Report #1

Fair Pay/Play in the UK Voice-Over Industries:

An Online Survey of 200+ voice-overs

Researchers

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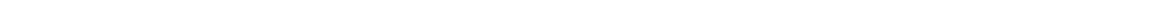
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Inside Cover

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A pilot study funded by the UK Economic and Social Research Council, delivered by a team of independent researchers of the Centre for Science, Culture and the Law at Exeter (University of Exeter)

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The Centre for Science, Culture and the Law at Exeter, SCULE.

Executive summary of the Report

The emergence of online peer-to-peer recruitment platforms, which have introduced Uber-like business models for the commissioning of creative content, brings both threats and opportunities to the UK creative economy. This research investigates the impact of these platforms from the perspective of a specific market: the UK voice-over industries. This is done by analysing levels of remuneration, recruitment and contractual practices as well as the role played by intellectual property rights in monetizing the work of voice-over performers.

This pilot study follows two recent reforms of EU regulations: the first regards fairness in relation to authors' and performers' remuneration (via intellectual property rights); the second focuses on fairness and transparency in the contractual terms practiced by online intermediation services (such as online peer-to-peer recruitment platforms).[1] This research is also preceded by a report on the remuneration of creative labour in the digital environment published by the World Intellectual Property Organization[2] and important seminal academic work on this question.[3]

In a two-part analysis, this study demonstrates that online peer-to-peer recruitment platforms defeat the framework of intellectual property (copyright and performers' rights) on a global scale. The research findings are outlined in two reports. The first report (this document) analyses the findings of the online survey carried by the research team to capture the experience of voice-over performers on remuneration, recruitment, contract and intellectual property. The second report contrasts these results with a review of online peer-to-peer recruitment platforms' terms and conditions, scheduled to be released by January 2020.

The results of the survey show that: online peer-to-peer recruitment platforms are perceived very negatively by voice-over performers; the use of written contracts, summarizing the key aspects of a transaction is extremely rare; and, there is a critical lack of awareness of intellectual property rights within voice-over performers paired with a perceived lack of representation by unions or organizations to defend and advance their rights. At the same time, the survey also evidences that the UK voice-over market is extremely versatile, and contributes to an impressive range of cultural, communication and entertainment sectors. The survey thus evidences that the UK voice-over industries are a key contributor to the country's creative economy. As such, national policy-makers must take measures to safeguard the market's resilience in the global digital environment, which in this case, includes addressing the role and impact of online peer-to-peer recruitment platforms.

The research concludes that the contractual terms currently practiced by online peer-to-peer recruitment platforms pose a threat to the UK intellectual property framework. However, preliminary investigation also suggests that these platforms could become an opportunity to introduce principles of contractual best practice on a global scale, should their terms and conditions be appropriately revised.

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[1] Directive (EU) 2019/790 of the European Parliament and of the Council of 17 April 2019 on copyright and related rights in the Digital Single Market and amending Directives 96/9/EC and 2001/29/EC (Text with EEA relevance.). PE/51/2019/REV/1. OJ L 130, 17.5.2019, p. 92–125; Regulation (EU) 2019/1150 of the European Parliament and of the Council of 20 June 2019 on promoting fairness and transparency for business users of online intermediation services (Text with EEA relevance) PE/56/2019/REV/1 OJ L 186, 11.7.2019, p. 57–79.

[2] Alexander Cuntz, Creators' Income Situation in the Digital Age, Economic Research Working Paper No 49 (WIPO, 2018).

[3] Focusing on the UK and EU studies, Martin Kretschmer and others, UK Authors' Earnings and Contracts 2018: A Survey of 50,000 Writers, CREATe, 2019); Lucie Guibault and others, Remuneration of authors and performers for the use of their works and the fixations of their performances (Study for European Commission DG Communications Networks, Content & Technology, 2015); Lucie Guibault and Olivia Salamanca (Europe Economics), Remuneration of authors of books and scientific journals, translators, journalists and visual artists for the use of their works (Study for European Commission DG Communications Networks, Content & Technology, 2016). On creators use of intellectual property: Townley and others, Creating Economy: Enterprise, Intellectual Property and the Valuation of Goods (OUP, 2018).

Content

1   Introduction

'Fair Pay/Play in the UK Voice-Over Industries' is an independent research project financed by the UK Economic and Social Science Research Council (ESRC, ESRC-IAA Business Boost Award, £3,000). The project is led by researchers from the Centre for Science, Culture and Law at Exeter, Dr Mathilde Pavis and Dr Huda Tulti with the collaboration of Dr Joanne Pye (University of Exeter).

As part of this pilot study, the research team conducted an online survey to gather evidence on voice-over performers' experiences of pay, recruitment, contracts and intellectual property rights. This is the first step towards investigating the impact of online peer-to-peer recruitment platforms on the UK creative industries.

This document is the first of two reports summarizing the findings of this pilot study. This report outlines the context, objective and structure of the pilot study, and details the findings of the online survey.

1.1 Context of the Study

The issue of fair remuneration for authors and performers was subject to a recent reform under the legislation of the European Union. The Digital Single Market Directive introduced additional legal measures to safeguard fair remuneration for artists.[4] Whilst these measures were passed to adapt the framework of intellectual property to the digital environment and new ways of producing and consuming content, the reform did not set to tackle one of the most recent challenges faced by creative workers in the UK and European creative economy: online peer-to-peer recruitment platforms;[5] platforms which have introduced Uber-like business models to the creative industries.

A subsequent Regulation did acknowledge the critical part played by online intermediation services such as online peer-to-peer recruitment platforms, in the commercial success of their business users. The Regulation references the importance of platforms' contracts in relation to their users' intellectual property rights but only requires that the relevant terms be transparent, without introducing any further or meaningful measure to safeguard the bargaining position of platform users.[6]

In the face of this silence or gap in policy-making, this study addresses the role and impact of online peer-to-peer recruitment platforms on artists' ability to leverage remuneration from their intellectual property rights. The research identifies the threats and opportunities this type of platforms brings to the creative economy.

Online peer-to-peer recruitment platforms in the creative industries

Until recently, the creative industries remained relatively unaffected by the phenomenon of 'uberization'[7] that hit many other markets. This statement held true until internet service providers such as Fiverr, PeoplePerHour, Quidjob or Upwork introduced online

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[4] Directive (EU) 2019/790 of the European Parliament and of the Council of 17 April 2019 on copyright and related rights in the Digital Single Market and amending Directives 96/9/EC and 2001/29/EC (Text with EEA relevance.). PE/51/2019/REV/1. OJ L 130, 17.5.2019, p. 92–125. The Directive is to be transposed by 7 June 2021 by member states, this includes the UK pending withdrawal from the EU.

[5] Regulation (EU) 2019/1150 of the European Parliament and of the Council of 20 June 2019 on promoting fairness and transparency for business users of online intermediation services (Text with EEA relevance) PE/56/2019/REV/1 OJ L 186, 11.7.2019, p. 57–79 (Regulation 2019/1150).

[6] Regulation 2019/1150, Article 3(e).

[7] Uberizing (derived noun 'uberization') stands for 'to subject (an industry) to a business model in which services are offered on demand through direct contact between a customer and a supplier, usually via mobile technology' (Collins Dictionary

platforms to broker the commissioning of bespoke creative content.

Clients (companies, organisations or individuals) can now use these online platforms to hire creative services such as logo design, video-making or voice-over acting from artists located anywhere in the world. These online marketplaces act as peer-to-peer recruitment platforms, bringing the business model of Uber to the creative sector: i.e. use the internet to enlist and match offer and demand. These platform providers remunerate their services by charging a fee for each successful transaction.

Like Uber, peer-to-peer recruitment platforms remove barriers to entry into the market for artists. This allows amateurs and professionals alike to become suppliers. With an increase in offer unparalleled by an equivalent rise in demand, the market becomes more competitive and more favourable to clients who wish to commission creative content for less. Peer-to-peer recruitment platforms thus harness the advantages of an unregulated global market (the creative industries) and workforce (authors and performers).

Peer-to-peer recruitment platforms differentiate themselves from traditional recruitment channels by their ability, and promise, to broker cheaper creative work. Their business model and unique selling point relies in large part on this characteristic.[8] This aspect of their business model is not the focus of this study, but forms part of the context in which it sits.

Another important feature of these platforms is their terms and conditions. Whilst, peer-to-peer platforms describe their involvement in the transactions they facilitate as 'neutral', providing a mere online notice board service for their users, their terms of use tell a different story. These platforms impose standard form contracts whose terms govern, and actively shape, the transaction negotiated between the platform users, i.e. artists and clients. The platform thus controls certain aspects of the contract made between artists and clients by imposing certain terms or proposing terms applicable by default. These terms may relate to the price paid in exchange for services, the quality of these services, or penalties in the event of non or late delivery.

These terms and conditions are key in maintaining the delivery of a consistent and efficient service. In this regard, the methods employed by these peer-to-peer recruitment platforms are no different to the models put in place by predecessors such as Uber for taxi services, and AirBnB for holiday rentals, who also control service standards and pricing. However, from a legal standpoint, commissioning creative content is a more complex transaction than ordering taxi services or agreeing to a holiday let, because it inevitably involves the transfer of intellectual property rights.

In producing bespoke creative content, artists may use material protected by existing intellectual property rights. Artists will also generate new material protected by a '*new*' layer of intellectual property rights. These 'new' intellectual property rights aim at enabling artists to yield remuneration from their work, in proportion to its use by the client.

Intellectual property rights are rights enforced by states at the national level which are nevertheless internationally recognised. This means that similar levels of protection exist and will be enforced in many countries, as the main intellectual property treaties have been widely ratified.[9] This detail is important in practice as peer-to-peer recruitment platforms operate on a global scale and broker cross-border transactions between artists and clients.

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[8] For example, this is the case of the platform QuidJob who advertise on their website's home page that *"[e]very service on [their] platform is under £200. You can be sure that you will get good value for your money"*.

[9] Berne Convention 1886, Rome Convention 1961, Agreement on Trade-Related Aspects of Intellectual Property Rights 1994, WIPO Performances and Phonograms Treaty 1996.

Intellectual property rights relevant to the present study include copyright and neighbouring rights (in particular, performers' rights), trade mark and design rights. The study focuses on copyright and performers' rights for these are more directly relevant to the work of voice-overs. Both of these intellectual property rights include economic rights, moral rights and equitable remuneration rights. In the UK, they are governed by the Copyright, Designs and Patents Act 1988 (as amended), which must be interpreted in light of ratified international conventions and European Union (EU) regulation, until the withdrawal of the UK. The UK may remain bound to certain EU regulations, included those relevant to intellectual property rights, if the country leaves with a deal depending on the terms of such agreement.

Peer-to-peer online recruitment platforms: threats to intellectual property rights

At present, it is common for online platforms to impose on artists using theirs services the outright assignment of all 'new' intellectual property rights to clients. This is achieved by including clauses to that effect in the standard form contracts binding all platform users.

In principle, agreeing to the full assignment of intellectual property rights is lawful and may be a suitable business decision for all involved. However, full assignments of intellectual property rights must be matched by remuneration that is proportionate to the level of rights assigned by the artist and the subsequent use of the work by the client – at least in principle. The substance and purpose of intellectual property rights rest on this premise. Rights of equitable remuneration have been introduced to buttress this purpose and artists' contractual position.

In 1992, EU countries, including the UK, introduced 'equitable remuneration rights' to reinforce artists' contractual position. These rights are also guaranteed under international conventions on copyright and performers' rights.[10] UK-style 'equitable remuneration rights' provide that the users of copyright content or performances captured in a sound recording (clients, producers or broadcasters) redistribute a portion of the revenues generated by the communication to the public (amongst other protected rights) or its commercial exploitation back to the relevant authors and performers.

Equitable remuneration rights apply across the EU and, as such, it is likely that a significant number of the transactions operated by Fiverr, Upwork, Quidjob or PeoplePerHour will fall within the scope of these rights. Equitable remuneration rights will apply to the work delivered by voice-overs.

A review of online recruitment platforms' contracts performed by the research team indicate that their terms and conditions do not reference, signal or raise the possible application of equitable remuneration rights.[11] This includes platforms operated by companies registered in the England & Wales, or whose standard form contract nominate the laws of England & Wales as applicable to their agreement.[12]

The contractual practice of peer-to-peer recruitment platforms also indicates that full assignment of intellectual property rights are introduced without clear and transparent notification to the parties, without providing a genuine opportunity of negotiation, and last but not least, without appropriate financial compensation. The fact that peer-to-peer

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[10] Berne Convention 1886, Article *11bis*(2), Article 13(1) ; Rome Convention 1961, Article 12 ; WIPO Performances and Phonograms Treaty 1996, Article 9, Article 13(2), Article 15(1).

[11] Terms and conditions reviewed by the research team to date include: Fiverr, Upwork, The Mandy Network, QuidJob, Backstage.com, Castingcall, CastingNetworks.com, Cloudpeeps, PeoplePerHour, Voices.com, Voices UK. The full list of platforms, and associated terms and conditions, will be published in the second report of the pilot study (Report #2).

[12] These include: The Mandy Network, Quidjob, PeoplePerHour and Voices UK amongst others. The full list of platforms, and associated terms and conditions, includes those operating under the laws of England & Wales will be published in the second report of the pilot study (Report #2).

recruitment platforms apply this practice to all transactions, and on a global scale, adds cause for concern. As such, the terms of use currently applied by peer-to-peer recruitment platforms hold the potential to defeat the purpose of the intellectual property framework, circumventing measures put in place to ensure equitable remuneration for protected artists. This study investigates this risk of harm to the intellectual property framework.

Peer-to-peer online recruitment platforms: opportunities for intellectual property rights

Whilst the terms of use of certain peer-to-peer recruitment platforms pose a threat to the intellectual property framework[13] for the reasons outlined above, they could also be an opportunity to achieve fair remuneration via intellectual property rights. These platforms are in the position to set new standards, educate their users on applicable rights and encourage appropriate levels of remuneration.

Peer-to-peer online recruitment platforms are in the position to raise awareness amongst their users, artists and clients alike, on the application of intellectual property rights in the transactions they broker. Platforms are also uniquely positioned to educate and encourage adequate quoting and pricing on account of intellectual property rights, aside from the remuneration of labour and costs of production, usually covered by "spot" or "studio" fees.

For example, this could be achieved by introducing 'creator-friendly' and transparent terms on intellectual property rights. Such terms would limit any transfer of rights to what is needed by the client for the purpose of the transaction (i.e. avoiding the blanket assignment of all rights for no purpose or without remuneration). Creator-friendly terms would also remind all parties of equitable remuneration rights where applicable.

A second phase of this research will be dedicated to exploring workable solutions to turn peer-to-peer recruitment platforms into an opportunity for remuneration on account of intellectual property rights, as opposed to a threat to the legal framework.

1.2 The Study

The pilot study *'Fair Pay/Play in the UK Voice-Over Industries'* is designed to document the practice and impact of peer-to-peer recruitment platforms on creative professional's ability to leverage remuneration from their intellectual property rights. The research focuses exclusively on voice-over performers working in the United Kingdom. Voice-over performers will be referred to as 'voice-overs' in the following sections.

In the absence of comparable studies on voice-overs, the research project was designed to generate the first data collection point to begin a conversation on these issues with key industry stakeholders. The research team identified these key stakeholders to be: voice-overs, unions and organisations representative of voice-overs or performers more generally, collecting societies, agents and agencies, online recruitment platforms, policy makers such as the UK Intellectual Property Office and the World Intellectual Property Organization, recording studios and buyers of voice-over content.

To this end, the study included two main components:

(a) an online survey designed to engage with voice-over performers working in the UK; and

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[13] See for example the control over pricing and level of intellectual property transfer prescribed by the terms and conditions of the platform Fiverr:
<https://www.fiverr.com/terms_of_service?source=footer#commercial-use-license> accessed 15 July 2019. A more comprehensive review of the terms and conditions practised by online peer-to-peer recruitment platforms will feature in the second report of the pilot study (Report #2).

(b) a review of peer to peer recruitment platforms' terms and conditions.

The preliminary findings of the research were discussed with industry stakeholders in a meeting held in London on 22 May 2019, and led by the research team. Members and representatives from the UK Intellectual Property Office (UKIPO), the World Intellectual Property Organization (WIPO), Equity Audio, Voquent, Another Tongue, Spotlight as well as professional voice-overs took part in the meeting. Invitations were issued to the representatives of several online peer-to-peer recruitment paltforms who have either declined to answer or attend.

Discussions during the meeting confirmed preliminary findings as reflective of the practice within the industry, and identified avenues of further research and outputs, which the industry will find helpful going forward.

The results of the online survey are described and discussed in detail in this report. The results of the review of online platform's terms and conditions will be shared in the second report, scheduled to be released by January 2020.

1.3 Why a Focus on Voice-Overs?

The study focuses on the position of voice-overs as a case study for three main reasons:

(a) First, voice-overs are performers, holders of performers' rights in their performance, not copyright.[14] In comparison to authors and copyright, performers and performers' rights have received less attention from scholars and policy-makers. The focus of this study thus contributes to bridging this gap, and highlights that holders of copyright and performers' rights face similar challenges in the digital environment.

(b) Second, unlike other performers, voice-overs can execute their work remotely for their performance does not necessarily require their presence on stage, in studio or in front of the camera. Voice-over work can therefore easily be commissioned remotely, making this category of performers target users of peer-to-peer recruitment platforms. This aspect of their work also increases their vulnerability to isolation and exploitation.

(c) Third, voice-over work is immensely versatile and diverse. Of all types of performing arts, voice-over performances are found in arguably the broadest range of creative, cultural and entertainment sectors. Voice-overs are present in film and television, advertising, toy animation, video games and audio-books to only name a few. Working closely with voice-over representatives, the research team identified 32 different areas of voice-over work, ranging from more traditional careers utilising broadcasting platforms to others based on new digital technologies. This versatility adds to the strategic and economic weight of the voice-over industries within the broader UK creativity economy.

1.4 Structure of the Report

The Report is divided into 5 sections. The present section (Section 1) introduced the pilot study and the context of the survey. Section 2 presents the survey methodology and survey instrument. Section 3 describes the key findings of the survey. This section is followed by a single question analysis of the survey responses (Section 4). Section 5 closes the Report with the results of cross-tabulation performed on selected questions.

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[14] However, in situations where voice-overs are also commissioned to write the script and produce the sound recording fixing their performance, it is possible that they also hold copyright protection in additional to performer's rights.

2　The Survey Methodology

2.1 Objectives of the Survey

The aim of the online survey is to document current recruitment, remuneration and contractual practices in the UK voice-over industries based on empirical evidence. A second, more specific aim of the survey is to capture the impact or influence of peer-to-peer recruitment platforms on remuneration, recruitment and contractual practices in the UK, as perceived by voice-overs.

2.2 The Survey Instrument

The survey instrument was administered and supported by Jisc (formerly Bristol Online Surveys).

The survey was designed to be easy and quick to complete, with completion lasting no more than 15 minutes. It contains 51 closed and seven multiple-choice questions on the way voice-overs secure work, form and negotiation contracts. Another eight questions invited open-ended responses where actors could enter further details, if their situation was not adequately represented by choices offered. In addition to questions confirming eligibility to participate and willingness for further contact by the research team, the survey includes questions on:

1. the voice-overs' location, work place and education and training;

2. their active work areas within the voice-over industry, entry dates and most recent job histories, full- or part-time hours and skill levels;

3. sources for work (direct: end clients, agents, production companies; indirect: online marketplaces), and their detailed views on sources and fairness of practice;

4. annual income and its stability, number of jobs per year, timeliness of payment;

5. negotiating skills, budgetary constraints and compromise;

6. use of contracts and other types of agreement, awareness of intellectual property rights and their transfer; and

7. awareness of representative organisations and other legal rights.

Survey development was iterative and subjected to testing rounds with two target populations prior to publication. The first stage was piloted with voice-overs themselves to consult on the clarity of vocabulary and terminology, including questions and answers and survey length. To further fine tune the survey and minimise confusion, the second round was circulated to a sample of researchers to test clarity of writing on a sample unfamiliar with trade-specific terms and issues, and test the navigation path of the survey from beginning to end.

The survey was open between 4 January 2019 and 1 April 2019 inclusive. The survey was accessible by clicking on a link made publicly available online. The platform was selected due to its wide availability, familiar format to general audiences and easy-to-follow layout.

The research team contacted unions, societies and associations representing voice-overs to advertise the survey on social media and circulate the survey to their members. The survey was actively advertised on Twitter by Equity Audio, Spotlight, Voquent, NetworkVO, VoicesUK, Aepoartis, and Gravy For The Brain Ltd. Voice-overs have re-posted the link to our survey on open and closed Facebook groups gathering voice-overs. The survey was also promoted by the University of Exeter and Exeter Law School via social media, newsletters and website statements. The survey was also covered by national press media in article published by *The Times* on 26 March 2019 ('*Voiceover artists face losing intellectual property rights',* here) and *The Stage* on 2 March 2019 (Giverny Masso, '*"Gig economy could be driving down wages in UK voice-over industry" experts warn'*, here).

2.3 The Survey Sample

The survey sample was produced by convenience sampling due to our distribution strategy. Respondents to the survey are self-selecting, and as such reflect those artists who are broadly in favour of surveys of this type, conversant with technology and prepared to engage with social media networks. As such, participants embody an open orientation and are keen to advocate for their niche in the industry: they are prepared to pool their views with other voice-overs, and supportive of the strategy to publicise the legal ramifications of their working environment. As such, the sample cannot be taken as strictly representative of voice-overs in the UK or worldwide.

Out of the total dataset of 249 responses 239 were included in the analysis which follows.

Three responses were excluded because they did not meet one of the eligibility criteria of the survey. Eligibility to participate in the survey required that the respondent be over the age of 18 years old, to work or have worked as a voice-over, and have a link to the UK by either residing in the UK, or having worked for a UK client. The focus of the study on UK law (contract and intellectual property laws) in the UK voice-over industries required that respondents have a link to the UK. UK law will or may apply for contracts formed in the UK and for work performed in the UK or by a UK resident/citizen.

When individual responses were subsequently scanned, it became clear that there were seven examples of duplication where respondents had entered the survey twice. These were harmonised into a single response based on the later of the duplicate entries. It should be noted, however, that – as duplicates were identified based on email addresses – there may be a few other instances of duplication where respondents opted not to enter contact details.

The survey was itself gender-blind. There were no specific questions included in the survey relating to gender breakdown as a much lower number of responses were anticipated, which would have yielded a sample too narrow to provide reliable gender-based analysis. With the higher response rate, consideration of the gender balance in the sample was subsequently reconstructed. Some indication of gender was achieved by individually analysing respondents' email addresses where available and offered for follow-up contact by the research team. Assumed gender was cross-checked against Web page profiles and, where it could be confirmed, inserted into a new variable. According to the email contact details provided, of known responses there was a nearly even split between male and female: 28% were male and 30.1% female, giving almost 60% of respondents with known gender. Of the others, the gender of just under a fifth (19.2%) of respondents could not be determined from their addresses, and a further 22.6% of email addresses were missing altogether.

The broad sample of respondents included voice-overs across all age groups and entry dates into the industry, from veterans of over fifty years' experience to very recent

recruits of only a few months. Participants therefore could address perceived trends and shifts over time and the impact of digital technologies, from the more traditional media platforms that once comprised the majority of voice-over jobs to the newest opportunities afforded by state-of-the-art video games and digital personal assistants. They also reflected a wealth of professional and training backgrounds, including academic degrees, drama school qualifications, technical courses, coaching and other training.

2.4 Survey Analysis

The survey analysis was performed by Dr Joanne Pye.

As confirmed by higher than anticipated participation levels, the survey itself was well received and accessible to its target audience. Ethical considerations included guarantees of anonymity of respondents, which may have contributed to generating the excellent response rate.

The translation of questions, originally placed into Jisc (Bristol Online Surveys) format, into SPSS format for analysis purposes requires recoding to improve data presentation and analysis. Recoding has been carried out with:

(a) multiple choice questions, which now appear as a single variable with multiple coded values, rather than be listed as separate options;

(b) scale questions where it was both appropriate and necessary for presentation;

(c) questions related to the year in which respondents first commenced voice-over work to have responses appear as years of experience and in decade ranges; and

(d) questions related to the background of respondents, which was set as a free text entry on the survey instrument.

3   The Survey: Summary of Findings

Voice-overs are key contributors to the UK creative economy

The study demonstrates that the voice-over market is extremely versatile, and contributes to an impressive range of cultural, communication and entertainment sectors. Working closely with voice-overs, the team details no less than 32 specialisms, ranging from more traditional careers utilising broadcasting platforms to others based on new digital technologies. The survey results revealed that the list was far from exhaustive. On average, a voice-over will intervene in 5 or more areas of voice-over work. Diversity in a voice-over's portfolio applies regardless of their profile (part-time, full-time), years of experience or annual income. This confirms the pivotal role of voice-overs within the creative economy.

Voice-overs' annual income for part-time and full-time work

Survey results on annual income from voice-over work span across £5,000 and £100,000 for part-time and full-time work, with a few exceptions earning more. Annual earnings for voice-overs working on a part-time basis average between £5,000 and £10,000, with very few responses declaring earning more than £20,000. The scale of annual income for voice-over working full time was widespread, with the largest group of respondents situated between £20,000-£50,000.

Survey results confirm a correlation between the number of 'jobs', 'contracts' or 'gigs' and revenue levels. Annual income increases proportionately to the number of 'jobs' secured by voice-overs up until a certain point (100 to 200 'jobs' or 'contracts' per year), after which remuneration levels decrease, indicating lower levels of pay for the work executed. *NB: Caution should be exercised in interpreting these numbers further as individual interpretation of what constitutes a 'job', 'contract' or 'gig' varies.*

Voice-overs' recruitment is mediated

Survey results evidence that voice-overs secure work via mediated sources more often than they do directly with clients. Mediated sources refer to agents, recording companies or work secured via peer-to-peer online recruitment platforms. Peer-to-peer recruitment platforms are making their presence felt as a recruitment method by clients or source of work for voice-overs. 64% of the respondents declare being registered with at least one of these platforms. One-half of respondents report that they secure up to 25% of their paid work via these platforms. Another 17% work via online marketplaces regularly (between 25% and 50% of their paid work), whilst a further 15% secure the majority of their work through them (over 50%).

Voice-overs rate online peer-to-peer recruitment platforms as exploitative

Survey results unequivocally evidence that peer-to-peer recruitment platforms are perceived very negatively by voice-overs who describe them as "poor value", "exploitative", "unfair" and "low quality". Whilst part-time voice-overs also described online platforms negatively, they noted that they could nevertheless be a "useful" source of work. This suggests that this type of recruitment method does fulfil a need on the voice-over market, catering notably for those engaged in the industry on a part-time basis. Negative attributes far outweighed positive ones.

In sharp contrast, voice-overs' rating of their working experience with agents, end clients or recording companies are significantly more positive stressing professionalism, fairness, respect and trust in the working relationship. Traditional agents are the most

highly rated (noted as particularly knowledgeable), followed by end clients and then recording companies in terms of quality of working relationships.

Voice-overs negotiate contracts over emails

Survey results reveal that the use of written contracts, summarizing the key aspects of a transaction, is extremely rare. Emails (a form of written agreement nonetheless) remain the preferred method of conducting business and forming agreement, followed by telephone conversations. Over 13% of the respondents report signposting clients to their own term and conditions, displayed on their professional website.

Voice-overs rarely negotiate intellectual property rights for lack of knowledge

Voice-overs report that they sometimes, though rarely, raise the question of intellectual property rights in the context of negotiations. This is consistent with low levels of unawareness or knowledge on intellectual property rights disclosed by respondents. Around half of the respondents declare being familiar with intellectual property rights (40.2%), including performers' rights (57.3%). A similar number of respondents (46%) report making use of them in negotiating their contracts, but less than a third of the participants (29.7%) declare knowing the difference between assignments and licences of intellectual property rights or being aware of equitable remuneration rights (26.8%). The overwhelming majority of voice-overs (82.8%) declare having no knowledge of the Copyright Tribunal.

Voice-overs are un-represented by union and representative organisations

The majority of voice-overs (82%) could point to a union or organisation, that they felt acted as a representative organisation. Three-quarters of them (73.2%) named Equity (followed by Screen Actors Guild American Federation of Television and Radio Artists (SAG-AFTRA) at 6.6%). However, only 13% of voice-overs find themselves well represented by this organisation (here, Equity).

4   The Survey: Single Question Analysis

This section summarises responses to the survey, question by question. The data analysis was performed by Dr Joanne Pye.

4.1 About You

Q1   Are you over the age of 18?

All respondents confirmed that they were over 18.

Q2   Have you done voice-over work in the UK or for a UK client?

This was a qualifying question in order to be eligible to participate in the survey, and after screening (as set out above) all respondents answered in the affirmative.

Q3   I confirm that I understand all the information provided in the Survey Information Sheet and I agree to take part in the survey.(NB: The information sheet is attached to this report under Appendix)

All respondents agreed.

Q4   I understand that my responses will form part of published work but will remain anonymous.

All respondents agreed.

Q4   a Gender of respondents

Table 4.1

Gender

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Male	67	28.0	36.2	36.2
	Female	72	30.1	38.9	75.1
	Unknown	46	19.2	24.9	100.0
	Total	185	77.4	100.0	
Missing	0 (Missing)	54	22.6		
Total		239	100.0		

According to the email contact details provided, of identifiable responses there was a nearly even split between male and female: 28% were male and 30.1% female, giving almost 60% of respondents with known gender. [15]The gender of nearly one-fifth (19.2%)

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[15] In column 'Percent', the table shows 28.0 % of male responses due to rounding.

of respondents could not be determined from their addresses, and a further 22.6% of email addresses were missing altogether.

Q5   Where do you work?

Table 4.2

Where do you work?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Austria	1	.4	.4	.4
	France	2	.8	.8	1.2
	Germany	1	.4	.4	1.7
	Portugal	2	.8	.8	2.5
	Spain	3	1.2	1.2	3.7
	United States of America (USA)	8	3.3	3.3	7.0
	United Kingdom (UK)	225	93.0	93.0	100.0
	Total	242	100.0	100.0	

Over 96% of respondents were from the UK or the US. Respondents were a far-flung group; they are a testament to the wide reach of the survey.

Q6   Where do you live?

Table 4.3

Where do you live?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Austria	1	.4	.4	.4
	France	2	.8	.8	1.2
	Germany	1	.4	.4	1.7
	Portugal	2	.8	.8	2.5
	Spain	3	1.2	1.2	3.7
	United States of America (USA)	8	3.3	3.3	7.0
	United Kingdom (UK)	225	93.0	93.0	100.0
	Total	242	100.0	100.0	

As would be expected from Q5 above, results for where respondents lived matched those for where they worked.

Q7   Have you completed any form of training or professional qualification in relation to your voice-over work?

Table 4.4

Have you completed any form of training or professional qualification in relation to your voice-over work?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	184	76.0	76.0	76.0
	No	58	24.0	24.0	100.0
	Total	242	100.0	100.0	

This is a well-qualified group of respondents: over three-quarters (76%) had completed training. Their type of training is detailed below in Q7a, recoded from their free text responses.

Q7a   If yes, please specify:

Figure 4.1 Type of voice-over training
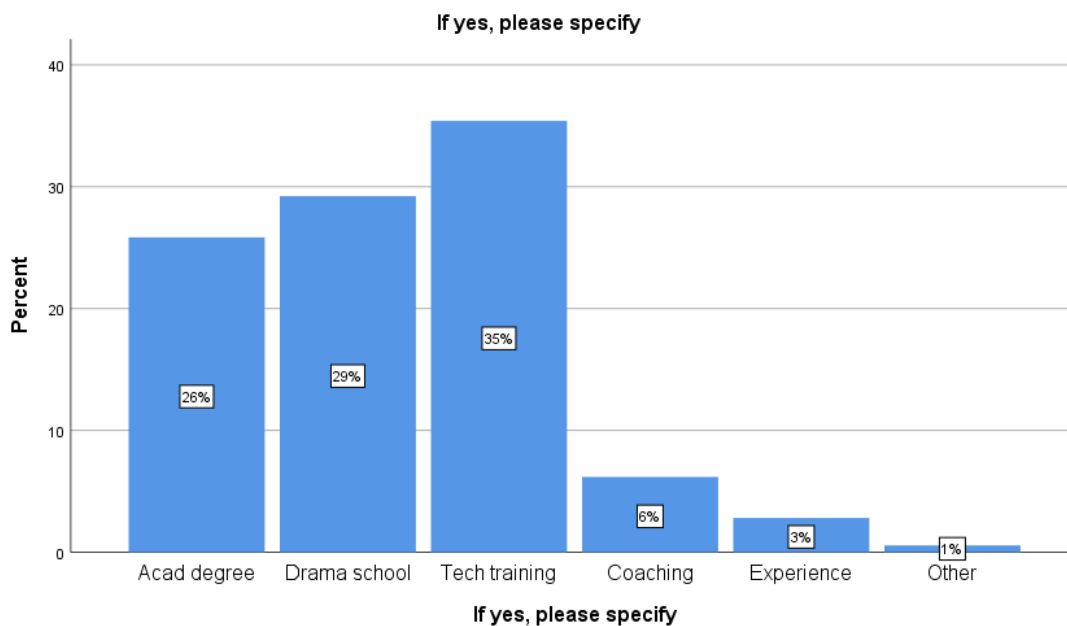
Over one-third of respondents (35%) had undertaken some form of technical training across a wide range of courses available, whether day workshops or longer programmes lasting several months. Over one-quarter (26%) had pursued academic degrees in Drama or related subjects, whilst 29% had attended courses at specialist drama schools, some lasting several years. A much smaller percentage (6%) had received coaching in one or more voice-over areas.

4.2 About Your Work

Q8   Which areas of voice-over have you done work in?

The voice-over industry offers an extremely diverse range of opportunities for artists. Respondents were given a set of 32 possible areas which they might work in, of which many were widely active across different types of work. They were able to indicate which of these they participated in by ticking multiple responses.

The following pie chart (Figure 4.2) illustrates this breakdown by showing the relative contribution each area of work makes towards 100% of responses overall. It must be borne in mind that categories are not mutually exclusive, and therefore respondents could tick as many areas as applied to them. Numbers reflect frequencies of responses.

Figure 4.2 Relative frequencies of voice-over areas
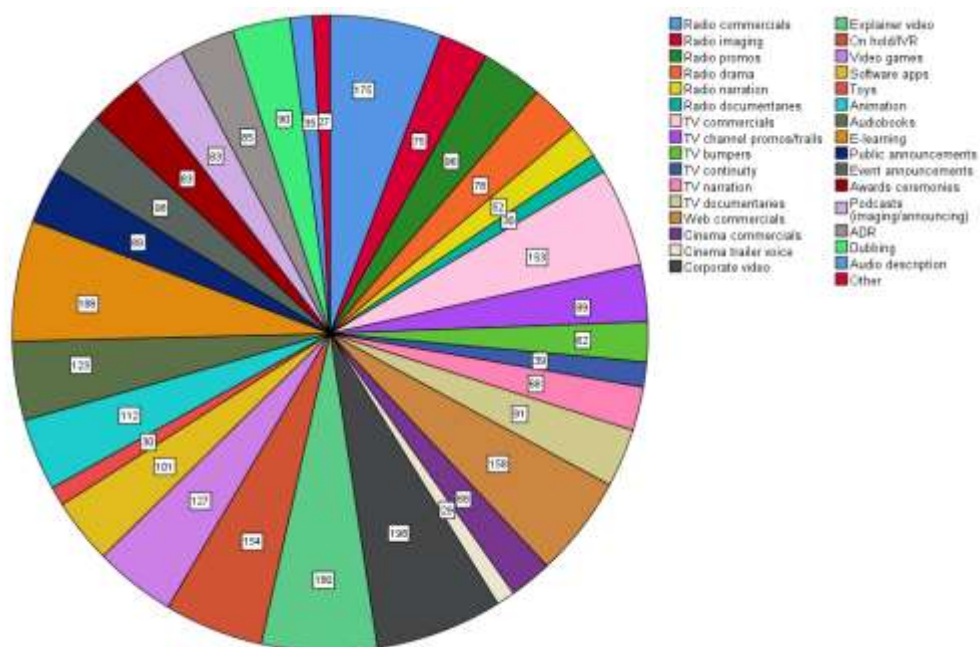
Q8a   If you selected Other, please specify:

A relatively small number of respondents (11.2%) ticked 'Other', which covered a disparate collection of areas. The most common were English Language Teaching (ELT) and audio guides, such as for museums. Greetings cards, guided meditations and 'voice of a petrol pump' were more unusual.

Q9   Do you specialise in a particular area?

Table 4.5

Do you specialise in a particular area?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	83	34.7	34.7	34.7
	No	156	65.3	65.3	100.0
	Total	239	100.0	100.0	

Responses regarding specialisation confirmed Figure 4.2 above that the majority of respondents (nearly two-thirds or 65.3%) covered a range of voiceover areas, although just over one-third did specialise.

Q9a   If yes, please specify:

Q9a on specialist areas again appeared as free text. Although recoding was considered as an option, in the end a simple hand count was performed to identify the most frequent specialisms. These appeared as:

- Audiobooks – 19 responses

- Commercials – 10 responses

- Corporate – 13 responses

- Radio – 8 responses

- Audio drama – 7 responses

Q10   When was your first voice-over work?

Figure 4.3a Entry dates to the voice-over industry

When was your first voice-over work?
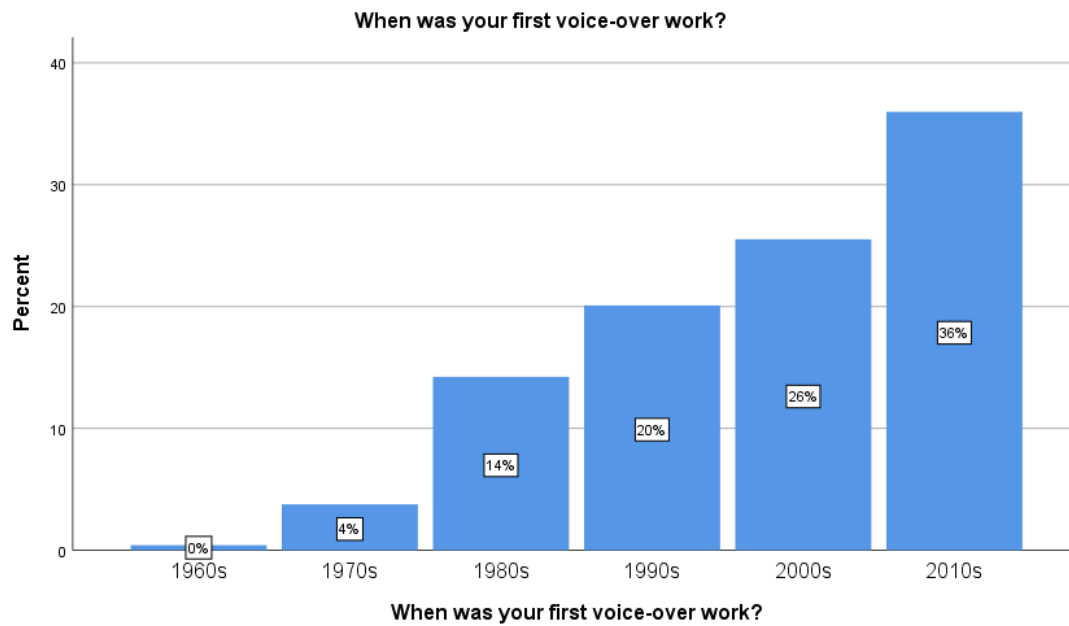
Figure 4.3b Ranges of years of experience

How many years have you been working as a voice-over artist?
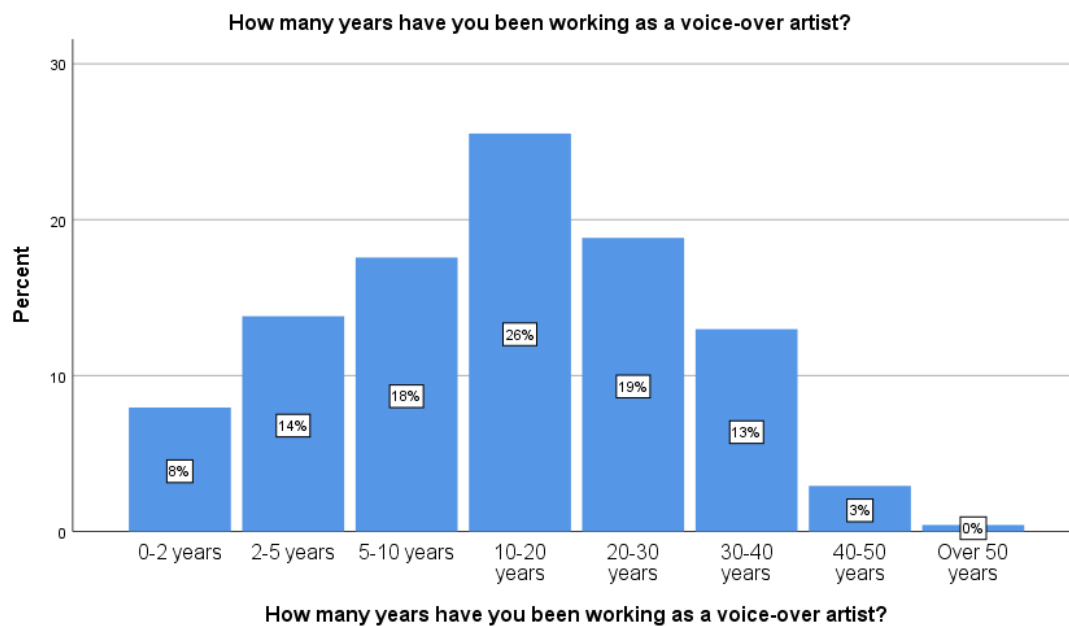
As mentioned above, respondents' individual entry dates were recoded into decades to make analysis more concise. These ranged widely, with the earliest date 1965 and the latest 2019. Date of entry did not necessarily relate to self-reported skill levels, and it is interesting to see that over one-third (36%) of respondents were relatively recent entrants to the profession.

Q11   When was your last or most recent voice-over work?

This is a professionally active group: bearing in mind that the survey closed at the end of March 2019, the overwhelming majority (92.1%) had already worked in 2019, and 7.9% had last worked in 2018. These percentages are likely to have altered slightly. There were no earlier responses.

Q12   Are you currently a full-time or part-time voice-over?

Most respondents (59%) reported that they were full-time voice-over artists, while 41% were part-time. This question has undergone further cross-tabulation with other responses in section 5 below.

Q13   How would you describe your voice-over skill level?

Figure 4.4 Self-reported voice-over skill levels
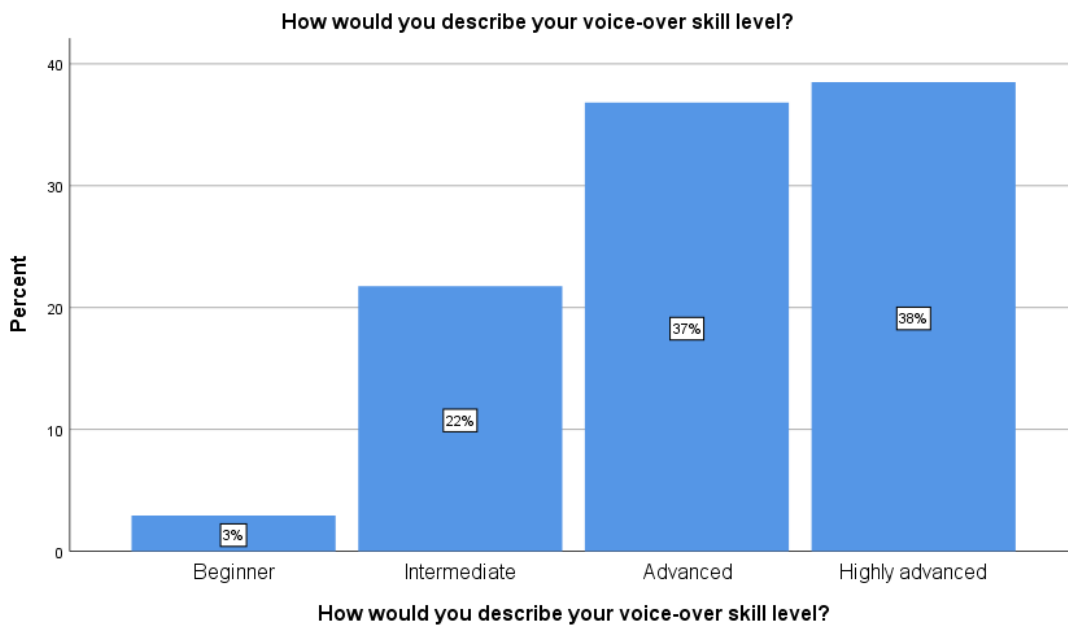
Respondents appear to be quite a confident group overall. Only one-quarter (25%) consider that their skills are at 'beginner' or 'intermediate' levels, while three-quarters (75%) report that they are either 'advanced' or 'highly advanced'

4.3 Recruitment

Q14   How do you secure work?

**Figure 4.5 Numbers reporting sources of work**
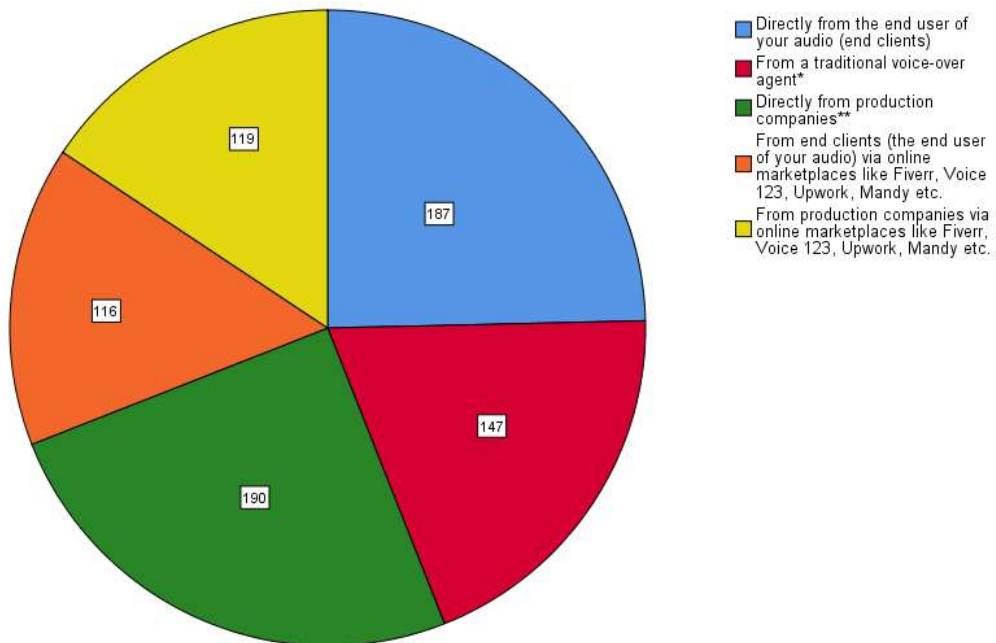
Respondents were asked to indicate which sources they used in order to secure work and were able to tick multiple responses. They ranged widely across possible sources: the relative numbers with recourse to each type of source appear above (Figure 4.5). The use of online marketplaces by both end clients and production companies are making their presence felt as a source of work.

4.4 Working Directly with End Clients

Q15   How often are you hired directly by end clients?

Figure 4.6 End client hiring patterns

How often are you hired directly by end clients?
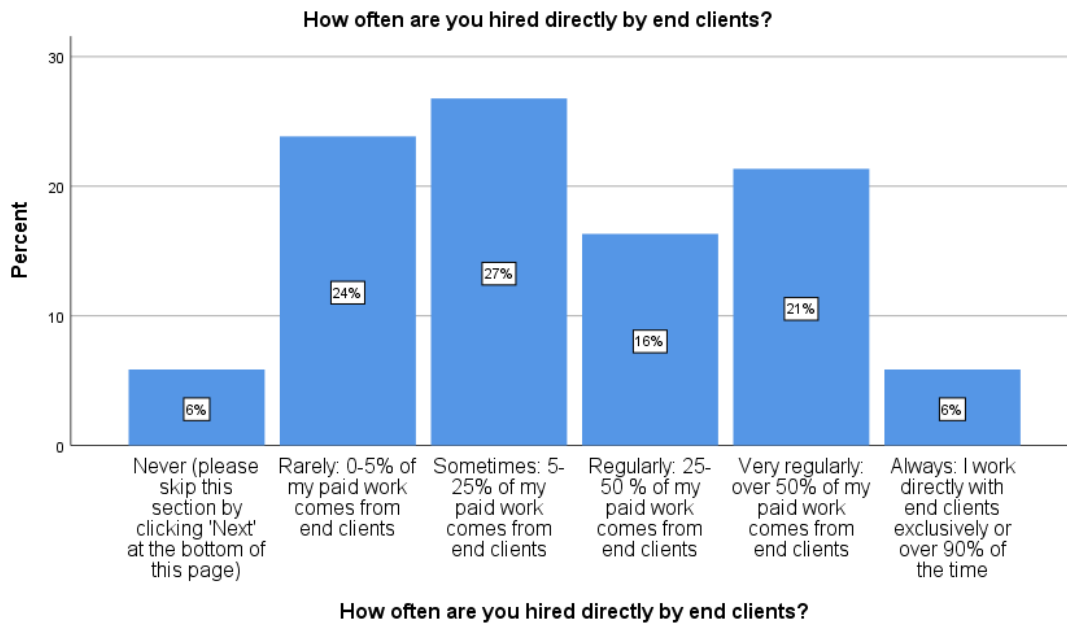
Over 50% of respondents report that they 'sometimes', or more rarely, are directly hired by end clients. The proportion of respondents that report hiring 'very regularly' (21%) – one-fifth of the whole – are higher than those reporting 'regularly' or 'always', perhaps surprisingly. This pattern suggests that those who receive very regular work from specific end clients are well known by them and often in receipt of repeat custom.

Q16   Which of the following words would you use to describe the end clients you work for directly?

**Figure 4.7 Numbers using words to describe end clients**
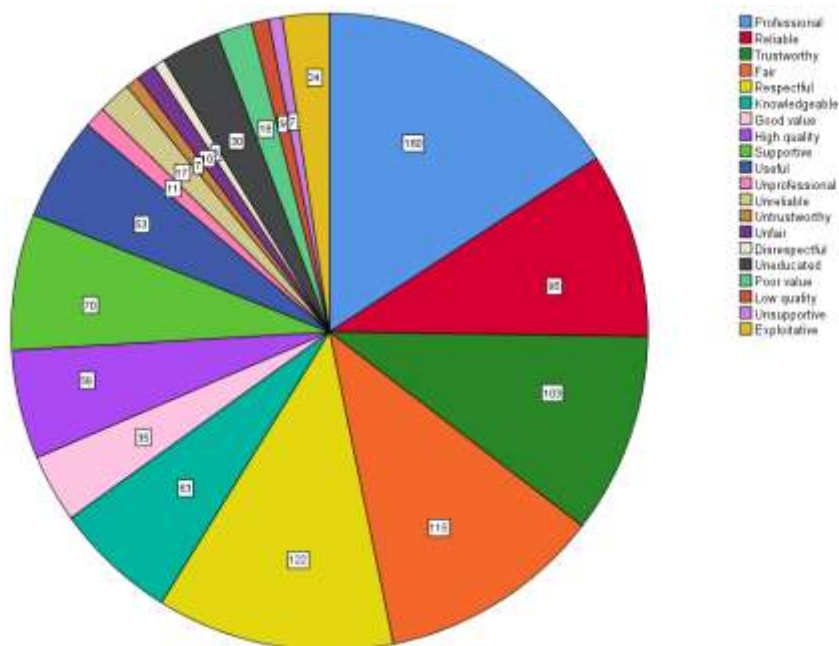
Generally speaking, end clients are well thought of by the large majority of respondents answering this question, for which they were able to tick multiple responses. Only 13.7% of characterisations fall into the negative categories, which each represent a very small proportion of the overall population.

Q17   Do you believe you are fairly paid for the work you do, when working directly with end clients?

Figure 4.8 Percentages believing they are fairly paid by end clients

Do you believe that you are fairly paid for the work you do, when working directly with end clients?
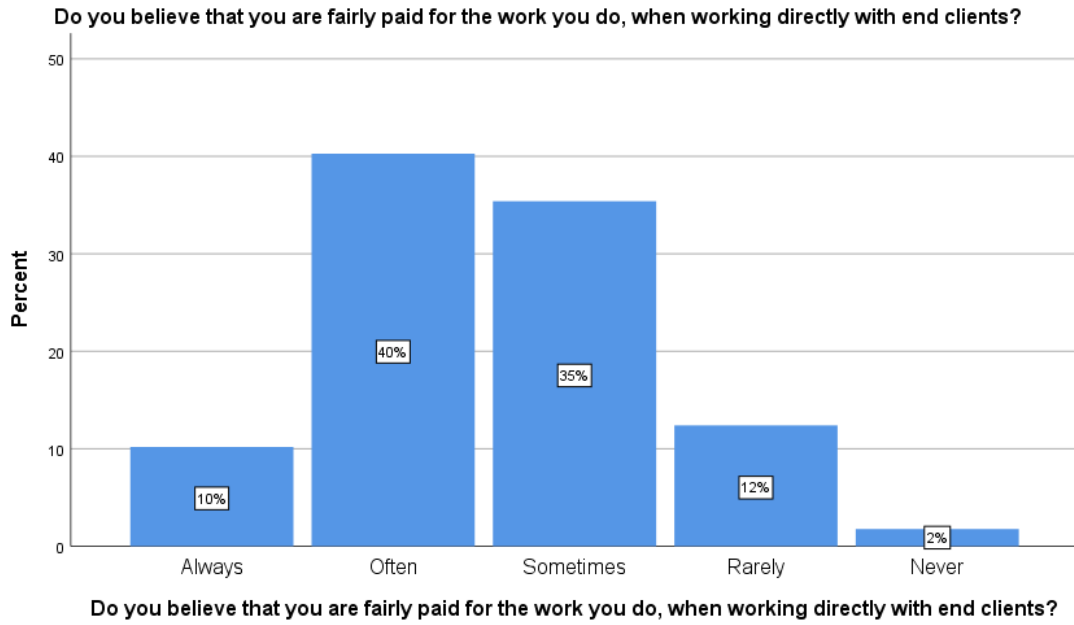
By and large, respondents' positive impressions above of working directly with end clients carries through into their perceptions of fair pay. Half of the sample reporting such interactions notes that they are 'always' or 'often' paid fairly. Just over a third (35%) feels they are 'sometimes' paid fairly; 14% report 'rarely' or 'never'.

4.5 Working with Agents

**Q18   How many agents do you work with?**

Table 4.6

How many agents do you work with?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	None (please skip this section by clicking 'Next' at the bottom of this page)	69	28.9	28.9	28.9
	1	72	30.1	30.1	59.0
	2	32	13.4	13.4	72.4
	3	30	12.6	12.6	84.9
	4	6	2.5	2.5	87.4
	5 or more	30	12.6	12.6	100.0
	Total	239	100.0	100.0	

There is again an interesting split when respondents are asked how many agents they work with. Just under one-third (30.1%) use a single agent only – slightly more than do not use agents at all. Approximately 13% each use two or three agents, and a comparable percentage (12.6%) use multiple agents, defined as five or more – clearly casting their net widely to receive work, with perhaps a less close relationship to each agent they work with.

Q19   How often are you hired through your agents?

Figure 4.9 Agent hiring patterns
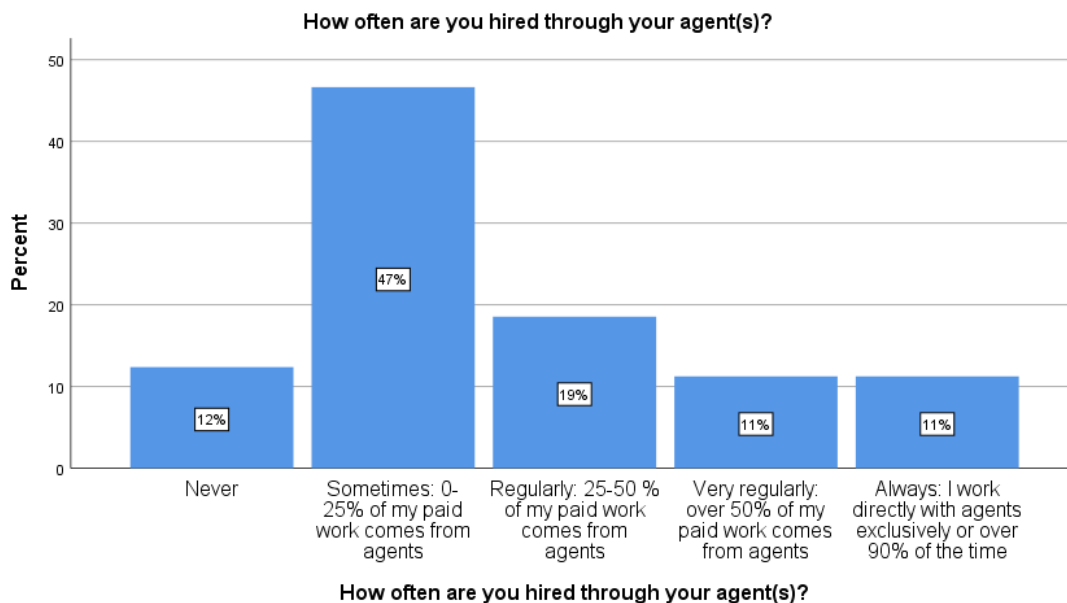
Compared with end clients, nearly 50% of respondents report that they are 'sometimes' hired through agents. Only about one-fifth (19%) receive 'regular' work from them, and

the percentage drops further for more frequent hiring. This pattern suggests that agents are not as well relied upon as a single source for work as end clients, requiring voice-over artists to look to other sources for their full- or part-time working.

Q20   Which of the following words would you use to describe the agents you work with?

Figure 4.10 Numbers using words to describe agents
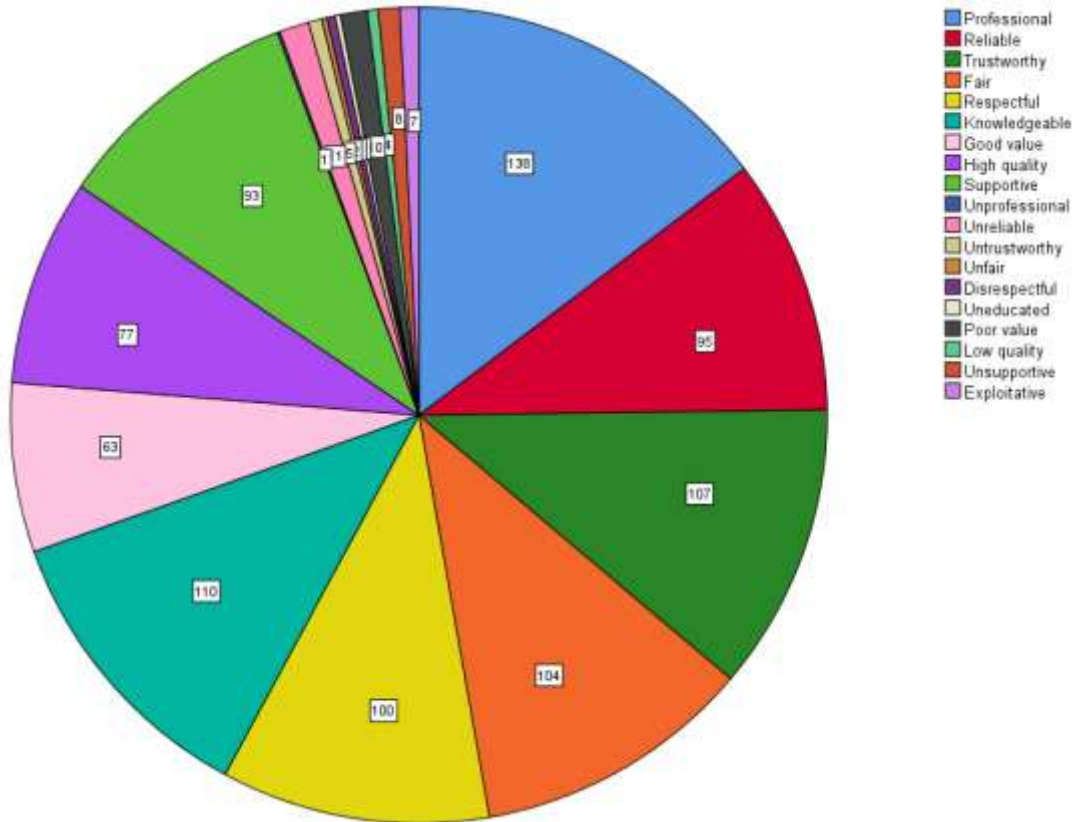
Although they do not use the services of agents as frequently as working directly with end clients, respondents are generally happy with the experiences of their relationships with them. Once again, the distribution of positive impressions far outweighs the negative, with only 5.6% of the sample reporting that they do not view agents in a constructive way. It appears that agents are regarded in an even better light than end clients.

Q21   Do you believe that you are fairly paid for the work that you do, when working with your agents?

Figure 4.11 Percentages believing they are fairly paid by agents

Do you believe that you are fairly paid for the work you do, when working with your agent(s)?

Do you believe that you are fairly paid for the work you do, when working with your agent(s)?
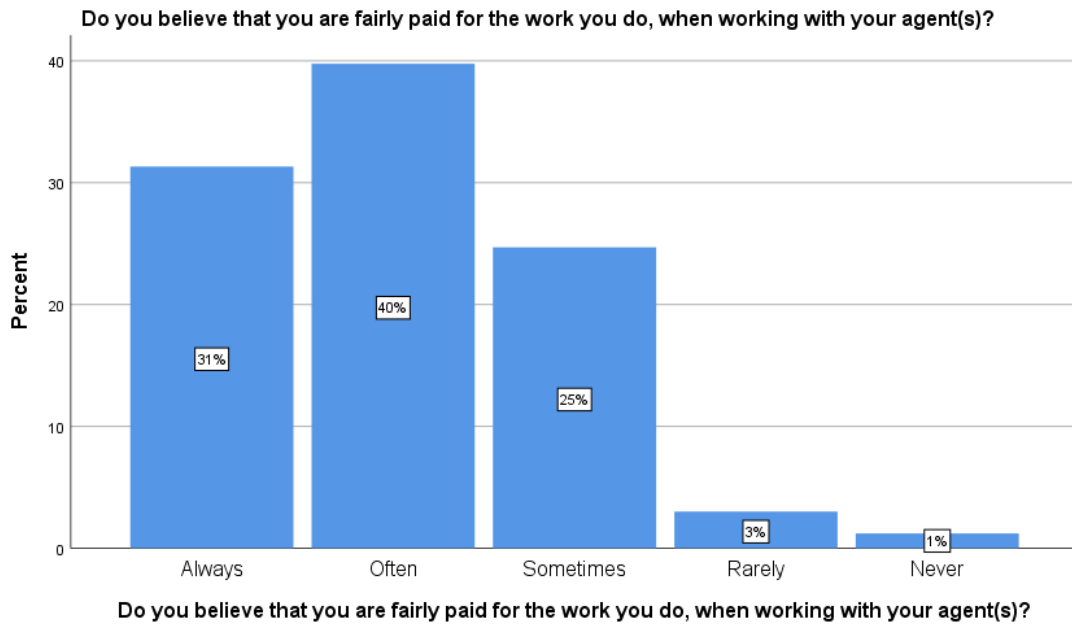
Nearly three-quarters of respondents (71%) are 'always' or 'often' happy with the fairness of their pay received from agents, with another quarter reporting that they are 'sometimes' fairly paid. Only 4% believe that they rarely if ever receive a fair share.

4.6 Working with Production Companies

**Q 18   How many agents do you work with?**

Table 4.7

How many production companies* do you work with?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	None (please skip this section by clicking 'Next' at the bottom of this page)	26	10.9	10.9	10.9
	1	11	4.6	4.6	15.5
	2	23	9.6	9.6	25.1
	3	17	7.1	7.1	32.2
	4	11	4.6	4.6	36.8
	5	9	3.8	3.8	40.6
	5-10	49	20.5	20.5	61.1
	10-15	24	10.0	10.0	71.1
	15-20	15	6.3	6.3	77.4
	20-25	13	5.4	5.4	82.8
	25-30	6	2.5	2.5	85.4
	30 or more	35	14.6	14.6	100.0
	Total	239	100.0	100.0	

Numbers of production companies that respondents work with are much more varied than with end clients or agents. About two-fifths (40.6%) work with five companies or less, with two or three companies being the more usual. Just under one-third (30.5%) of respondents work with between five and fifteen production companies. Around 14% work with between fifteen and thirty companies, and about another 14% work with thirty companies or more – a truly diverse portfolio.

Q23   How often are you hired through production companies?

Figure 4.12 Production company hiring patterns

How often are you hired through production companies?

How often are you hired through production companies?
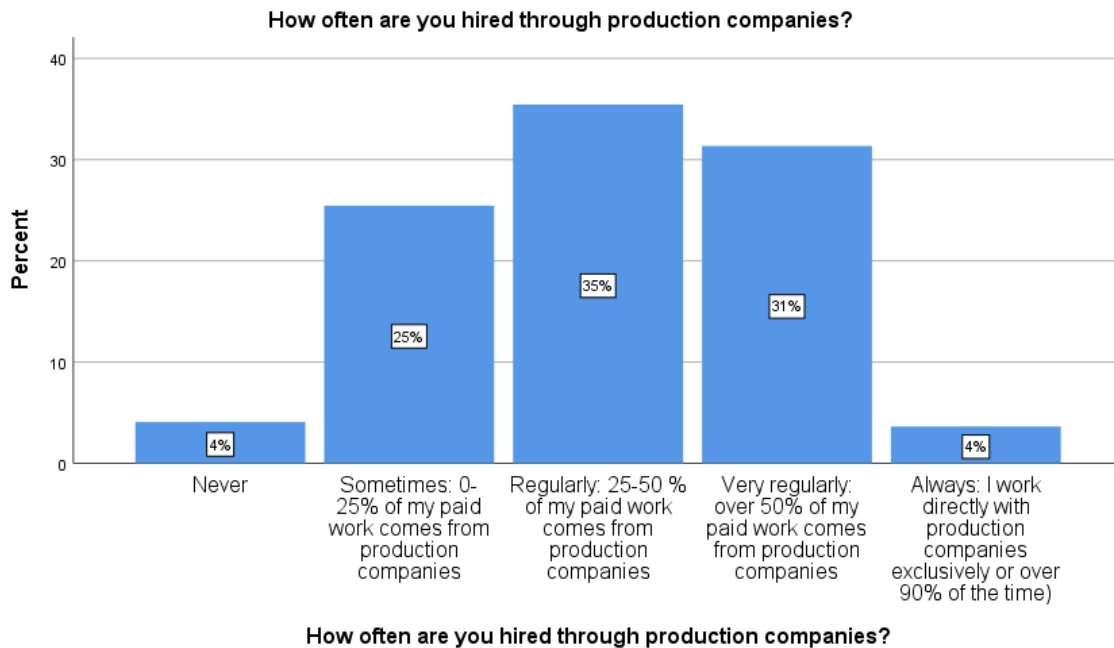
Production companies, it seems, are a very useful source of work for voice-over artists. The majority (70%) of respondents report that their work flow is 'regular', 'very regular' or 'always' with production companies (the latter defined as over 90% of the time). A further 25% 'sometimes' receive work via production companies, with only 4% 'never' working through them.

Q24   When you have secured work through a production company, how often have you had access to the end client (the end user of your audio) to discuss the project?

Table 4.8

When you have secured work through a production company, how often have you had direct access to the end client (the end user of your audio) to discuss the project?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Never	72	30.1	33.2	33.2
	Sometimes: 0-25% of the time	106	44.4	48.8	82.0
	Regularly: 25-50 % of the time	23	9.6	10.6	92.6
	Very regularly: over 50% of the time	11	4.6	5.1	97.7
	Always: exclusively or 90% of the time	5	2.1	2.3	100.0
	Total	217	90.8	100.0	
Missing	System	22	9.2		
Total		239	100.0		

Nearly half (48.8%) of respondents report that they 'sometimes' have access to end clients through production companies, whilst one-third 'never' have access to them. Those that can regularly or more often expect to work with end clients via production companies are a much smaller group of 18%. This pattern may suggest that it is not standard practice for production companies to bring end clients together with voice-over artists.

Q25   Which of the following words would you use to describe the production companies you work with?

**Figure 4.13 Numbers using words to describe production companies**
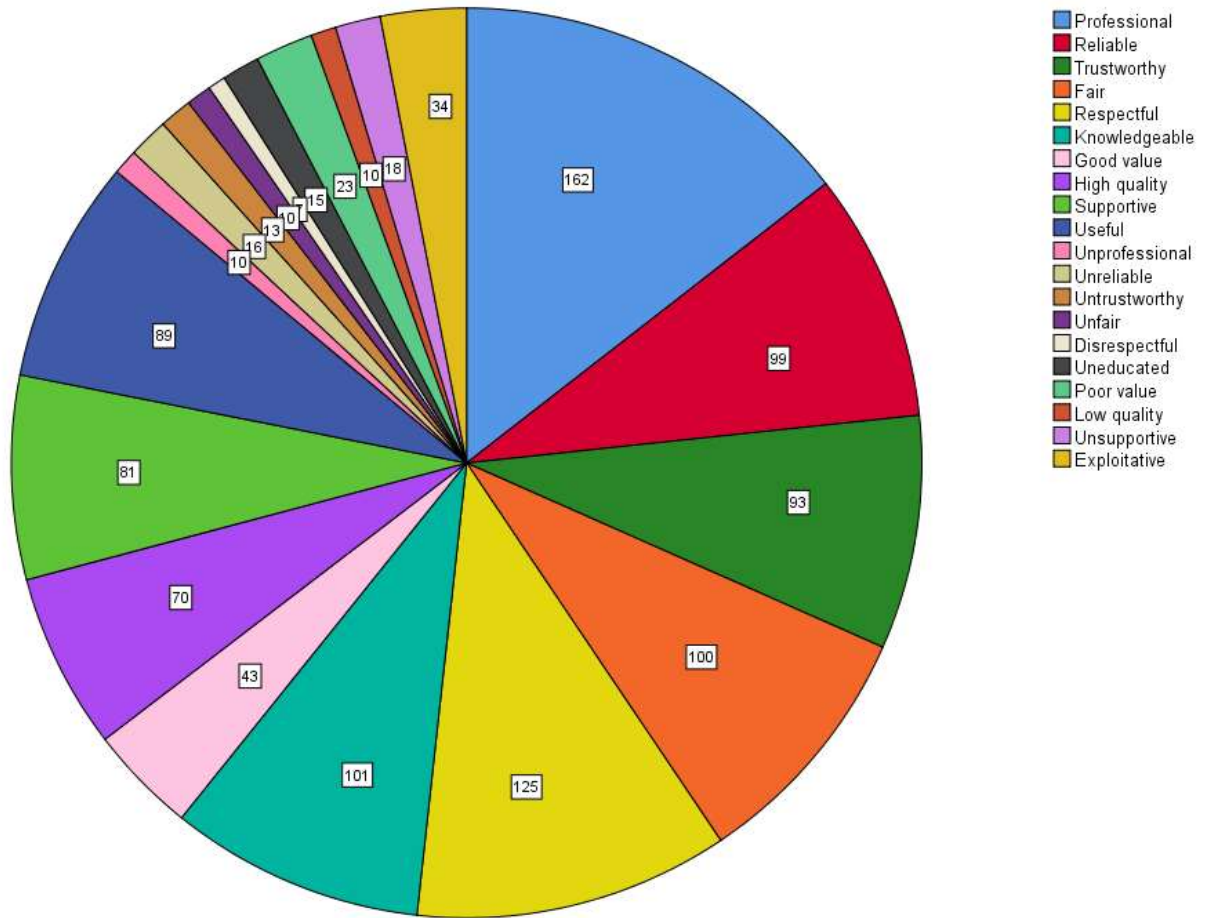
Again, respondents have a broadly positive view of their relationships with production companies, and it is striking to see the same pattern as with end clients and agents. Only 13.9% of voice-over artists reporting regard production companies negatively, a very similar percentage to how end clients are valued. It is clear that production companies occupy an important and well-valued niche for voice-over work in the industry.

Q26 Do you believe that you are fairly paid for the work you do, when working with your production companies?

Figure 4.14 Percentages believing they are fairly paid by production companies

Do you believe that you are fairly paid for the work you do, when working with your production companies?
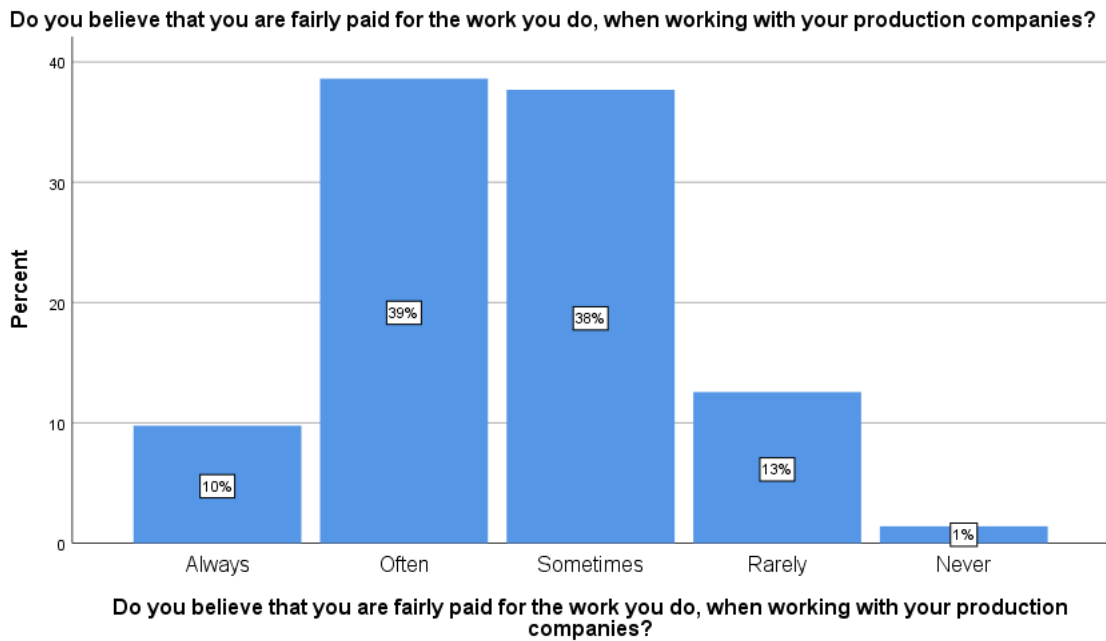
Production companies do not hold quite as good a reputation as agents when it comes to perceived fair payment for voice-over artists. Almost one-half (49%) believe that they are 'always' or 'often' fairly paid, with those reporting as fair payment 'sometimes' (38%) in a similar percentage to those seeing this 'often' (39%). Saying this, only 14% believe that they are 'rarely' or 'never' fairly paid by production companies.

4.7 Working via Online Marketplace

Q27 Are you registered with any online marketplaces like Fiverr, Upwork, Mandy etc?

Online marketplaces reflect a new entrant type to the established hiring models surveyed above for voice-over artists, but their impact on the overall work landscape is less well understood. One of the main purposes of this research is to determine the extent of their uptake so far in the industry and to what extent marketplaces may be interfering with existing work arrangements and pay levels.

Just under two-thirds (64.7%) of respondents reported that they were registered with online marketplaces out of a total of 93.7% overall answering this question.

**Q28 If yes, how often do you secure work via these online marketplaces?**

Figure 4.15 Online marketplace hiring patterns
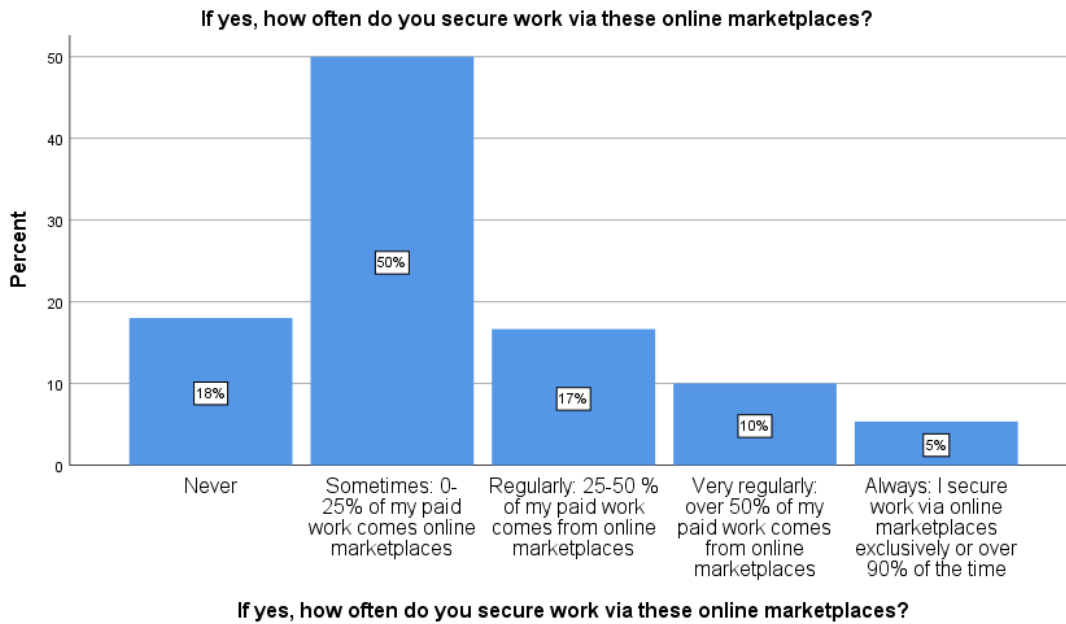
It would seem that the online marketplace hiring model is beginning to make its presence felt amongst other types of work opportunities for voice-over artists, although it may not be the route of choice. One-half of respondents report that they 'sometimes' secure work in this way, that is up to 25% of their paid work. Only another 17% work via online marketplaces regularly (up to 50% of their time), whilst a further 15% secure work through them either 'very regularly' or 'always'

Q29 Which of the following words would you use to describe these online marketplaces?

Figure 4.16 Numbers using words to describe online marketplaces
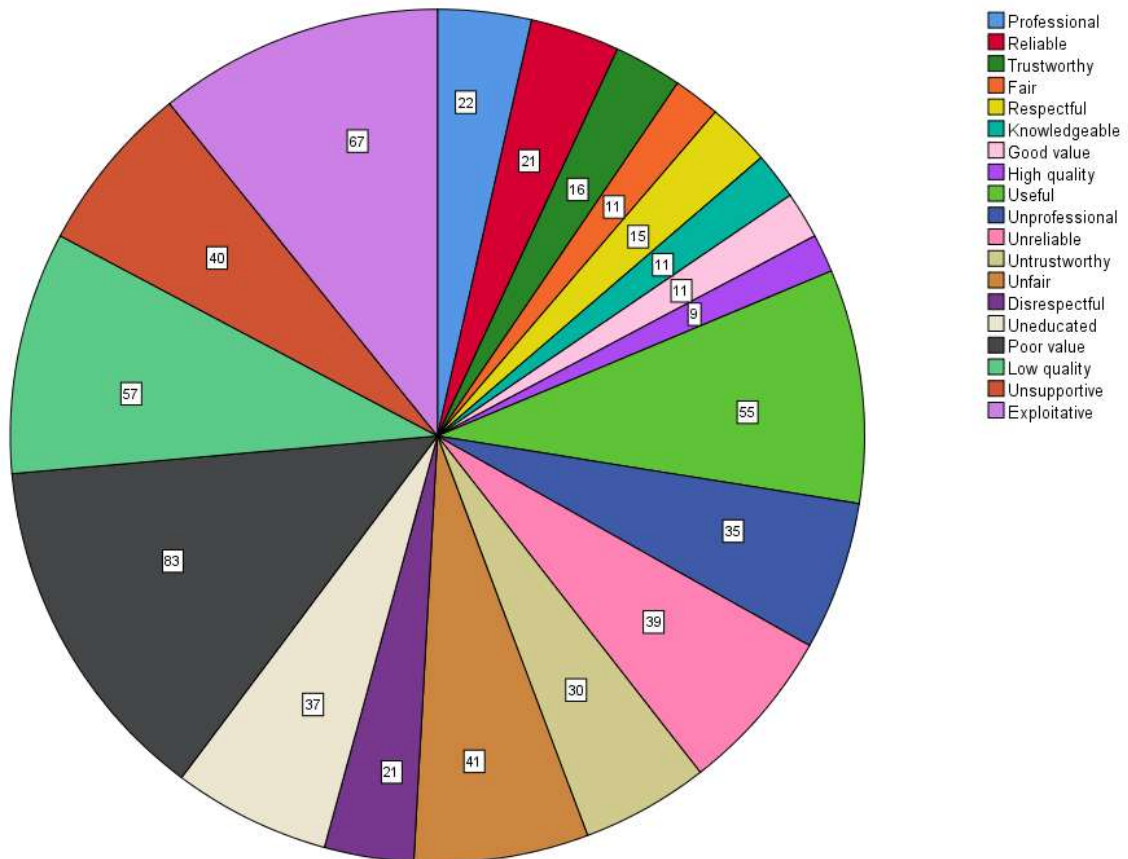
It is immediately apparent that the relative percentages applying positive and negative perceptions to other channels for accessing employment have been reversed with online marketplaces. Only 28% of those responding feel that they show the same generally helpful qualities as end clients, agents and production companies. The most common descriptions used come from those who see online marketplaces as 'poor value' (13%) and even 'exploitative' (11%). Clearly there is much progress for online marketplaces to make within the industry before they can bring their reputation in line with other sources for voice-over work.

4.8 Pay

Q30 What is your approximate gross voice-over annual income?

Table 4.9

What is your approximate gross annual voice-over income?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Rather not say	31	13.0	13.3	13.3
	£0-£1k	12	5.0	5.2	18.5
	£1k-£5k	32	13.4	13.7	32.2
	£5k-£10k	23	9.6	9.9	42.1
	£10-15k	19	7.9	8.2	50.2
	£15-20k	13	5.4	5.6	55.8
	£20-£30k	27	11.3	11.6	67.4
	£30-£40k	18	7.5	7.7	75.1
	£40-£50k	20	8.4	8.6	83.7
	£50-£60k	14	5.9	6.0	89.7
	£70-£100k	13	5.4	5.6	95.3
	£100-£150k	6	2.5	2.6	97.9
	£150-£250k	2	.8	.9	98.7
	Over £250k	3	1.3	1.3	100.0
	Total	233	97.5	100.0	
Missing	System	6	2.5		
Total		239	100.0		

13.3% of respondents declined to answer this typically sensitive question. Of the majority that did respond, 42.6% receive up to £20k gross annual income. Almost 12% receive between £20k and £30k, just over 16% between £30k and £50k, nearly 12% between £50 and £100k, and just under 5% over £100k gross per year.

Q31 How many jobs do you secure per year on average?

Table 4.10

How many jobs do you secure per year on average?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Between 1-5	13	5.4	5.8	5.8
	Between 5-10	23	9.6	10.3	16.1
	Between 10-20	27	11.3	12.1	28.1
	Between 20-30	14	5.9	6.3	34.4
	Between 30-40	13	5.4	5.8	40.2
	Between 40-50	14	5.9	6.3	46.4
	Between 50-70	15	6.3	6.7	53.1
	Between 70-100	14	5.9	6.3	59.4
	Between 100-120	9	3.8	4.0	63.4
	Between 120-150	9	3.8	4.0	67.4
	Between 150-170	7	2.9	3.1	70.5
	Between 170-200	7	2.9	3.1	73.7
	Between 200-220	6	2.5	2.7	76.3
	Between 220-250	8	3.3	3.6	79.9
	Between 250-300	6	2.5	2.7	82.6
	Between 300-350	7	2.9	3.1	85.7
	Over 350	32	13.4	14.3	100.0
	Total	224	93.7	100.0	
Missing	System	15	6.3		
Total		239	100.0		

The majority of respondents (just under 60%) undertake up to 100 jobs per year, with nearly all job number bands reporting at least 6% of the overall sample. Above this number percentages drop, to between 3% and 4% gaining 100 to 200 jobs per year, and between 2.7% and 3.6% between 200 and 350 jobs per year. Interestingly, cross-tabulations (section 5) show that by far the busiest group in those undertaking over 250 jobs per year were those who reported their income as between £30k and £50k per year. This therefore suggests that the many jobs they were engaged to do, did not pay well.

Q32 Has your voice-over income level noticeably increased or decreased over your career?

Just over half of respondents (52.3%) report an increase whilst 18.1% note a decrease, which is positive news overall. 29.5% report a relatively stable income which has not fluctuated significantly over time.

Q33 How often are you paid on time?

Figure 4.17 Timeliness of payments
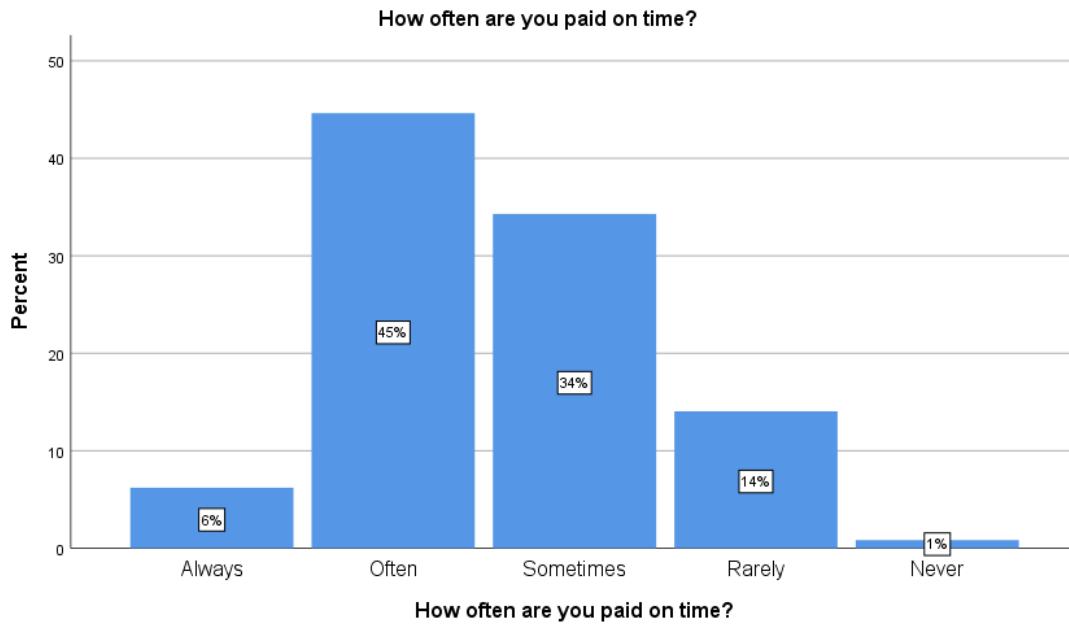
Generally speaking, just over one-half (51%) of respondents note that they are 'often' or 'always' paid on time. About one-third are 'sometimes' paid on time, whilst a further 15% rarely if ever enjoy timely payments. This pattern suggests that late payments are not an endemic disadvantage in the industry, but is an issue commonly or regularly experienced by voice-overs nonetheless.

Q34 How often do you have to chase late payments?

Figure 4.18 Percentages chasing late payments
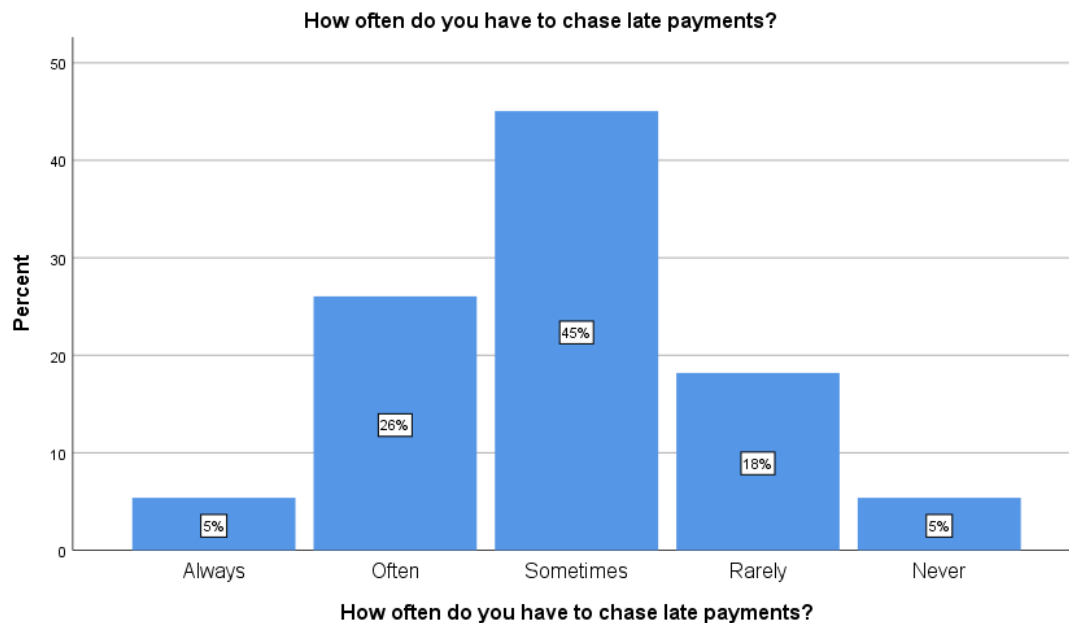
A flip side to Q33 above, nearly half (45%) of respondents reporting confirm that they 'sometimes' have to chase late payments, which again suggests that timeliness of payment is a concern for voice-over artists, but not a pressing one. Nearly one-third (31%), however, state that they 'often' or 'always' need to follow up payments, whilst a further 23% 'rarely' or 'never' have to do so.
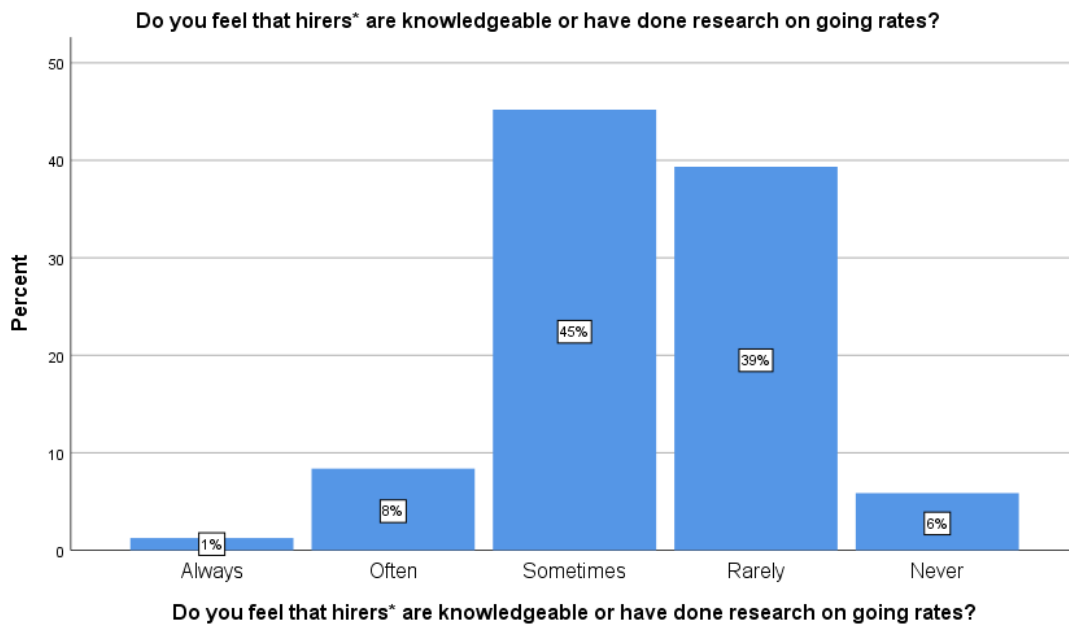
4.9 Negotiations

Q35 Do you find negotiating with hirers difficult, manageable or easy?

A comfortable majority (62.3%) felt that negotiations were manageable, but nearly one-third (31%) did find negotiations difficult. A small sample (6.7%) thought they were easy. These results suggest that many voice-over artists are confident to enter negotiations, but for others some training might be useful.

Q36 Do you feel that hirers are knowledgeable or have done research on going rates?

Figure 4.19 Hirers' awareness of payment rates for voice-over artists

Do you feel that hirers* are knowledgeable or have done research on going rates?

The other aspect of artists' success at negotiations of course is how aware hirers are themselves of fair payment within the industry. Here, nearly half (45%) of respondents felt that hirers were 'sometimes' aware of going rates, whilst another 39% were 'rarely' aware and 8% were 'often' aware. These levels may reflect either easier or more difficult negotiations on both sides.

Q37 How often do you turn away work due to low budgets?

Figure 4.20 Budgetary reasons for declining work

How often do you turn away work due to low budgets?
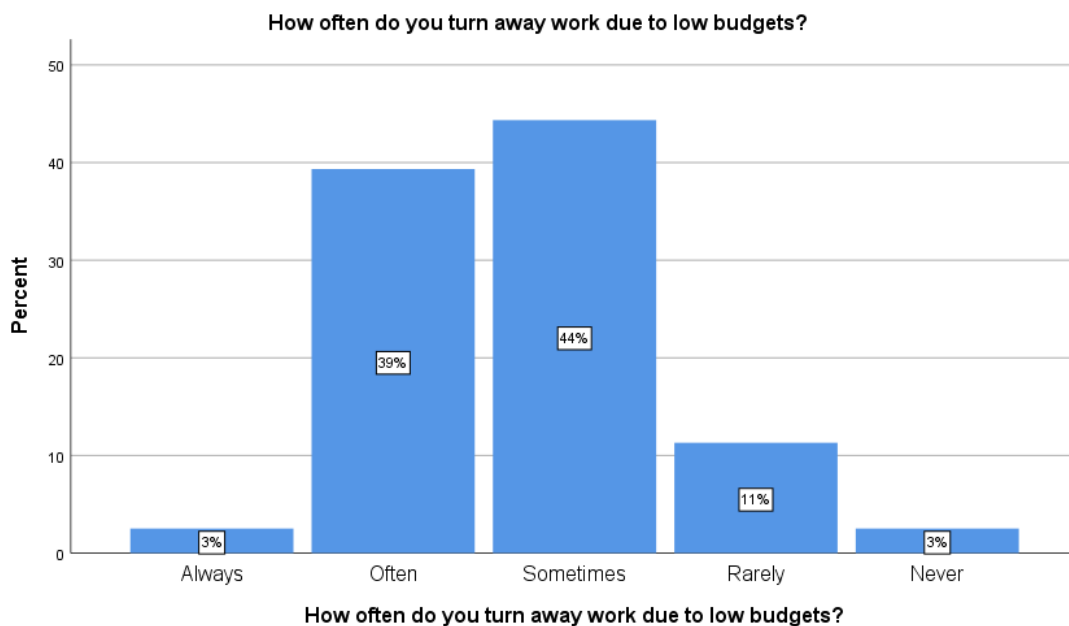
Although over two-fifths (44%) of respondents confirm that they 'sometimes' have to turn

away work due to unrealistically low budgets, nearly as many (39%) say that they 'often' do, while another 11% 'rarely' do or have to. This fairly mixed response may point to various factors that range between awareness of standard rates of pay by hirers, poor budgeting skills on their part, breakdown in negotiation, lack of bargaining power or knowledge of self-worth by voice-overs.

Q38 How often do you compromise on your ideal rate to get work?

Figure 4.21 Levels of compromise on pay within the industry
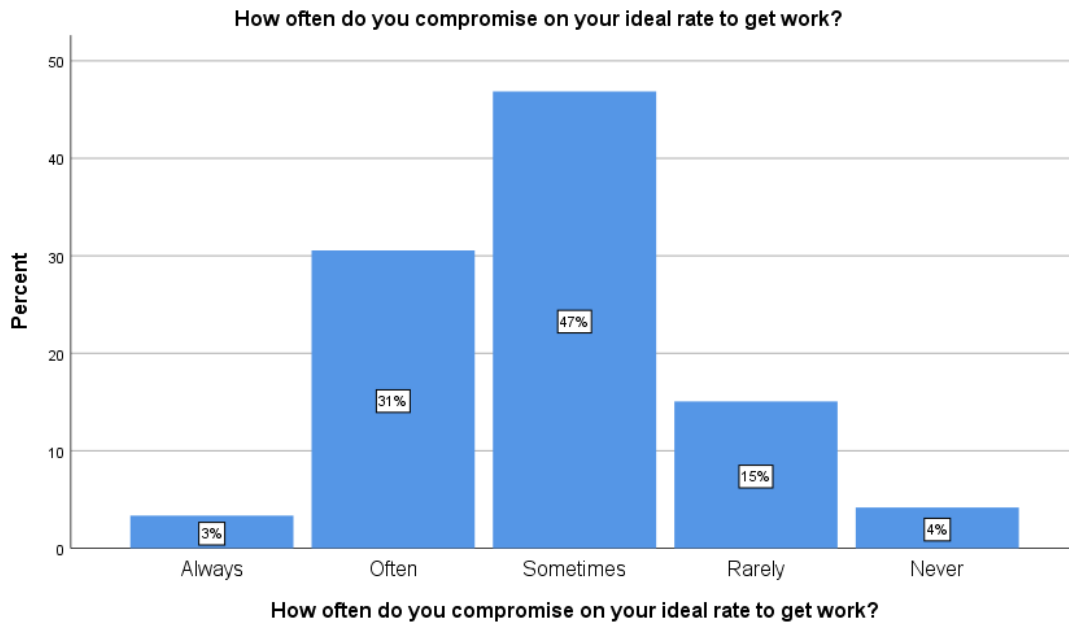
Nearly half (47%) of voice-over artists report that they 'sometimes' have to compromise, whilst nearly a third (31%) note that they 'often' compromise and a further 15% 'rarely' compromise. These results suggest that some flexibility on pay is important for respondents, although it becomes worrying when compromise has to happen too regularly.

4.10 Your Contracts

Q.39 How often do you sign a contract with a hirer?

Table 4.11

How often do you sign a contract (i.e. a paper or electronic document) with a hirer?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Never (I never sign any documents)	20	8.4	8.4	8.4
	Very rarely (between 0-5% of the time)	99	41.4	41.4	49.8
	Rarely (between 5-10% of the time)	30	12.6	12.6	62.3
	Sometimes (between 10-25% of the time)	45	18.8	18.8	81.2
	Often (between 25% and 50% of the time)	12	5.0	5.0	86.2
	Very often (between 50% and 70% of the time)	6	2.5	2.5	88.7
	Almost always (70-90 % of the time)	11	4.6	4.6	93.3
	Systematically (90-100%)	16	6.7	6.7	100.0
	Total	239	100.0	100.0	

Responses to this question are quite revealing. Well over half (62.4%) report that they 'rarely', 'very rarely' or 'never' sign contracts with hirers, whilst nearly one-fifth (18.8%) do 'sometimes' – the second largest single group. Just under one-fifth (18.8%) sign contracts 'often' or more frequently. These figures starkly illustrate a clear trend in the sector to not rely on written contracts when forming agreements. Whilst written contracts are not necessary to benefit from contract law or intellectual property law protection, as an artist, they are recommended in order to ensure that the parties are clear on the terms and scope of their engagement. Contracts are usually viewed as good business practice, and are especially useful to record the parties' agreement and intention at the start of a project, should their working relationship deteriorate further down the line.

**Q40 If you sign a contract, how often is that contract your own document template?**

Figure 4.22 Use of own contracts by voice-over artists

If you sign a contract, how often is that document your own contract template?

If you sign a contract, how often is that document your own contract template?
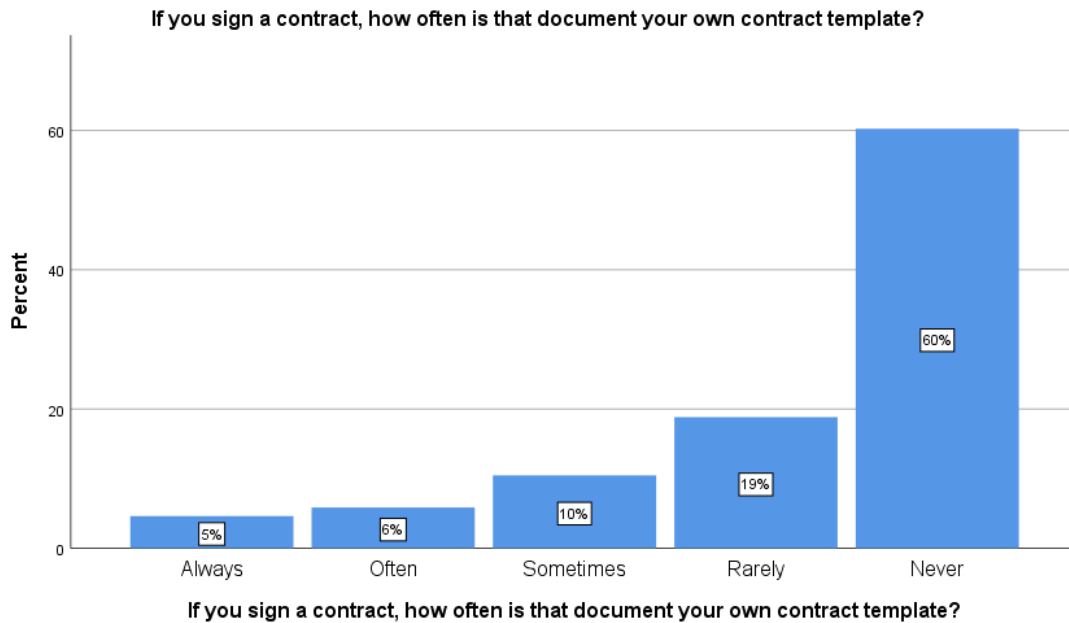
The figures above confirm those in Q39. Almost four-fifths (79%) of respondents 'rarely' or 'never' use their own contract template, with only 11% 'always' or 'often' using theirs. There appears to be a definite training need within the voice-over industry to improve awareness of contract law as a support for artists to build confidence to develop their own contracts.

Q41 If you sign a contract, how often is that document provided by the hirers?

Figure 4.23 Use of hirers' contracts by voice-over artists

If you sign a contract, how often is that document provided by the hirers?

If you sign a contract, how often is that document provided by the hirers?
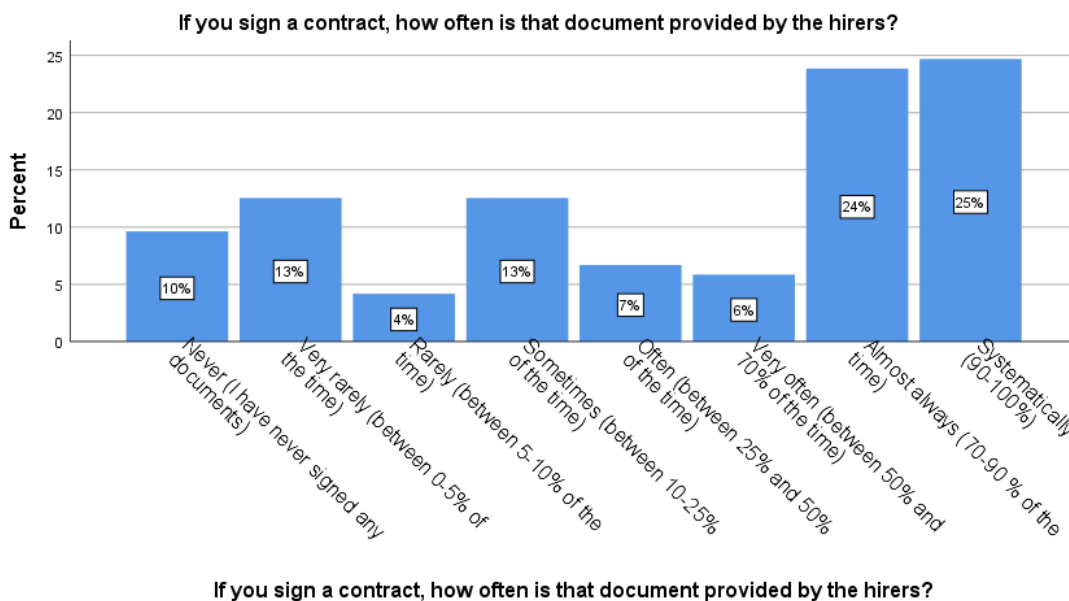
These figures illustrate a sharp divide in use of contracts and a rather mixed picture. Contracts seem to show a frequent pattern of use by hirers, with nearly two-thirds (62%)

providing these either 'often' or more regularly still in their commissioning of voice-over work. Below this level, contracts are provided in a patchy way, with 13% reporting their use both 'sometimes' and 'very rarely'. The sense is that it depends on the individual or type of hirer as to how formal their contracting process is, and may also reflect variations depending on area of voice-over work.

Q42 In cases where you do not sign a contract, how do you form an agreement with the hirers?

Figure 4.24 Other forms of agreement used
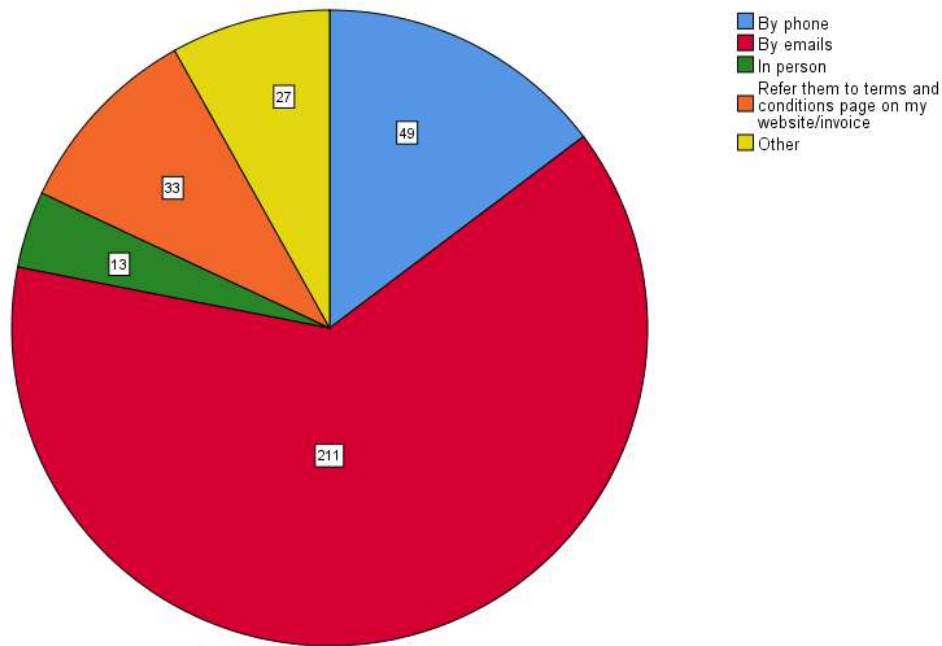
Responses to this question reflect the general trend showing how widely emails are now being used for official communications, and are clearly (63%) the favourite medium for entering into agreements with hirers. It is also interesting to see that 13.8% of respondents maintain their own websites which include terms and conditions, which may suggest awareness of best practice principles when it comes down to legal protection within the industry.

Face-to-face and telephone discussions may be particularly important for voice-over artists as modes of doing business, because they can be key in demonstrating their vocal expertise. However, whilst telephone and in person contact are legally binding, they provide no record of the parties' agreement except for what each person remembers to be the final contract agreed. This has positive and negative consequences for both parties: whilst both can be held accountable by verbal agreements, these agreements are difficult to litigate when things go wrong. It becomes a case of one party's word against another's. It is worth noting that assignments of intellectual property rights (copyright or performers' rights) are only valid if put in writing.

Q42a If you selected Other, please specify:

The modest number of free text responses indicate that agents are the primary source for contract negotiation amongst respondents. Several state that they 'never' work

without a contract, and also that terms and conditions are displayed elsewhere, as on invoices.

Q43 Have you ever sought legal advice before signing a contract?

Table 4.12

Have you ever sought legal advice before signing a contract?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes, always	4	1.7	1.7	1.7
	Mostly	4	1.7	1.7	3.3
	Sometimes	25	10.5	10.5	13.8
	Rarely	38	15.9	15.9	29.7
	No, never	168	70.3	70.3	100.0
	Total	239	100.0	100.0	

The percentages in Table 4.12 speak for themselves: the great majority (over 86%) of respondents 'never' or 'rarely' seek legal advice before contracting. Another 10.5% are more cautious and 'sometimes' seek advice, with less than 5% doing it as part of their standard practice.

Q44 Has a hirer, who has asked you to sign their contract, ever recommended that you seek legal advice before doing so?

The large majority (96.6%) of respondents confirm that this is 'rarely' or 'never' done by hirers.

Q45 Do you mention intellectual property rights (IPR) in your negotiations with hirers?

Figure 4.25 Involvement of IPR in contractual negotiations

Do you mention intellectual property rights in your negotiations with hirers?

Again this question shows a mixed picture. Nearly half (46%) of respondents make some use of intellectual property rights in negotiations; just over a quarter (26%) mention it 'sometimes', whilst one-fifth (20%) treat it as a standard negotiating point. Over half (54%) of respondents, however, 'rarely' or 'never' mention it, which may reflect lack of awareness or less confidence in negotiations.

Q46 Are intellectual property rights mentioned in the contracts or the terms and conditions you draw up yourself?

Figure 4.26 Use of intellectual property rights in own contracts

Are intellectual property rights mentioned in the contracts or the terms and conditions you draw up yourself?
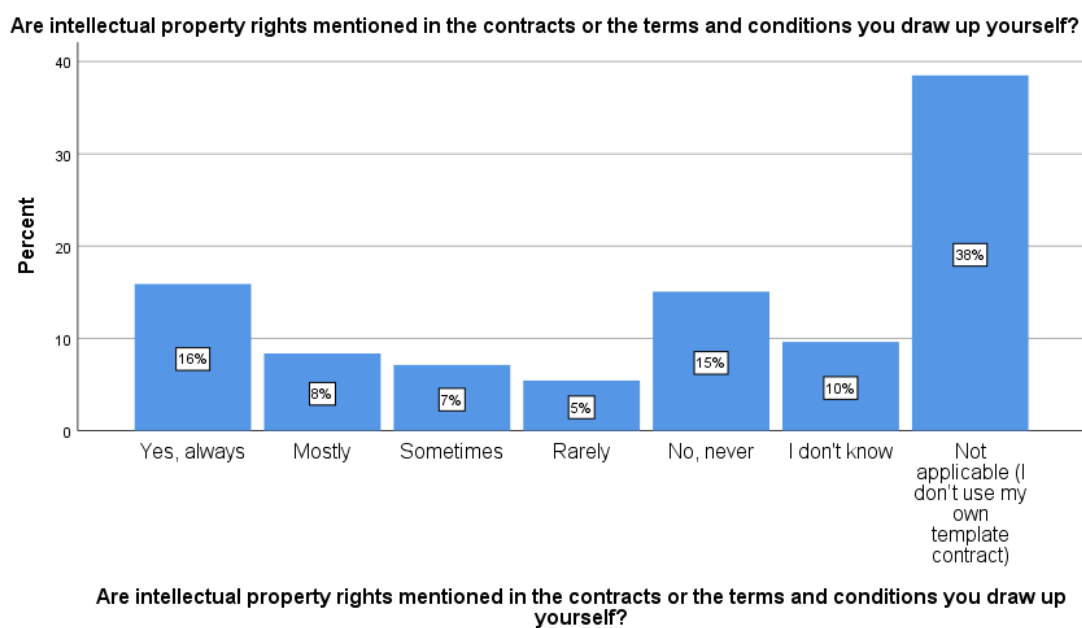
This question aims to understand more deeply a general awareness of intellectual property rights amongst voice-over artists, which may enter into written contracts even where they do not form part of the negotiation process. Again percentages suggest that intellectual property rights are mainly underutilised in their own agreements by artists, with only about a quarter (24%) stating that they 'mostly' or 'always' use them.

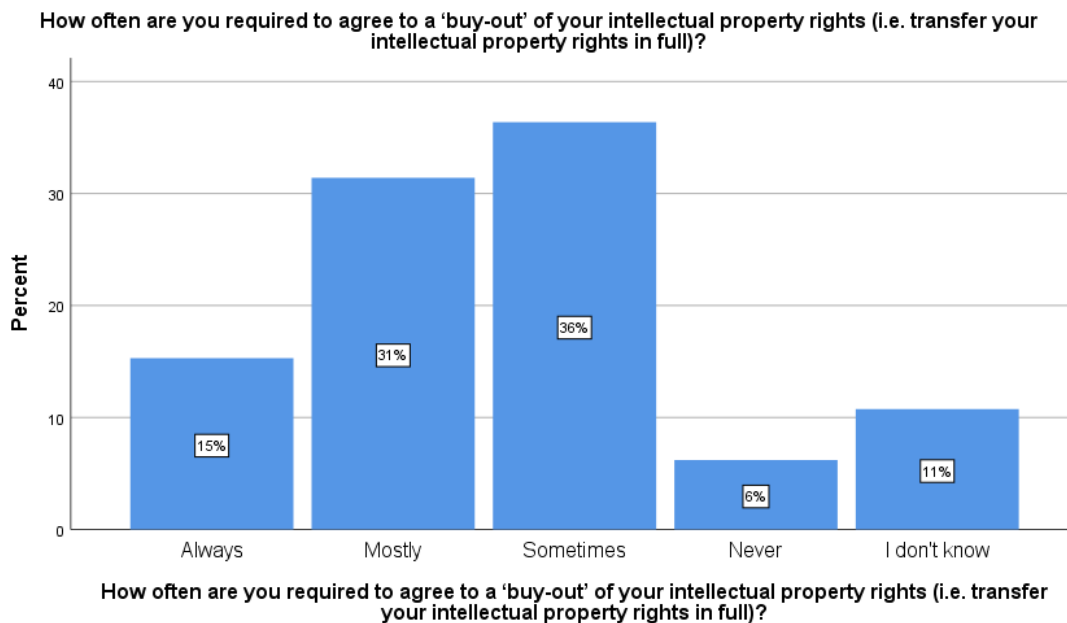**Q47 Are intellectual property rights mentioned in contracts drawn up by hirers?**

Figure 4.27 Use of intellectual property rights in hires' contracts

Are intellectual property rights mentioned in the contracts drawn up by hirers?

Are intellectual property rights mentioned in the contracts drawn up by hirers?
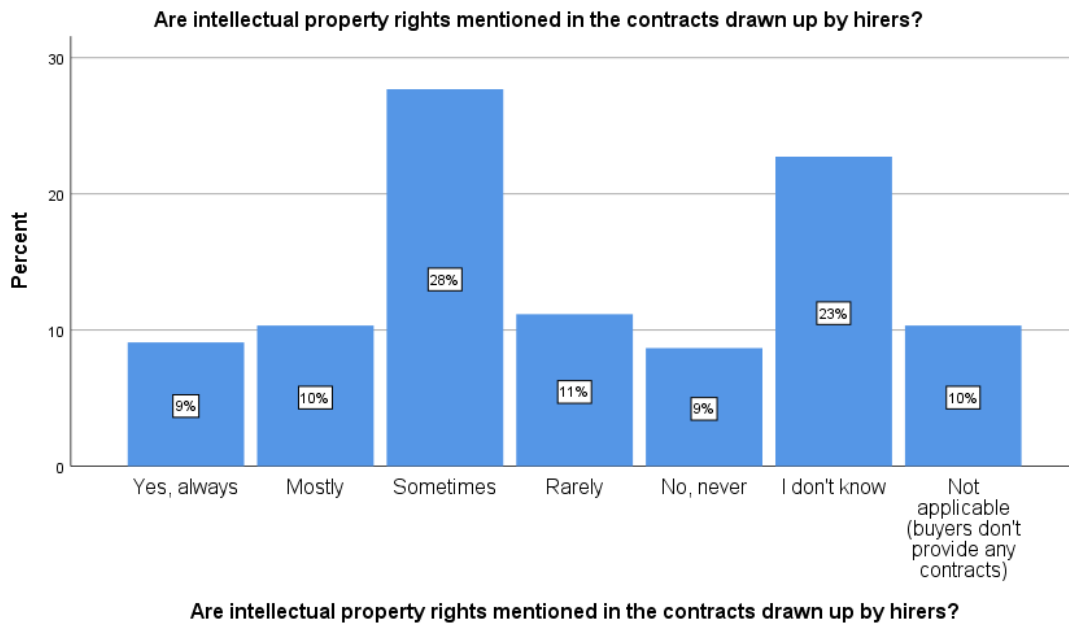
Again, there is a divide in responses which nevertheless appears to show awareness and recognition of intellectual property rights when mentioned in hirers' contracts. Nearly half (47%) of respondents note that IPR appears 'sometimes' or more often, and 11% 'rarely'. Just under a quarter (23%), however, frankly state that they 'don't know', which may also apply to those 9% who 'never' see IPR mentioned. Yet another 10% are not sufficiently involved in formal contracting to say.

Q48 How often are you required to agree to a 'buy-out' of your intellectual property rights (ie transfer your intellectual property rights in full)?

Figure 4.28 Prevalence of transfer in full of intellectual property rights

This key question addresses one of the central issues of the project: the respective levels of awareness of intellectual property rights by both hirers and voice-over artists, and how they are valued by them. Percentages suggest that recognition of their value is significant by hirers, where nearly half (46%) of respondents are required to transfer their rights 'always' or 'most' of the time. Another third (36%) are made to transfer rights 'sometimes' – the single largest group of respondents. Only a very small group (6 %) never agree to a buy-out, and 11% declares being unaware of the level of right-transfer they agree to.

4.11 Your Rights

Q49 Do you feel like you have a good understanding of your intellectual property rights?

Interestingly, respondents were split nearly evenly on this question. 40.2% answered in the affirmative whilst 44.8% disagreed. Another 15.1% were not sure.

Q49a If you have clicked 'I don't know', please specify

The sample that were unclear on their understanding mainly expressed partial, rather than full awareness, of the legal position.

Q50 Are you aware of any union or organisation that represents your interests as a voice-over?

The large majority of over three-quarters (82%) of respondents answered positively, whilst 18% said no.

Q50a If yes, please provide the name of this or these organisations

Almost three-quarters (73.2%) of respondents mentioned Equity. The next largest grouping at 6.6% was the Screen Actors Guild-American Federation of Television and

Radio Artists (SAG-AFTRA), a US trades union representing approximately 160,000 film and television actors, journalists, radio personalities, recording artists, singers, voice actors, and other media professionals worldwide.

Q51 Do you feel that this organisation properly represents your professional and legal interests as a voice-over?

Figure 4.29 Quality of representation by professional organisation

Do you feel that this organisation properly represents your professional and legal interests as a voice-over?

Do you feel that this organisation properly represents your professional and legal interests as a voice-over?

Again, we see a virtually even split between positive and negative views of (mainly) Equity by respondents: 52% are broadly happy with their representation whilst 48% are not.

Q52   Are you aware of legal rights called 'performers' rights'?

The majority of 57.3% of respondents considered that they were aware whilst 42.7% are not.

Q53   Are you aware of legal rights called 'equitable remuneration rights'?

These rights were less well known: just 26.8% of respondents had heard of them, but most (73.2%) had not.

Q54   Are you aware of differences between assigning and licencing intellectual property rights?

Nearly one-third (29.7%) were aware of the differences, but most (70.3%) were not.

Q55   Have you ever heard of 'the copyright Tribunal and what it does?

Respondents' awareness was very low here: only 17.2% had heard of the body whilst 82.8% had not. The suite of responses above indicates that there is a substantial need for education and training within the voice-over industry to place them in a stronger legal position when negotiating.

The following cross-tabulated survey responses were selected from the single questions summarised above for their deeper insight into potential and identified issues affecting voice-overs within the industry. They are therefore useful not only in confirming assumptions that have been made, but also aggregate individual responses to strengthen and show trends affecting substantial groupings of artists.

The topics covered in this section combine survey responses on:

- voice-over areas across respondents;

- self-reported levels of experience;

- self-reported remuneration levels;

- full- and part-time worker status;

- budgetary constraints on accepting work;

- numbers of jobs per year undertaken;

- and general awareness of their legal rights.

5.1 Voice-Over Acting Specialisms

Table 5.1

Number of respondents reporting areas of work

Number of respondents	Number of areas of work per respondent
7	1
5	2
6	3
9	4
212	5 or more

Table 5.1 shows the number of respondents who reported working across the 32 diverse voice-over areas depicted in Figure 4.2. It will be apparent that the great majority (88.7%) gain work from five or more voice-over areas, which suggests that versatility is quite important within the industry.

Figure 5.1 Voice-over areas and perceptions of fair pay through end clients
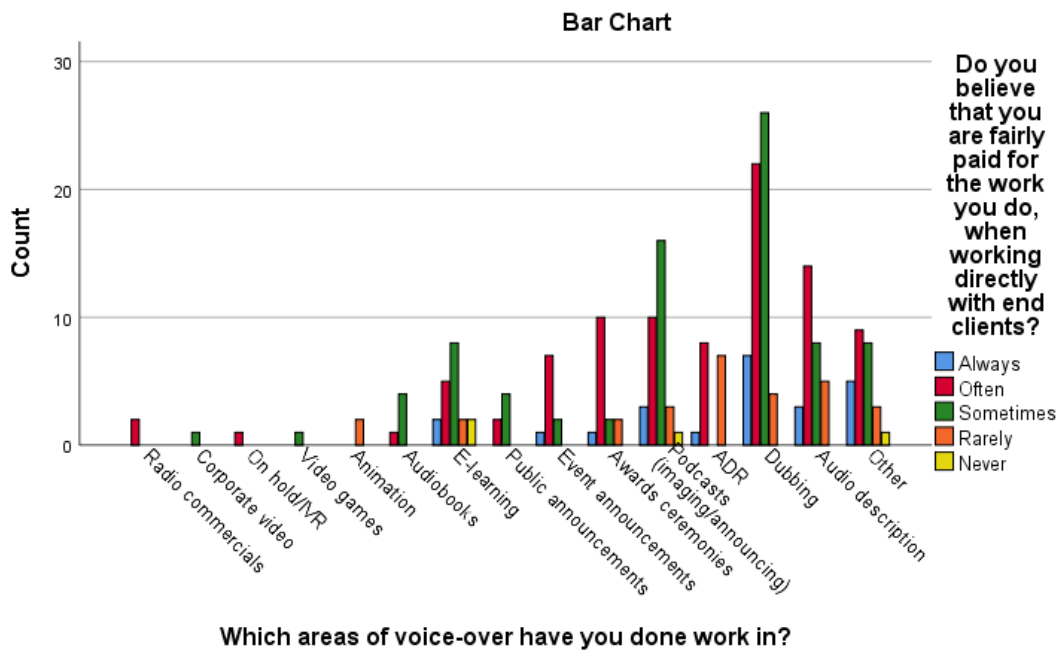
Figure 5.2 Voice-over areas and perceptions of fair pay through agents
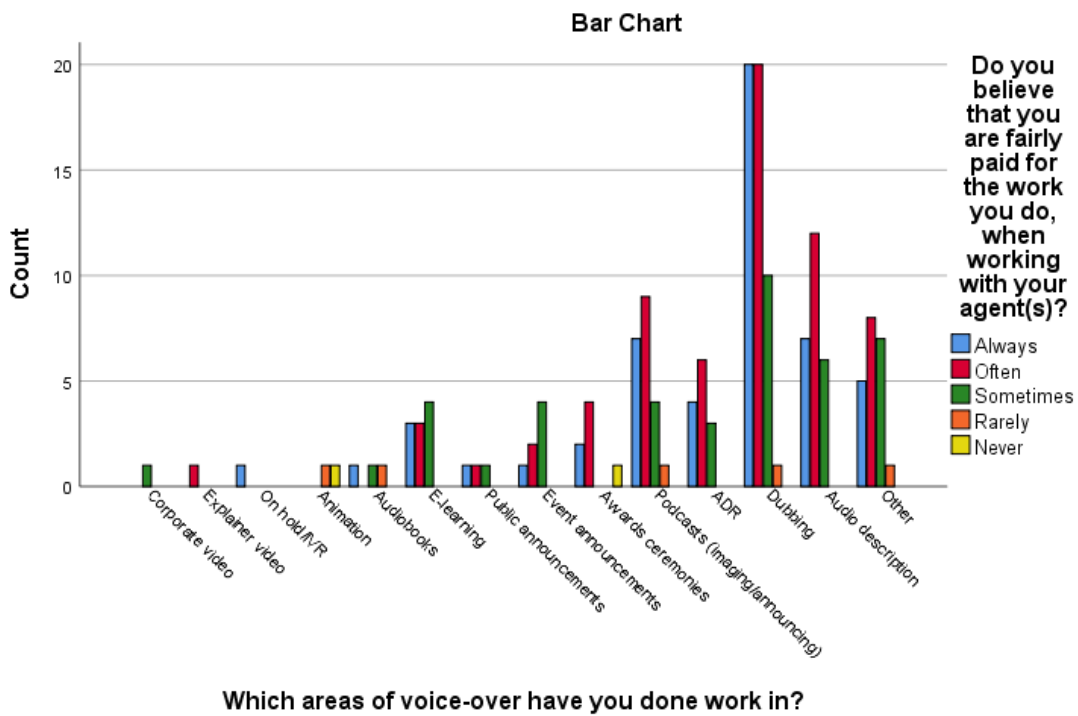
Figure 5.3 Voice-over areas and perceptions of fair pay through production companies
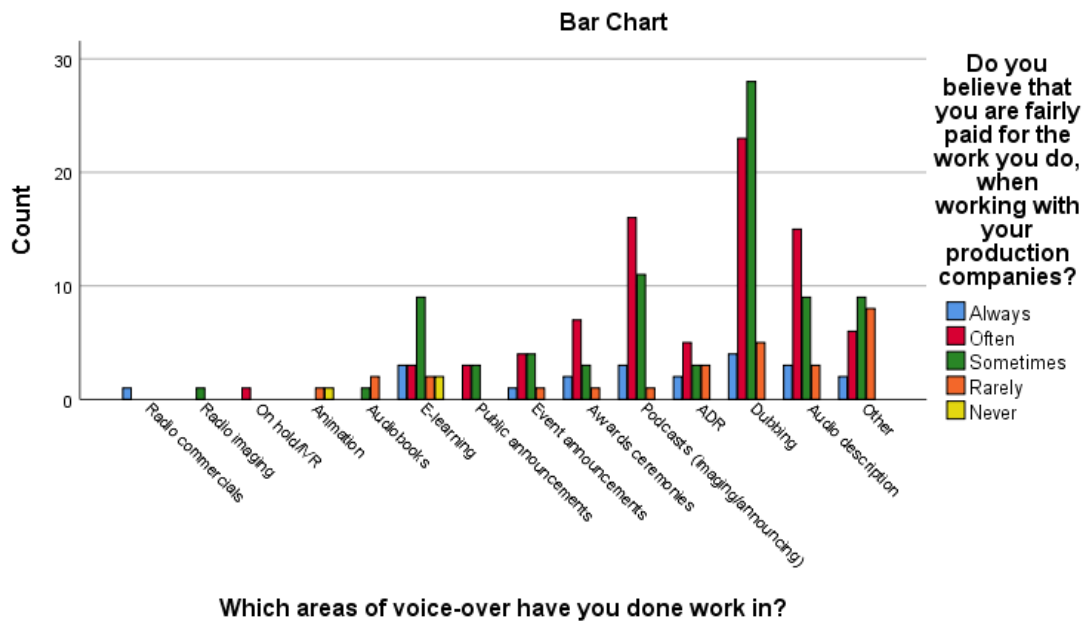
Figures 5.1 to 5.3 illustrate differing perceptions according to voice-over area of whether artists feel they are fairly paid by: end clients, agents, and production companies respectively. It appears that, with end clients, more working specifically in events announcements, awards ceremonies, podcasts, ADR (automated dialogue replacement), dubbing, and audio description have the most positive assessment of fairness in pay, reporting that they 'often' are fairly paid by end clients. Agents fare even better, according to many voice-over artists working in e-learning, podcasts, ADR, dubbing and audio description, who feel they are 'always' fairly paid by agents. With production companies, a sizable number of those working in awards ceremonies, podcasts, dubbing and audio description feel they are 'often' fairly paid, with a similar profile to end clients.

Figure 5.4 Voice-over areas and use of online marketplace platforms
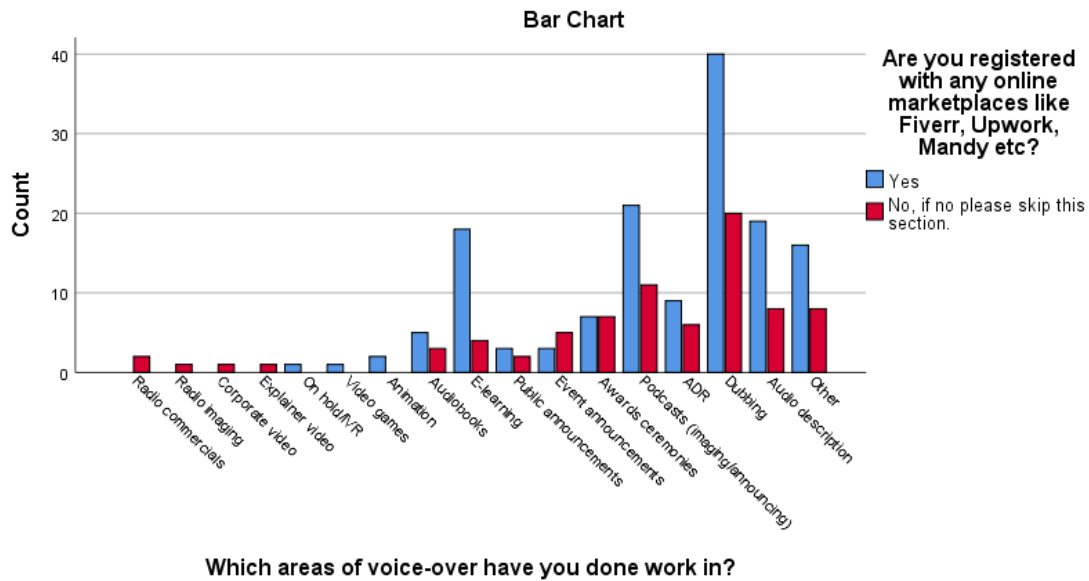
We see in Figure 5.4 a picture of how prevalent the use of online marketplaces are in particular segments of the voice-over industry. Results suggest that the greatest number of registrations with them are in e-learning, podcasts, ADR, dubbing and audio description. There may be some correlation with 'newer' modes of voice-over, such as e-learning and podcasts, that have been relatively recent entrants into the industry due to technology shifts.

5.2 Years in Industry and Self-Reported Levels of Experience

Table 5.2

Breakdown of years of experience with self-reported skill levels

Number of cases	Self-reported skill level	Lowest number of years reported	Highest number of years reported	Mean	Median	Standard deviation
7	Beginner	0	7	1.57	1	2.44
52	Intermediate	1	28	7.25	4	7.69
88	Advanced	1	43	15.63	14	10.49
92	Highly advanced	3	54	24.32	23.5	11.08

Table 5.2 shows that many of the respondents are confident in their skill levels, which are not necessarily correlated with number of years working in the industry. Saying this, as would be expected the mean value of their responses rises according to years reported.

Figure 5.5 Years of experience and self-reported remuneration levels
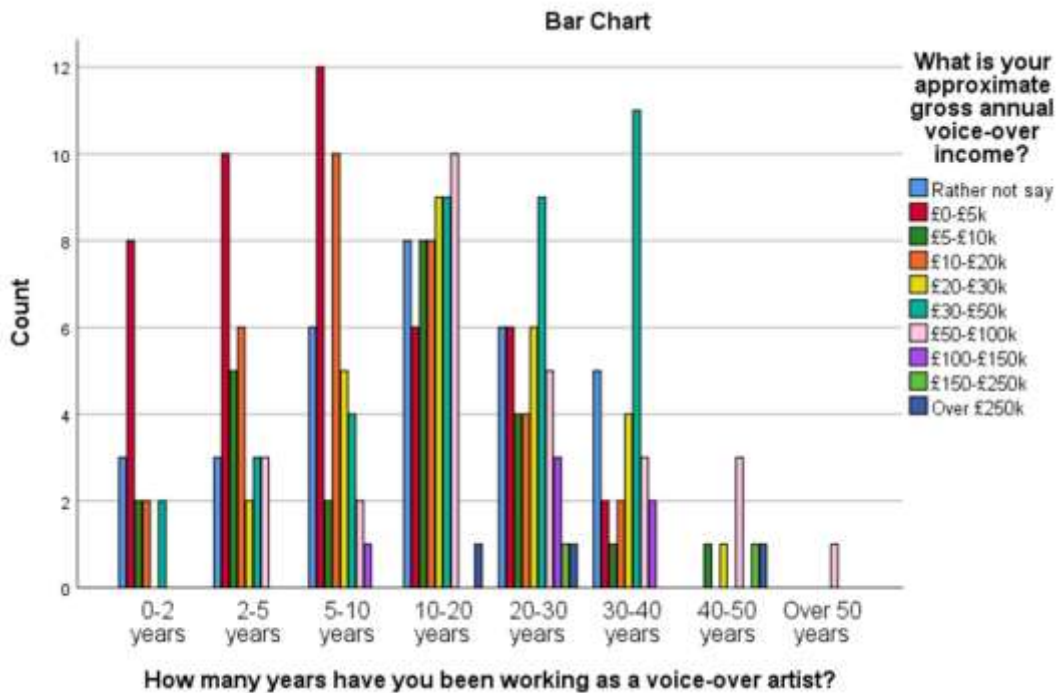

Figure 5.5 tabulates the number of years that voice-over artists have been active in the industry with their remuneration levels. We can see that those who have been working for less than ten years are often towards the bottom end of earnings, showing the largest number receiving under £5k per year. Those working for between 10 and 30 years have the widest range of earnings; for both this group and those active for up to 40 years, the most usual pay scale is between £30k and £50k per year. Some working for between ten and 20 years can earn between £50k and £100k per year, but this level of pay begins to decline between 20 and 40 years in the industry. After this point it rises again for those with long experience, with the veteran respondent of over 50 years time served earning between £50k and £100k. It is possible that the declining pattern may be somewhat due to part-time working patterns. This will be explored further below.

Figure 5.6 Number of jobs per year and self-reported skill levels
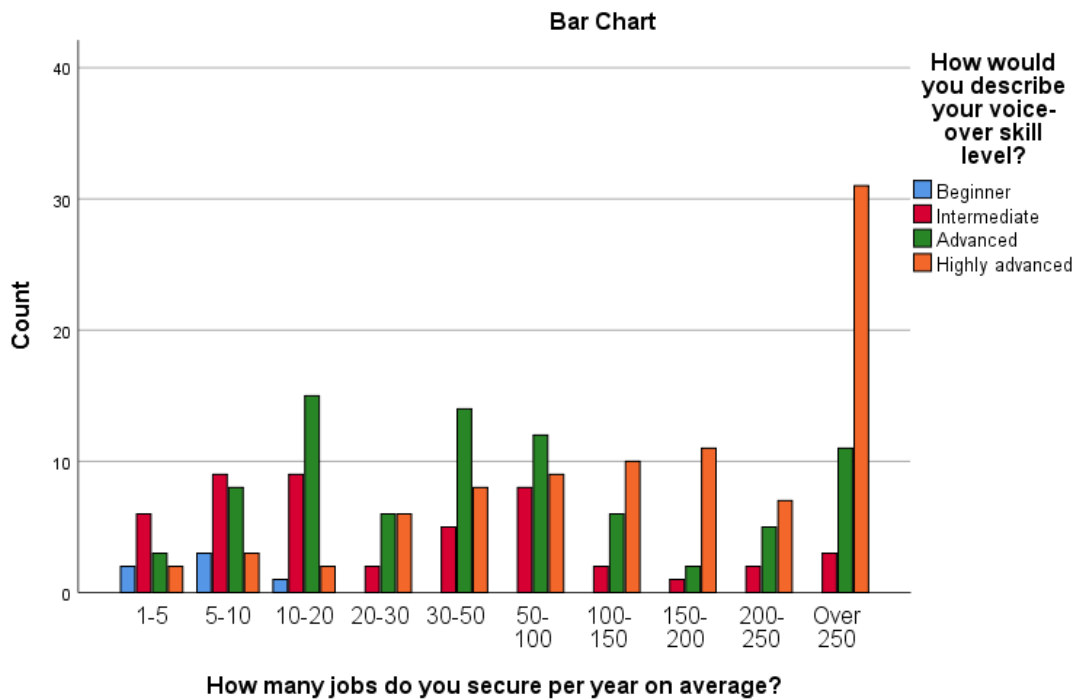
Looking at how skill levels might affect number of jobs per year, it is rare to find those classifying themselves as 'beginners' in the industry to report more than 20 jobs per year. Those self-reporting 'intermediate' skills are more widely represented across job numbers, but here too these appear to tail off somewhat beyond 100 per year, before rising again to over 250. 'Advanced' voice-over skills deliver the greatest number of jobs between 20 and 100, whilst 'highly advanced' artists regularly command well over 50 jobs per year, outnumbering others at between 100 and 200, and beyond 250 jobs per year.

Figure 5.7 Number of jobs per year and self-reported remuneration levels
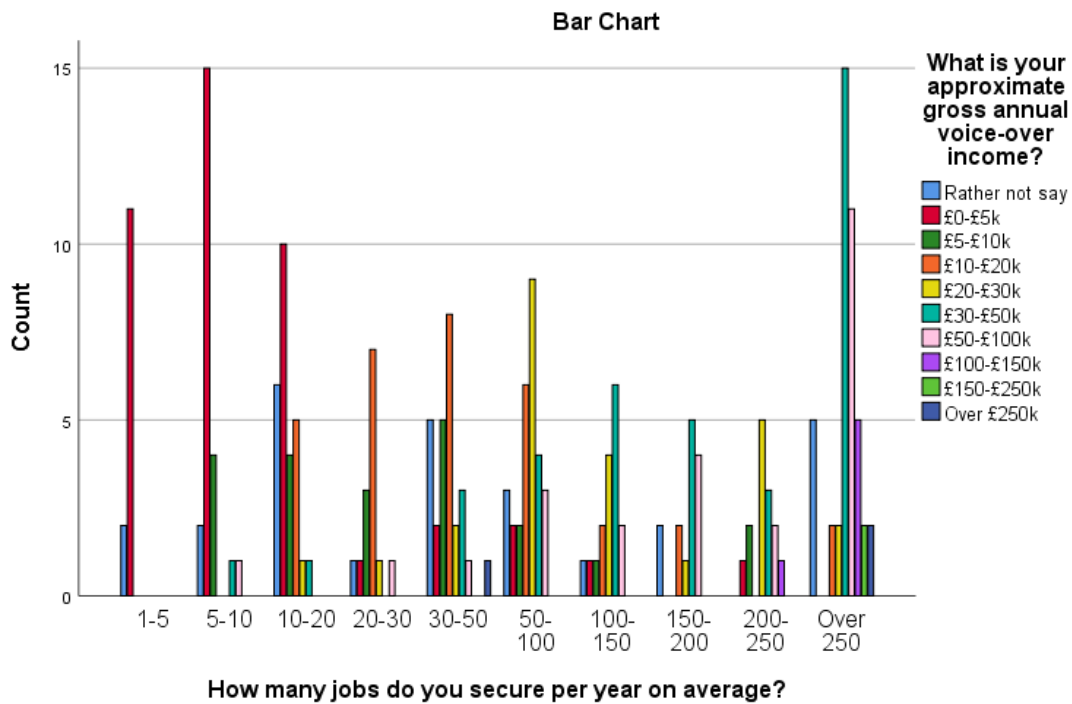
In Figure 5.7 we see a correlation between relatively low numbers (under 20) of jobs secured and lower levels of annual income. It would be expected that they would increase in direct proportion with each other. Those with fewest jobs per year do fall into the lowest income bracket, and this relationship persists: a gradual increase in pay can be seen alongside rising numbers of jobs up to about 150 jobs a year. After this level there appears to be no further premium on pay up to about 250 jobs a year: more respondents' incomes seem to level off between £20k and £50k regardless of number of jobs worked. Once over 250 jobs a year are undertaken, however, annual salaries of up to £100k and even beyond occur fairly regularly.

For those securing between 20 and 50 jobs per year, annual income rises moderately to between £10k and £20k. As might be expected, up to 100 jobs per year tend to deliver between £20k and £30k income, which rises to between £30k and £50k for between 100 and 200 jobs per year. Beyond this point the picture becomes more mixed, which suggests some decline in job value; those earning between £50k and £100k are best represented at up to 200 and beyond 250 jobs per year. Although this suggests that some of these may be part-time working, we will explore working patterns below.

5.3 Full-Time and Part-Time Working Patterns

Figure 5.8 Full-time/part-time workers and self-reported remuneration levels
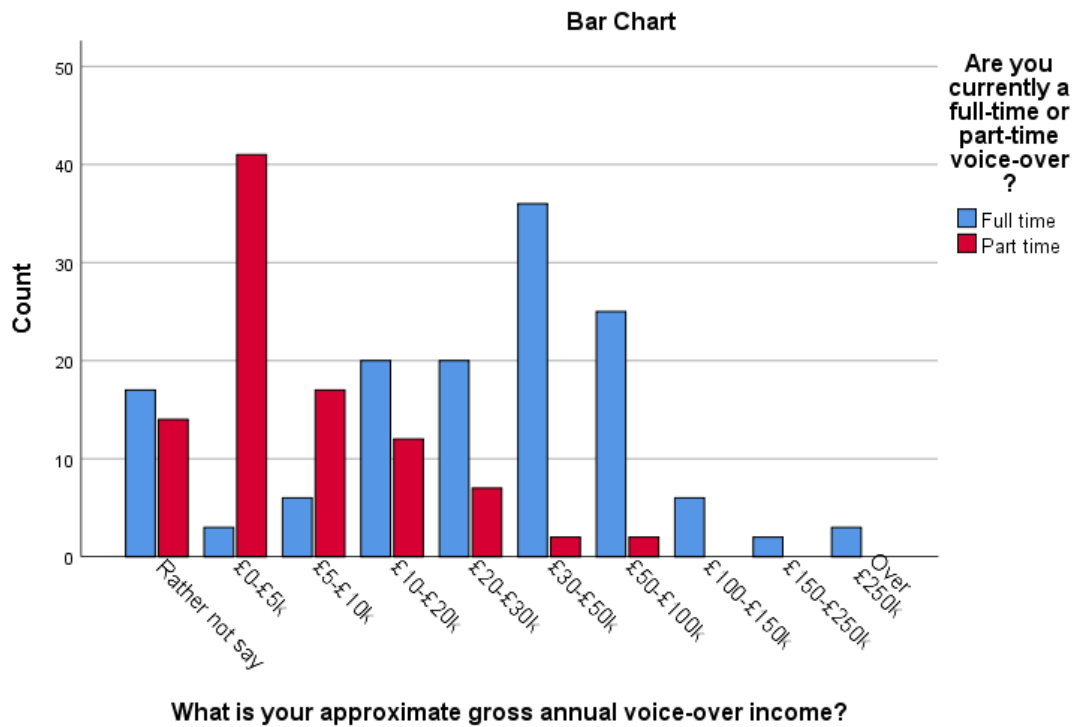

We see in Figure 5.8 the relative distribution of annual income with full- and part-time working patterns. The greatest number of those earning up to £10k per year are indeed part-time; full-time working begins to become more prevalent for those earning upwards of £10k per year, and thereafter increases with salary. The largest numbers reporting full-time working earn between £30k and £100k per year; those earning at higher levels are invariably full-time.

Figure 5.9 Full-time/part-time workers and modes of recruitment
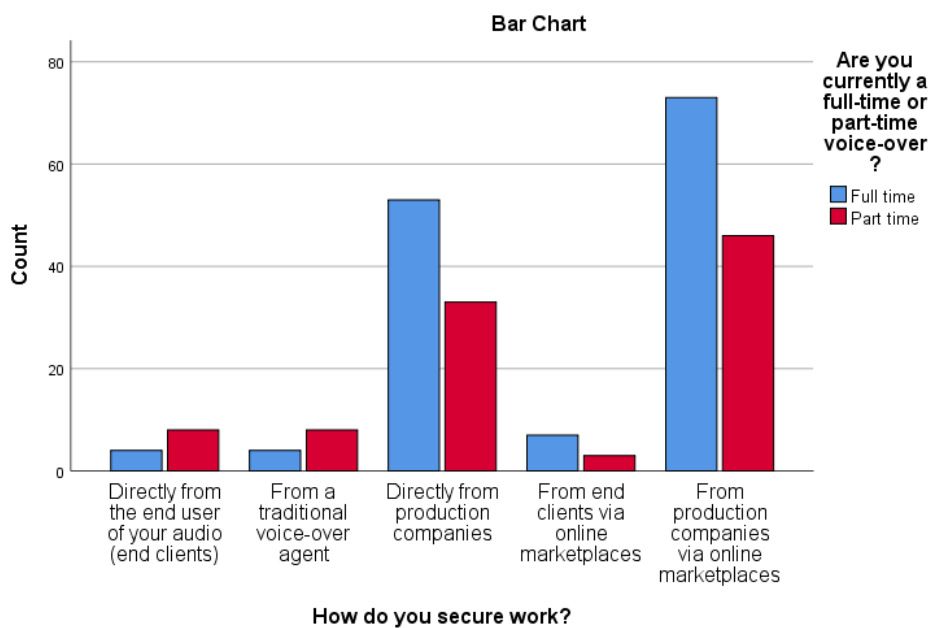
The survey sought to ascertain whether there were any patterns in modes of recruitment favoured by full- or part-time workers. It appears that work through production companies, whether directly or via online marketplaces, are the most common mode of recruitment for both full-time and part-time workers. There were no discernible patterns apparent in the much lower numbers recruited directly from end clients or agents, or from end clients via online marketplaces.

Figure 5.10 Full-time/part-time workers and views of online recruitment platforms
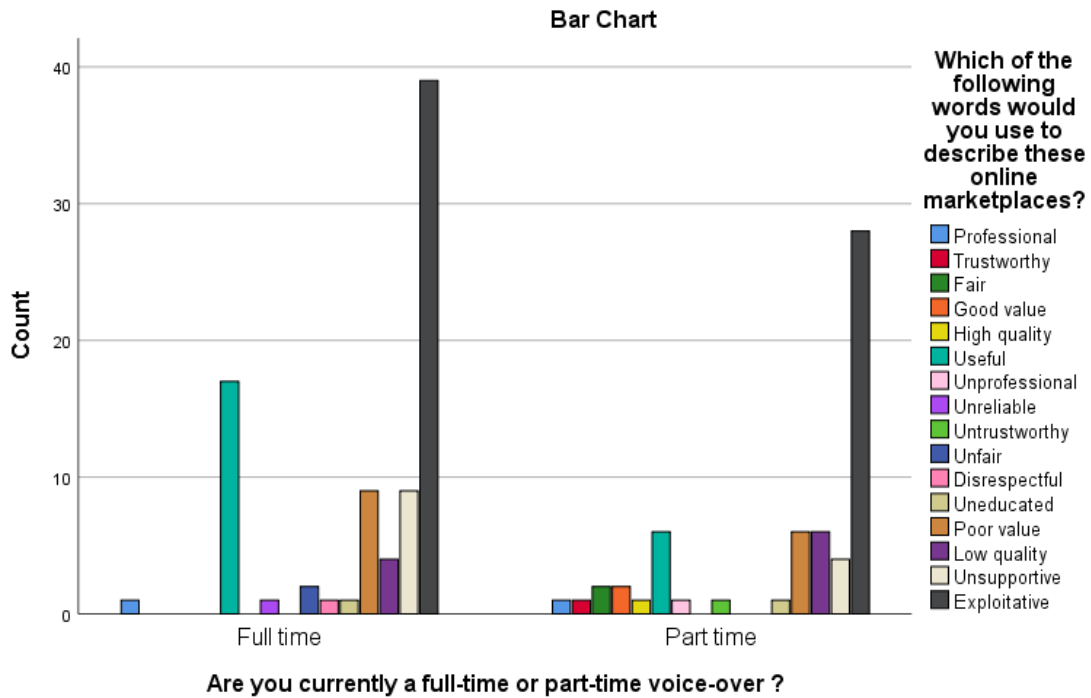
According to Figure 5.10, there is a difference of opinion between full-time and part-time voice-over artists as to their impressions of online recruitment platforms. Although they all agree that they are 'useful', full-time workers generally see the platforms in a more negative light than part-time workers. All feel they are 'poor value' and 'unsupportive', with 'exploitative' especially strongly felt by both types.

5.4 Views on budgetary constraints

Figure 5.11 Years of experience and turning down rate due to budgetary reasons
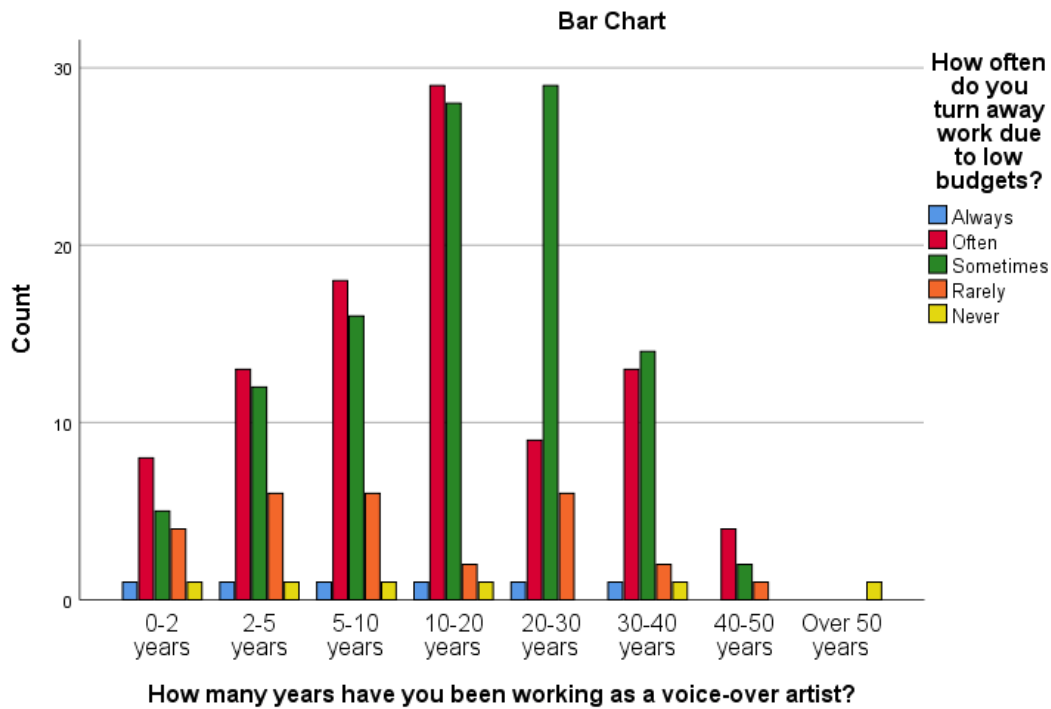

Respondents were asked how often they turned away work for being poorly paid, and this was cross-tabulated with their years in the industry. Whilst all reported generally that this happened 'sometimes', those that had worked less than twenty years as voice-over artists turned down work more 'often'. Between twenty and thirty years, turning down work 'sometimes' was more commonly reported, and both to a similar extent up to forty years. After forty years the number of responses to this question declined markedly.

**Figure 5.12 Years of experience and compromising on ideal rates due to budgetary reasons**
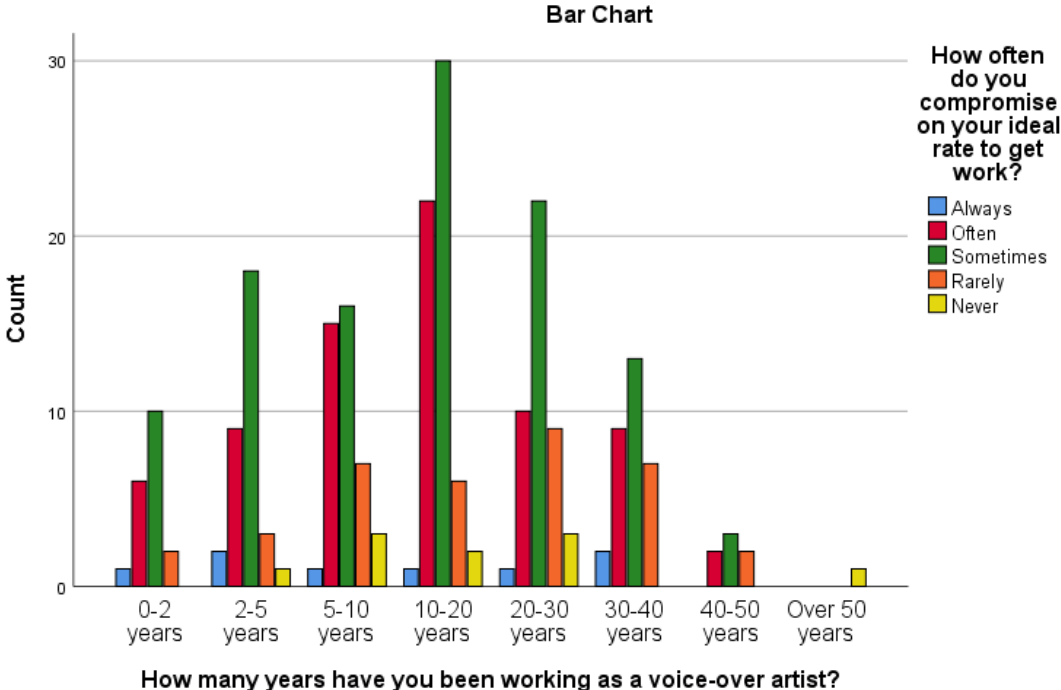
Following on from Figure 5.11 above, Figure 5.12 aims to tease out from respondents how willing to compromise they might be on their rates depending on budget. Again, artists of all levels of experience reported that they were flexible on their ideal rates 'sometimes' to a large extent, with those working between five and twenty years willing to compromise most 'often'. After twenty years in the industry respondents are nearly as likely to compromise 'rarely' as 'often'.

Figure 5.13 Levels of remuneration and turning down rate due to budgetary reasons
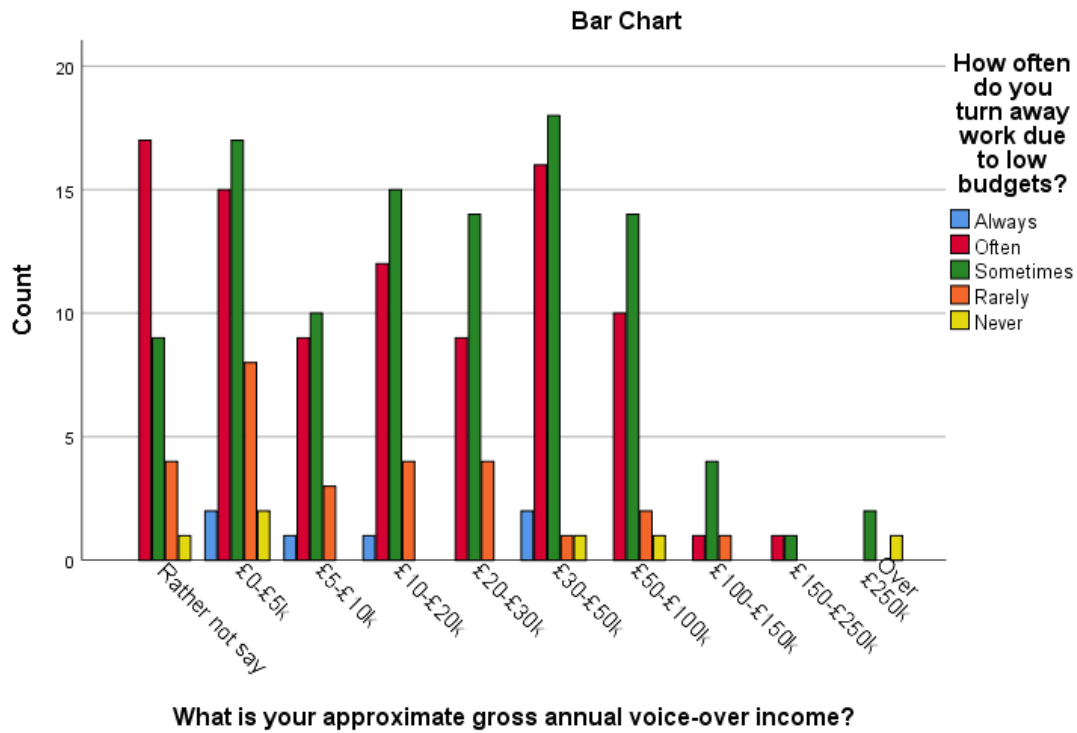
When analysed with annual income, turning down work 'sometimes' for budgetary reasons is common across all pay levels received. It happens slightly less often amongst respondents earning between £5k and £30k, and from £100k onwards. Those at the lowest end of the pay spectrum and earning between £30k and £50k turn away work that they perceive as underpaid most 'often'.

Figure 5.14 Levels of remuneration and compromising on ideal rates
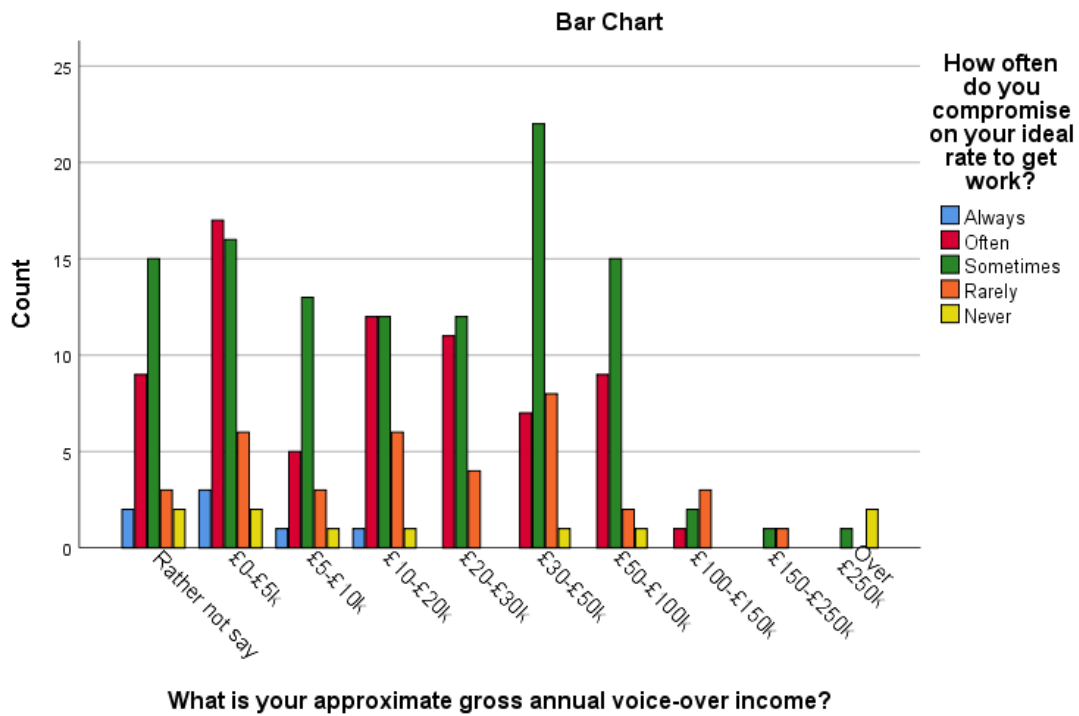
All levels of pay report that they are 'sometimes' prepared to compromise on ideal rates to a large extent. Those respondents earning at the lowest levels, and between £10k and £30k, are as willing to compromise 'often' as 'sometimes' and so appear to be fairly flexible. Between £5k and £10k, and for most earning upwards of £30k, compromise is much more likely to happen 'sometimes' than 'often'.

5.5 Numbers of Jobs Per Year

Figure 5.15 Years of experience and number of jobs per year
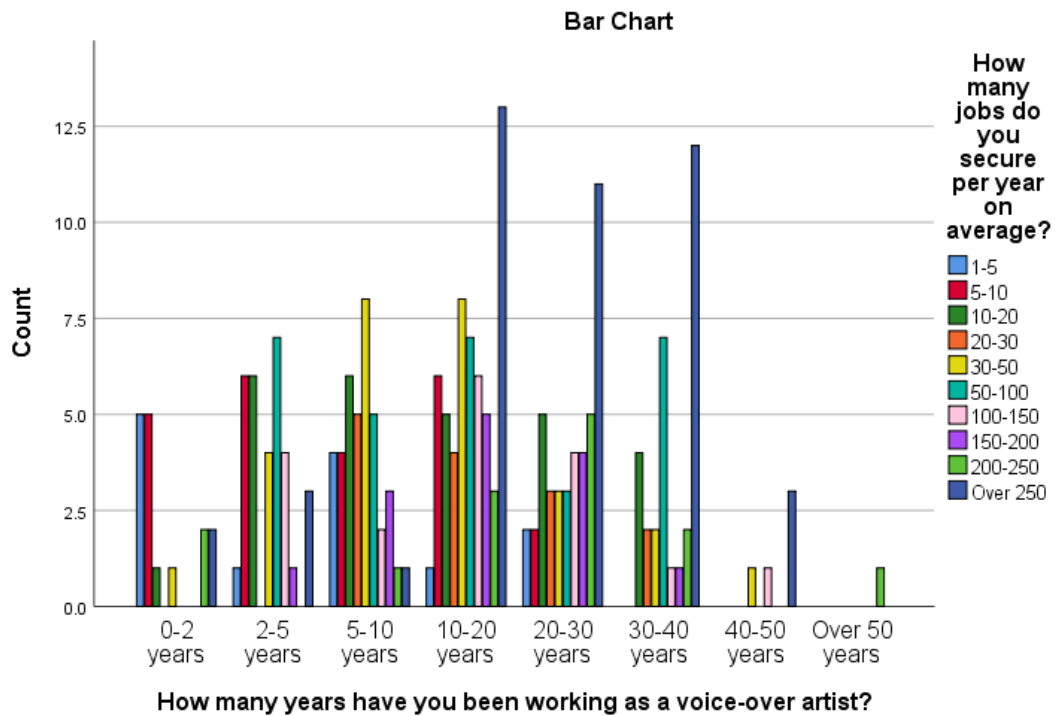
When cross-tabulating years of experience and the number of jobs, the picture becomes more complex. Interestingly, the most active respondents working the greatest numbers of jobs a year are far and away those in the industry for between ten and forty years. The largest range of jobs per year are worked by voice-over artists of between five and thirty years' experience. These figures suggest that there is a 'bedding-in' period for new entrants for the first few years, but also that there is not necessarily an advantage in terms of greater numbers of jobs to be expected once an artist is fully experienced.

## 5.6 Contractual Practice and Intellectual Property Rights

Figure 5.16 Years of experience and awareness of intellectual property rights
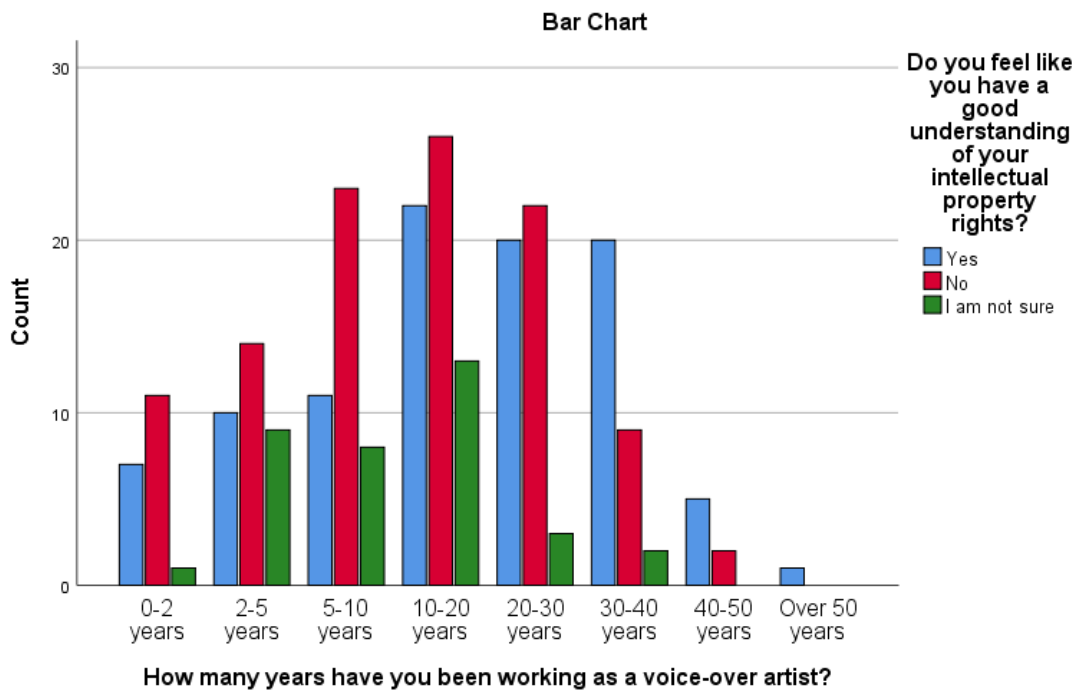
Respondents were asked how good an understanding they felt they had of intellectual property rights. The most positive responses were correlated most strongly with artists in the industry for between 10 and 40 years. Saying this, those working for between five and 30 years felt more strongly that they did not have a good understanding of IPR, markedly so in the case of those under 10 years in the industry. There is a sense that these respondents may have some knowledge, but are just as aware that this is likely to be incomplete. The most aware artists in the 10 to 20 year group were also least sure about how much they knew.

Figure 5.17 Years of experience and contract templates
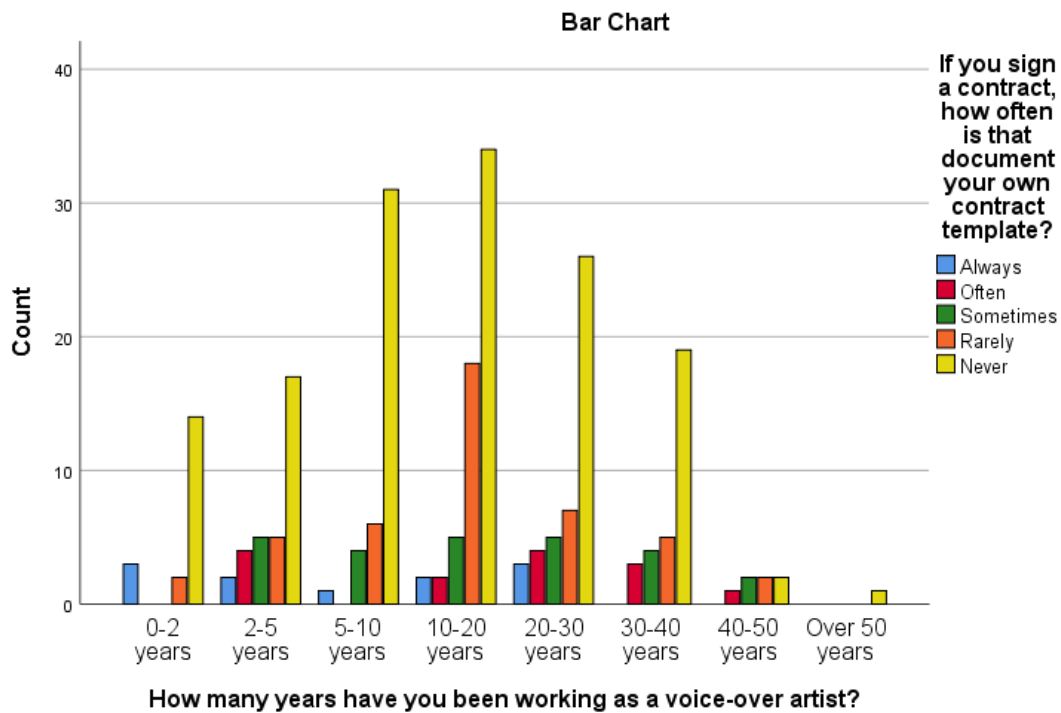
Responses regarding artists' own use of contract templates were cross-tabulated with years of experience. By far the most prevalent response across the board was that they 'never' used their own contracts. The largest group reporting that they 'rarely' used their own contracts had been working between 10 and 20 years. Profiles of other levels of experience suggest that there is not a significant correlation between these and use of their own contracts.

Figure 5.18 Years of experience and negotiating expertise
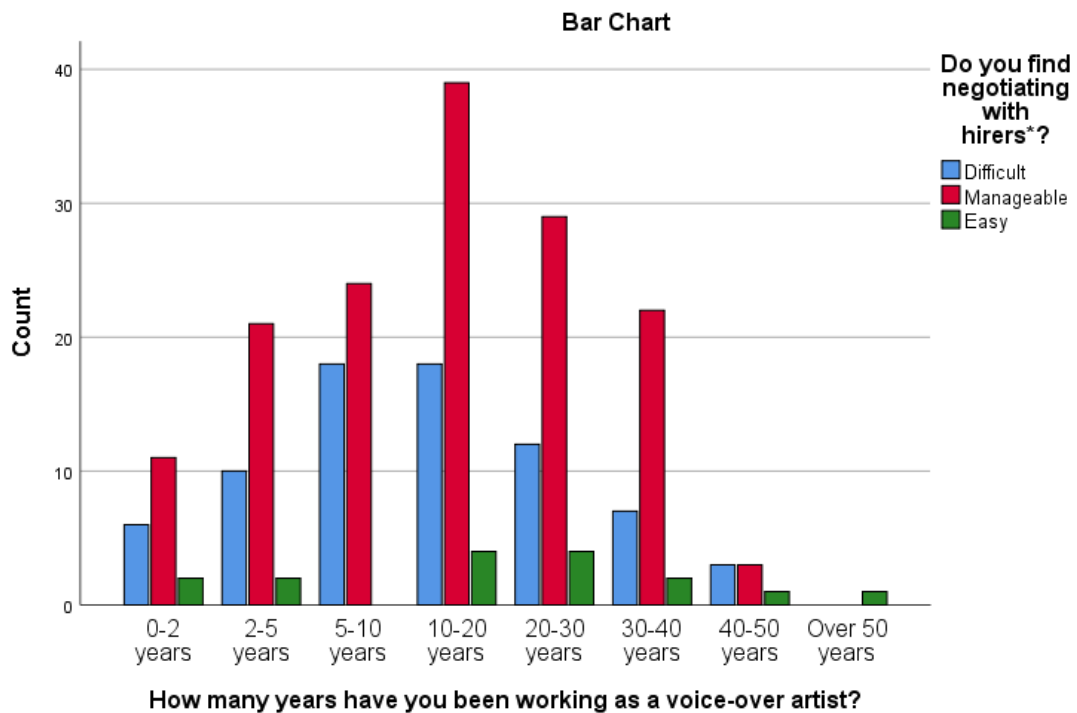
Looking at whether years of experience had an impact on confidence in their negotiations with hirers, it appears that as might be expected confidence rises with years of experience. Respondents finding negotiations most manageable have been working for 10 to 20 years, although both they and those with slightly less experience also report the highest levels of difficulties. Beyond 20 years levels of perceived difficulty decline markedly, although earliest entrants also report less problems.

Appendix   Survey participants information sheet

See the next page for the Survey participants information sheet.