

The Australian Screen Producer in Transition

Mark David Ryan, Ben Goldsmith,
Stuart Cunningham and Deb Verhoeven

... the term 'producer' covers a broad range of roles. It includes both entrepreneurs and employees. It spans the hands-on role of the line producer and the financing role of the executive producer. It extends across a wide variety of screen-based media, from film and television to corporate videos, computer games and new media.¹

The role of the screen producer is ramifying. Not only are there numerous producer categories, but the screen producer function is also found on a continuum across film, television, advertising, corporate video and the burgeoning digital media sector. In recent years, fundamental changes to distribution and consumption practices and technologies should have had a correlate impact on screen production practices and on the role of existing screen producers. At the same time, new and recent producers are learning and practising their craft in a field that has already been transformed by digitization and media convergence. Our analysis of the work, experience and outlook of screen producers in this chapter is based on data collected in the Australian Screen Producer Survey (ASPS), a nationwide survey conducted by the ARC Centre of Excellence for Creative Industries and Innovation, the media marketing firm Bergent Research and the Centre for Screen Business at the Australian Film, Television and Radio School (AFTRS) in 2008/2009 and 2011.² We analyse the results to better understand the practice of screen production in a period of industry transition, and to recognize the persistence of established production cultures that serve to distinguish different industry sectors.

Theoretical background

The ASPS project was initiated in 2008 to address a deficit in screen producer research which has typically relied on either analysing *observed* workflows and industry cultures or on personally *experienced* (e.g. 'knowledge in practice', 'participant observation') approaches. Instead, the ASPS is built on reported

data gathered from a broad sample of producers in order to map the culture and motivations of this influential sector of the Australian screen industries. Three strands of academic work are of particular relevance here: studies of creative labour and work in the media industries; production studies; and creative industries research.

In his book *Media Work*, Mark Deuze identifies four elements that ‘tend to get mixed up’ in analyses of what is involved in work in media industries: content, connectivity, creativity and commerce.³ The producer is ‘a uniquely “in between” figure’ who spans and mediates all four of these elements through their finance, creative and practical production work.⁴ While Deuze’s focus is not restricted to screen producers, his arguments around the precariousness of media work (defined as ‘the financial and existential insecurity arising from the flexibilization of labor’⁵), the management of creativity and media convergence are highly relevant to our study. There are many other contributions to critical analysis of precarious media work; the ‘consistent findings’ of which, Mark Banks and David Hesmondhalgh say, include that

creative work is project-based and irregular, contracts tend to be short-term, and there is little job protection; that there is a predominance of self-employed or freelance workers; that career prospects are uncertain and often foreshortened; that earnings are usually slim and unequally distributed, and that insurance, health protection and pension benefits are limited; that creatives are younger than other workers, and tend to hold second or multiple jobs; and that women, ethnic and other minorities are under-represented and disadvantaged in creative employment. All in all, there is an oversupply of labor to the creative industries with much of it working for free or on subsistence wages.⁶

The tendency to paint a particularly bleak picture of media labour is emphasized by some writers’ focus on ‘below the line’ media workers, that is, those with less industrial power than producers.⁷ David Lee, in his work on British independent television production, describes this as a focus on “ordinary” cultural workers.⁸ This work characterizes media labour as primarily project based, freelance and insecure. But the ‘uniquely in-between’ producer figure could hardly be described as ‘ordinary’ given the combined creative and managerial roles they often occupy. Producers, as ‘above-the-line’ workers, are not as easily substitutable as below-the-line workers, particularly, for example, on runaway or footloose projects that ‘destination shop’ around the world to take advantage of tax incentives or exchange rate differentials in order to lower production costs. What can also distinguish the attitudes of the producer cohort (and other key creative roles) from ‘ordinary’ media workers is their adherence to the notion of ‘good work’ that creative labour represents in the modern economy and the undeniable attraction of (relatively) autonomous labour that it promises.⁹

Closely related to work on cultural labour is a contemporary field that has come to be known as ‘production studies.’ Emerging from cultural studies first in the work

of John Thornton Caldwell on film and video production workers in Los Angeles, production studies adopts ethnographic methods to examine the 'cultural practices and belief systems' and 'industrial reflexivity' of media workers.¹⁰ In common with some of the work on media labour discussed earlier, production studies tend to focus on 'below-the-line' workers. This is made explicit in the title of Vicki Mayer's book *Below the Line: Producers and Production Studies in the New Television Economy*.¹¹ Mayer broadens the definition of 'television producer' to include workers whose labour is essential to television production and whose identities are constructed in and through media work, but who are largely invisible in both academic and industry discourse. Through case studies of television set assemblers in Brazil, soft-core cameramen at the annual New Orleans Mardi Gras, casters or talent scouts for reality television shows and volunteer advocates and regulators of local cable television in America, Mayer deconstructs academic deployments of (and limits on) the terms 'creative', 'professional' and 'producer'. Rather than referring to those in creative, managerial or financial control, Mayer uses 'producer' in a deliberately broad sense to mean, essentially, anyone 'whose labor, however small, contributes to [television] production'.¹² However, in pushing a 'laborist' line of approach this far, Mayer risks losing the distinctions between the levels of risk and precariousness carried by the employee or contracted worker and those carried by those who are responsible for leading and/or coordinating production projects. In order to specifically address these distinctions, the ASPS defines a producer as 'someone who manages the financial, creative, technical and/or logistical challenges of making screen content'.¹³

The third area of relevant scholarship is creative industries research. The ASPS was commissioned by the ARC Centre of Excellence for Creative Industries and Innovation (CCI), whose focus is on an enterprise or entrepreneurial approach to cultural and media production and consumption with an emphasis on the transformations that digital affordance effects in the field. The CCI has conducted theoretical work on structural change in cultural and media markets,¹⁴ strategies of 'born digital' games firms under conditions of rapid global change¹⁵ and the skills needs and gaps in Australia's digital games industry.¹⁶ The CCI has also worked extensively with national statistics, including trends in the relation between the broad creative class and key creative roles such as the producer.¹⁷ Analysis of this kind has shown that, for example, while there had been record growth in internal migration into Queensland and its capital, Brisbane, and corresponding growth in the professional and creative workforces, there has not been a commensurate increase in producer and key creative capacity in the region.¹⁸ With the ASPS, the CCI has engaged directly in analysing the Australian screen producer in a period of industrial transition.

Surveying the producer

The ASPS arose from the observation that very little independent scholarly research focused on the screen producer, and that the field of producer studies needed more

systematic empirical grounding across all subfields of screen production (not only film and television but also commercial/corporate and new media/digital). A targeted national survey was deemed necessary to avoid 'glossing over the important role played by producers, owing to the gap between "top-down" analyses that scope the industry at the sectoral level and "bottom up" analyses that focus on the work lives of creative practitioners'.¹⁹ The surveys provided the opportunity to interrogate several issues around the culture of producing in Australia from the perspective of producers themselves. These included the relationship between a producer's experience and education, and their sources of project funding; the levels of business expertise in the different sectors; the impacts of media convergence, digitization and industry change; and most recently, the transitional pathways of established media producers into digital media production. The objective was to produce findings that would have value for policy makers and industry bodies, as well as giving screen producers themselves a clearer picture of their own professional context. The period between the two surveys was dynamic. Changes in the policy environment included the establishment of a new national funding agency and the introduction of new financing mechanisms, in particular the Australian Screen Production Incentive (which includes a Producer Offset). The finance environment was also characterized by fluctuations in the value of the Australian dollar, and the overall industry ecology was marked by significant changes to production and consumption technologies.

The first ASPS, conducted between November 2008 and June 2009, established a comprehensive list of over 4,000 individuals with at least one producer credit – a surprisingly large number. Focus groups in Melbourne and Sydney were consulted to ensure that the survey questions were acceptably framed. A senior statistician was consulted to verify the project methodology. A random sample of 2,000 was then invited by e-mail to participate in the ASPS, with the incentive of a prize draw (five iPods were won by participating producers). Approximately 12 per cent of invitees ($n = 227$) completed the online survey. The ASPS established baseline statistics on the demographics of the producer cohort, as well as data on their industry experience, education, professional development and funding sources for their work. Producers' sentiments towards their work and profession were also assessed. Producers were divided into one of four sectors – television, film, commercial/corporate and new media (referred to as digital media in 2011 survey) – based on respondents' self-identification of which sector was their main income source. A key finding of the first survey was that producers in each of these sectors demonstrated distinctive attitudes, motivations and backgrounds.

A second ASPS was conducted between November and December 2011 and emulated the methodology of the first survey to produce a reliable basis for comparison. An updated database of approximately 5,000 screen producers was prepared. A focus group with a small representative sample of film, television, digital media and commercial producers was held in Melbourne to develop and refine the original questionnaire in light of more recent industry practices and vocabularies. In order to increase the response rate from the first survey, a cash prize of \$2,000 was offered, with the winner selected from randomized results of a voluntary game

of skill. Every twentieth participant also received a free cinema ticket. A modified stratified sample method was used to ensure sampling of an adequate, diverse range of screen producers. E-mails soliciting participation were sent to 4,872 producers, with an 8 per cent overall response rate ($n = 407$). Due in part to the larger initial population and in part to the revised approach to sampling, this produced an 80 per cent increase over the 2008 response rate ($n = 227$). Despite the adjusted sampling method, the spread of film, television and commercial producers in the second ASPS was similar to that in the first; however, there was a large increase in the number who identified as digital producers (from 8 per cent of the total in 2008 to 14 per cent in 2011), which may be explained by the growth in this sector over the period. The 2011 ASPS also received significantly more responses from producers in all sectors aged 20–24, and from television producers aged 35–39. The second ASPS asked the same questions as the first, but several questions were added: on international partnerships, tax incentives, levels of debt and attitudes to government support and industry leadership (Figure 7.1).

Television producers

Producers who identified television as their main source of income made up the largest group in both ASPSs: 47 per cent of respondents in 2008, and 37 per cent in 2011 (Figure 7.1). Across the two surveys there is surprising consistency in this category (particularly given fluctuations in the national television production slate in this period). In both ASPSs, 56 per cent of television producers were men, and the cohort overall averaged 17 years of experience in the industry. Given the option of self-identifying in one of ten producer roles,²⁰ in 2011, none identified as a digital producer, indicating that this is not a common job title in television, and/or that at this stage of the transition to digital, such a role is typically outsourced. In terms of the types of content produced, the majority of television producers in both ASPSs worked in multiple genres, but documentary was the most common genre in 2008 and 2011, nominated by 66 per cent in both surveys.

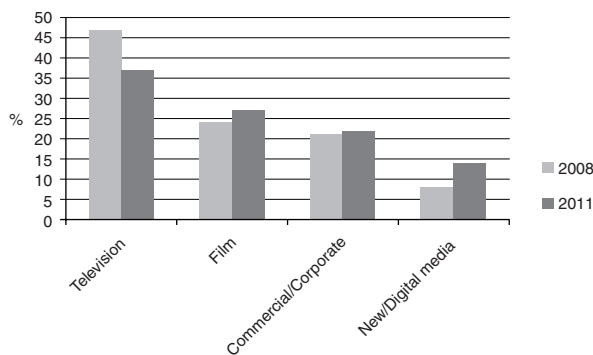


Figure 7.1 Graph showing responses to the Australian screen producers survey question: Which one of these industries is your main source of income?

Some differences between the surveys were apparent. In the second ASPS, television producers were the oldest sector on average, with 57 per cent aged 50 or over compared to 47 per cent in 2008. The 'aging' of producers in this sector (or put another way, the failure of younger producers to enter this sector) may vindicate the poor performance expectations held by TV producers in the earlier survey (only 4 per cent were optimistic about growth). The overall television production sector (by number of projects, total dollar value of production and hours produced) shrank during the period under study. However, other explanations were provided by those surveyed. For one producer the key barrier to entry lay with the design of funding schemes; 'Too much reliance on Government funding by very experienced companies means it is too hard for people making their first or second production.' Another provided commentary on how the aging of the sector underlined a sense of precariousness: 'Age is an issue. As you get older, people are more inclined to go with younger people who are less expensive to employ.' The poor performance of the national television slate may also explain other distinctions between the two survey results. For example, one significant difference between the two ASPSs came in response to the question posed to all producers: 'In which sector have you previously produced?' In 2008, 68 per cent of all producers had previously worked in television. In 2011, this figure had dropped to 60 per cent.

In terms of their working arrangements, the most significant change among television producers between the two surveys was the proportion of those employed on a permanent, full-time basis: 29 per cent in 2008, falling to 17 per cent in 2011. The reason for this may perhaps be, at least in part, the increasing tendency for the major networks to outsource production to independent companies, although this is contradicted somewhat by the proportion of television producers working directly for the largest media companies (i.e. those with over 200 employees, likely to be the major networks), which increased from 29 per cent in 2008 to 46 per cent in 2011. Taken at face value, and given that television producers constitute the largest grouping in both ASPSs, these statistics might appear to tell us something about the precariousness of employment conditions among screen producers in general. As we will discuss later, however, the shift away from permanent full-time employment is not exactly mirrored in the other sectors. In 2011, television producers were least likely to have another job either within or outside the industry, with only 27 per cent reporting additional employment, compared with 55 per cent of film producers, 48 per cent of digital media producers and 42 per cent of commercial producers.

The second survey found TV producers to be the most negative about their own future role, with the highest percentage of all sectors nominating to retire (14 per cent) and the lowest number believing they will be in the same industry doing better (only 54 per cent) over the next three years. An overall sentiment index calculated across several survey questions revealed TV producers to be the least optimistic sector surveyed (see Figure 7.2). If they have any optimism, it is reserved for the belief that others will achieve success before they do (a negative sentiment that is revealed across the survey as more likely to rise with age).

Producer sectors	Calculated score (overall sentiment out of 100)
TV	36
Commercials	37
Film	46
Digital media	54
TOTAL	41

Figure 7.2 Producer sentiment index by sector

Film producers

Film producers were remarkably constant as a distinct industry cohort across the two surveys. Producers whose main source of income was from work in film made up a quarter of respondents in both ASPs (24 per cent in 2008, 27 per cent in 2011) (Figure 7.1). Almost half in both 2008 and 2011 were aged over 50 (43 per cent in 2008, 46 per cent in 2011), with an average age of 47. The gender balance was consistent, with 53 per cent male in 2008 and 54 per cent in 2011. Most film producers worked in multiple genres, although drama was decisively the principal genre in both surveys (78 per cent in 2008, 81 per cent in 2011). Among all respondents, film producers were more likely to run their own company either as an employer or sole trader (75 per cent in 2008, 65 per cent in 2011), with the main difference in employment status being the rise in freelance employment (9 per cent in 2008 to 17 per cent in 2011). Film producers (consistently across both surveys) were more highly educated but reported the least security of employment and steady income. Despite this strong sense of precariousness, they were also (again consistently across surveys) the most positive about their future prospects, with three-quarters believing they would be working in the same industry in 10 years' time and doing better (perhaps because they couldn't do worse?). Reinforcing this positive outlook, the sentiment index recorded film producers as the most optimistic in terms of their personal prospects over the next 3–10 years (although not in the shorter term of 12–24 months).

In part this optimism can be explained by the low value placed by film producers on financial success. Neither was being well known to the public a motivator for film producers. Instead, their prime incentive is satisfying creative vision. However, the area of motivation did produce one of the few distinctions between the first and second survey of film producers. Winning the respect of peers leapt from 4 per cent

in 2008 to 31 per cent in 2011 ('drives me a lot'). Of the four producer groups, film producers were most likely to own a share of their work (97 per cent owned at least 1 per cent of the rights, compared with 86 per cent of digital, 69 per cent of television and 47 per cent of commercial producers). Film producers were also most likely to own at least a 50 per cent share in their work (67 per cent, compared with 52 per cent digital, 47 per cent television and 26 per cent commercial producers). And yet film producers also indicated their frustrations with financial settings and their impact on business sustainability: 'The regulatory and tax incentive environment for private investment in films has become so prohibitive and difficult that it is almost impossible to attract reasonable amounts of private investment to sustain it.' They also commented: 'The biggest problem is business sustainability. Working on low budget films with low fees and overheads and how time-consuming it is to apply for development funds when trying to keep the momentum going on the projects.'

Commercial/corporate producers

The proportion of commercial/corporate producers (hereafter 'commercial') also remained steady across the two ASPs: 21 per cent in 2008, 22 per cent in 2011. Commercial producers were on average slightly younger than their counterparts in television and film, with a substantial proportion aged under 40 (44 per cent in 2008, 40 per cent in 2011). Among all respondents, commercial producers were most likely to have worked in multiple genres, with advertising (85 per cent in 2008, 74 per cent in 2011) and corporate communications (64 per cent in 2008, 70 per cent in 2011) being the main genres of production. Commercial producers were more likely to be freelancers than their counterparts (21 per cent in 2008, 25 per cent in 2011), although in both ASPs most ran their own company either as an employer or sole trader (64 per cent in 2008, 56 per cent in 2011).

A very considerable difference between the 2008 and 2011 cohorts of commercial producers is that while the gender balance of commercial producers in the 2008 ASPs was consistent with the overall average (53 per cent male, 47 per cent female), there was a significant disparity in 2011, in which 64 per cent of respondents were male and 36 per cent female (see Figure 7.3). The sharp decline of women's participation in this sector warrants further investigation.

Significantly, in the 2008 ASPs, commercial producers were already more engaged with new media production than their counterparts in film and television. In 2008, more producers reported either having previously produced new media content (40 per cent, compared with 23 per cent of television and 25 per cent of film producers) or to be currently producing new media content at the time of the ASPs (40 per cent, compared with 15 per cent of television and 11 per cent of film producers). In this regard commercial producers were an industry bellwether. Taken together, the proportion of traditional media producers (commercial, film and TV) with digital production experience rose significantly between the two ASPs. In 2008, 28 per cent of traditional media producers stated that they had 'previously

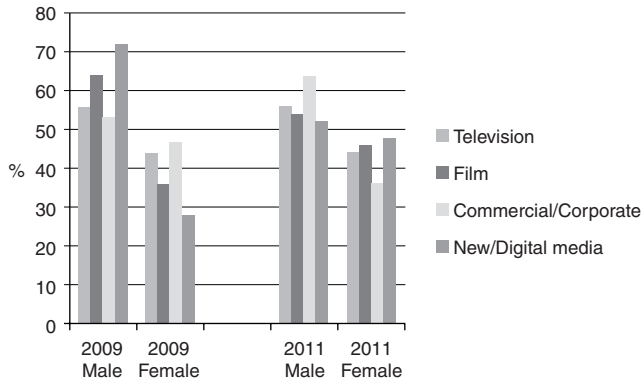


Figure 7.3 Graph comparing gender profiles of 2009 and 2011 ASPS cohorts

produced' digital content. In 2011, this figure rose to 39 per cent. In 2008, 20 per cent of traditional media producers were producing digital content at the time of the ASPS. By 2011, that figure rose to 32 per cent.

Other indicators point to the growing importance of digital media production. Growth was also registered in the time spent by all producers in digital production (up from 9 per cent to 16 per cent) and in the proportion who rated digital production 'most important to me' (up from 9 per cent to 13 per cent). These figures are broadly in line with the overall rise in the proportion of producers earning their principal source of income from digital (up from 8 per cent to 14 per cent). Most interestingly, however, the proportion of traditional producers *intending* to produce digital content in the future rose only marginally over the two surveys, from 43 per cent in 2008 to 45 per cent in 2011. Coupled with the clear persistence of production cultures in the 'traditional' media sectors across the two surveys, this could indicate that traditional producers are outsourcing some digital work to a cohort of specialized digital media producers, rather than taking on this work themselves and transforming their practice as a result.

New media/digital producers

The proportion of new media (8 per cent in 2008) or digital producers (14 per cent in 2011) increased substantially across the surveys, which may have been due to the increased digital media sample size in 2011. Regardless of the reasons, this cohort clearly formed a distinctive professional culture compared to other producer types. The highest proportion of women were working as digital producers in 2011 (48 per cent) (see Figure 7.3). What especially distinguishes this cohort of producers is its youth and relative inexperience. Fifty-one per cent were aged under 40 in 2008, and 46 per cent in 2011. The equivalent figures for traditional media producers were 26 per cent in 2008 and 28 per cent in 2011. Digital producers claimed an average of only ten years' experience in the industry (compared to 17 years for the other cohorts),

although given the relatively recent emergence of digital media production, it was no surprise that these producers were less experienced than their counterparts.

Among the four producer groups, digital producers were more likely to be freelancing. While the proportion of freelancers increased across the board from 2008 to 2011, the largest jump was in digital media, where the figure rose from 6 per cent to 18 per cent. A considerably higher proportion of digital producers felt that it was easy to enter the industry than their traditional media counterparts – 40 per cent compared with 23 per cent of film, and 28 per cent of traditional media producers overall – although digital producers were also most likely to work in another industry in 2011 (36 per cent, compared with just 18 per cent of television, and 26 per cent of traditional media producers overall).

In terms of education and professional training, digital producers again differed from the other producer groups. While creative arts was by some distance the principal field in which all producers across both surveys reported having completed a course of study, in 2011 digital producers were much more likely than traditional producers to have completed degrees in information technology, education, management/commerce and natural and physical sciences. Digital producers were also more likely to have postgraduate qualifications. IT was considered by those with qualifications in that field to be most important in gaining their current position. The importance placed on IT suggests that these producers already know what a recent study of creative intensity across the British workforce concluded: ‘creative talent has its greatest economic impact when working in tandem with ICT’, while the combination of IT and creative labour is now clearly a ‘distinctive feature’ of the creative industries.²¹ In both ASPSSs, the majority of new media/digital producers were creating content for personal computers (72 per cent in 2008, 82 per cent in 2011), with a substantial proportion also producing for mobile devices (44 per cent in 2008, 57 per cent in 2011).

Further differences between digital and traditional producers were evident in the sources of project funding, ownership of intellectual property and levels of debt carried. Digital producers recorded the highest proportion of self-funding (28 per cent) of projects in 2011, and tended to own more projects outright – 38 per cent of digital producers reported owning 100 per cent of IP in their work, compared with just 22 per cent of traditional producers. Fully three-quarters of digital producers carried less than \$50,000 in debt, and only 2 per cent carried more than \$250,000. The equivalent figures for traditional producers were 65 per cent with less than \$50,000 debt, and 5 per cent with over \$250,000.

In terms of sentiment and outlook, digital producers were considerably more optimistic than their peers. 81 per cent were confident about the potential for growth in their industry, compared with 55 per cent of film, 45 per cent of television and just 42 per cent of commercial producers. In fact, more digital producers expressed a positive outlook than their counterparts on every measure. On their own short- (12–24 months) and long-term prospects (3–10 years), 80 per cent and 84 per cent of digital producers expressed positive sentiments, compared with 68 per cent and 70 per cent of traditional producers. 64 per cent of digital producers expressed confidence

in the positive short-term performance of their industry, compared with 53 per cent of traditional producers. While levels of confidence in the positive effects of state and federal governments' policies were low among all cohorts, digital producers were more optimistic than their peers. Similarly, when asked about their prospects of achieving their professional goals, digital producers were considerably more positive than their counterparts (38 per cent to 22 per cent). Digital producers also expressed greater confidence in the strength of industry leadership (32 per cent to 15 per cent).

Differences and consistency

The two surveys register strong continuity, but there were notable differences between 2008 and 2011:

- Average industry experience for all producers increased by five years.
- Participation in TV production fell from 68 per cent to 60 per cent.
- Strong growth in digital media projects in development and production.
- Reported revenue earned from digital media almost doubled in 2011.
- Responses suggest that this is a trend which is likely to continue.
- Fewer traditional producers (all sectors other than digital media) were permanent full-time employees.
- Traditional producers relied less on their industry financially and more on other incomes.
- Perception of earning a high income declined dramatically.
- Producers with a creative arts degree increased.
- Producers with a management background increased.

Most notable is the rise in digital production amongst producers in all segments. The percentage of film, TV and commercial/corporate producers who are currently producing, or have previously produced digital content increased exponentially from 48 per cent to 73 per cent. The proportion of producers who spent most time in digital rose from 9 per cent to 16 per cent. 'Most time spent in TV' fell from 43 per cent to 34 per cent. The proportion saying digital was 'most important to me' rose from 9 per cent to 13 per cent, although film also rose from 43 per cent to 47 per cent. TV was down from 40 per cent to 32 per cent.

Despite these evident differences, the 2011 results confirm the key original finding of distinct production cultures. While digitization has made an evident impact (more identify as digital producers and more nominate digital production as an area of future interest and employment), the 2011 findings remain consistent with the 2008 findings. There are also several common issues across cohorts. All producers identified the development of quality creative ideas as a primary concern; finding people to share critical knowledge; and a lack of confidence in their own essential producing skills such as dealing with the marketing and legal aspects of production. And yet one of the striking observations when comparing the surveys is the lack of convergence between producing cultures. While there are many

commonalities, especially among television, film and commercial producers, there are also clear differences between the four producer groups.

Emerging themes

Precariousness, flexibility, the ‘Portfolio Career’

The ASPs provide insights into some of the principal concerns of the academic literature on media labour, particularly precariousness, the ‘portfolio career’ and flexible working conditions. The ASPs demonstrate that conditions of precariousness are endemic to the sector, but producers are also in quite different positions than their below-the-line colleagues. Producers often play significant roles in the initiation, creative control and/or management of media projects. As project initiators, they create or facilitate work for other media professionals. Through the creative control they can exert over projects via, for example, the negotiation and control of rights, and contracting the project team and services, their decisions determine the conditions of other media workers.

In both surveys, a significant proportion of producers ran their own companies. Sixty-six per cent in 2008 and 48 per cent in 2011 were small businesses or microenterprises – firms with fewer than five employees. This is common in media industries around the world,²² although critical studies of the management of media firms tend to focus on the largest firms rather than those that are typical²³ – which is also a reason why there is a strong focus on below-the-line employees. The ASPs show that microenterprises were (by some margin) most common in film, with 78 per cent of film producers in 2008 and 85 per cent in 2011 working either as a sole trader or as a microenterprise employing between two and four people.

Other findings lend some support to arguments advanced in the media labour literature about precariousness and flexible employment conditions. While the numbers of producers identifying as freelancers were relatively low – 12 per cent in 2008 and 16 per cent in 2011 – so too were the numbers employed on a permanent full-time basis (16 per cent / 11 per cent). In addition, 11 per cent of producers in 2008 and 9 per cent in 2011 were employed on either fixed-term, open-ended or project contracts. Overall, in 2008 only 3 per cent of respondents said that they had ‘never’ experienced flexible working arrangements, with 34 per cent saying that they did ‘always’ or ‘most of the time’.²⁴ In 2011, the corresponding figures were 4 per cent and 57 per cent. 40 per cent of all producers in 2008 said they were ‘very’ or ‘slightly’ driven by flexible working arrangements, while in 2011, 66 per cent of traditional producers stated that flexible working arrangements drive them ‘a lot’ or ‘a bit’.

During their careers, media workers are likely to have several employers, and to experience ‘periods of salaried employment interspersed with contract employment, self-employment, and unemployment’.²⁵ Mark Deuze argues that ‘people building their careers in the media ... are typical examples’ of the trend labelled by Charles Handy (1989) as the ‘portfolio worklife’.²⁶ To some extent this is not new; the project-based

character of much media production ensures that media workers are likely to be employed by or work with many different companies over their careers. While the concern of below-the-line media workers, particularly over the typicality in their industry of the 'portfolio' or 'boundaryless career', is well documented,²⁷ Deuze acknowledges that 'many in the higher skilled knowledge-based areas of the labor market seem to prefer such precarious working conditions, associating this with greater individual autonomy, the acquisition of a wide variety of skills and experiences, and a reduced dependency on a single employer.'²⁸ This latter attitude appears to be borne out in the ASPSS. In response to the question, 'Why did you choose to work as a freelancer or run your own company?', 51 per cent of all respondents in 2008 and 55 per cent in 2011 answered 'greater freedom', with 'better quality of work' and 'better earning power' also scoring highly. This correlates with other attitudinal postures discussed later.

The ASPSS' findings on respondents' work outside media production lend further weight to the argument that portfolio careers are common in this industry. In 2008, 65 per cent of respondents had previously worked in another industry, with 31 per cent reporting that they were doing so at the time of taking the ASPSS. In 2011, 27 per cent of all producers were working in another industry at the time of taking the survey, while a further 15 per cent had another job in the media in addition to their work as a producer. Interestingly, while in 2011 digital producers were more likely than their counterparts to be working in another industry, they were also the most optimistic about the prospects of their chosen field.

Outlook

Digital producers' optimism correlates to the perception of industry growth. More than 80 per cent of digital producers believed their industry would grow over the next three years. Digital and younger producers were most positive about their prospects of 'having a big hit' over the next three years. Given that digital producers tended to be younger and less experienced than their traditional media counterparts, and less indebted, their optimism could be the product of their relatively recent entry into the field. And yet this does not explain the fact that film producers – who on average were much older and more experienced – were most optimistic about their own long-term prospects, with 75 per cent seeing themselves working in the same industry in 2021 and doing better than they were in 2011, compared with 71 per cent of digital, 55 per cent of commercial and 54 per cent of television producers. Again, film producers had a high expectation of growth in their sector, with more than half predicting expansion over the next three years. Rapid generational leadership change in this sector may be harder to achieve due precisely to the extremely flexible nature of its firm structure and project-based production dynamics.

'Psychic income'

Another distinctive and related feature of the screen industry is the importance placed on non-monetary motivations and rewards. This 'psychic income' 'consists of the

myriad intangible benefits that together compensate for the loss of financial income.²⁹ In response to a series of questions on their principal motivations, 94 per cent in 2008 and 100 per cent in 2011 rated 'satisfying my creative vision' as their primary driver. Only 48 per cent in both ASPSPs were either 'very driven' or 'slightly driven' by the prospect of 'making a lot of money'. Slightly larger proportions – 72 per cent in 2008, 78 per cent in 2011 – were either 'very driven' or 'slightly driven' by 'steady income stream', but in both surveys this rated lower than 'contributing to the art form' (77 per cent /78 per cent) and 'achieving critical success' (77 per cent /87 per cent). These results are also borne out in a major survey of AFTRS alumni conducted in 2011.³⁰ Producers place a lower emphasis on financial sustainability than on their pursuit of creative expression. As Verhoeven and Cameron observe in their discussion of the first ASPSP, 'On the one hand "psychic income" might be holding the industry back. On the other, it might be the very element holding it together.' That is, it may be a drawback (because it may make financially unsustainable businesses more likely) or a benefit (because it facilitates the initiation and production of projects that might be rejected as unviable if assessed on commercial grounds alone).³¹

The propensity of producers to take on projects that either may produce no or little income or may appear to have little chance of financial success is another reason for the levels of work outside the screen industry. Over the two surveys, producing has provided 67 per cent of television producers' income (64 per cent for commercial, 55 per cent new media/digital, 41 per cent film). As well as having the lowest proportion of income from producing, film producers had the highest proportion of income from other occupations (32 per cent, compared with 22 per cent for new media/digital, 15 per cent commercial, 14 per cent television), and the highest level of reliance on family support (6 per cent, compared with 3 per cent for new media /digital, 2 per cent commercial, 2 per cent television) and on private income (9 per cent, compared with 5 per cent for commercial, 3 per cent television, 2 per cent new media/digital). Television showed a classic employee skew in 'total personal income from producing' in the 2008 ASPSP, composed of solid salary-wage earning. Film showed a classic arts skew, with a large proportion of unsustainably low-income earners (45 per cent earned less than \$25,000 from producing in 2008) and a very small number of high-income earners (7 per cent earned over \$150,000). This correlates with a strong sense of earnings foregone (opportunity cost), which is highest in film, and also with the finding on producers' motivation: the creative vision is more powerful than the money.

Geography

Not surprisingly, the majority of respondents in both surveys were based in the two most populous states, New South Wales (NSW) (46 per cent in 2008, 49 per cent in 2011) and Victoria (29 per cent in 2008, 26 per cent in 2011). The vast majority of these producers were based in either Sydney or Melbourne. In the 2011 ASPSP, 60 per cent of television producers were based in NSW, reflecting the fact that all five free-to-air television networks, the largest pay-television provider and most pay-television channels are headquartered in Sydney. That said, it is worth noting that the figure of

60 per cent of television producers based in NSW is considerably higher than the last recorded total of commercial free-to-air television employees based there (42.6 per cent in 2006).³² While there will undoubtedly have been change in the sector since 2006, this discrepancy is likely to remain, with higher ratios of technical and on-screen employees to producers in other locations due to the concentration of creative decision-making in Sydney (and, to a lesser extent, Melbourne). This is an intrinsic part of the screen ecology; geography underscores differences between above and below the line labour.

The landscape is somewhat different in new/digital media. In 2008, 39 per cent of new media producers were based in Melbourne, and only 33 per cent in Sydney. Although the figures shifted in 2011 to 34 per cent for each city, the prominence of Melbourne (and to a lesser extent Brisbane) in new/digital media is noteworthy. Melbourne has been the centre of computer game development in Australia since the early 1980s. In 2008, the Australian Bureau of Statistics produced a report on *Digital Game Development Services* which found that three-quarters of games development businesses then operating in Australia were in NSW, Victoria or Queensland.³³ Although most were based in Victoria (16), Queensland's firms were larger; 48.6 per cent of the total games development workforce was located in Queensland. In 2009, another report identified 62 game development and related companies, with 22 in Victoria, and 18 in Queensland.³⁴ Despite the closure of several major studios, most foreign-owned, between 2008 and 2011, several major developers remain based in Melbourne, including EA Games' Firemonkeys, whose game *Real Racing 3* was showcased at the iPhone 5 and iPad Mini global launch in 2012. The resilience of game production in Melbourne is due in part to the policies of successive state governments – at least until recently – which have included subsidizing access to software development kits (SDKs), providing funding to establish the national headquarters of the Game Developers Association of Australia in Melbourne and to build a motion capture laboratory, as well as investing in game development and marketing.

Conclusion

The Australian Screen Producer Surveys paint a multi-hued picture of contemporary screen producers in a specific national market. The main findings of the two ASPSS tell two stories. First, digitization and media convergence continue to impact on production practices and outlooks, and digital production is increasingly important to all producers. The surveys demonstrate that cross-media mobility is not simply a characteristic of media consumption; it is also a fact of life in production. And yet, while digitization and the popularity of new distribution platforms have had a range of impacts on screen production, including facilitating the emergence of a distinct cohort of digital producers, change or transition has been unevenly felt and experienced across the various production sectors. For example, commercial producers showed considerably higher rates of involvement in digital production than their counterparts in film and television.

Second, we can clearly identify the persistence of different production cultures, particularly between traditional and digital producers, but also among the traditional production sectors of television, film and commercial. While there is evidence of increased engagement by traditional producers in digital projects, we are not (yet) seeing correlated changes between the previous and current practices of these culturally discrete cohorts. Despite the willingness of proven producers to engage in emerging online, transmedia and cross-media production, distinct production cultures persist.

The ASPs set out to explore the practices, attitudes and aspirations of producers as they adjust to working in an increasingly convergent digital media marketplace. The first survey confirmed some assumptions about production cultures and producers' attitudes, but also provided a range of new insights. The second survey enabled us to compare the impact of digitization and media convergence change over time, and to appreciate the continuities of producer practice in a period of unsettling technological change.

Notes

- 1 Allan Cameron, Deb Verhoeven and David Court, 'Above the Bottom Line: Understanding Australian Screen Content Producers', *Media International Australia*, 136 (2010): 93.
- 2 A detailed report can be found at <http://www.cci.edu.au/producersurvey2012>.
- 3 Mark Deuze, *Media Work* (Cambridge: Polity Press, 2007), 57.
- 4 Cameron, Verhoeven and Court, 'Above the Bottom Line', 94.
- 5 Enda Brophy and Greig de Peuter, 'Immaterial Labor, Precarity, and Recomposition', in *Knowledge Workers in the Information Society*, ed. Catherine McKercher and Vincent Mosco (Lanham, MD: Lexington Books, 2007), 180.
- 6 Mark Banks and David Hesmondhalgh, 'Looking for Work in Creative Industries Policy', *International Journal of Cultural Policy*, 15:4 (2009): 420.
- 7 For example: Susan Christopherson, 'Beyond the Self-Expressive Creative Worker: An Industry Perspective on Entertainment Media', *Theory, Culture and Society*, 25:7–8 (2008): 73–95; Rosalind Gill, "'Life is a Pitch": Managing the Self in New Media Work', in *Managing Media Work*, ed. Mark Deuze (Thousand Oaks, CA: Sage, 2011), 249–62; David Hesmondhalgh and Sarah Baker, *Creative Labour: Media Work in Three Cultural Industries* (London: Routledge, 2011); Vincent Mosco and Catherine McKercher, *The Laboring of Communication: Will Knowledge Workers of the World Unite?* (Lanham, MD: Lexington Books, 2008).
- 8 David Lee, 'The Ethics of Insecurity: Risk, Individualization and Value in British Independent Television Production', *Television and New Media*, 13:6 (2012): 481.
- 9 See Banks and Hesmondhalgh, 'Looking for Work in Creative Industries Policy', 415–30; Mark Banks, 'Autonomy Guarantee? Cultural Work in the "Art-Commerce Relation"', *Journal for Cultural Research*, 14:3 (2010): 251–69; David Hesmondhalgh and Sarah Baker, "'A Very Complicated Version of Freedom": Conditions and Experiences of Creative Labour in Three Cultural Industries', *Poetics*, 38:1 (2010): 4–20; Adam Arvidsson, Giannino Malossi and Serpica Naro, 'Passionate Work? Labour Conditions in the Milan Fashion Industry', *Journal for Cultural Research*, 14:3 (2010): 295–309.

- 10 John Thornton Caldwell, *Production Culture: Industrial Reflexivity and Critical Practice in Film and Television* (Durham: Duke University Press, 2008), 1.
- 11 Vicki Mayer, *Below the Line: Producers and Production Studies in the New Television Economy* (Durham: Duke University Press, 2011).
- 12 Mayer, *Below the Line*, 179.
- 13 Australian Screen Producer Survey Questionnaire, 2011.
- 14 Jason Potts and Stuart Cunningham, 'Four Models of the Creative Industries', *International Journal of Cultural Policy*, 14:3 (2008): 233–247.
- 15 John Banks, 'The iPhone as Innovation Platform: Reimagining the Videogames Developer', in *Studying Mobile Media: Cultural Technologies, Mobile Communication, and the iPhone*, ed. Larissa Hjorth, Jean Burgess and Ingrid Richardson (London: Routledge, 2012), 155–172; John Banks and Stuart Cunningham, 'Games/entertainment Software', in *Handbook of the Digital Creative Economy*, ed. Ruth Towse and Christian Handke (London: Edward Elgar, forthcoming).
- 16 Sandra Haukka, *Working in Australia's Digital Games Industry: Consolidation Report*, ARC Centre of Excellence for Creative Industries and Innovation and Queensland University of Technology in partnership with the Games Developers' Association of Australia, (May 2011).
- 17 Stuart Cunningham and Peter Higgs, 'Creative Industries Mapping: Where Have We Come From, and Where Are We Going?' *Creative Industries Journal*, 1:1 (2008): 7–30; Stuart Cunningham and Peter Higgs, 'Measuring Creative Employment: Implications for Innovation Policy', *Innovation: Management, Policy and Practice*, 11:2 (2009): 190–200; Stuart Cunningham, 'Developments in Measuring the "Creative" Workforce', *Cultural Trends*, 20:1 (2011): 25–40.
- 18 Stuart Cunningham, 'The Creative Cities Discourse: Production and/or Consumption?' in *Cities, Cultural Policy and Governance, The Cultures and Globalization Series, Volume 5*, ed. Helmut K. Anheier and Yudhishtir Raj Isar (Thousand Oaks CA: Sage, 2012), 111–12.
- 19 Cameron, Verhoeven and Court, 'Above the Bottom Line', 100.
- 20 The ten producer roles in the questionnaire were: Associate Producer; Co-Producer; Executive Producer; Producer; Senior/Supervising Producer; Series Producer; Line Producer; Digital Producer; Recent Graduate; Other.
- 21 Hasan Bakhshi, Alan Freeman and Peter Higgs, *A Dynamic Mapping of the UK's Creative Industries* NESTA (December 2012).
- 22 Charles H. Davis reports that in the 'creative content and technical craft segments' of the screen industry in Canada (which comprise more than just production companies), 'more than 85 per cent' of the firms are microenterprises (Charles H. Davis, 'New Firms in the Screen-Based Media Industry: Startups, Self-Employment and Standing Reserve', in *Managing Media Work*, ed. Mark Deuze (Thousand Oaks, CA: Sage, 2011), 170). Mark Deuze notes that 'according to the Bureau of Labor Statistics of the US Department of Labor, in 2004 over four-fifths of the jobs in film and television were in establishments with twenty or more workers, even though most companies in the industry have fewer than five employees', Mark Deuze, *Media Work* (Cambridge: Polity Press, 2007), 176.
- 23 Davis, 'New Firms in the Screen-Based Media Industry', 168.
- 24 Only 53 per cent of all respondents answered this question.
- 25 Davis, 'New Firms in the Screen-Based Media Industry', 171.
- 26 Deuze, *Media Work*, 11.

- 27 See for example Caldwell, *Production Culture*, and Christopherson, 'Beyond the Self-Expressive Creative Worker', 73–95.
- 28 Deuze, *Media Work*, 23.
- 29 Deb Verhoeven and Allan Cameron, 'Above the Bottom Line: Analysing the Culture of Australian Screen Content Producers', *Lumina*, 6 (2011): 56–7.
- 30 See David Court and Simon Molloy, 'For Love and Money: Estimating the Value of Psychic Income in Australian Screen Production', *Lumina*, 10 (2012): 25–35.
- 31 Verhoeven and Cameron, 'Above the Bottom Line', 57.
- 32 Australian Bureau of Statistics, 8679.0 – *Television, Film and Video Production and Post-Production Services, Australia, 2006–07* (Canberra: ABS, 2008).
- 33 Australian Bureau of Statistics, 8515.0 – *Digital Game Development Services, Australia, 2006–07* (Canberra: ABS, 2008).
- 34 Innovation and Business Skills Australia (IBSA), *Review of the Digital Games Development: Game Art, Animation and Programming* (December, 2009), 9. See also Haukka, *Working in Australia's Digital Games Industry*, 16.