process contd.

## *Response rate*

In total, questionnaires were sent to a valid sample of 567 companies (including production, post-production and service provision companies). 172 responses were received representing a 30% response rate. A further 87 companies provided partial information by telephone, increasing the company response rate to 46%.

Circa 3,000 questionnaires were sent to freelancers comprising writers, producers, directors screen talent and crew. 968 freelancers responded to the survey, resulting in a freelancer response rate of 32%.

Additionally, all domestic Broadcasters (RTE, TG4, TV3, City Channel and Setanta) received a questionnaire and responses were received from the terrestrial channels and some digital channels. Responses to all surveys were collated and analysed - key findings of which are presented in Sections 2, 3 & 4 of this report.

# Section 1: Overview of the Audiovisual Content Production Sector in Ireland

## Introduction & sectoral background

### Introduction

This review of the audiovisual content production sector is the first of its kind as it encompasses information/ data pertaining to audiovisual companies, freelancers and the domestic broadcasting community.

It is a milestone survey which provides a baseline for the industry against which future surveys may be benchmarked and will form the basis of an industry consultation programme and to the development of a strategy for the sector going forward

### Sectoral background

The table below details the total value of the audiovisual content production sector in Ireland in 2007.

	€million	%
Broadcasters	€182.5	33%
Independent Sector	€374.8	67%
<b>Total</b>	<b>€557.3</b>	<b>100%</b>

The value of the audiovisual content production sector in Ireland is estimated at €557.3 million, 0.3% of GDP (2007 CSO National Income – current market prices – preliminary figures). The independent sector accounts for 67% of this figure (€374.8 million) and the remaining 33% (€182.5 million) is the value of the domestic Broadcasters' in-house productions.



## Section 1: Overview of the audiovisual content production sector in Ireland

### Employment in the sector

#### *Employment in the sector*

The table below details the number of individuals and full time equivalents (FTEs) employed in the audiovisual content production sector in Ireland in 2007, as derived from the PwC survey results.

Sector		Number of individuals	%	FTE	%
Broadcasters		1,021	15	913	17
Independent	Freelancers (creative, production & post-production)	3,016	85	1,659	83
	Companies (production, post-production & Service Providers)	2,868		2,868	
<b>Total</b>		<b>6,905</b>	<b>100</b>	<b>5,440</b>	<b>100</b>

During 2007, circa 6,900 individuals were employed in the sector, 1,021 (15%) of which were employed by Broadcasters and circa 6,000 (85%) by the independent sector (comprising 3,016 freelancers and 2,868 company employees).

Using a conversion factor of 0.55<sup>1</sup> for freelancers, then this equates to circa 5,500 FTEs – roughly equivalent to 0.3% of the total working population in Ireland (based on Q3 2007 CSO employment figures).

The above table does not include figures for actors and extras which are considered to comprise an additional 137 FTE's (Source: IFB).

<sup>1</sup>Freelancer FTE calculations were worked out on the basis that 60% of freelancers worked 30 weeks per annum and the remaining 40% worked 10 weeks per annum - equating to a FTE conversion of 0.55.

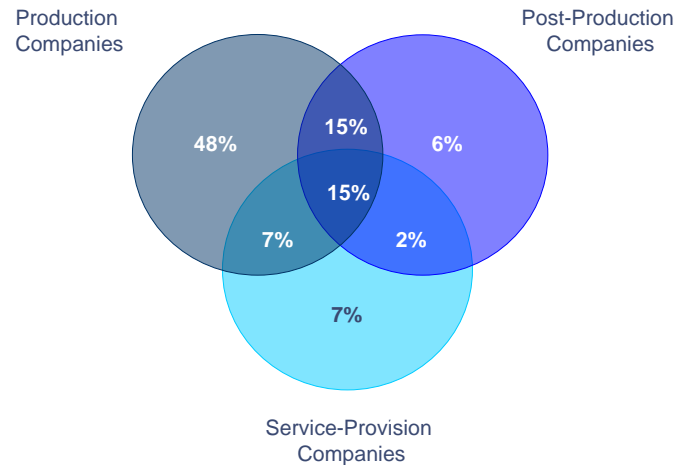
# Section 1: Overview of the audiovisual content production sector in Ireland

## Sector size

### Sector size

It is estimated that a total of 567 companies in the independent audiovisual sector in Ireland are involved in content production. This is made up of content production companies, post-production companies and service providers.

In all 259 unique responses were received. An interesting feature to emerge from this study is the extent of integration within the sector – with many companies being involved in more than one aspect of the overall content production/ post-production process (as illustrated in the venn diagram below).



Significant integration can be viewed amongst production and post-production companies with 15% of respondents citing working in both of these areas. Additionally, 15% of companies reported working across all three sectors of production, post-production and service provision.

These findings illustrate a significant development within the sector since the Coopers & Lybrand industry report published in 1992 where this type of integration was not evident .

# Section 1: Overview of the audiovisual content production sector in Ireland

## Sector value

### Sector value

The table below details the value of the independent audiovisual content production sector in Ireland during 2007.

	Overall sector €M	% of overall sector	PwC survey €M	PwC survey % of overall sector
Live Action:	283.7	76	176.4	62
<i>Feature films</i>	54.1	19	45.1	83
<i>Television dramas (Series)</i>	97.9	34	76.1	78
<i>Television – documentary, factual &amp; entertainment</i>	93.1	33	30.3	33
<i>Short films</i>	1.8	1	1.4	78
<i>Commercials</i>	30	11	21.1	70
<i>Corporate video</i>	6.8	2	2.4	35
Animation	78	21	59	76
Digital Content Production	4.2	1	1.4	33
Other	8.9	2	4.1	46
<b>Total</b>	<b>374.8</b>	<b>100</b>	<b>240.9</b>	<b>64</b>

In 2007, based on the PwC survey and additional information provided by the IFB and the Broadcasters who fund independent productions, and from discussions with industry informants, the value of the overall independent audiovisual content production sector in Ireland was estimated at €374.8 million.

The sector is made-up of live action for film and television, animation, digital content and other productions. Live action, comprising feature films, television dramas (series), documentaries/ factual & entertainments programmes, short films, commercials and corporate videos, represents 76% (€283.7 million) of the sector, animation accounts for 21% (€78 million), digital content production 1% (€4.2 million) and 'other' productions (including music videos & pop promos, multi-media productions, pod-casts and media transfer facilities) the remaining 2% (€8.9 million).

In extrapolating up from the PwC data for feature film, TV drama, shorts, other TV programmes and animation the main sources of information were those organisations (IFB and Broadcasters) noted above. However, in relation to TV commercials and corporate videos, extrapolations were derived as follows.

In relation to TV commercials, total media spend on TV advertising in Ireland during 2007 has been estimated at €300 million. (Source: Sunday Business Post). On this basis, the percentage of 10% (€30 million) attributed to TV commercial production (as stated in the table above) would be considered low by international standards but in the context of the Irish market is thought to be reasonable given the level of imported material.

### Sector value contd. & Broadcasters additional spend

#### **Sector value**

In relation to corporate videos, the PwC survey gathered information from 36 companies who produced 191 corporate videos, at a total value of €2.4 million. In extrapolating up to arrive at a total sectoral value of €6.8 million, regard was given to the income of a number of large corporate video businesses that did not provide income figures, and to the fact that their projects are of a larger scale.

Overall, the PwC survey represents 64% of the total value of the audiovisual content production sector in Ireland during 2007.

#### **Broadcasters – additional spend**

During 2007, Broadcasters reported a total expenditure on in-house content development/ production activities of €182.5 million. This figure comprised of, in part, €90.3 million of labour costs, €25.3 million in payments to non-company staff and a further €53.2 million on other direct costs – all of which contribute directly to the economy.

Additionally, Broadcasters cited a combined total capital investment on plant and machinery (utilised for content production) of €10.5 million in 2007.

Section 2 details the key messages arising from both the company and freelancer surveys.

# Section 2: Key Messages from Company & Freelancer Survey

## Section 2: Key Messages from Company and Freelancer Survey

### Company key messages

In all, 567 companies were invited to participate in the PwC survey. A total of 259 responses were received which represents a 46% response rate. The findings of these 46% of companies are presented in the company key messages.

***Responding company profile - relatively newly established, predominately based in Dublin and tend to be involved in numerous areas within the sector***

- Almost half (47%) of the companies that participated in the review have been trading for 5 years or less suggesting a vibrant sector attracting high levels of new entrants. This is particularly evident amongst production and post-production companies.
- The majority of companies (68%) are Dublin based with another smaller audiovisual cluster in the West (13%)
- 85% of companies are involved in the area of production.
- Findings indicate high-levels of integration across the various areas particularly production and post-production (15% of companies work in both). A further 15% report working across all three areas – production, post-production and service provision.

***Documentary/ factual programmes, short films and feature films are the most frequently worked in genres***

- Responding production companies reported mainly working in the development/ production of documentary/ factual, short film and feature film.
- However, companies generally work across genres, the following genre groupings are evident:
  - feature films, documentary/ factual and short films;
  - commercials, corporate videos and digital content; and
  - animation, corporate videos and digital content

***The Irish Film Board, 'own' equity and domestic Broadcasters are the most important sources of funding for development and production activities***

- The Irish Film Board (82%) and 'own equity' (81%) were considered as the most important sources of development funding by the responding companies.
- In terms of production funding, companies viewed the Irish Film Board (79%), domestic Broadcasters (72%), 'own' equity (66%), the Irish Tax incentive (57%) and international pre-sales (56%) as the most important sources.

***Responding companies reported 1,234 projects, with the combined gross budget of €241 million, were produced during 2007 – of which €166.4 million was spent in Ireland***

- Participating companies produced a total of 1,234 projects in 2007. Commercials accounted for 258 of this figure, corporate videos 191, documentary/ factual programmes 145, digital content productions 138 and 'other' productions 267 (includes music videos/ pop promos, weddings/ events, multi-media, e-learning and tuition).
- Responding companies reported a combined gross budget for all the productions undertaken in 2007 totalled €240.9 million, of which feature films, television dramas and animation accounted for 75%.
- €166.4 million of this was spent in Ireland – primarily on television dramas (series), animation and feature film projects.
- Revenue by way of overheads/ production fees to the production company was reported at €27.3 million.

## Section 2: Key Messages from Company and Freelancer Survey

### Company key messages contd.

***Total company turnover of responding companies increased by €43 million between 2006 and 2007***

- With regard to the 230 participating companies who stated turnover figures for 2007, a total turnover of €205.9 million was reported representing an increase of €43.3 million on 2006 figures
- Production companies report the largest increase in turnover between 2006 and 2007 – an increase of €27.8 million.

***Participating companies have a total of €69.6 million invested in tangible assets. Post-production companies report the highest level of investment (€51.7 million) in this respect, primarily in equipment (IT & Plant)***

- Since their inception, responding companies have invested €69.6 million in tangible assets (premises, fixtures & fittings, equipment and motor vehicles).
- Post-production companies account for the largest proportion of tangible assets (€51.7 million).
- The net book value of these investments was estimated at €23.4 million in 2007.
- We are aware however that there are a number of companies involved in Outside Broadcasting whose assets are not included in the above values. We estimate that the total investment of these companies' tangible assets to be in the region of €19 million with a net book value of €8.8 million.

***1,275 permanent and 123 FTE freelance/ temporary staff were employed by participating companies during 2007 – a total of 1,398 FTEs***

- Within the responding cohort, a total of 1,275 permanent staff were employed by participating companies in 2007.
- Production companies employ approximately one-third more permanent staff than post-production companies (930 compared to 652) and more than double that of service provision companies (930 compared to 458). Temporary/freelance staff worked a total of 28,141 days in 2007, representing 123 FTE positions.

***Low levels of staff training reported particularly amongst participating production and post-production companies***

- Less than 40% of participating companies reported that staff undertook training in 2006 or 2007.
- Service provision companies are more likely to provide training to employees than production and post-production companies.

## Section 2: Key Messages from Company and Freelancer Survey

### Freelancer key messages

***Responding freelancers are a relatively young group and predominately male***

- 91% of respondent freelancers are under 50 years of age suggesting a relatively young industry but might also be indicative of a retention issue within the sector.
- Two-thirds of participating freelancers are male which is considered representative of the sector as a whole.

***'Who you know' is an important entry route into the sector***

- Respondents cited personal contacts/ recommendations as reasons for entering and staying within the industry as well as being important in terms of getting work.
- A general interest in the sector/ skills set and training/ placements were also considered key.

***10% of respondent freelancers reported no longer working in the industry. Of those still working in the industry only 2% have plans to leave***

- 10% of freelancers reported no longer working within the industry – almost half of which had left within the last two years.
- Main reasons cited for leaving were lack of work (31%), lack of opportunities (25%) and for lifestyle reasons (15%).
- Of those still active within the industry, only 2% plan to leave. The main reasons cited being decreasing pay and not enough work.

***High levels of cross-over evident within the industry***

- Freelancers reported working mainly in the areas of creative and production.
- Although, 58% of the respondents worked in one area only, 18% reported working in both the areas of creative and production and a further 19% reported working in all three areas (creative, production and post-production).

***Findings suggest supplementary employment necessary for freelancers working within the sector***

- 71% of respondents reported spending a minimum of 50% of their working time working in the sector. However, only 32% spend more than 90% of their time doing so.
- Almost half of the respondents (46%) stated periods of continuous unemployment in excess of 11 weeks.

***Union/ Guild membership not prevalent within the industry***

- 76% of freelancers are not a member of any Union and almost half of the respondents (48%) reported that they were not members of any Union or Guild.
- Of the 52% who do hold membership, 22% are members of SIPTU and a further 12% members of the Irish Playwrights and Screen Writers Guild.



### Freelancer key messages contd.

#### ***Convergence of skills evident across different genres***

- The findings indicate that individuals work across a number of different genres – particularly short films, feature films, television dramas (including series) and documentaries.
- On average freelancers reported working on between 2 and 5 projects per genre in 2007.

#### ***Good level of mobility within the sector***

- 32% of respondents worked internationally during 2007.
- Of those respondents who worked overseas, 27% of their time was spent doing so.

#### ***Almost half (49%) of respondents earned less than 25,000 in both 2006 and 2007 from content production***

- Freelancer earnings from content production ranged from €2,500 to €150,000 in 2006 and 2007.
- Total earnings rose from €20.55 million in 2006 to €21.47 million in 2007 – effectively in-line with inflation.
- The post-production area has experienced the largest increase in the number of individuals earning more than €35,000 per annum – up 6% from 2006 figures.

#### ***Only 25% of participating freelancers contribute regularly to a private pension plan***

- Only one quarter of respondents reported contributing regularly to a private pension plan.
- 72% of those who do are aged between 31 and 50 years.
- Only 13% of respondents over the age of 50 reported contributing to a pension.

#### ***Freelancers are a well educated group***

- 59% of respondents reported having achieved either a Degree, Master/ Postgraduate Degree or Doctorate/ Post Doctoral Degree.
- Only 2% have no formal qualifications at all

#### ***Over half of participating freelancers undertook formal industry training prior to entering the sector. 41% continue to undertake regular professional training – 75% of which is job specific.***

- Of those individuals who undertook formal industry training, 80% were aged between 20 and 40 years – suggesting a more recent recognition of the importance of achieving relevant qualifications prior to entering the sector.
- Dun Loaghair Institute of Art, Design and Technology, Dublin Institute of Technology, University College Dublin and Ballyfermot College of Further Education were the most frequently cited education/ training providers.
- In terms of training completed since entering the sector, over 80% of respondents state undertaking up to three weeks a year – 37% of which is provided by FAS Screen Training Ireland.

# Section 3: Production, Post-Production/ Service Companies – A Closer Look

## **Main Points**

Findings suggest a vibrant sector attracting high levels of new entrants particularly in the area of production and post-production.

85% of respondent companies are involved in the area of production – primarily in the documentary/ factual, short-film and feature film genres.

Production companies consider the Irish Film Board to be most important source of development and production funding.

Respondent companies reported producing a total of 1,234 projects in 2007 with a combined gross budget of €241 million – of which €166.4 million was spent in Ireland.

A relatively low level of training (40%) was undertaken by the staff of respondent companies during 2006 and 2007.

### Key Findings

The following section details the key findings of the company survey under the areas of:

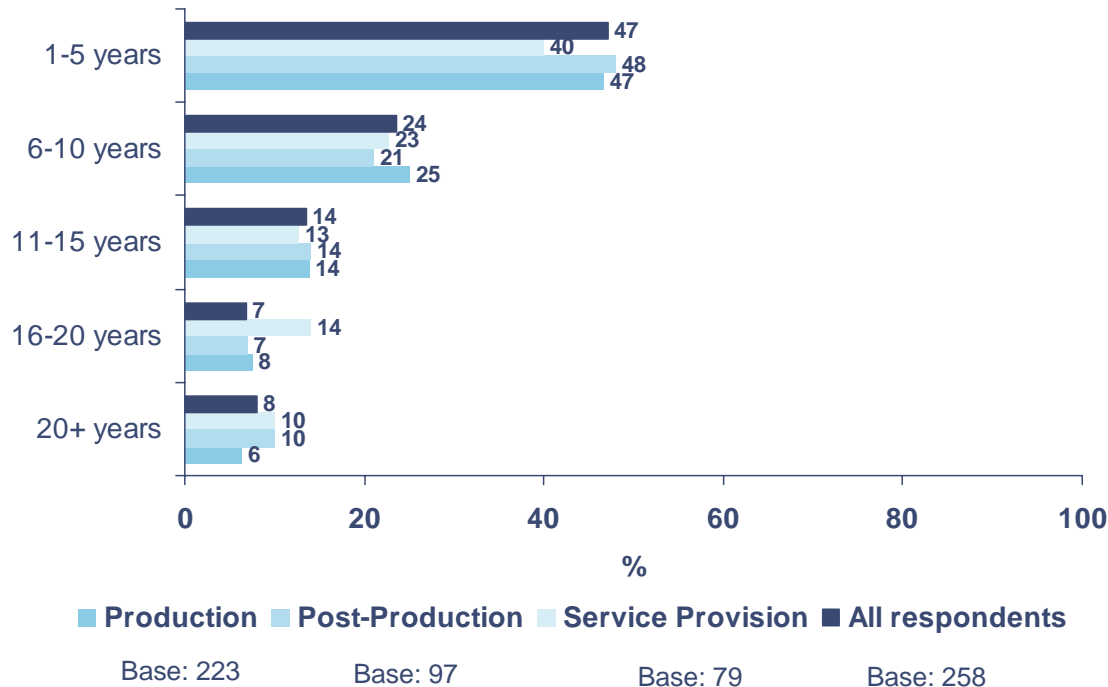
- (i) Sectoral Profile
- (ii) Development Activities
- (iii) Production Activities
- (iv) Financial Information
- (v) Sources and Application of Funding
- (vi) Employee Numbers and Training

## (i) Sectoral Profile

## (i) Sectoral Profile

**71% of responding companies have been trading less than 10 years, however, service provision companies are longer established than their production and post-production counterparts.**

How many years has your company been trading?



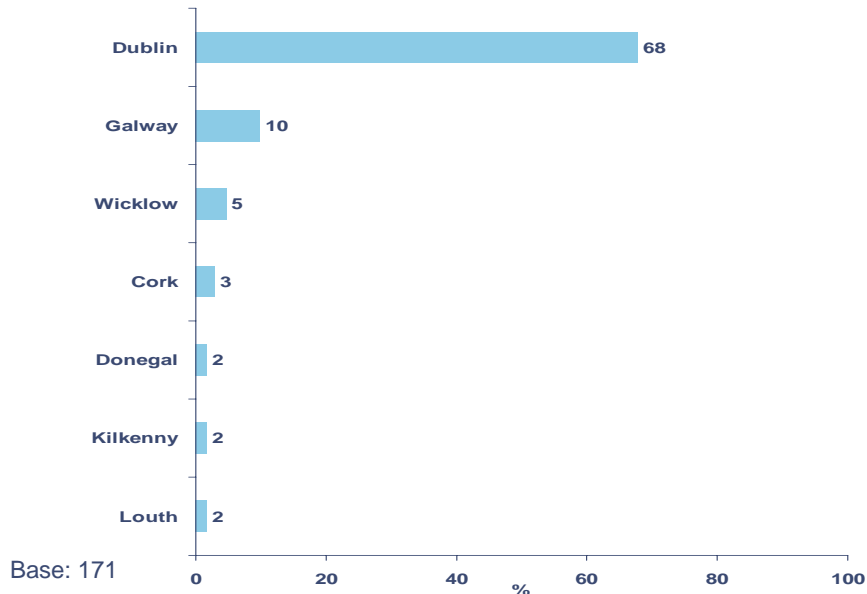
- In all, 567 companies were invited to participate in the PwC survey. A total of 259 responses were received which represents a 46% response rate. The findings of these 46% of companies are presented in the remainder of this section.
- 71% of responding companies have been trading for less than 10 years suggesting a vibrant sector attracting significant levels of new entrants.
- Service provision companies tend to be longer established than their production and post-production counterparts with 24% of them in operation for more than 16 years.

*Note: Respondents may have worked in 1 area or more – base for production, post production and service provision exceeds 258*

## (i) Sectoral Profile

Two audiovisual clusters, Dublin and Galway, are at the heart of the industry.

Where is your company based?



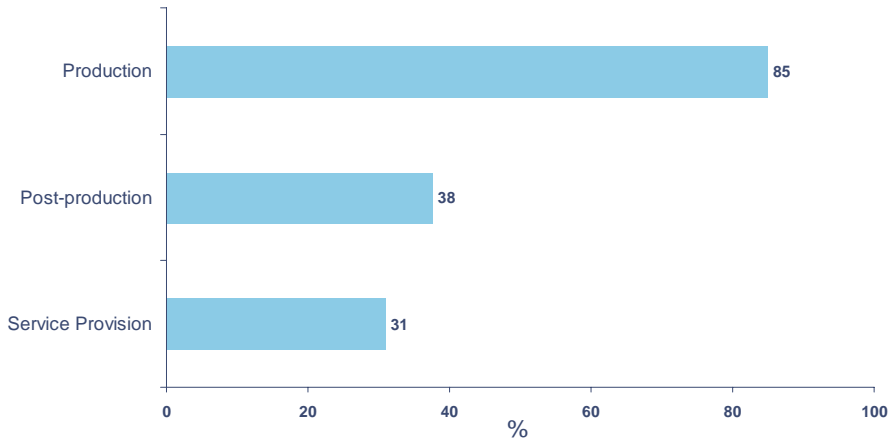
Other Counties	%
Clare	1.2
Kerry	1.2
Meath	1.2
Offaly	1.2
Waterford	1.2
Carlow	0.6
Kildare	0.6
Laois	0.6
Leitrim	0.6
Limerick	0.6
Tipperary	0.6

- 68% of responding audiovisual companies are Dublin based – suggesting this is where the greatest number of jobs are held. A further 6% are based in the Greater Dublin Area (Wicklow 5% and Kildare 1%).
- The west of the country is also represented with a combined 13% of companies residing in Galway (10%), Clare (1%), Limerick (1%) and Tipperary (1%).

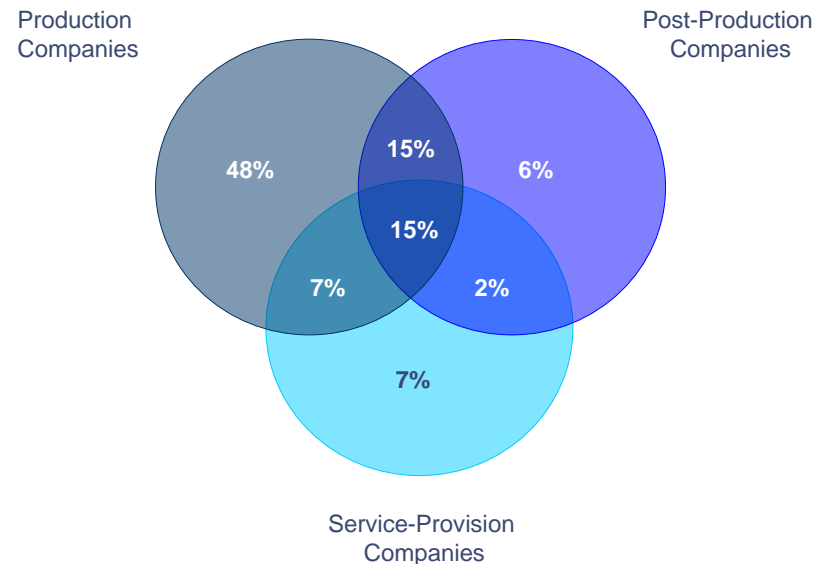
## (i) Sectoral Profile

The majority of responding companies are involved in the area of production. However, there are significant levels of integration across the sector.

Which of the following areas is your company involved in?



Base: 259 (Please note: multi-response question - % exceeds 100%)

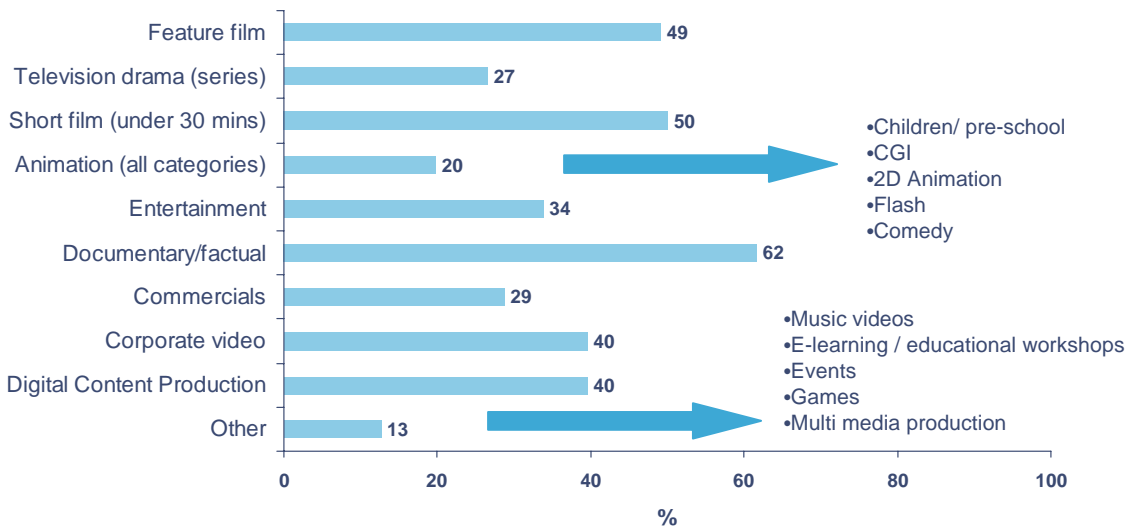


- Of the responding companies, 85% are involved in the area of production.
- However, the findings indicate (see venn diagram above) significant integration across the industry with many companies being involved in multiple roles/ activities, particularly production and post-production. Furthermore, 15% of companies reported being involved in all three areas of production, post-production and service provision.

## (i) Sectoral Profile (Production Companies only)

**Documentary/ factual, short film and feature film were the most frequently cited genres developed and/ or produced by responding production companies.**

**Is your company involved in the project development and/or production of?**



Base: 222 production companies only (Please note: multi-response question - % exceeds 100%)

- Production/ development of documentary/ factual programmes, short films and feature films were most frequently cited areas worked in by responding companies.
- Additionally, the areas of corporate videos, digital content, entertainment and commercials also record high numbers.
- Findings show that a wide base of genres are developed/ produced, with many companies involved in multiple genres.

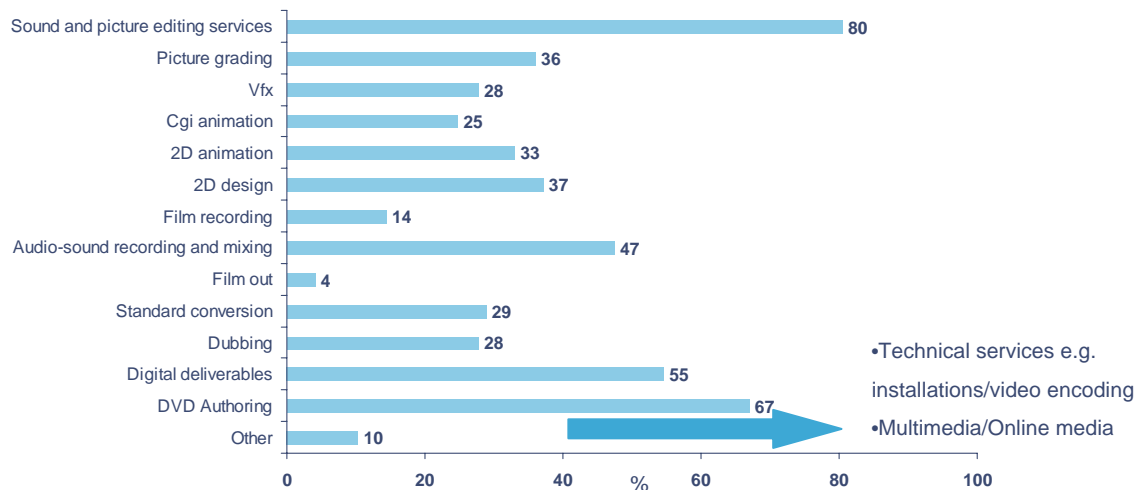
- However, responding companies tend to concentrate on genre groupings such as:
  - Feature films, documentary/ factual programmes and short films;
  - Commercials, corporate videos and digital content; and
  - Animation, corporate video and digital content.



## (i) Sectoral Profile (Post-Production Companies only)

**Of those responding companies who are involved in the area of post-production, the main services provided are sound and picture editing, DVD authoring and digital deliverables**

### What range of post production services do you offer?



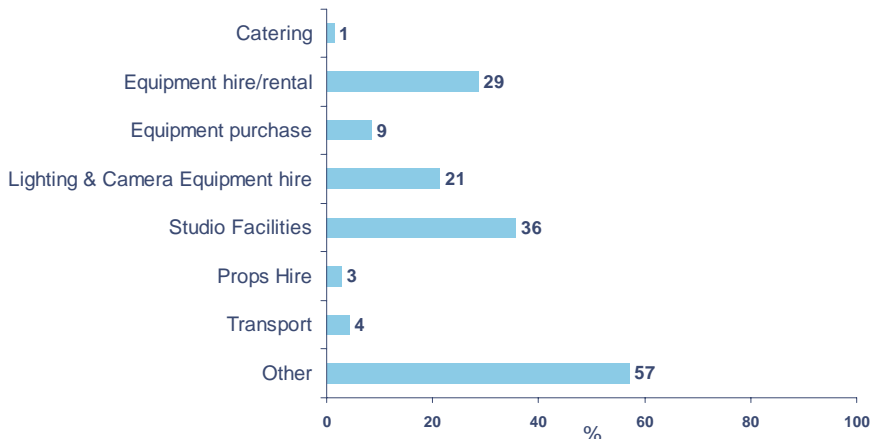
Base: 97 post-production companies only (Please note: multi-response question - % exceeds 100%)

- Post-production companies offer a wide range of services to the industry but the areas of sound and picture editing, DVD authoring and digital deliverables are the most prevalent amongst respondent companies.

## (i) Sectoral Profile (Service Provision Companies only)

# Studio facilities and equipment hire/ rental are the most frequently cited services offered by responding service provision companies

Which area of service provision is your company currently involved in?



Base: 70 service provision companies only (Please note: multi-response question - % exceeds 100%)

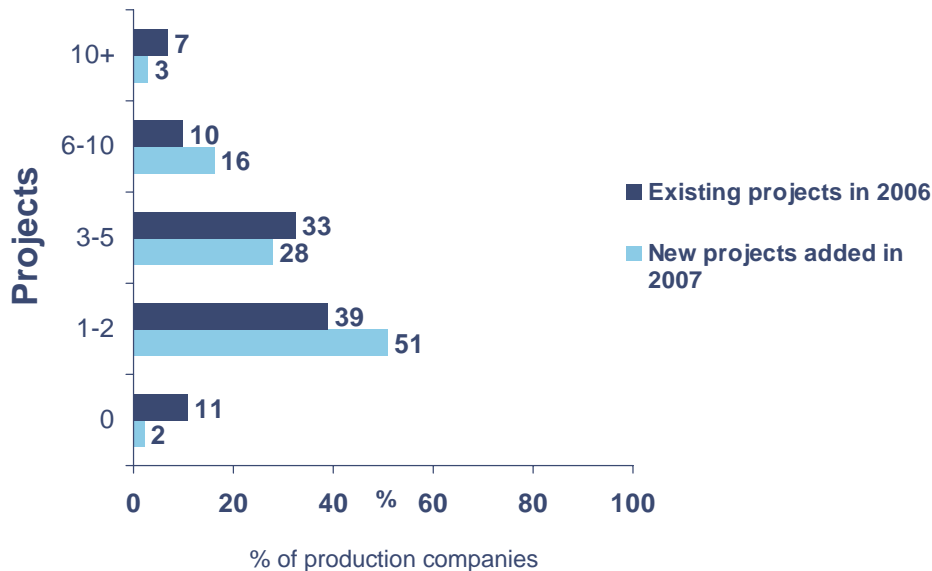
- The most frequent services offered by responding service provision companies are studio facilities and equipment hire/ rental (including lighting and camera).
- Prop hire, transport and catering were also mentioned.
- 57% of 'other' service provision roles were cited including casting rooms & locations, models & doubles, software, distribution, financing, education & workshops and consultancy.

## (ii) Development Activities

## (ii) Development Activities (Production Companies only)

**Levels of development activity has increased between 2006 and 2007. However, the number of companies handling more than 10 projects is low.**

**How many projects had you in active development in 2006 and how many new projects were added in 2007?**



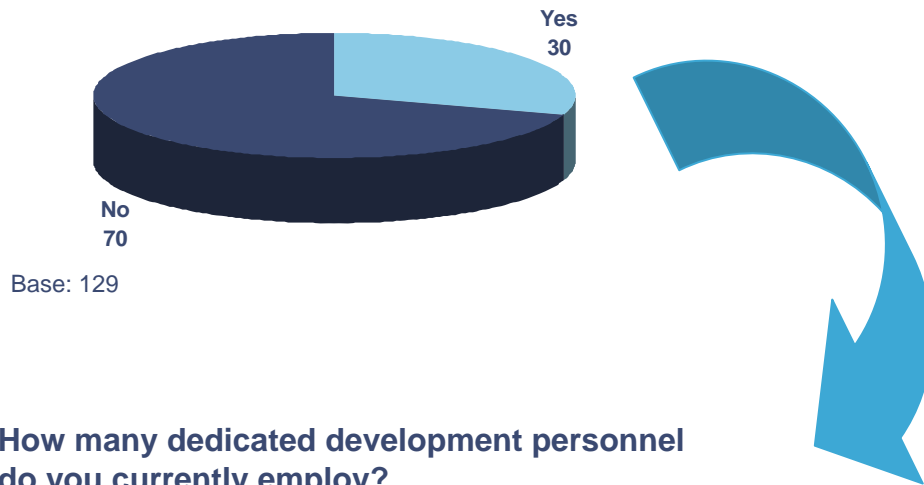
- Findings indicate a significant increase in the level of development activity of respondent companies between 2006 and 2007.
- 72% of the responding companies had between 1 and 5 projects in active development during 2006 with 79% of companies adding between 1 and 5 further projects in 2007.
- The number of companies handling more than 10 projects is low.
- It is important to note that information on the number of projects that might have been dropped from 2006 is not available.

Base 2006: 129  
Base 2007: 129

## (ii) Development Activities (Production Companies only)

**On average, responding production companies who employ personnel dedicated to project development stated employing between 3 and 4 personnel for this purpose**

**Do you employ any dedicated development personnel?**



**How many dedicated development personnel do you currently employ?**

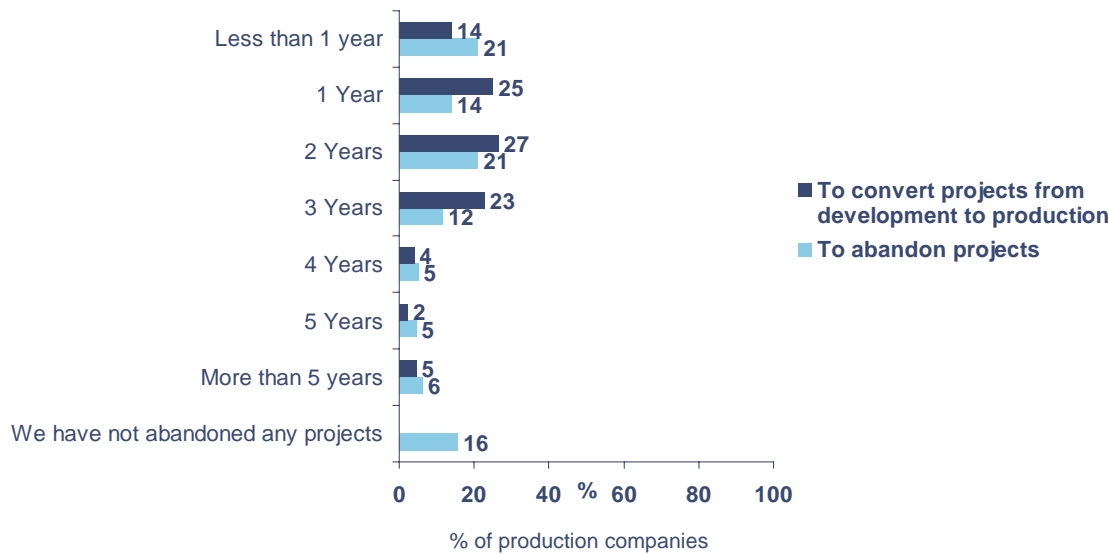
	Average	Max	Base
Full-time	1.05	3	39
Part-time (Exclusive)	0.41	2	39
Part-time (Non-exclusive)	0.59	6	39
Freelance	1.21	6	39

- Less than one-third (30%) of responding production companies reported employing staff specifically for development purposes.
- Of those who do (39 companies), between 2 and 6 personnel are employed for this purpose.
- The findings suggest that dedicated personnel are generally taken-on on a project-by-project basis.

## (ii) Development Activities (Production Companies only)

**The majority of responding production companies (90%) reported generally taking three years or less to convert a project from development to production. The decision to abandon a project is usually taken within two years.**

**What is the average time taken.....?**



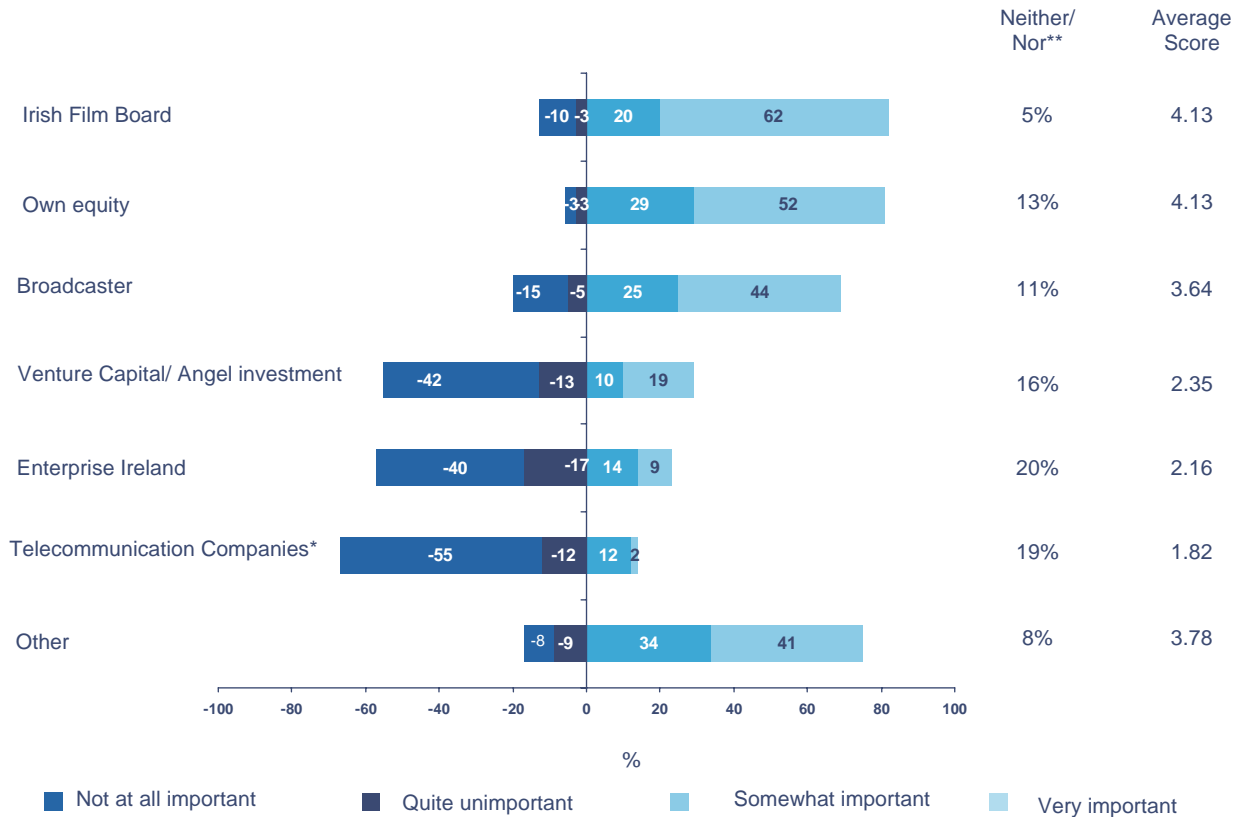
Base: 128

- Findings show that conversion of projects from development to production typically takes 3 years.
- Whereas, projects are generally abandoned within 2.

## (ii) Development Activities (Production Companies only)

# The Irish Film Board and 'own equity' are considered the two most important sources of development funding by responding production companies.

Please rate each of the following sources of development funding in order of their importance to your development activities.



- Responding production companies view the Film Board and 'own equity' as the most important sources of development funding.
- Broadcasters are also considered to be an important source.
- Telecommunication companies, Enterprise Ireland, VC and angel investment are considered the least important.

Base: 91 to 121

\* Only applicable to mobile content production companies

\*\* Neither/ nor scores represent those respondents stating 'neither important or unimportant' to sources of development funding

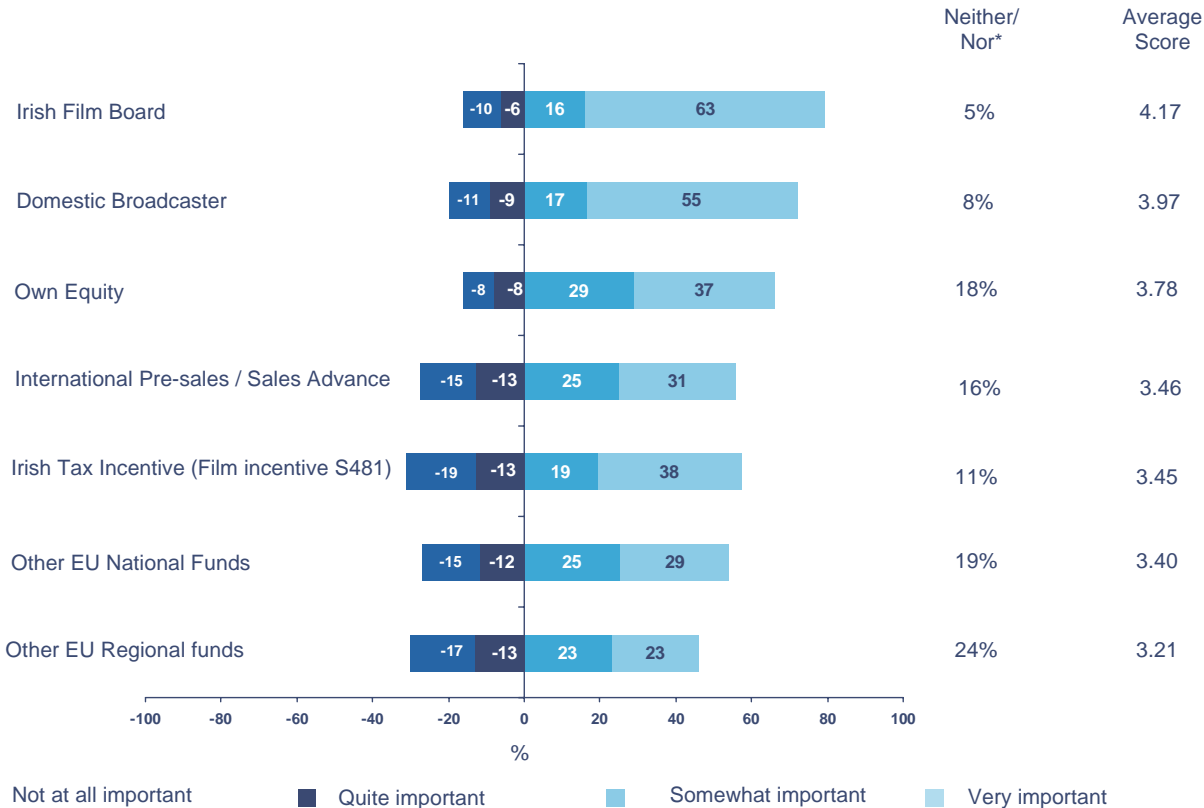
## (iii) Production Activities



### (iii) Production Activities (Production Companies only)

**The Irish Film Board, domestic Broadcasters, own equity, international pre-sales and the Irish Tax incentive are considered the most important sources of production funding by responding production companies.**

**Please rate each of the following sources of production funding in order of their importance to your production activities**



- As with development funding, the Irish Film Board (4.17 average score) are rated the most important source of production funding by responding companies.
- This is coupled with domestic Broadcaster (3.97) funding and 'own equity' (3.78).
- Other significant sources include international pre-sales/ sales advance, Irish tax incentive (film incentive S481) and other EU national/ regional funds.
- Although ranked 5<sup>th</sup> in terms of overall importance, 38% of respondents considered Irish Tax Incentive funding (film incentive S481) to be 'very important' placing it 3<sup>rd</sup> after the Irish Film Board and Domestic Broadcaster funding in this respect.

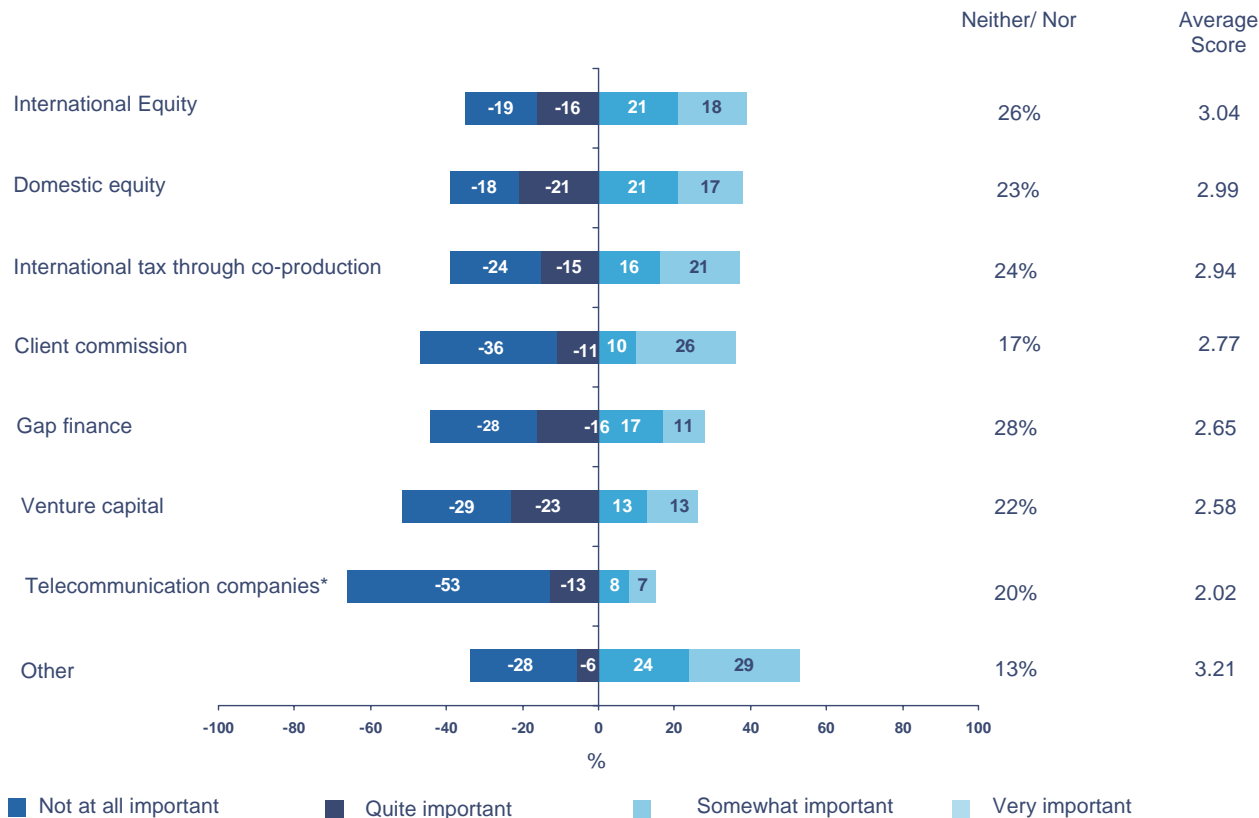
Base: 153

\* Neither/ nor scores represent those respondents stating 'neither important or unimportant' to sources of production funding

### (iii) Production Activities (Production Companies only)

**Telecommunication companies, Venture Capital and gap finance are considered the least important sources of production funding.**

**Please rate each of the following sources of production funding in order of their importance to your production activities contd.**



- The least important sources of production funding to responding companies are telecommunication companies, Venture Capital and Gap finance.

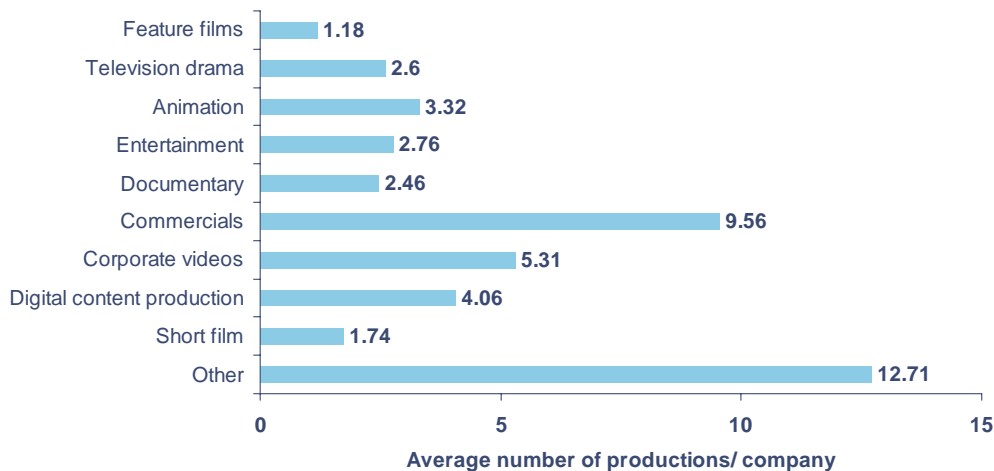
Base: 68 to 132

\* Only applicable to mobile content production companies

### (iii) Production Activities (Production Companies only)

## Responding companies cited producing 1,200 projects, across all genres, in 2007.

Average number of productions by genre, by company



	Average	Maximum	Sum	Base
Feature Film	1.18	2	24	22
Television Drama (Series)	2.60	10	26	10
Animation	3.32	15	63	19
Entertainment	2.76	6	47	17
Documentary/ Factual	2.46	24	145	59
Commercials	9.56	60	258	27
Corporate Video	5.31	26	191	36
Digital Content Production	4.06	25	138	34
Short Film (under 30 mins)	1.74	12	75	43
Other	12.71	50	267	21
<b>Total number of projects</b>			<b>1234</b>	

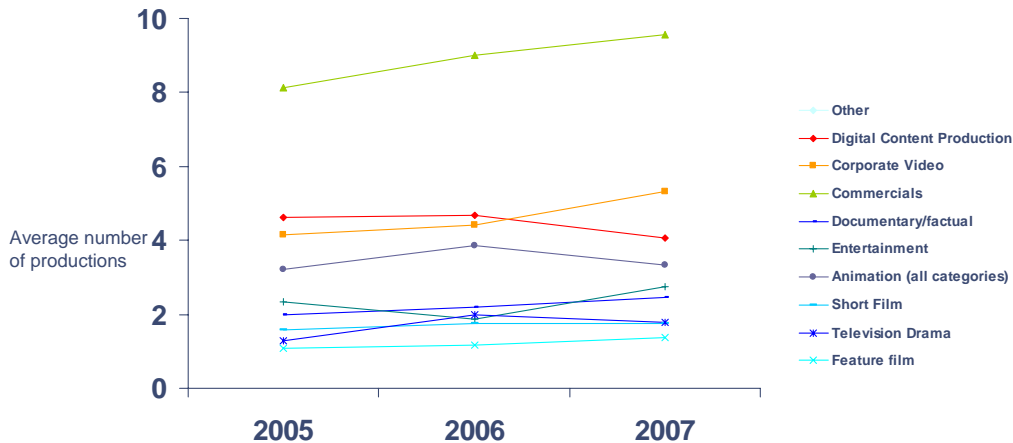
Table note: Average = average number of projects produced by companies, Maximum = single highest number of projects produced by a company, Sum = total number of projects produced and Base = number of production companies,

- The table below details the number of projects produced, by genre, by the 46% of respondent companies. The average is the average number of projects produced by companies in a particular genre with the Maximum being the single highest number of productions produced by any one company. The sum indicates the total number of productions and the base represents the number of companies involved in each genre.
- In all, 1,234 projects across the various genres, were produced in 2007.
- In terms of the percentage each genre represents of the total number of productions, commercials dominate at 21% followed by corporate videos 15% and documentary/ factual programmes at 12%. However, in terms of value corporate video productions only account for 1% of the total gross budget of all productions.
- The 'other' category, comprising events, music videos & pop promos, e-learning, multi-media production, pod-casts and media transfer facilities, represents 22% of the total number of projects produced.
- 50 feature films and television dramas were produced, which while low in relative terms, represents a very vibrant level of activity.

### (iii) Production Activities (Production Companies only)

**Increases in number of projects produced, across all genres, are evident.**

**How many projects, by genre did your company produce between 2005 and 2007?**



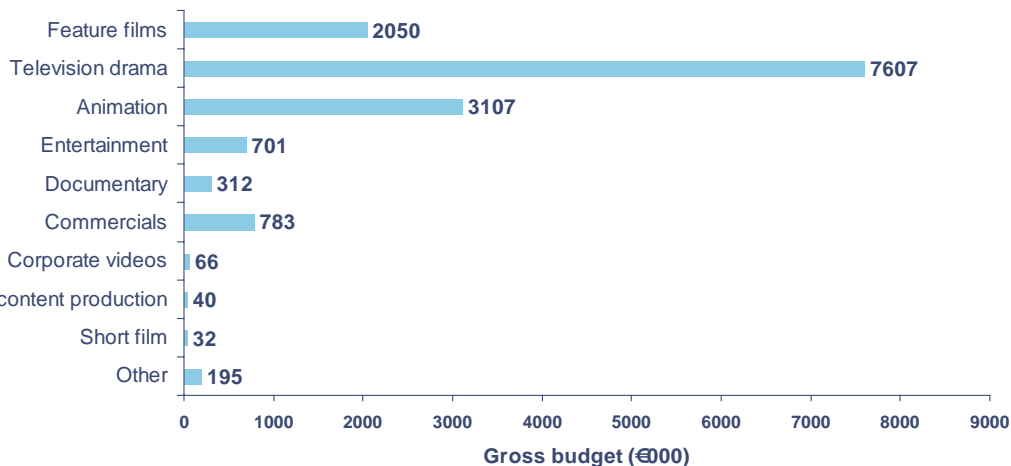
- The table below details the number of projects, by genre, produced by responding production companies in 2005, 2006 and 2007.
- The number of television dramas, short films, animation, documentary/ factual programmes, commercials, corporate videos and digital content productions have all increased year on year between 2005 and 2007.
- The largest increases between 2006 and 2007 are in the areas of documentary/ factual programmes (+47 projects), Corporate videos (+45 projects) and Commercials (+42 projects).
- Feature films also show a significant increase of 11 projects from 2006 to 2007.

Genre	Number of productions		
	2005	2006	2007
Feature films	13	13	24
Television drama (Series)	9	14	26
Short film	62	63	75
Animation (all categories)	42	50	63
Entertainment	28	28	47
Documentary/ factual	81	98	145
Commercials	171	216	258
Corporate video	104	146	191
Digital content	88	122	138
Other	249	261	267
<b>Totals</b>	<b>847</b>	<b>1,011</b>	<b>1,234</b>

### (iii) Production Activities (Production Companies only)

Responding companies reported a total gross budget, across all genres, of circa €241 million in 2007.

Average gross budget by genre, by company



	€000			Base
	Average	Maximum	Sum	
Feature Film	€2,050	€8,500	€45,094	22
Television Drama (Series)	€7,607	€31,645	€76,067	10
Animation	€3,107	€36,000	€59,026	19
Entertainment	€701	€3,570	€11,923	17
Documentary/ Factual	€312	€2,500	€18,422	59
Commercials	€783	€3,500	€21,139	27
Corporate Video	€66	€425	€2,363	36
Digital Content Production	€40	€400	€1,353	34
Short Film (under 30 mins)	€32	€120	€1,392	43
Other	€195	€2,700	€4,101	21
<b>Total</b>			<b>€240,880</b>	

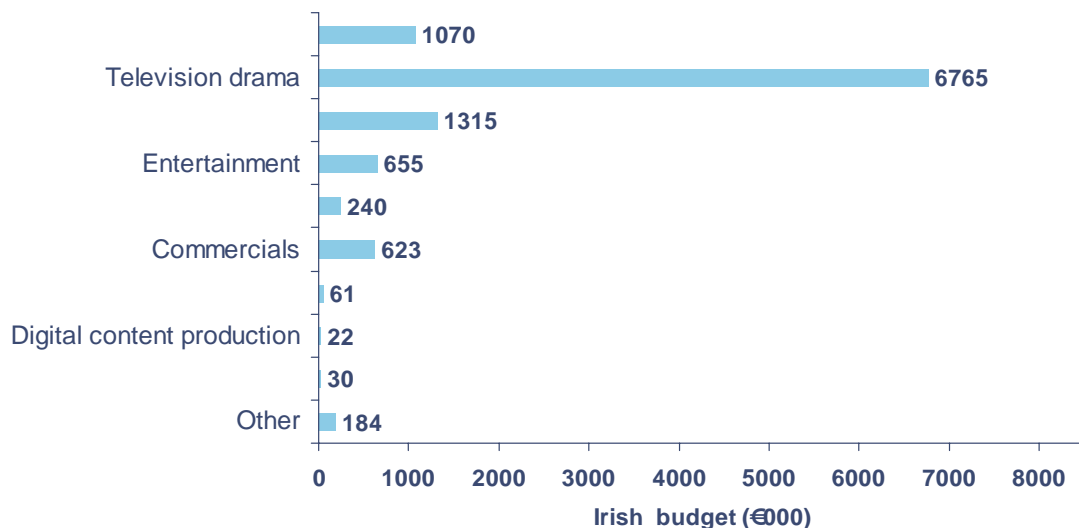
- The table below details the gross budget, by genre, of all projects produced in 2007 by responding Production companies.
- The total gross budget for the 1,240 projects across all genres in 2007 was almost €241 million.
- The largest proportion of this total is accounted for by television dramas (32%) and animation (25%).
- Corporate videos, digital content production and short films contribute the least to this total with a combined gross budget of just over €5 million.
- The 267 'other' productions had a total gross budget in excess of €4 million.

Table note: Average = average gross budget by company, Maximum = single highest gross budget reported by a company, Sum = total gross budget of all productions and Base = number of production companies

### (iii) Production Activities (Production Companies only)

**69% of the gross budget (€166.4 million) of the projects reported by the 46% of responding companies was spent in Ireland.**

**Average Irish budget by genre, by company**



- The table below details the Irish budget of all projects produced by the 46% of respondent companies.
- The proportion of the reported gross budget actually spent in Ireland during 2007 was €166.4 million – which represents 69% of the total gross budget for all productions.
- The largest contributor to this figure was television dramas (series) with a total Irish spend of €67.7 million (41%).
- 89% of the gross budget for television dramas, 52% for feature films and 42% of all animation productions is spent at home.

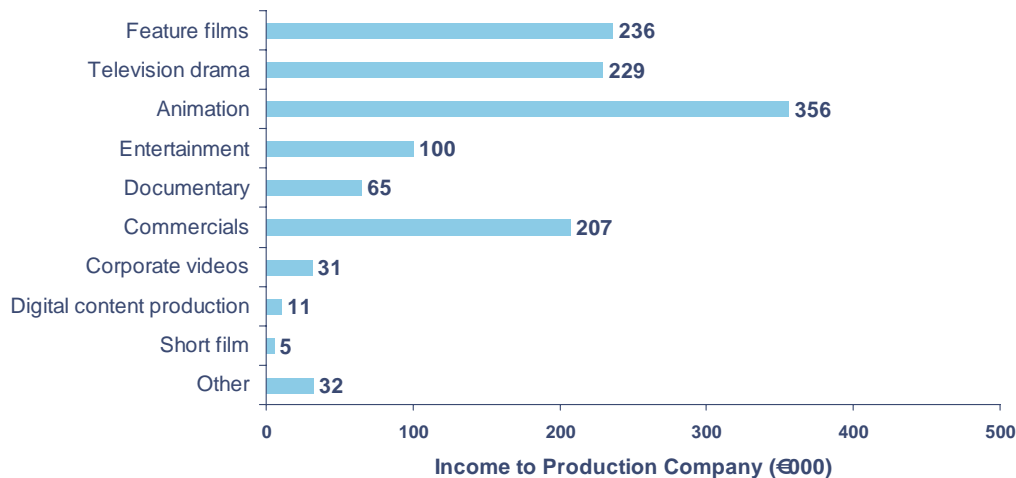
	€000			Base
	Average	Maximum	Sum	
Feature Film	€1,070	€5,000	€23,533	22
Television Drama (Series)	€6,765	€31,227	€67,649	10
Animation	€1,315	€15,000	€24,979	19
Entertainment	€655	€3,570	€11,131	17
Documentary/ Factual	€240	€2,100	€14,189	59
Commercials	€623	€3,500	€16,817	27
Corporate Video	€61	€425	€2,209	36
Digital Content Production	€22	€180	€759	34
Short Film (under 30 mins)	€30	€120	€1,290	43
Other	€184	€2,700	€3,857	21
<b>Total</b>			<b>€166,413</b>	

*Table note: Average = average Irish budget by company, Maximum = single highest Irish budget reported by a company, Sum = total Irish budget, and Base = number of production companies*

### (iii) Production Activities (Production Companies only)

A total residual income to production companies of €27.3 million was reported by the respondent companies in 2007. The largest contributors were animation productions (€6.8 million), commercials (€5.6 million) and feature films (€5 million).

Average income to the production company by Genre, by company



- The table below details the income to the production companies, by genre, in relation to all the projects produced in 2007 by the 46% of respondent companies.

- The income to the production company is the revenue (i.e. the residual income) by way of overheads/ production fees to the production company.

- The total income to production companies from productions across all genres in 2007 was €27.3 million.

- Animation, commercials and feature films provided the most income to their production income – representing 63% of the total.

	€000			Base
	Average	Maximum	Sum	
Feature Film	€236	€250	€4,959	21
Television Drama (Series)	€229	€750	€2,059	9
Animation	€356	€4,371	€6,755	19
Entertainment	€100	€340	€1,704	17
Documentary/ Factual	€65	€725	€3,851	59
Commercials	€207	€900	€5,596	27
Corporate Video	€31	€260	€1,114	36
Digital Content Production	€11	€80	€365	34
Short Film (under 30 mins)	€5	€55	€231	43
Other	€32	€235	€681	21
<b>Total</b>			<b>€27,315</b>	

Table note: Average = average income to production company by company, Maximum = single highest income to production company reported by a company, Sum = total income to production companies and Base = number of production companies

## (iv) Financial Information



## Responding production companies saw the largest increases in gross turnover from 2006 to 2007 (34%).

What was your company's turnover in 2006 and 2007?

2006	Average	Minimum	Maximum	Sum	Base
Production only	€803,527	€0	€18,485,356	€81,156,275	101
Post-Production only	€1,993,220	€2,000	€9,088,422	€21,925,422	11
Service Providers only	€1,308,251	€1,500	€7,000,000	€17,007,258	13
Production & Post-Production	€511,526	€0	€3,422,214	€14,322,714	28
Production & Service Provider	€650,557	€0	€1,932,127	€7,156,127	11
Post-Production & Service Provider	€455,000	€50,000	€900,000	€1,820,000	4
Production, Post-Production & Service Providers	€637,373	€0	€6,364,059	€19,121,197	30
All respondents	€820,752	€0	€18,485,356	€162,508,933	198

2007	Average	Minimum	Maximum	Sum	Base
Production only	€947,333.90	-€2,000	€32,778,408	€108,943,399	115
Post-Production only	€1,945,102.00	€300	€9,336,924	€23,449,224	12
Service Providers only	€1,552,688.00	€60,000	€7,000,000	€20,184,944	13
Production & Post-Production	€487,399.54	€0	€3,507,984	€17,058,984	35
Production & Service Provider	€596,704	€0	€2,754,809	€10,143,971	17
Post-Production & Service Provider	€447,500.00	€50,000	€860,000	€1,790,000	4
Production, Post-Production & Service Providers	€714,835	€0	€8,721,213	€24,304,376	34
All respondents	€895,108.25	€2,000	€32,778,408	€205,874,898	230

- Of the 230 responding companies, the total turnover reported in 2007 was €206 million, an increase of circa €43.4 million (27%) from 2006 to 2007.
- The largest increases can be seen amongst production companies with has experienced an increase of 34%.

(iv) Financial Information (Post-Production and Service Providers only)

**Entertainment/ documentary/ factual programmes account for almost one quarter of responding post-production and service provision companies turnover in 2007 (24%).**

**In 2007, please estimate what percentage contribution each of the following made to your company's turnover?**

Genre	Post Production	Service Provider	Total %
	%	%	
Feature film	4	6	5
Television drama (Series)	3	10	7
Short film (under 30 mins)	6	6	6
Entertainment/ documentary/ factual	28	20	24
Commercials	9	10	11
Corporate video	14	12	13
Animation (all categories)	10	8	8
Digital content production	14	16	13
Other	12	12	13
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>

Live action {

Base: 61

Base: 48

Base: 78

*(A number of respondent companies are involved in both post-production and service provision, therefore the base for post production and service provision exceeds 78)*

*Note: As not all Post-Production or Service Provision companies are involved in each of the listed genres the percentage contributions are based on Average score calculations of valid responses only i.e. excludes non-applicable responses.*

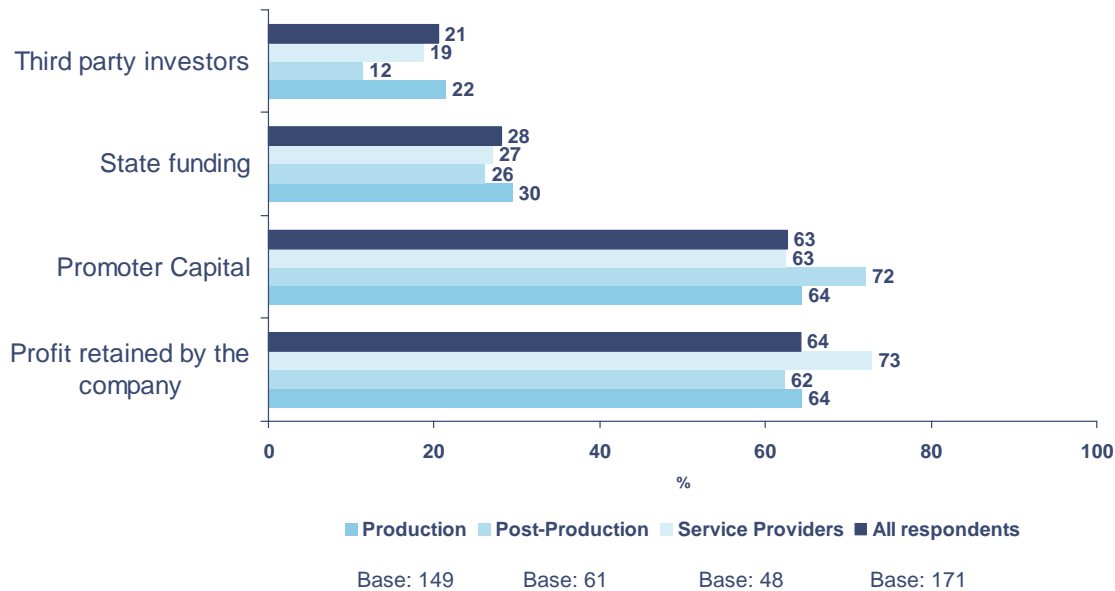
- Percentages quoted in the table are based on the responses of 78 individual companies involved in the areas of post-production and/ or service provision. As a number of these companies are involved in both areas the base for post-production and service provider exceeds the total base of 78.
- Live action contributes equally to the turnover of both post-production and service provision companies (representing 64% of total company turnover).
- The main contributor to post-production and service provision companies turnover is entertainment/ documentary and factual productions, 28% and 20% respectively.
- Both animation and digital content productions account for circa 15% of the companies turnover and 'other' productions the remaining 12%.

## (v) Sources and applications of funds

## (v) Sources and Applications of Funds

**Profit retained by the company and promoter capital are the two largest sources of company financing reported by responding companies.**

### How is your company actually financed?



(multi-response question - % exceeds 100%)

- Profit retained by the company and promoter capital are the two largest sources of company funding.
- Whilst post-production companies are generally promoter capital funded and service providers typically profit funded, production companies tend to favour a mixture of the both.

*Note: Respondents may have worked in 1 area or more – combined base for production, Post production and service provision exceeds 171*

## (v) Sources and Applications of Funds

**Respondent companies have invested almost €70 million in fixed assets. Post-production companies have invested the largest amount in this respect (circa €52 million).**

Since your company inception, how much do you estimate you have invested in the following fixed assets?

	Production		Post Production		Service provision		All respondents	
	Mean	Base	Mean	Base	Mean	Base	Mean	Base
Premises (Land/Buildings)	70,321	149	95,685	61	205,833	48	89,812	171
Fixtures & Fittings	37,038	149	76,720	61	76,799	48	54,700	171
Equipment (IT/Plant)	95,328	149	661,890	61	203,361	48	255,637	171
Motor vehicles	5,074	149	12,593	61	9,598	48	7,044	171
<b>Total Tangible Fixed Assets</b>	<b>30,956,299</b>		<b>51,660,237</b>		<b>23,788,337</b>		<b>69,629,799</b>	

*Note: Respondents may have worked in 1 area or more – base for production, post production and service provision exceeds 171*

- In total, companies have almost €70 million invested in fixed assets over their lifetime of which, post-production companies account for €51.7 million and production companies a further €31 million.
- Companies reported intangible assets in the form of intellectual property and goodwill. These figures however have not been included at this stage due to the large variance in treatment of these assets by the responding companies.

## (v) Sources and Applications of Funds

The total balance sheet value of fixed assets held by participating companies in 2007 is in excess of €23.4 million.

What was the balance sheet value (Net Book Value) of the same assets in 2007 (or your last set of audited accounts)

	Production		Post Production		Service provision		All respondents	
	Mean	Base	Mean	Base	Mean	Base	Mean	Base
Premises (Land/Buildings)	44,479	149	23,456	61	95,780	48	45,760	171
Fixtures & Fittings	12,838	149	18,742	61	24,409	48	14,419	171
Equipment (IT/Plant)	34,108	149	186,757	61	75,912	48	73,764	171
Motor vehicles	2,427	149	4,412	61	5,241	48	2,808	171
<b>Total Tangible Fixed Assets</b>	<b>13,983,899</b>		<b>14,235,379</b>		<b>9,664,408</b>		<b>23,384,324</b>	

*Note: Respondents may have worked in 1 area or more – base for production, Post production and service provision exceeds 171*

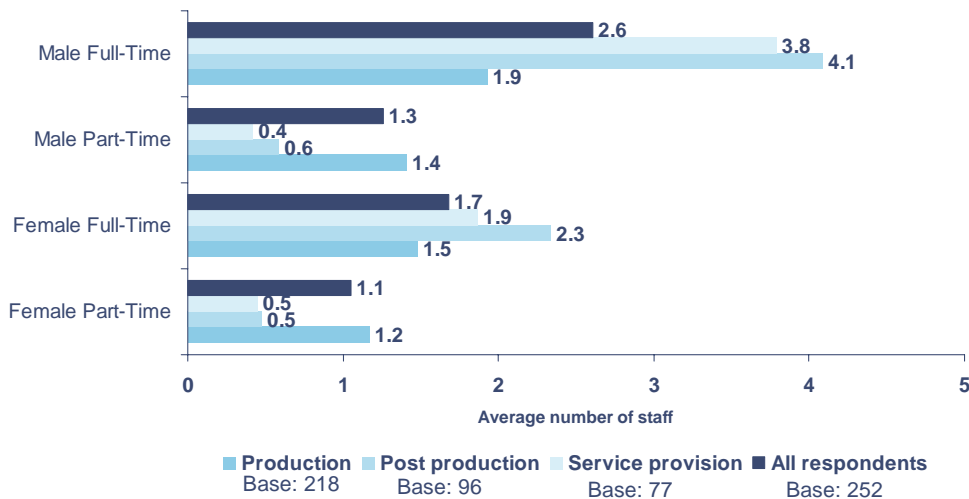
- The current balance sheet value of tangible fixed assets stood at €23.4 million in 2007 with the largest proportion (circa €14 million) being attributed to post production companies.
- Respondent companies reported current values of intangible assets in the form of intellectual property and goodwill. These figures however have not been included at this stage due to the large variance in treatment of these assets by the responding companies.

## (vi) Employee Numbers and Training

## (vi) Employee Numbers and Training

**Participating audiovisual content production companies reported employing a total of 1,275 permanent staff in 2007 – predominately in the area of production.**

**How many male and female permanent staff, were employed by your company in 2007?**



- In total the respondents employ 1,081 full-time staff and 582 part-time staff equating to a total full-time equivalent of 1,275 staff.
- 76% of all permanent staff employed by the companies are male.
- On average companies employ between 6 and 7 personnel.
- Post-production companies cite slightly above average permanent staff numbers of between 7 and 8 persons employed.

	Production	Post-Production	Service Provider	Total
Number of male full-time	421	393	292	657
Number of female full-time	322	225	144	424
<i>Total number of full-time staff</i>	<i>743</i>	<i>618</i>	<i>436</i>	<i>1,081</i>
Number of male part-time	307	57	32	317
Number of female part-time	254	46	35	265
<i>Total number of part-time staff</i>	<i>561</i>	<i>103</i>	<i>67</i>	<i>582</i>
<b>Total FTE*</b>	<b>930</b>	<b>652</b>	<b>458</b>	<b>1,275</b>

Note: Respondents may have worked in 1 area or more – base for production, Post production and service provision exceeds 252

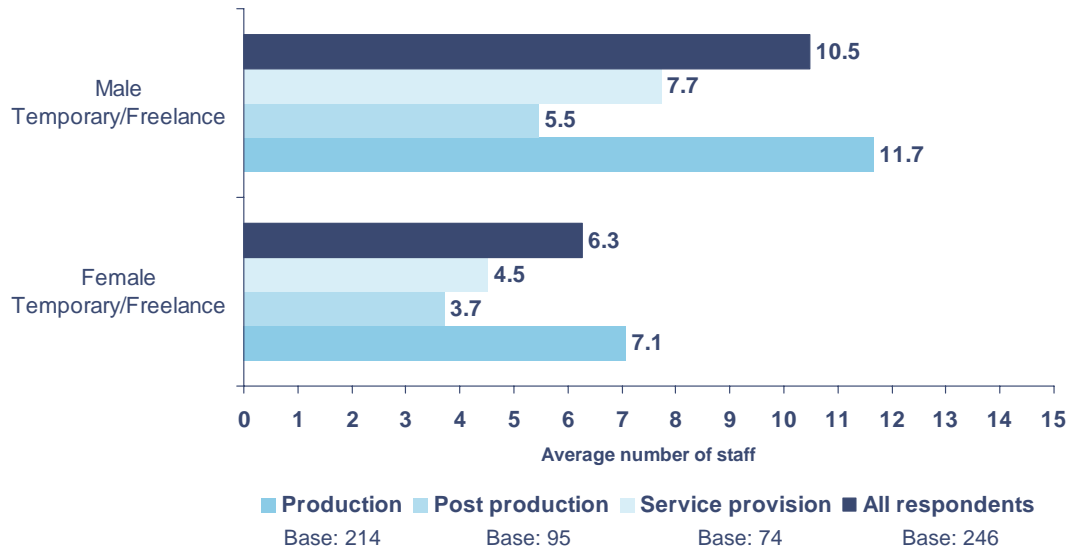
\*FTE - 3 part-time staff = 1 full-time staff



## (vi) Employee Numbers and Training

# Temporary/ freelance staff employed in respondent companies represent 123 FTE positions in 2007.

How many male and female temporary/freelance staff, were employed by your company in 2007, and what was the total number of days worked?



- A total of 3,133 temporary/ freelance staff were employed by responding companies during 2007.
- Combined, these 3,133 staff worked a total of 28,141 days – representing 123 FTE positions\*.
- The findings show that production companies employ above average numbers of temporary and freelance staff (average of 19 staff per company).

	Production	Post-production	Service-Provider	All respondents
Number of male temporary/ freelance	2,495	518	571	2,580
Number of female temporary/ freelance	1,512	353	344	1,553
Total number of temporary/ freelance staff	4,007	871	915	4,133
Total number of days worked	25,777	9,105	8,457	28,141
<b>FTE*</b>	<b>113</b>	<b>40</b>	<b>37</b>	<b>123</b>

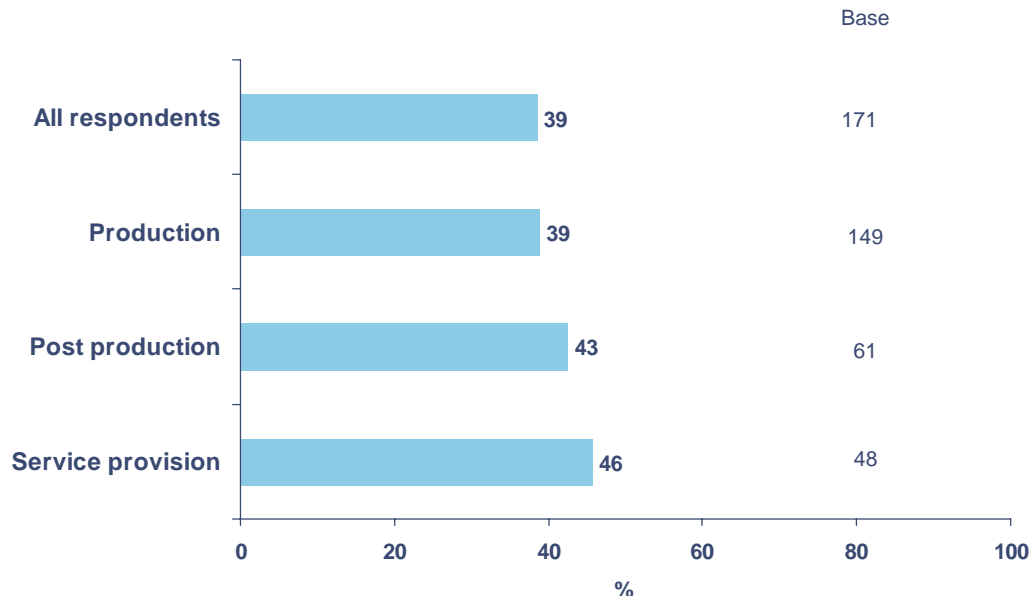
Note: Respondents may have worked in 1 area or more – base for production, Post production and service provision exceeds 252

\* 1 FTE = 229 days

## (vi) Employee Numbers and Training

**Less than 40% of responding companies state company staff undertook training during 2006 and 2007.**

**Have any of your employees undertaken any training in 2006 and 2007?**



*Note: Respondents may have worked in 1 area or more – base for production, Post production and service provision exceeds 171*

- Levels of employee training within the industry are relatively low with less than 40% of companies citing staff having undertaken any training in 2006 and 2007.
- Production companies fare worst in this respect in comparison to their service provision and post-production counterparts.

# Section 4: Freelancer Community - Profile

## Main Points

Findings suggest a relatively young industry with over 90% under the age of 50 – the majority of which are male.

Personal contacts and relationships, a general interest in the sector and training/ placements were cited as the main entry routes into the sector.

Freelancers report significant levels of cross-over within the sector in terms of the areas worked in with almost one-fifth of respondents working in the areas of creative, production and post-production.

Union and Guild membership is not prevalent within the sector with 76% of freelancers reporting not being a member of a Union and 48% nether a member of a Union or a Guild.

Freelancers reported earnings between €2,500 and €150,000 in 2006 and 2007. The area of post-production has experienced the largest increase in the number of individuals earning €35,000 per annum.

Freelancers are a well educated group with 59% having achieved either a Degree, Master/ Postgraduate Degree or Doctorate/ Post Doctoral Degree – only 2% of freelancers have no formal qualification at all. Furthermore, 41% of freelancers continue to undertake professional training, the majority of which is job specific.

### Key Findings

The following section details the key findings of the freelancer survey under the areas of:

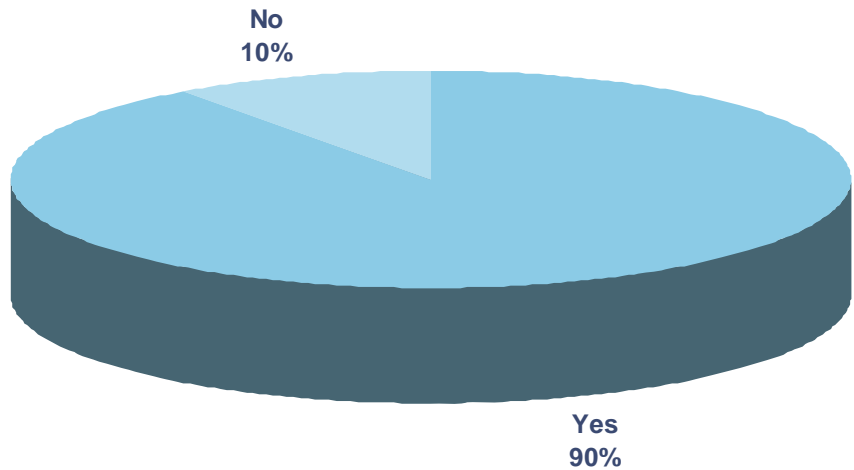
- (i) Freelancer Profile
- (ii) Work Profile
- (iii) Education and Training Undertaken

## (i) Freelancer Profile

## (i) Freelancer Profile

**90% of respondents reported that they have worked in the audiovisual content production industry in the last 2 years.**

**Are you currently involved in the audiovisual content production industry?**



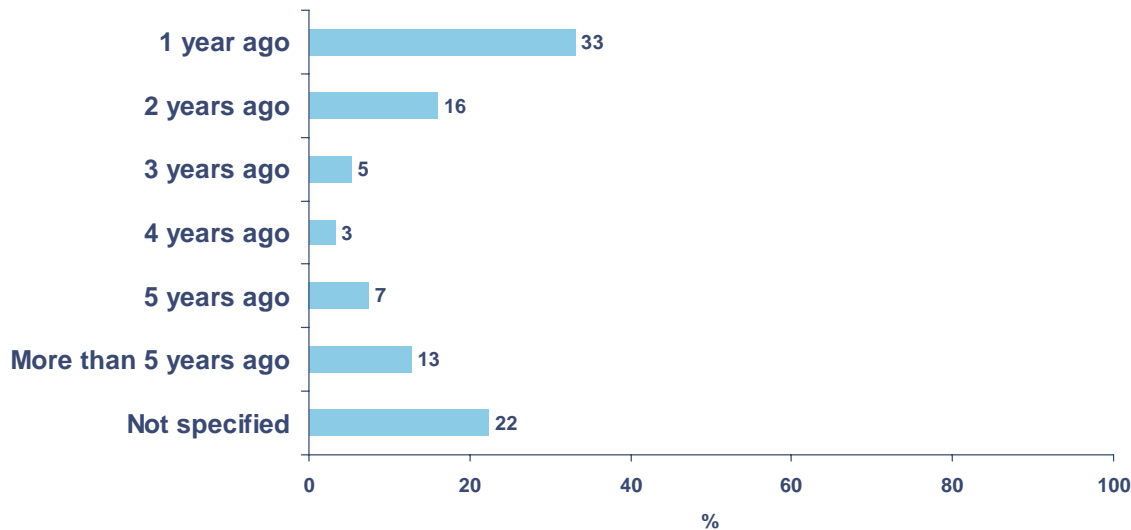
Base: 968

- 3,016 freelancers were invited to participate in the PwC survey. A total of 968 freelancers responded equating to a response rate of 32%. The remainder of this section presents the findings of these 32% of freelancers.
- Of the 968 respondents, 10% reported that they were no longer involved in the industry i.e. have not undertaken paid professional work in the last 24 months, with the remaining 90% having worked on projects.
- The responses for the remainder of the freelancer survey are based on a valid sample of 874 respondents.

## (i) Freelancer Profile

# Almost half of the freelancers who are no longer involved in the industry reported leaving within the last two years

### When did you leave the industry?

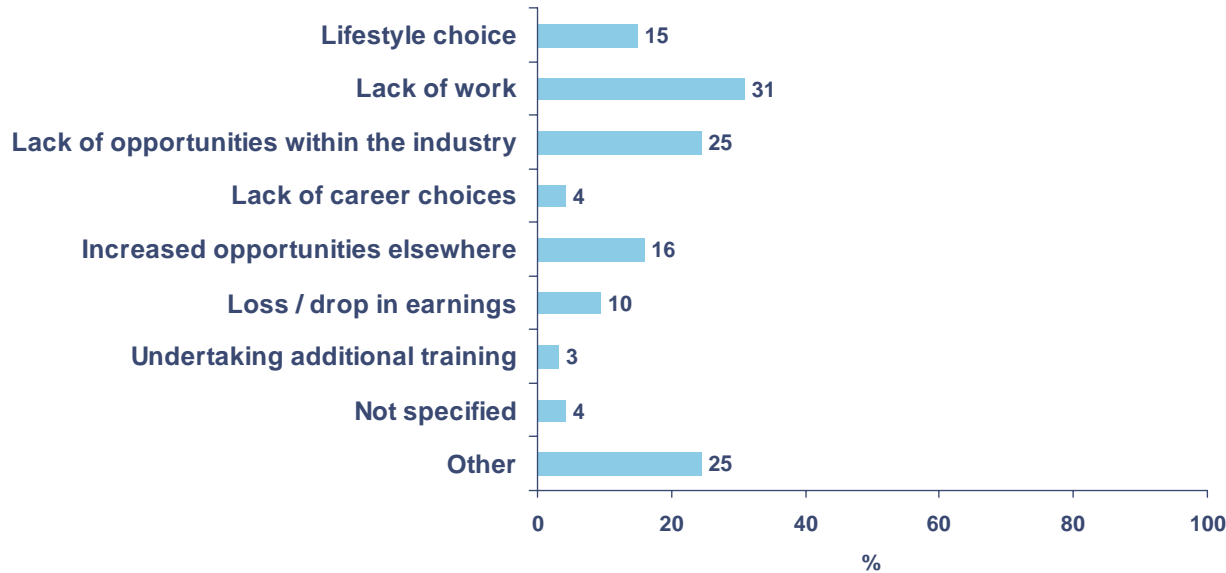


Base: 94 (Asked of those not currently involved meaning they have not undertaken paid professional work in the last 24 months)

- Results suggest a recent increase in the number of individuals leaving the industry with almost half of the respondents having left within the last two years.
- A further 15% cited leaving between three and five years ago and 13% more than 5 years ago.
- This pattern of industry fall-off is possibly reflective of the challenges faced by freelancers in firstly becoming aware of up-coming projects, and secondly getting a position on a project.

## Main reasons for leaving industry were lack of work and opportunities

What were your reasons for leaving the industry?



Base: 94 (Asked of those not currently involved meaning they have not undertaken paid professional work in the last 24 months)

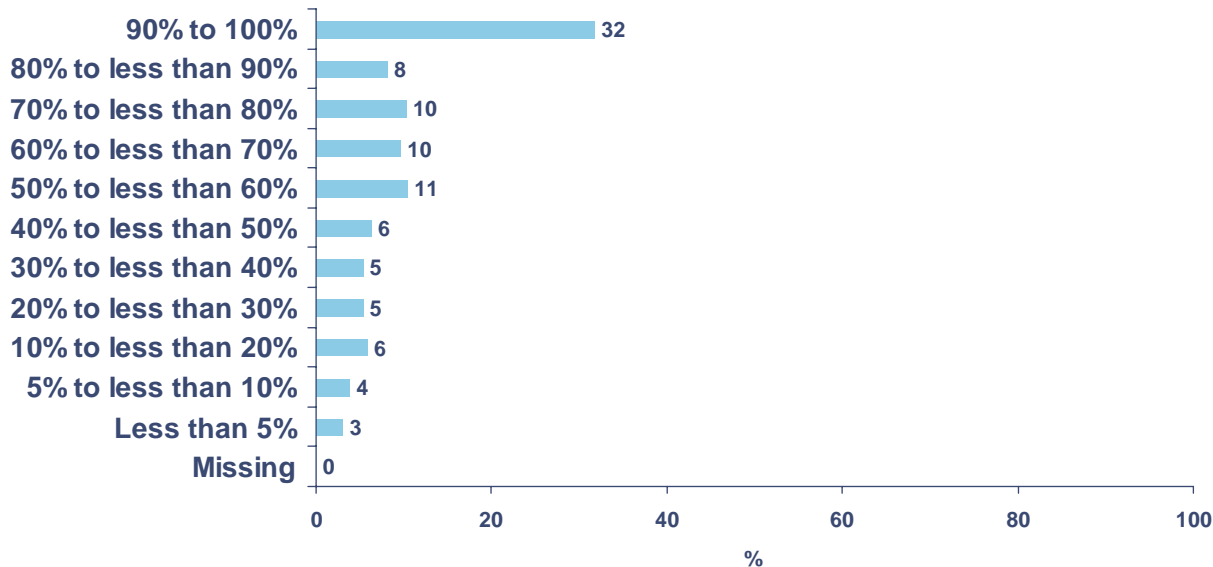
- The main reasons cited for leaving the industry were lack of work (31%) and lack of opportunities (25%).
- 15% attributed their exit to a lifestyle choice and 16% believed there were better opportunities outside of the industry.
- A loss of, or drop in, earnings was cited by 10% of freelancers as a reason for leaving.
- Furthermore, 3% of respondents stated that they had left the industry to undertake additional training.



## (i) Freelancer Profile

**71% of freelancers working in the industry report spending at least 50% of their time doing so.**

**What percentage of your time is spent actively working in the audiovisual content production industry?**



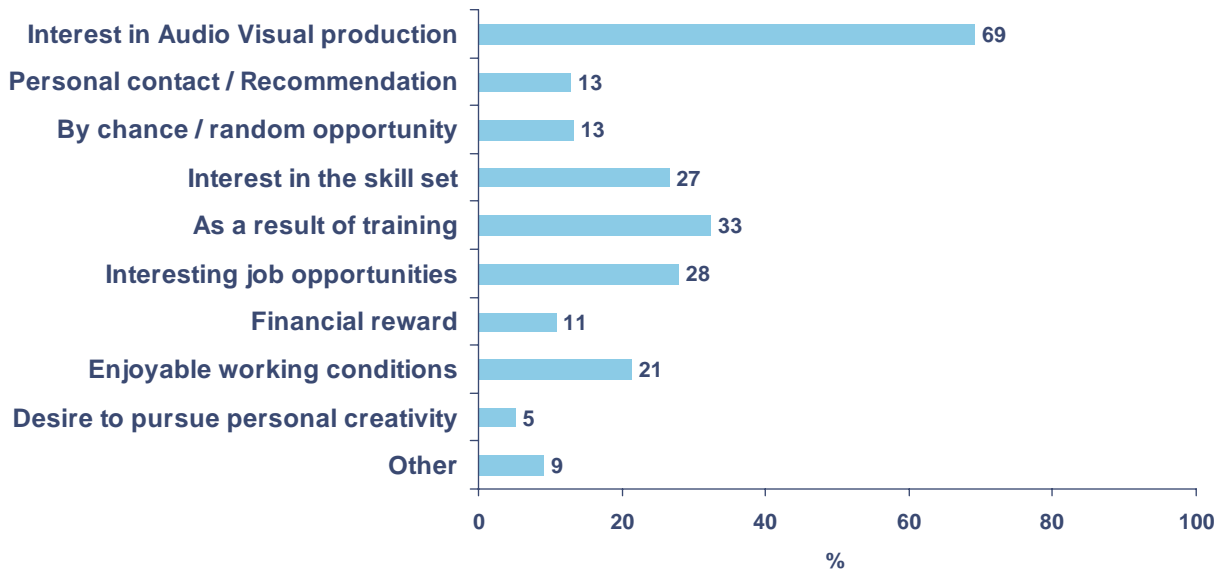
Base: 874 (those respondents who reported actively working in the industry)

- Of those freelancers currently involved in the industry, 71% reported spending between 50% and 100% of their time actively working within the audiovisual content production industry.
- However, only 32% of freelancers spend 90% or more of their time in the industry
- Whilst respondents report generally reasonable levels of employment, the findings suggest that additional employment may be required to supplement this.

## (i) Freelancer Profile

**Interest in the sector/ skill set are the main reasons stated for entering the audiovisual content production industry. Who you know is also an important entry route.**

**What were your reasons for entering the industry?**



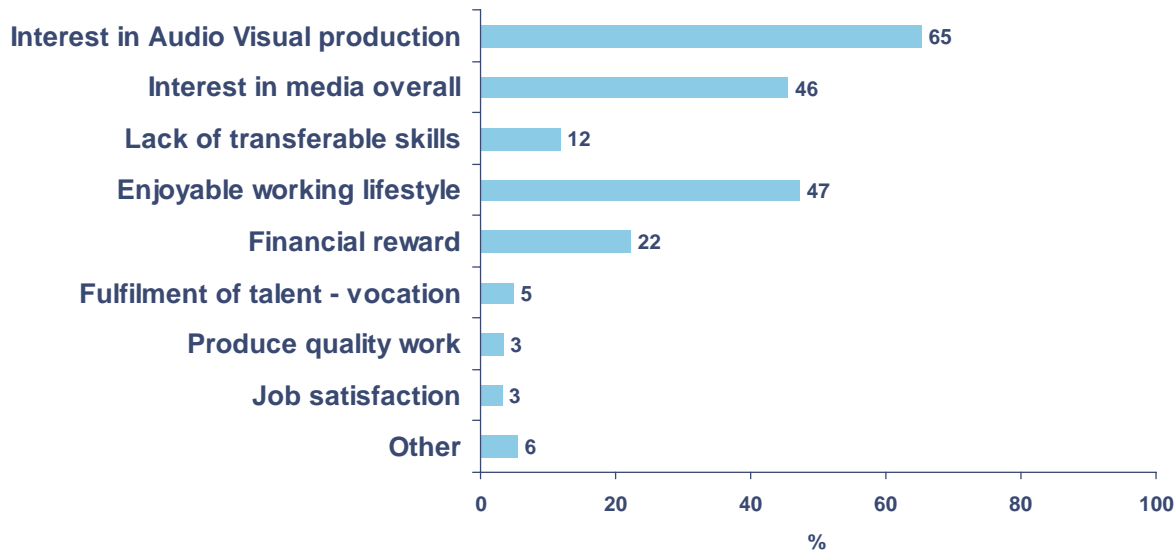
Base: 873 (Please note: multi-response question - % exceeds 100%)

- A general interest in the industry and skill set were two of the most frequently cited reasons for freelancers entering the industry (69% and 27% respectively)
- One-third of freelancers reported entering the industry as a result of undertaking specific training.
- A further 21% stated they enjoyed the working conditions of the industry and 11% were enticed by financial reward.
- Having a personal contact or recommendation accounted for 13% of the responses suggesting who you know within the industry is an important entry route.

## (i) Freelancer Profile

**Similarly, an interest in the sector/ media are also the reasons stated for staying in the industry, coupled with an enjoyable working lifestyle.**

**What were your reasons for staying in the industry?**



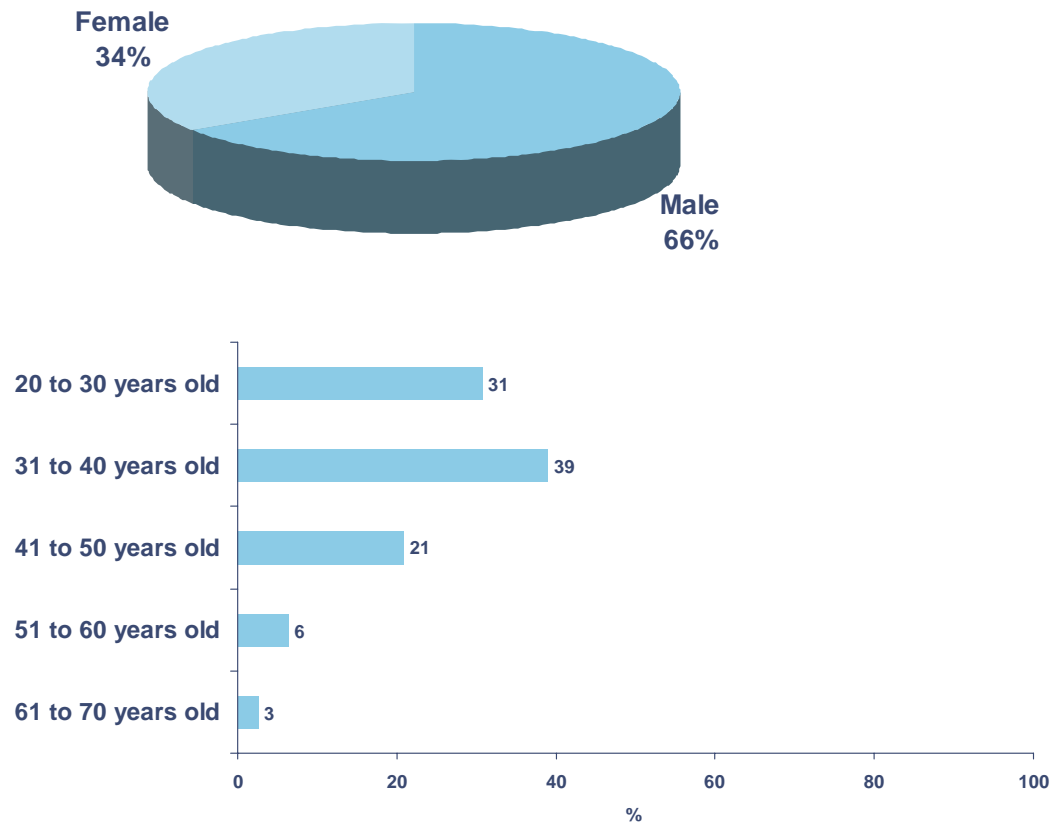
Base: 874 (Please note: multi-response question - % exceeds 100%)

- Reasons for staying in the industry are largely similar to those cited for entering the industry with a general interest in the industry and media accounting for 65% and 46% of responses respectively.
- Generally the responses indicate an enjoyment, satisfaction and personal fulfilment of working within the industry in addition to feeling sufficiently financially rewarded for work undertaken.

## (i) Freelancer Profile

Findings show that the freelancers are a relatively young group with 91% of respondents under the age of 50. They are also predominately male.

### Gender & Age Profile



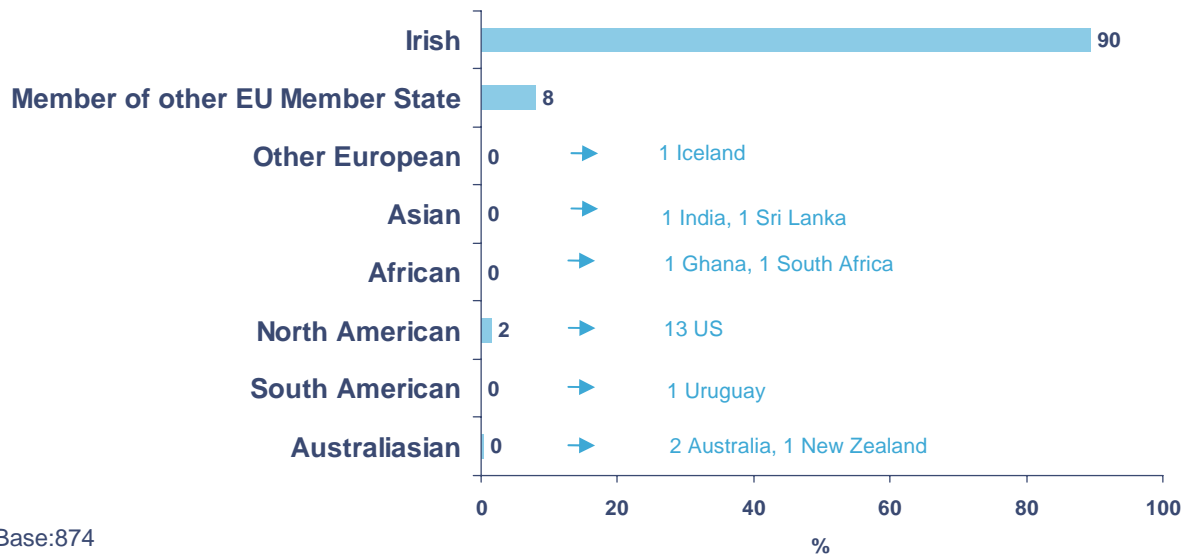
Base: 874

- Two thirds of the participating freelancers were male. This is thought to be quite an accurate representation of the industry as a whole.
- In terms of age profile, 91% of respondents are 50 years of age or under - indicating a relatively young industry.
- However, this might also suggest a retention issue within the sector i.e. it is a young persons industry and as you reach a certain age you change career course.

## (i) Freelancer Profile

**98% of the freelancers are European, comprising Irish nationals (90%) and those from another EU Member State (8%).**

### Nationality



Base:874

- 90% of the freelancers stated they were of Irish nationality. With a further 8% being nationals of other EU member states, predominately the UK, France, Germany, Italy and Spain (54%, 10%, 10%, 9% and 6% respectively).
- These findings suggest that although the industry does not attract a high proportion of foreign talent it does appear to retain many of it's own people.

## (i) Freelancer Profile

**Over three-quarters of respondents are from Dublin (68%) or the Greater Dublin Area (11%).**

**In which county do you live?**

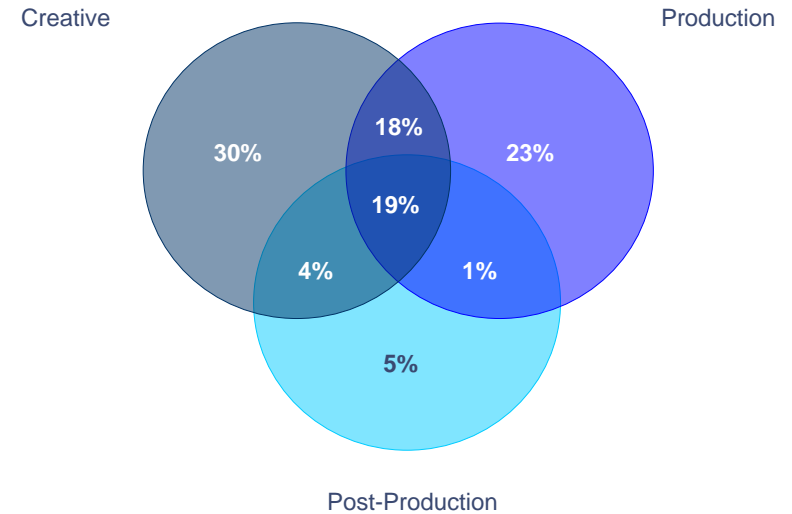
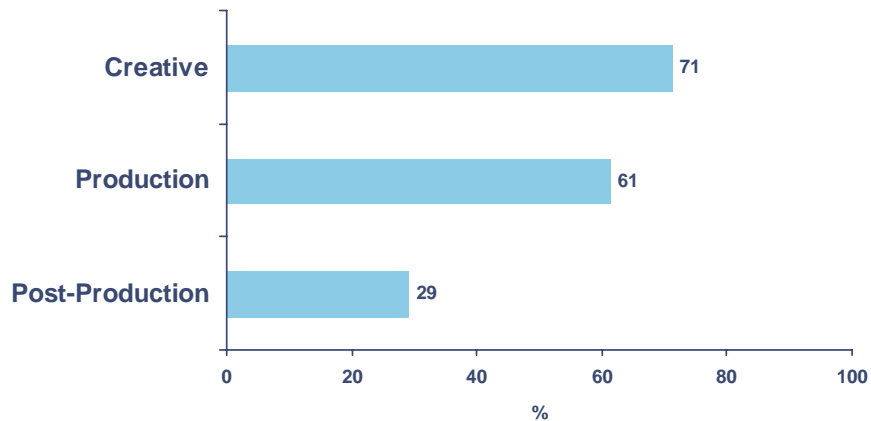
<b>County</b>	<b>%</b>
Dublin	68%
Wicklow	7%
Galway	6%
Cork	3%
Kildare	2%
Limerick	2%
Meath	2%
Clare	1%
Other - Southern Counties	8%
Other – Northern Counties	2%

- The majority of freelancers (68%) reported living in Dublin, with a further 11% residing in the Greater Dublin Area (Wicklow 7%, Kildare 2% and Meath 2%). This would imply that the glut of the work in the industry is Dublin based.
- 9% currently live in the west of the country (Galway, Clare and Limerick) and a further 3% in Cork.
- Only 2% of freelancers who responded to the census were from Northern Ireland.

## (i) Freelancer Profile

The Majority of freelancers are involved in the creative or production areas.

What area of the industry do you work within?



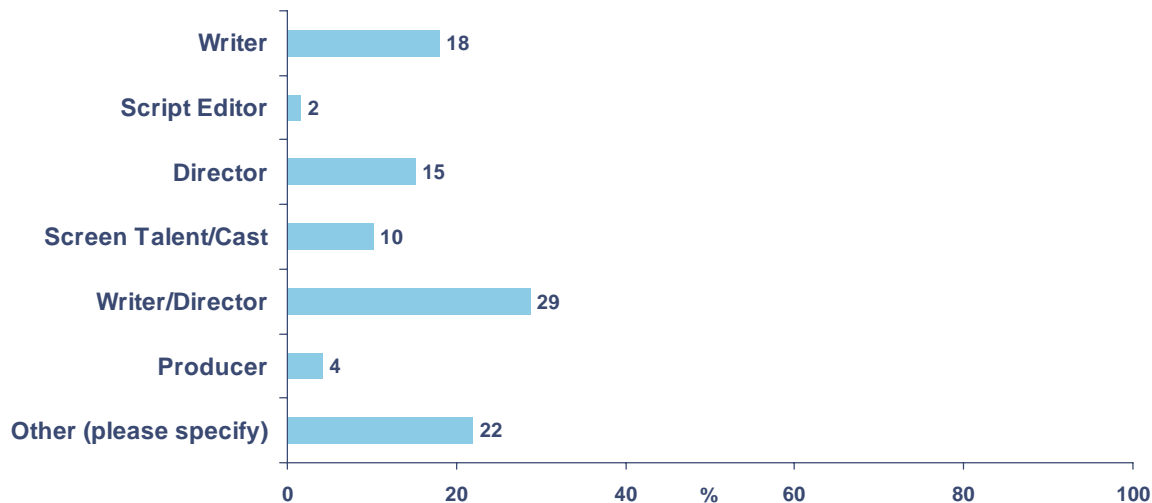
Base: 874 (Please note: multi-response question - % exceeds 100%)

- When asked to self-classify the area of the industry worked in, the majority of freelancers stated either creative (71%) or production (61%).
- Less than one third of the respondents stated their area of involvement as post-production.
- It is important to note however that the large proportion of freelancers classifying themselves as creative is representative of the respondent group rather than the industry as a whole.
- Findings indicate high levels of cross-over within the three areas (as illustrated in the venn diagram above). Whilst 58% of freelancers work in one area only, 18% work in both creative and post-production and a further 19% work across all three areas (creative, production and post-production).

## (i) Freelancer Profile

**Within the creative area the most frequently cited roles are Writer, Director or combination of both.**

**Creative – which of the following is your primary role?**



Base: 623

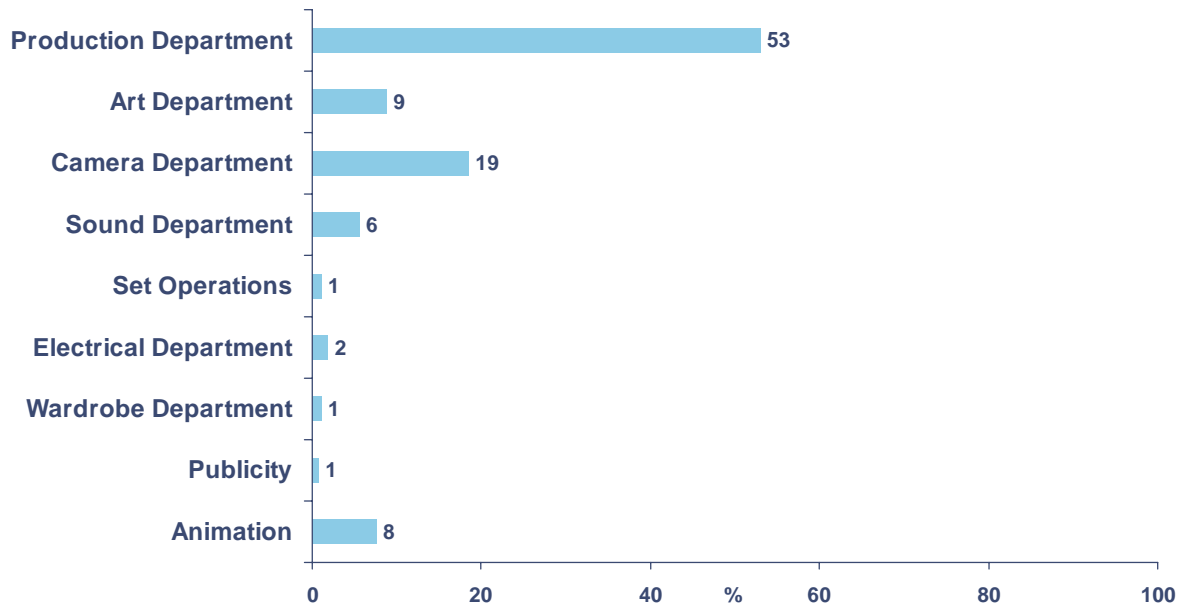
- Within the creative industry the roles of Writer, Director and Writer/ Director were most frequently cited as being the respondents primary role (18%, 15%, 29% respectively).
- A further 10% reported their primary role as screen talent/ cast. However, this group were difficult to identify and therefore survey so it is assumed that this figure is under-represented.
- Producers and Script Editor account for a further 6%.
- 22% of 'other' roles were specified. These include visual artists, sound designers, researchers, special effects, director of photography and composer to name a few.



## (i) Freelancer Profile

# The majority of freelancers (53%), involved in the area of production, reported working in a Production Department i.e. in the role of Line Production and Production Manager

### Production – which of the following do you primarily work in?



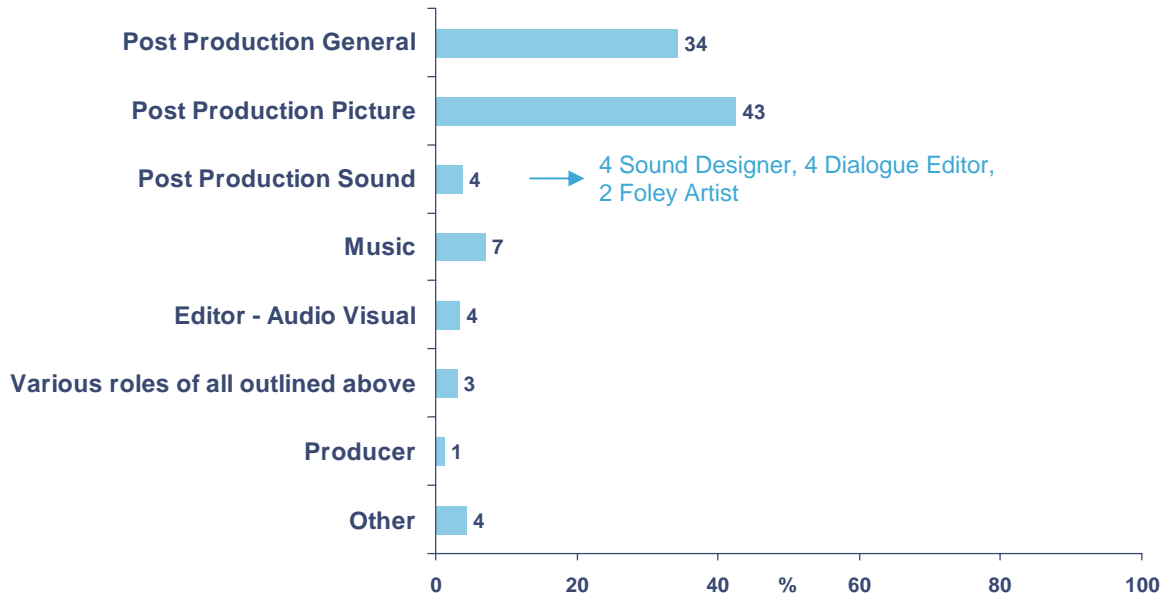
Base: 536

- Of the 536 freelancers who stated they worked within the area of production, the majority reported primarily working within the area of General production (53%) followed by the Camera Department (19%) and the Art Department (9%)
- Specific roles within General Production include: Line Production (27%); Production Manager (24%); Production Co-ordinator (9%); Researcher (7%); and First Assistant Director (6%)
- Of those respondents who stated working in the Camera Department (99 respondents) the main roles included Camera Operator (44%), Director of Photography (30%) and Camera Trainee (15%).
- Within the Art Department the primary roles were stated as Art Director (26%), production Designer (19%) and Stand-by Props (11%).

## (i) Freelancer Profile

**Post-production Picture (43%) and Post-Production General (34%) are the most frequently cited roles within the area of post-production.**

### Post-Production – which of the following do you primarily work in?



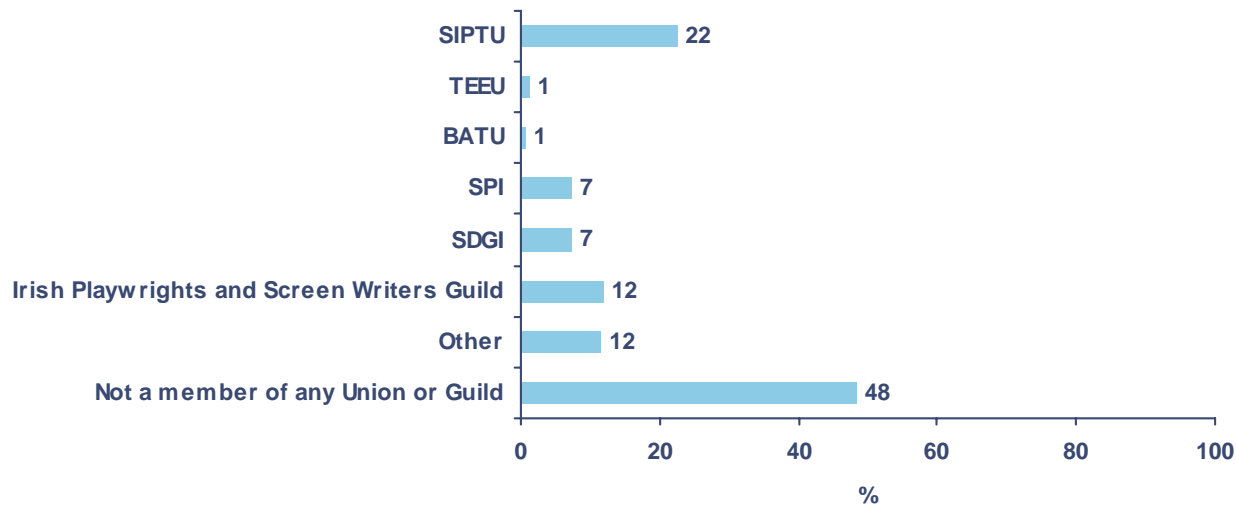
Base: 254

- Of those freelancers who stated they worked within the area of post-production (254 respondents), the most frequently cited primary areas were Post-Production Picture (43%) and Post-Production General (34%).
- Picture Editor, CGI Artist, Film Assistant Editor and On-Line Editor were the main roles held by freelancers working within the area of Post-Production Picture accounting for 63%, 9%, 7% and 7% respectively.
- Specific roles within the general area of post-production include Post-Production Supervisor (83%), Visual Effects Producer (14%), Post-Production Accountant (2%) and Music Supervisor (1%).

## (i) Freelancer Profile

**76% of responding freelancers are not a member of any Union and almost half of the respondents (48%) are not a member of either a Union or Guild.**

Are you a member of any of the following Unions or Guilds?



Base: 874 (Please note: multi-response question - % exceeds 100%)

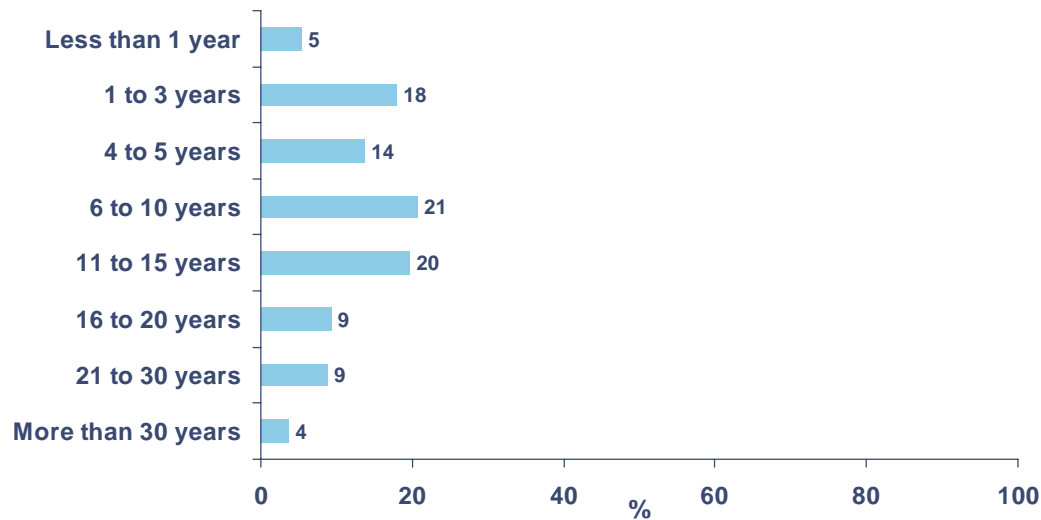
- 76% of responding freelancers reported not being a member of any Union.
- Furthermore, almost half of the freelancers (48%) reported that they were not a member of any Union or Guild.
- Of the remaining 52%, SIPTU accounted for 22% and 12% reported membership of the Irish Playwrights and Screen Writers Guild.
- Findings indicate less of a reliance on Unions/ Guilds to protect their interests.

## (ii) Work Profile

## (ii) Work Profile

**Findings suggest that there has been considerable growth in the industry over the last 15 years with 78% of responding freelancers having entered the industry since 1993.**

### How long have you worked in the industry?



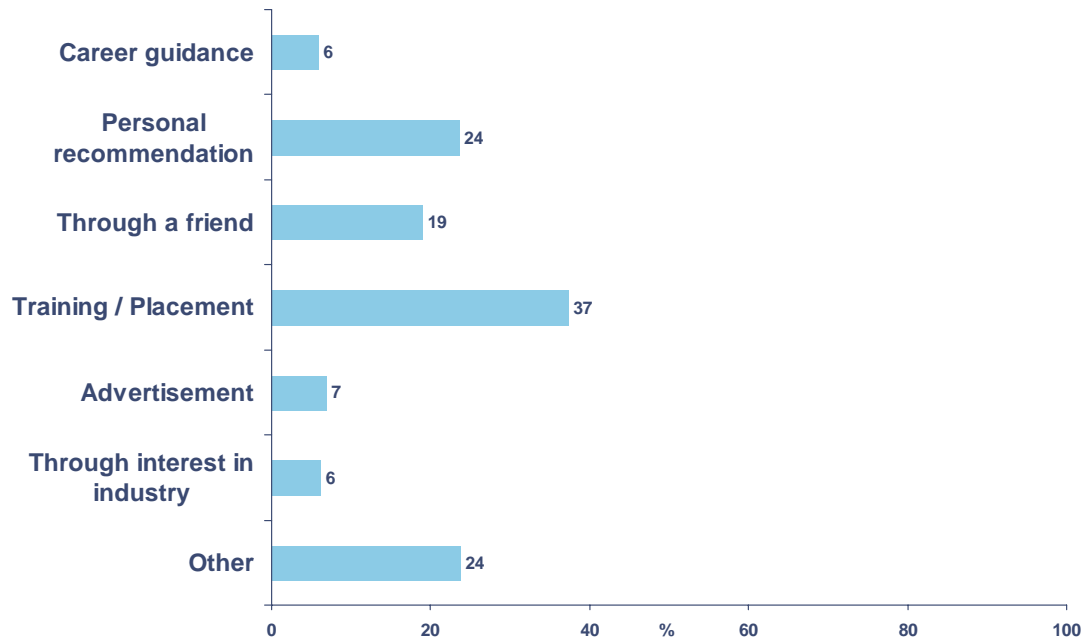
Base: 874

- Over three quarters of respondents (78%) have worked in the audiovisual sector for 15 years or less.
- 37% of which have worked in the industry for 5 years or less and the remaining 41% between 6 and 15 years.
- These figures support the assumption that there would appear to be an issue with long-term retention within the industry – with only slightly over one-fifth of the respondents (22%) reportedly having worked in the sector for over 15 years.

## (ii) Work Profile

### Training and placements considered to be the main entry route into the industry.

#### How did you enter the industry?

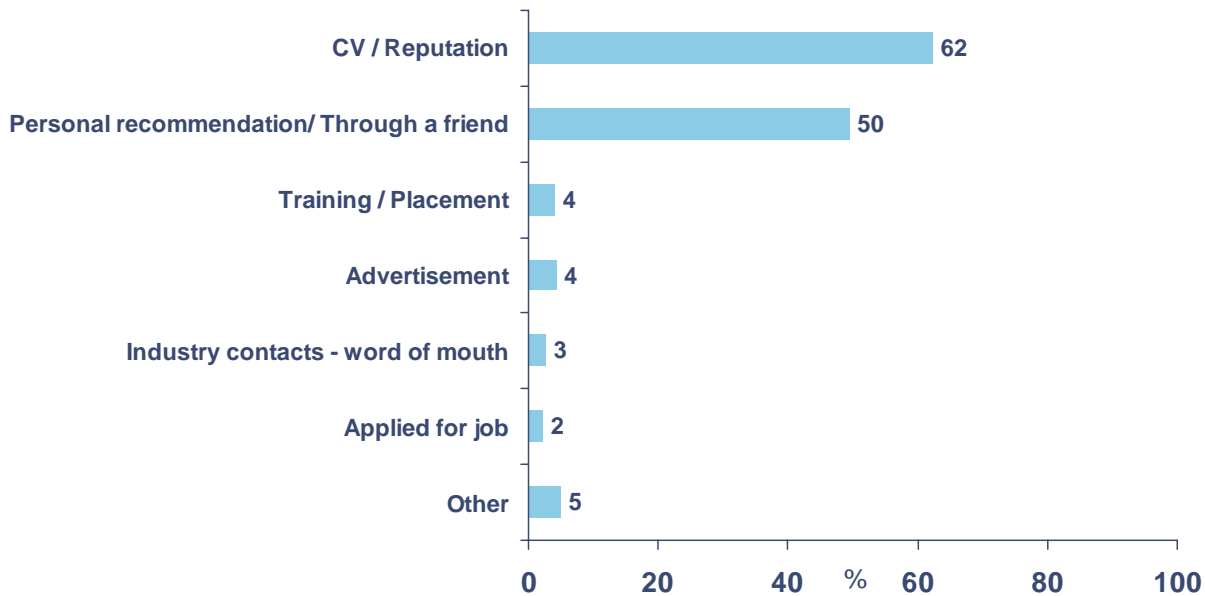


Base: 874 (Please note: multi-response question - % exceeds 100%)

- Training/ placements (37%) was the most frequently cited response for entering the industry – emphasising the important role that job placements plays within the industry.
- A further 43% entered the industry through either a personal recommendation (24%) or through a friend (19%) suggesting that ‘who you know’ is a significant route into the sector.
- Promotion/ advertising of the sector and career guidance were also stated as contributing factors (7% and 6% respectively).
- A general interest in the industry accounted for only 6% of responses.

## Last jobs achieved through reputation and personal networks.

### How did you get your last job?



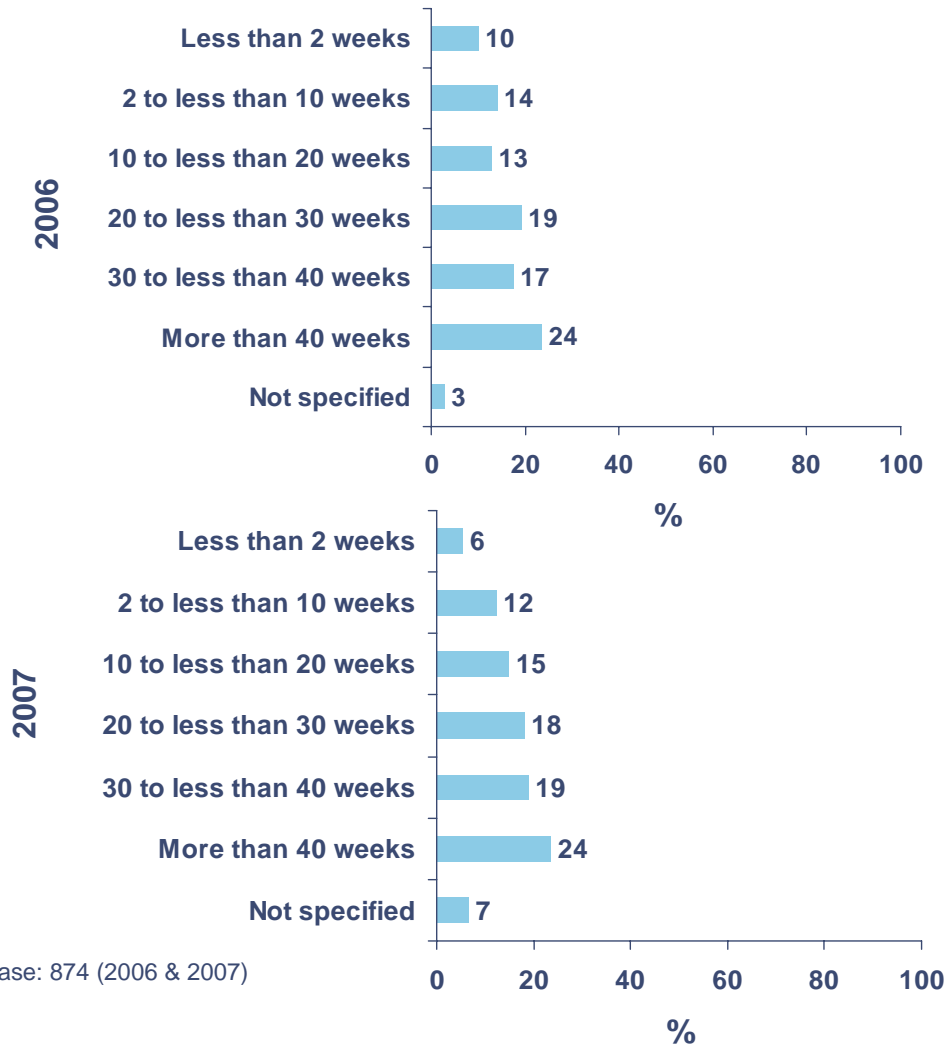
Base: 873 (Please note: multi-response question - % exceeds 100%)

- In terms of how individuals got their last job, CV/ Reputation and personal contacts were the most frequently cited reasons – 62% and 50% respectively. Once again the importance of prior experience and contacts within the industry are demonstrated in the results.
- Responding to an advertisement (4%) and applying for the job (2%) were also cited as contributory factors.
- Although earlier findings have indicated that undertaking formal training/ placements helped some individuals to enter the industry these are considered to play a relatively small part in actually securing work (4%) in the longer-term.

## (ii) Work Profile

# Circa 60% of freelancers worked in excess of 20 weeks within the industry in 2006 and 2007

Approximately how many weeks did you work in the audiovisual content production sector in 2006 and 2007?



- Findings suggest that during both 2006 and 2007 the majority of freelancers (circa 60% both years) worked in excess of 20 weeks within the industry.
- The flip-side of this is that approximately 40% of freelancers had less than 20 weeks employment in the sector during the same period.
- However, the occurrence of short-term employment (less than 10 weeks) has decreased from 24% in 2006 to 18% in 2007.

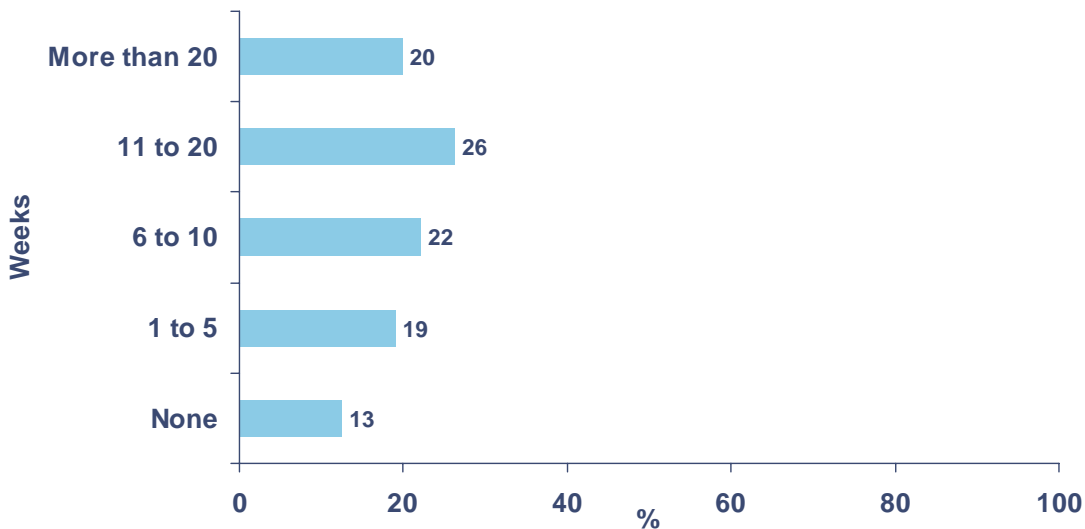
*Note: Freelancer FTE calculations were worked out on the basis that 60% of freelancers worked 30 weeks per annum and the remaining 40% worked 10 weeks per annum - equating to a FTE ratio of 0.55%.*



## (ii) Work Profile

**Almost half (46%) of the respondents stated periods of continuous unemployment of 11 weeks or more. Only 13% reported no unemployment in the last two years.**

**In the last two years, what was your longest single continuous period of unemployment?**



Base: 874

- 13% of freelancers reported no period of unemployment during the last two years. However, almost half of the respondents (46%) stated periods of continuous unemployment in excess of 11 weeks.

## (ii) Work Profile

**Short films, feature films, television dramas and documentaries are the most frequently worked on genres amongst respondents.**

**During 2007, please indicate the type of audiovisual project you were involved in.**

Project type	%	Project Type	%
Short films	42%	Website/ mobile phone content	2%
Feature films	41%	Training/ Educational workshops	2%
Television dramas (including series)	38%	Broadcast/ Transmission/ production services	1%
Documentaries	35%	Producing visual displays	1%
Corporate/ Music videos	29%	Factual programmes	1%
Commercials	21%	Animation	1%
Entertainment	18%	Other	9%
Children's/ young persons programmes	10%		

Base: 872 (Please note: multi-response question - % exceeds 100%)

- The findings show a convergence of skills across the different genres with individuals tending to work on more than one genre. Short films, feature films, television dramas, documentaries and corporate/ music videos are cited as the most frequently worked in areas.

## (ii) Work Profile

**On average, respondents worked on between 2 and 5 projects per genre.**

**During 2007, please indicate number of audiovisual project you were involved in.**

	Average number of projects	Minimum	Maximum	Base
Feature films	2.1	1	100	318
Television dramas (Series)	2.0	1	13	302
Documentaries	2.5	1	20	274
Children's/ young people's programmes	2.0	1	8	79
Entertainment programmes	3.5	1	20	135
Television commercials	4.3	1	40	167
Short films (less than 30 minutes)	2.3	1	12	339
Corporate/ music videos	3.4	1	25	226
Other	5.0	1	70	130

- On average respondents reported working on between 2 and 5 projects per genre during 2007.
- The number of projects worked on in television drama, feature films, documentaries, children's/ young peoples programmes and short films ranged from 2 to 2.5. Whereas freelancers worked on between 3 and 4 Corporate videos, entertainment programmes and television commercials projects during the same period.
- The maximum number of projects by genre reported by individual respondents were 40 television commercials, 70 'other' projects and 100 feature films (likely to be in the area of script editing/ reading).

## (ii) Work Profile

**Time spent working on projects varied between 5 weeks for television commercials and 16 weeks for television dramas/ drama series.**

**During 2007, please indicate the number of weeks you spent on such work.**

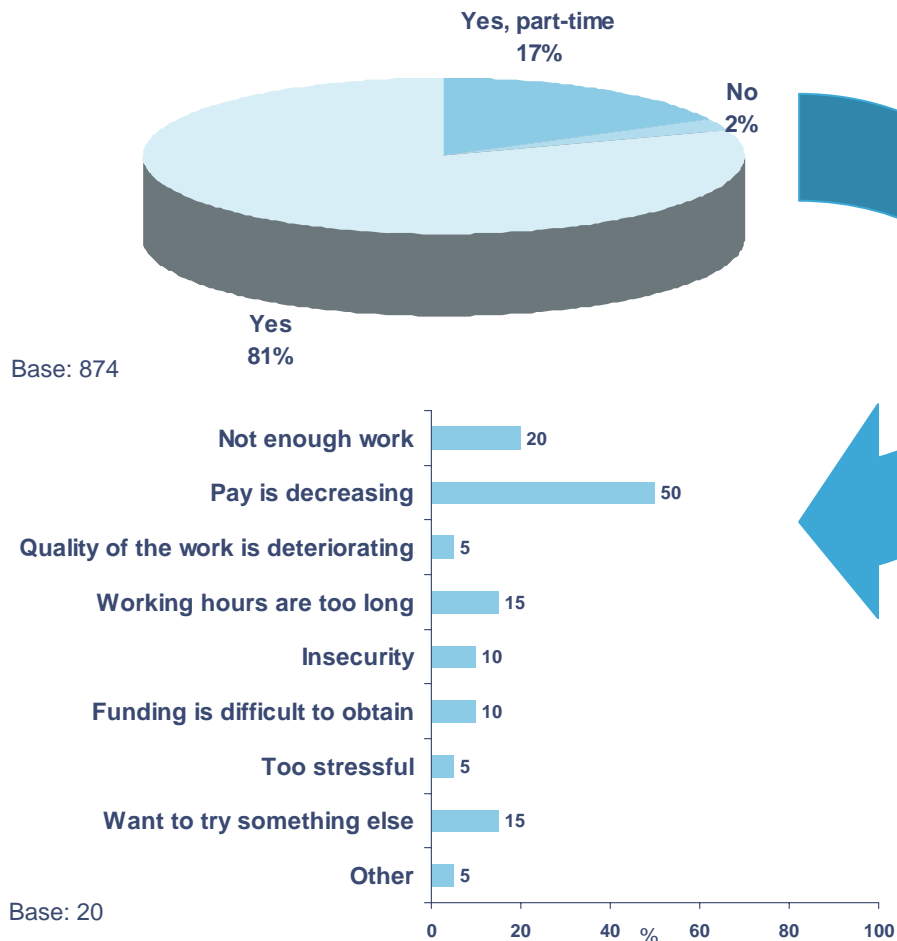
	Average number of weeks	Minimum	Maximum (weeks)	Base (freelancers)
Feature films	14.2	1	52	300
Television dramas (Series)	16.2	1	48	295
Documentaries	13.8	1	52	252
Children's/ young people's programmes	14.8	1	52	72
Entertainment programmes	14.3	1	52	124
Television commercials	5.1	1	48	153
Short films (less than 30 minutes)	6.4	1	38	318
Corporate/ music videos	7.1	1	40	211
Other	14.7	1	52	125

- In relation to the length of time spent working in a particular genre, this ranged from 5 to 16 weeks.
- A number of respondents reported working the maximum of 52 weeks during 2007 in the feature film, documentary, children's/ young people's and entertainment programmes and other genres.
- The lowest average time (5.1 weeks) was spent working in television commercials.

## (ii) Work Profile

**98% of respondents plan to stay in the sector. Of those who stated they plan to leave (20 respondents) the main reasons given were decreasing pay levels and insufficient work.**

### Do you intend staying in the sector?



- 81% of freelancers stated that they intended staying within the Audiovisual sector, with a further 17% saying they would stay, however, on a part-time basis. Thus, showing a huge commitment to the sector.
- Of those 2% who are considering leaving the sector (20 respondents) the main reason cited for doing so include: decreasing pay levels (50%); Lack of work (20%); unfavourable working hours (15%); difficulty in attracting funding (10%); and a general feeling of insecurity in the industry (10%) .
- 15% reported just wanting to try something else.

## (ii) Work Profile

### Almost one-third of freelancers have worked internationally during 2007.

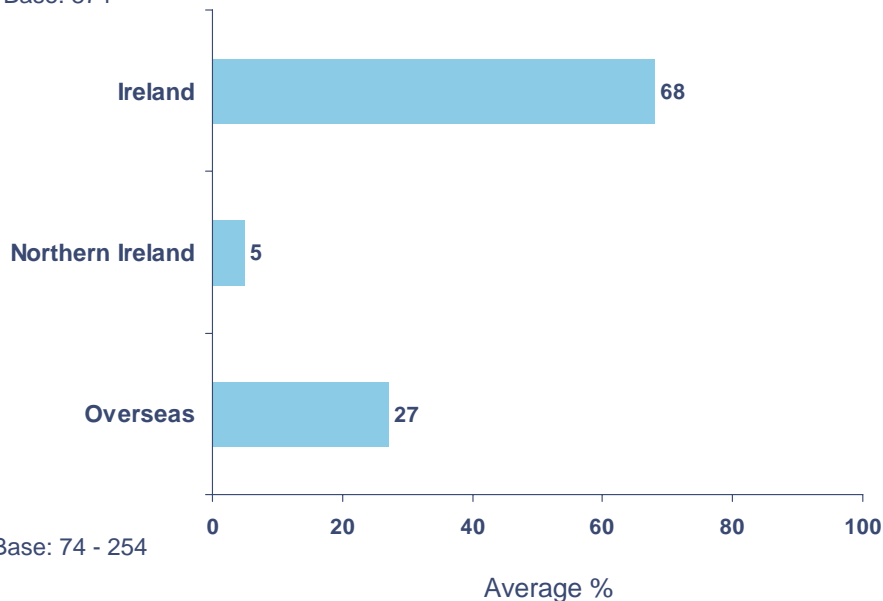
Did you work internationally in 2007?



Yes  
32%

No  
68%

Base: 874



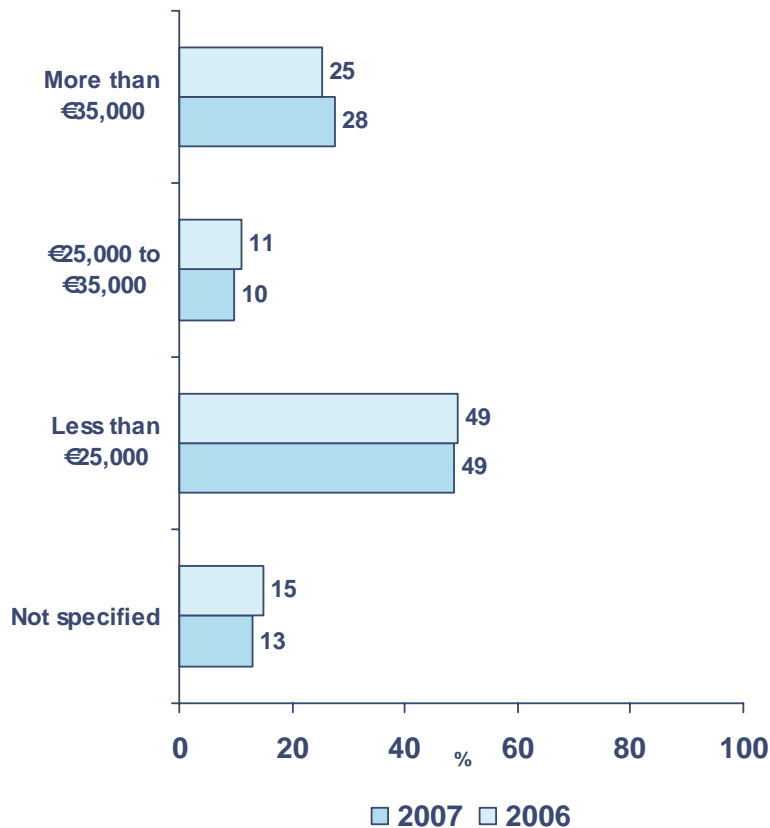
Base: 74 - 254

Average %

- Findings suggest a good level of mobility within the sector with almost one-third (32%) of freelancers reporting having worked internationally during 2007.
- Of those freelancers who reported having worked overseas in the last year, the average percentage of their time spent working internationally was 27%.

## Almost half of the participating freelancers in 2006 and 2007 earned less than €25,000 in content production.

What were your approximate pre-tax gross earnings from all audiovisual work in 2006 and 2007?

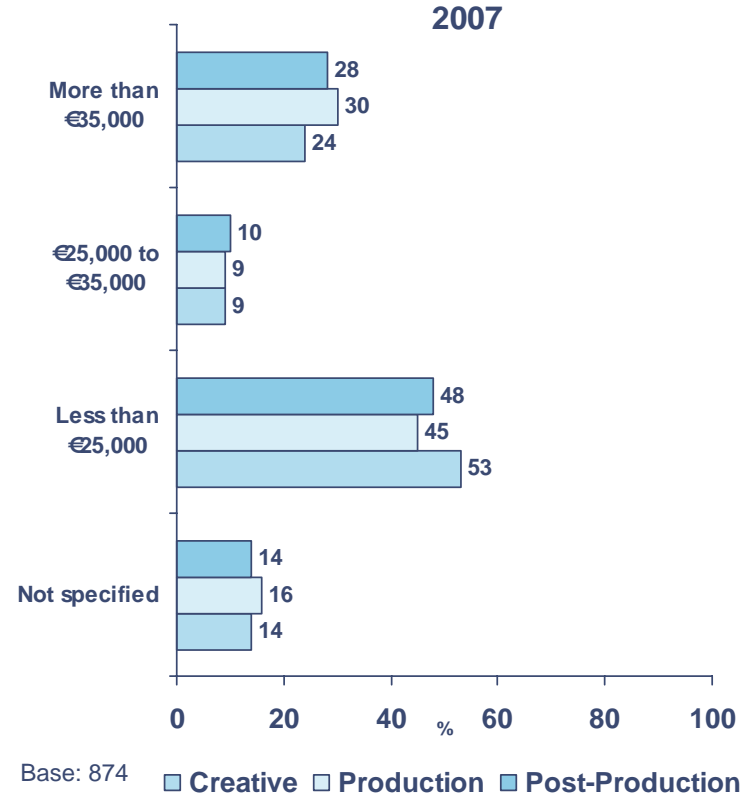
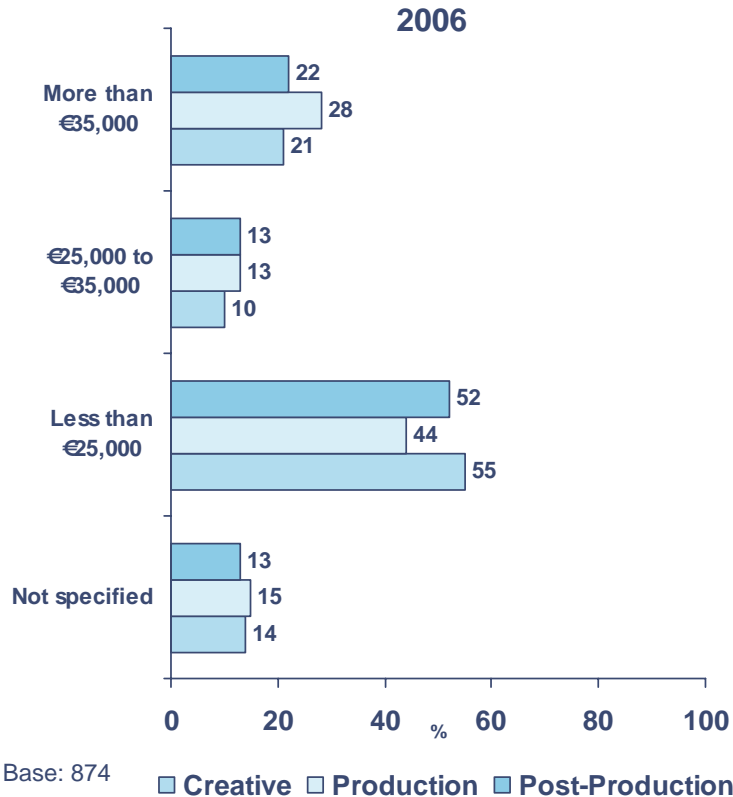


- Of those freelancers who specified their pre-tax gross earnings from content production for 2006 and 2007, almost half earned less than €25,000 in each year (49%).
- Earnings ranged from €2,500 to €150,000 in both years with average earnings of €27,364 in 2006 and €28,516 in 2006 and 2007 respectively.
- However, the number of respondents falling into the 'more than €35,000' salary bracket has shown a marginal increase in 2007 from 25% to 28%.
- The combined turnover for all respondents was €20.55 million in 2006 and €21.47 million in 2007 (see table below) – effectively in line with inflation.

	2006	2007
Lowest earnings per annum	€2,500	€2,500
Average earnings per annum	€27,364	€28,516
Highest earnings per annum	€150,000	€150,000
Total earnings	€20,550,164	€21,472,702

## (ii) Work Profile

Freelancers involved in the area of post-production show the largest increase in the more than €35,000 salary bracket between 2006 and 2007 – up 6%.



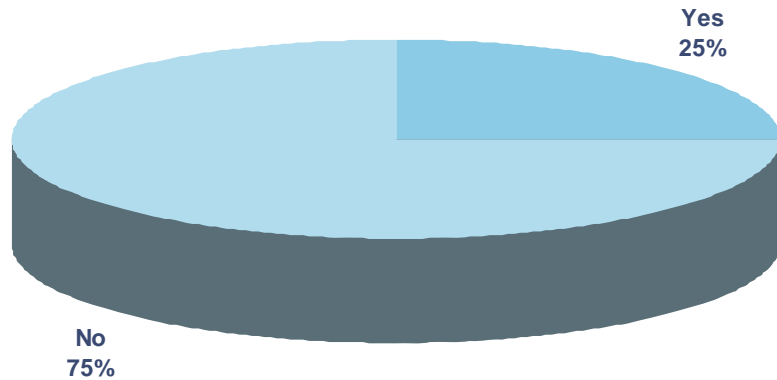
- Over half (53%) of freelancers involved in the area of creative reported earning less than €25,000 in 2007 compared to 48% of those involved in the post-production area and 45% involved in production.
- Furthermore, Individuals involved in the post-production area have experienced the largest increase in the more than €35,000 salary bracket - up 6% on 2006 figures. This group also report a decrease in the number of individuals falling into the 'less than €25,000 to 'less than €35,000' salary bracket over the same period (65% to 58%)



## (ii) Work Profile

# Only 25% of participating freelancers contribute regularly to a private pension plan.

Do you contribute regularly to a private pension plan?



Base: 874

Age	Those who contribute to a private pension plan	
	Number	%
Under 30	32	15%
31 – 50	157	72%
51+	29	13%
<b>Total</b>	<b>218</b>	<b>100%</b>

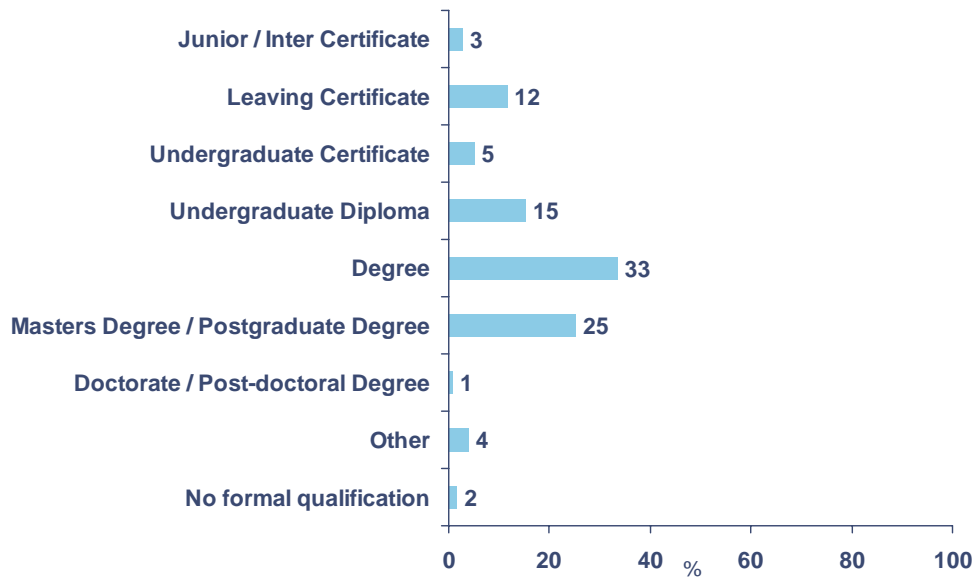
- One-quarter of respondents stated making regular contributions to a private pension plan.
- In relation to the 25% that do have a private pension plan, 72% of those are aged between 31 and 50 years compared to only 15% of those under 30 years of age.
- Surprisingly, only 13% of those aged over 50 report having a pension plan.

## (iii) Education & Training Undertaken

### (iii) Education & Training Undertaken

**Over 90% of respondents have at a minimum achieved their Leaving Certificate.**

**What is the highest level of education you have achieved?**



Base: 874

- The findings show a well educated group of individuals, with over half of the respondents (59%) having achieved either a Degree, Master/ Postgraduate Degree or Doctorate/ Post-Doctoral Degree.
- Whereas, 15% of the freelancers highest level of education attained was their Junior or Leaving Certificate. With a further 20% having attained an Undergraduate Certificate or Diploma.
- 2% have no formal qualification at all.

### (iii) Education & Training Undertaken

**Over half of the respondents undertook formal film industry education/ training prior to entering the industry.**

**Did you undertake any formal film industry education / training prior to entering the industry?**

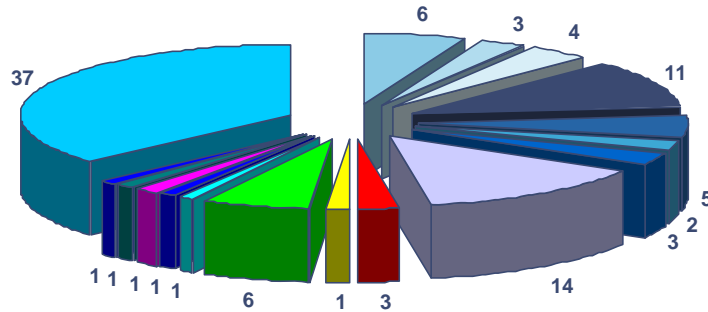


Base: 874

- The majority of respondents (53%) reported having undertaken formal industry education or training prior to entering the industry.
- 80% of those who undertook training were aged between 20 and 40 years of age indicating the more recent recognition of the significance of achieving a relevant qualification before entering the sector.

### (iii) Education & Training Undertaken

## Education is provided by a wide and varied group of providers



Base: 628

- Ballyfermot College of Further Education (BCFE)
- Colaiste Dhulaigh
- Dublin City University (DCU)
- Dublin Institute of Technology
- Filmbase
- Gaiety School of Acting
- Galway-Mayo Institute of Technology (GMIT)
- IADT, Dun Laoghaire
- NUI Galway
- Trinity College, Dublin
- University College Dublin (UCD)
- Griffith College
- New Media Technology Centre
- RTE
- St. John's Central College Cork
- University of Ulster
- Other

- The most frequently cited education providers are located in Dublin and surrounding areas. The institutions include: Dun Loaghaire Institute of Art Design and Technology (14%); Dublin Institute of Technology (11%); University College Dublin (6%) and Ballyfermot College of Further Education (6%).
- The main themes of the courses tend to be in the area of, in no particular order, Animation, Film & TV production, TV studies, radio, media, communications, drama, sound design, make-up, directing and screen/ script writing.
- In addition, Filmbase also provided a number of industry courses to participating freelancers which are more specialist in their nature for example, final cut editing, location sound recording, screen studio, short film production and playing to the camera.
- The 'other' category accounts for 37% of all responses given. This represents a wide range of education service providers from Ireland, the UK and internationally.

### (iii) Education & Training Undertaken

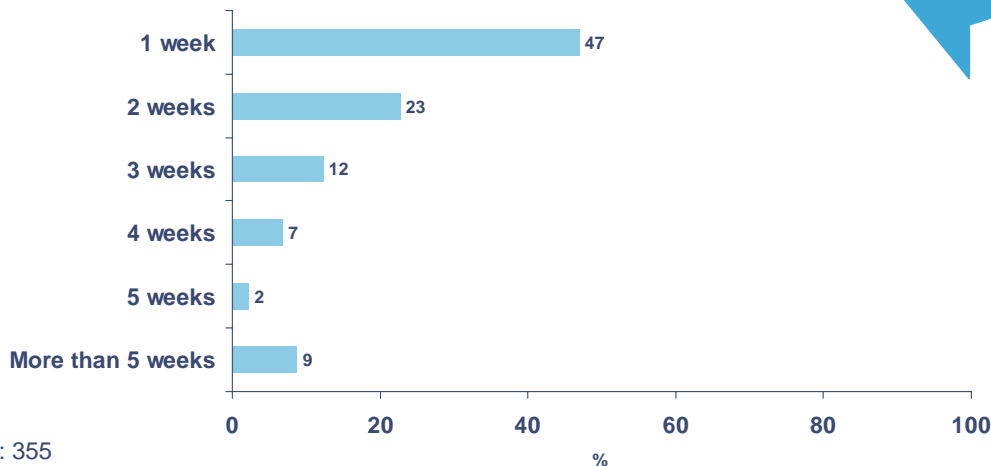
**Of those freelancers who undertake regular professional training, over 80% of respondents undertake up to three weeks professional industry training per year.**

Do you undertake regular professional industry training?



Base: 874

On average, how much professional industry training do you undertake per year?



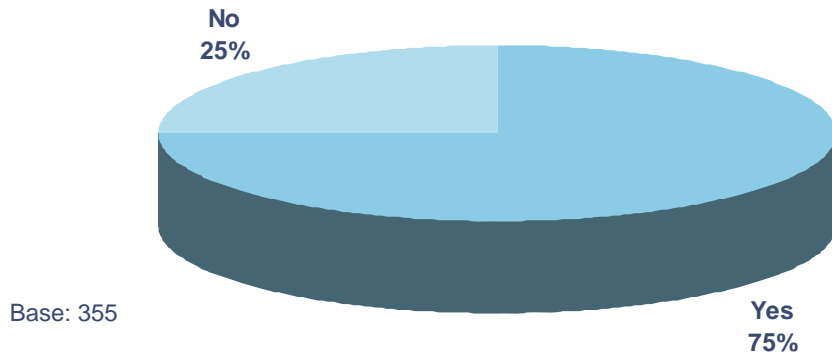
Base: 355

- In addition to training undertaken prior to entering the industry, 41% of freelancers continue to undertake regular professional industry training (355 respondents).
- The average amount of time spent on this training is between one and three weeks (total of 82% freelancers).
- A further 11% reported undertaking on average five weeks or more of training a year.
- Individuals between 20 and 40 years of age are more likely to undertake industry training with 70% stating that they do so regularly.
- Freelancers involved in the creative and production side of the industry are also more likely to undertake training.

### (iii) Education & Training Undertaken

**Three-quarters of participating freelancers state that the training they undertake is job specific.**

Is the training you undertake job specific?



- In terms of the type of training undertaken, 75% of participating freelancers stated their training to be job specific.
- In total there were 672 mentions of job specific training courses undertaken of which FAS Screen Training Ireland accounted for 37%
- The most frequently cited training courses by respondents were in the areas of:
  - Acting;
  - Camera work;
  - Digital – film/ photography;
  - Directing;
  - Final Cut;
  - Music/ audio/ sound; and
  - Script writing/ development.

