

IMDA Media Freelancer Study 2018



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Survey Coverage & Methodology

Introduction

Objectives

In 2018, IMDA conducted a study on the current landscape of media professionals offering services as freelancers (hereafter referred to as “media freelancers”) in Singapore. The Study took stock of and analysed (i) the pool of media freelancers in 2017 and (ii) 3-year (2018-2020) projected media freelancer pool across sectors, (iii) profile of media freelancers, (iv) profile of companies hiring media freelancers, (v) demand for media freelancers and (vi) the challenges and motivations faced by media freelancers and the companies hiring them. The study reached out to three categories of stakeholders:

- Full-time media freelancers in Singapore
- Media companies based in Singapore hiring such full-time media freelancers
- Non-media companies in Singapore (i.e. companies in other sectors of the economy) hiring such full-time media freelancers

Definition of Full-time Media Freelancer

IMDA defines media freelancer as:

- i. A person who does not have a contract of service with an employer **AND**
- ii. Operates his/her own media service business or trade¹ without hiring any employees; **AND**
- iii. He/ She negotiates his/her terms and benefits with clients, and it is clearly stated in the contract that it is his/her service as an individual that is being procured for all intents and purposes; **AND**
- iv. He/ She can either operate as individuals; OR have an ACRA registered entity such as sole proprietorships, Limited Liability Partnerships, Limited Liability Companies, Partnerships, and companies, where such entity does not hire any employees.

In addition, for the purpose of the study, IMDA defines full-time media freelancer as, “A media freelancer who has worked on media-related roles and their only source of active income is from freelancing engagements (and does not earn a regular salary)”

¹ Media service business or trade includes design, development, production, operation, distribution, sale and/or marketing of media.

Survey Methodology

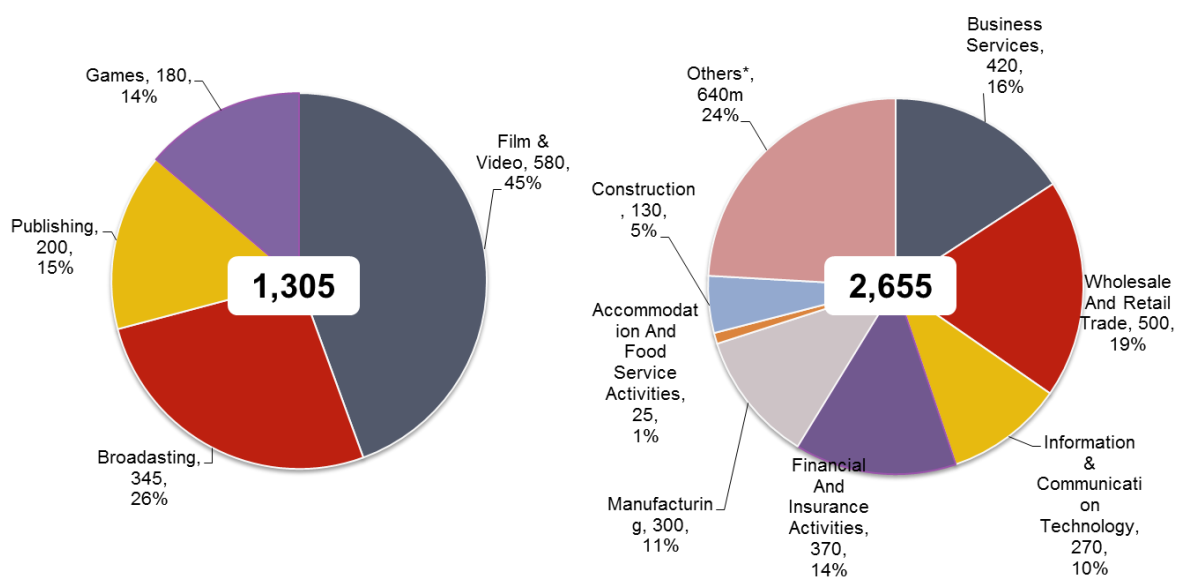
A stratified sampling method was used to construct a sampling frame. A total of 506 full-time media freelancers (92% Singapore Citizens and 8% Singapore Permanent Residents) and 510 Singapore-based companies (225 media companies and 285 non-media companies) who hire full-time media freelancers were interviewed for this study. The sampling plan uses references from the sampling plan for the MCI's ICMD Freelancer Study (2015), the sub-sector distribution of media companies, as well as the sector distribution of non-media companies in Singapore. The database of freelancers was based on publicly available listings, job sites (e.g. LinkedIn), references from the companies and from freelancers. The freelancers were then screened to ensure they are eligible as per the definition used. The data were collected through a mix of online surveys, in-depth interviews, and focus group discussions.

Study Findings

Media Freelancer Estimation

The study estimates that in 2017, there were 4,000 Singaporeans and Permanent Residents who worked as freelancer on media related-roles and whose only source of income came from such freelancing engagements. Approximately 66% of these media freelancers worked for companies in non-media sectors with Wholesale & Retail being the largest hirer (502). Among the media sub-sectors, Film & Video sub-sector was the largest hirer (580).

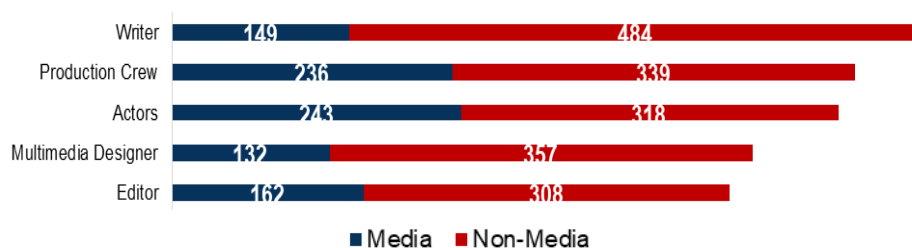
Figure 1: Supply of Media Freelancers by Sectors, 2017



*Other sectors included Transportation & Storage, Music, Printing, Post & Courier, Recreational, Social Services, Healthcare, Education, and Other Services;
Source: IMDA Media Freelancer Survey 2018 (Current Study)

The top three roles where media freelancers were hired for were, “Writer”, “Production Crew”, and “Actor”.

Figure 2: Top 5 roles where Media Freelancers Were Hired For

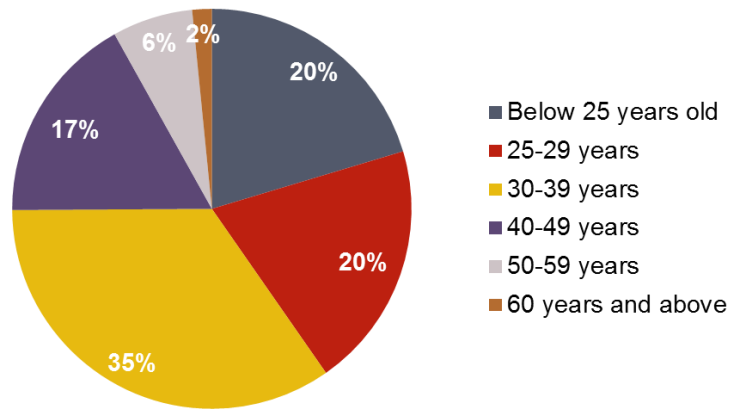


Note: The number of freelancers above do not represent unique number of individuals, as one freelancer can be involved in multiple job roles.

Demographic Profile

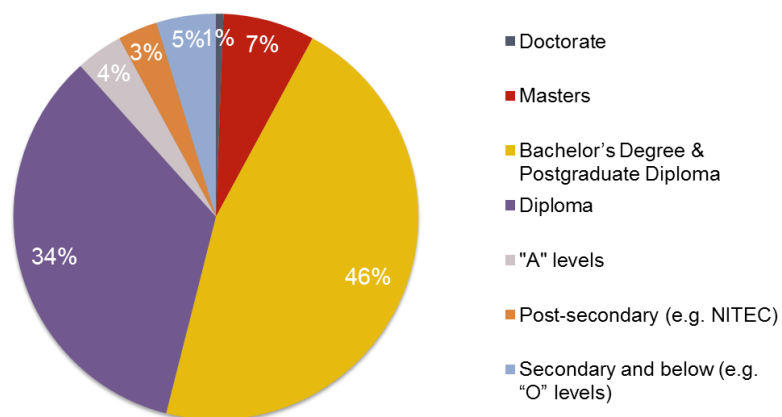
59% of media freelancers were male. The median age of media freelancers was between 30 and 39 years.

Figure 3: Age of Media Freelancers, 2017



88% of media freelancers had completed a tertiary education, of which 34% and 46% attained a Diploma or a Bachelor's degree/Postgraduate diploma, respectively.

Figure 4: Highest Academic Qualification Attained by Media Freelancers, 2017

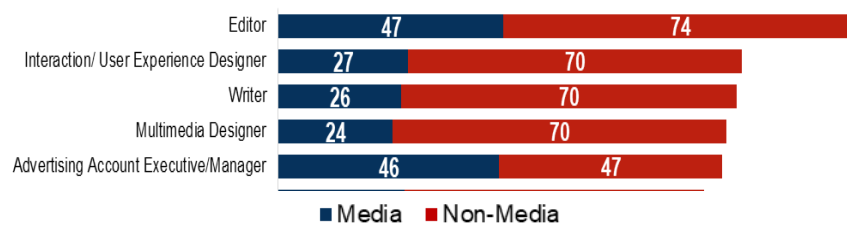


Projected Demand for Media Freelancers

The demand² for freelancing services was expected to grow between 5% and 8% per annum from 2018 to 2020 - to a demand of between 4,700 and 5,000. However, the supply of individuals involved in full-time media freelancing was expected to increase at a rate of only 1% per annum to 4,080 in 2020.

In terms of future demand, Interaction/ UX Designer and Advertising Account Executive/ Manager were expected to grow most significantly, especially in the non-media sectors.

Figure 5: Projected Demand of Top 5 Job Roles Over 2018-2020



Note: The number of freelancers above do not represent unique number of individuals, as one freelancer can be involved in multiple job roles.

Skills Gap

Data Analytics, Software Programming³, and UX/UI Design were technical skills with the largest gaps between what media and non-media companies required against what freelancers could currently supply. The lack of digital skills was highlighted in the analysis of soft skills - freelancers perceived that they possessed the soft skills demanded by companies (such as Communication, Creative Thinking, Problem Solving, etc.), except for skills related to Computational Thinking and Digital Literacy.

Sourcing for Opportunities

Channels that guaranteed high degree of trust (e.g. referrals, personal network) were preferred by companies and freelancers for sourcing of freelancers or jobs respectively. Among the freelance specific websites, Freelance.com, Freelancer.sg and Upwork are the top 3 preferred channels to find projects.

Tripartite Standard on the Procurement of Services from Media Freelancers

87% of media companies and 59% of non-media companies reported to have signed contracts with freelancers, but only 42% of freelancers reported that they had signed contracts with companies. Among the companies that had adopted the Tripartite Standard on the Procurement of Services from Media Freelancers (TS Media Freelancers), the rate of contract signing was higher (92% among media companies

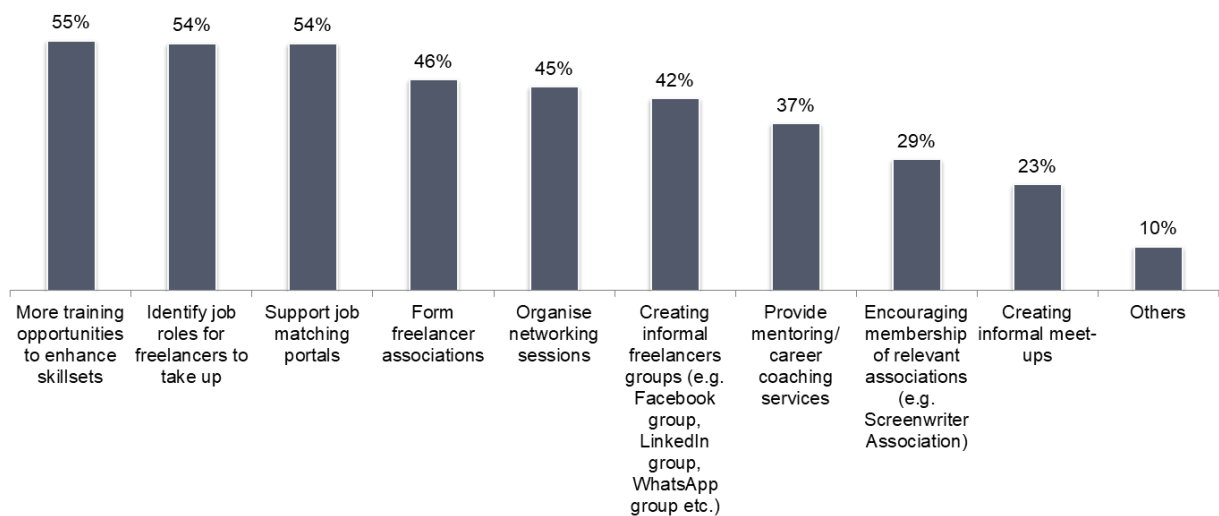
² Demand refers to the number of potential work opportunities for media freelancers in Singapore

³ Software Programming is related to tools related to Media sector – such as Media Analysis Tools, Animation/ Graphic Software, Web Design tools, Artificial Intelligence, etc.

and 82% among non-media companies) than that of companies that had not adopted the TS Media Freelancers.

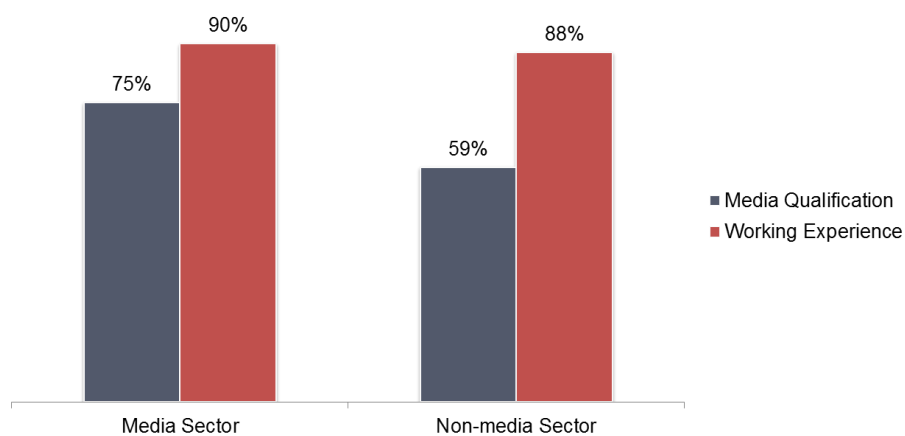
The companies noted that media freelancers needed more training opportunities, encouragement to improve skills, and support in job matching portals. Similarly, among freelancers, more training opportunities, identifying job roles for freelancers to take up (job roles where there is less competition from full-time professionals), and support in job matching portals were identified as the top possible support for media freelancers in Singapore.

Figure 6: Support needed by Freelancers, 2017



Around 90% of both media and non-media companies viewed it important for media freelancers to have media-related work experiences, significantly higher share than those (75% of media companies and 59% of non-media companies) requiring only a media-related qualification.

Figure 7: Importance of Media Qualification and Work Experience



Annex: Media-related Job Roles

For this study, 24 roles, which could potentially be done by freelancers, were identified as shown in the table below.

Table 1: Media Roles included in the study

	Roles
1	Writer (e.g. Screenwriter, Copywriter, Author, Publishing/ Advertising Editor, Script Writer)
2	Editor (e.g. Art Editor, Film/TV/Book Editor)
3	Production Crew (e.g. Cameraman, Gaffer)
4	Film/TV Producer, Executive Producer
5	Online Video Content Creator
6	Project Managers of Media IP (e.g. Assistant Director, Production Manager, Line Producer, Post-Production Supervisor)
7	Audio/ Sound Designer
8	Film/TV Production Designer
9	Animator (e.g. Game Artist, 3-D Modeller)
10	Marketing and Publicity Executive/Manager of Media IP
11	Sales and Distribution Executive/Manager of Media IP and Advertising Inventory
12	Director (e.g. Film/TV Director, Art Director, Creative Director, Photography Director)
13	Games Designer
14	Games Developer
15	Advertising Account Executive/Manager
16	Visual Effect Designer
17	News Reporter/ Broadcaster/ (Visual) Journalist
18	Multimedia Designer (e.g. Motion Graphics Designer)
19	Radio/Video Presenter
20	Interaction/ User Experience Designer (Analytics and Customer Insights)
21	Digital Illustrator
22	Actors
23	Interpreter/ Translator
24	Others (e.g. web designers, photographers, videographers, etc.)

Source: Frost & Sullivan

However, it should be noted that these roles are not exclusive to freelancers. The study aimed to understand which of these roles have higher proportion of freelancers.