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Session 2

Model surveys: Practical Issues

An European Pilot Survey on Audiovisual Services -

First Conclusions and Recommendations for a Further Development

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1. Preliminary note

The "Council Decision of 18 June 1992 establishing a two-year programme for the development of European statistics on services (92/326/EEC)" in Article 3 provides for the "carrying out of pilot surveys of service enterprises". In line with the action plan, these pilot surveys are intended to "supply preliminary data for the sectors covered and prepare the way for regular data collection based on the methodology". In this context, priority should be given to "those activities which are most dynamic and to those which are least covered by existing statistics". Therefore, among the sectors of economic activity proposed, audiovisual services were given top priority.

In view of recent developments characterized by changing the modern national economies into information, leisure and media societies, great importance is attached to the above sector. Its growth potential is judged to be considerable, in particular against the background of setting up private radio and television enterprises which has been authorised in many countries in the past few years. In empirical terms, however, proving an adequate quantitative importance of the sector has not yet been possible.

The model questionnaire attached as annex 1 was developed for the purposes of the pilot study. The questionnaire is characterized by a detailed breakdown of the variables *turnover* and *purchases of goods and services*. A special concept was also included for the variable *employment*. Regarding other variables, too, the questionnaire comprises a specific breakdown for the audiovisual sector.

The Methodological Manual of Statistics on Service Enterprises served as a reference framework for the study. In addition, explanatory notes on variables specifically used in the branch of audiovision were available. In line with the Methodological Manual, enterprises were chosen as survey units.

2. Pilot survey on audiovisual services: an overview of the participation and forms of conduct

All 1993 EU member states and almost all 1993 EFTA countries participated in the Pilot survey of audiovisual services. Some of them carried out independent surveys while others (e. g. France) integrated the pilot study into existing surveys. For most countries the pilot survey type of enterprise approach was rather new.

The population to be surveyed consisted of the enterprises whose principal or sole activity was one of the following according to NACE Rev. 1:

- motion picture and video production (92.11),
- motion picture and video distribution (92.12),
- motion picture projection (92.13)
- radio and television activities (92.20).

In some states, the survey was conducted in the form of a sample survey, in others as an exhaustive survey. Depending on the situation prevailing in the individual countries, mixed forms of surveys were used as well. In the majority of participating countries questionnaires were mailed to the enterprises, sometimes followed by telephonic or personal interviews if mail was not successful. For Greece the survey was conducted by specially trained staff from the statistical office, who interviewed accountants from the enterprises in the respective branches. While in some states the survey was conducted on a voluntary basis (A, B, DK, SF, D, NL, UK), in others the questions to enterprises were compulsory (E, G, IR, P). In general, existing registers of the national statistical offices could serve to obtain the addresses of the enterprises and, if required, to draw a sample. However, in Germany and Greece other sampling frames had to be used. For various reasons, though, some countries having at their disposal registers of the above type also seemed to face problems in gaining exact information about the survey population.

A synopsis of conducting the pilot survey in the individual countries is attached as annex 2.

The above short remarks show clearly that the framework conditions under which the pilot survey was conducted in the individual countries differed widely. Besides, the priorities the countries set in achieving the individual objectives of the study partly differed, too. Thus, for instance, some countries participating in the study concentrated particularly on examining methodological issues, i.e. on evaluating and testing the questionnaire, the methodology and definitions proposed by Eurostat. An important aim of some other countries was to check the quality of the register used in the survey, while others focused on gaining quantitative information. This situation has affected the comparability of both the quantitative and methodological results of the pilot study.

3. Methodological results of the pilot study

The present paper is the outcome of a first evaluation of the final reports of the countries participating in the pilot study. The possibility of misinterpretation on our part cannot be completely ruled out. We therefore consider this paper a basis for discussion rather than a report on the results obtained. The preliminary results to be outlined in the following should be regarded as working hypotheses which will require further verification based on the respective empirical material and may be modified in the light of the discussion which will hopefully follow now.

In the following, above all the problems realised will be described. For the time being, however, solutions cannot yet be proposed though first considerations have been made. We will nevertheless make an attempt to provide first ideas and recommendations for advancing the methodology. To this end, the following issues will be discussed:

- the enterprise as the unit of observation
- general comments and comments by subsector on NACE Rev. 1 in the audiovisual sector

- comments on the variables breakdown of turnover, breakdown of purchases of goods and services, investment and employment.

3.1 The enterprise as the unit of observation

In the pilot study all states chose the enterprises to serve as survey units. This was necessary in view of the list of variables as, in principle, only enterprises have at their disposal the account data required for answering the detailed questions on the breakdown of turnover and the breakdown of purchases of goods and services (see also the variables below).

Generally speaking, taking the enterprise as a unit of observation and description does not cause great problems. The enterprise is therefore considered to be the best statistical unit for data collection in a survey of this type.

However, some problems are mentioned in the final reports which can be mainly attributed to the specific national conditions.

The Netherlands reported that they had difficulties with enterprises using complicated juridical structures and companies that work for more than one country. It is also mentioned by the Netherlands that a small difficulty might occur where results from one enterprise with sole proprietorship and other enterprises are added. In this case it might be possible to make a double counting in gross figures where the sole proprietorship firm (one person) is hired as a freelancer by a larger enterprise. (See also below as regards the problem of freelancers).

An interesting problem was referred to by Spain, which can be attributed to the special radio and television system in that country. In Spain the public radio and television enterprises depend on the central and Autonomous Community governments and are managed by the public corporations of these entities. These public bodies regulate, manage and therefore prescribe the objectives of the public radio and television enterprises. These administrative and managing bodies do not carry out actual radio and television activities, they are therefore not included in NACE 92.20 and were not surveyed in the pilot study. However, radio and television companies have a special financial and accounting link with the bodies and groups to which they belong, which makes it difficult to measure the effect on certain economic variables. The juridical structure outlined above for instance has an impact on the composition of turnover, while it does not affect the total turnover. Since the aforementioned state agencies sell the advertising times to the advertising enterprises in Spain, public radio and television enterprises have lower advertising receipts. This situation is balanced out by the fact that their receipts from the 'commercialisation of own radiophonic or televisual works' sold to the state agencies are higher. Consequently, the enterprise concept of the pilot study is suited for Spain to a limited extent only.

3.2 General comments, comments by subsector, and comments on NACE Rev. 1 in the audiovisual sector

In the following, the individual subsectors of the audiovisual sector will be briefly described on the basis of general characteristics and the effects on the variables *turnover* and *persons employed*.

3.2.1 Motion picture and video production (NACE Rev. 1: 92.11)

In most countries, the major part of the enterprises concerned are classified under this subsector. The enterprises belonging to this sector often specialize in the production of either televisual works, motion pictures, or advertising and institutional films, every subsector with the corresponding turnover. In the last few years especially the production of televisual works has been of increasing importance. The sector consists of some medium, a few large and a large number of micro enterprises, with the micro enterprises often not producing any film during a year. It should be noted that the number of enterprises is also influenced by temporary enterprises set up specifically for the duration of a given film project. Thus the fluctuation of enterprises (births and deaths) can be relatively significant.

In the motion picture and video production sector the category of persons employed includes both *permanent* staff of an enterprise, i. e. persons who are employed permanently under a *normal* employment contract, and *temporary* staff, i. e. wage and salary earners employed only for the duration of the production of the work (actors, technicians). Moreover, it seems that in some countries freelancers often take part as actors or technicians in a film production. This influences the total labour costs because payments to freelancers are part of the purchases of services rather than of wages and salaries.

The vast majority of countries did not face any problems in allocating enterprises to the above NACE heading. The Netherlands recommended to make a heading for enterprises that render auxiliary services like translation, cameramen, etc. in the regular running of surveys on audiovisual services.

3.2.2 Motion picture and video distribution (NACE Rev. 1: 92.12)

In motion picture and video distribution three subsectors can be distinguished: motion picture distribution mainly dominated by affiliates of American enterprises (majors), video tape distribution services, often also affiliates of American majors, and purchasing of rights enterprises.

The first two groups of enterprises are specialized, their turnover is mainly characterized by their main activity. Enterprises of the third group have their main activity in the wider range of buying and

selling TV, video and other rights of audiovisual works. As regards employment, any special comments are not necessary.

Special account should be taken of the fact that the video rental sector does not belong to the audiovisual sector, but is assigned to NACE 71.40 (renting of personal and household goods n.e.c.). Belgium proposes to treat the video rental sector as a separate subdivision of the audiovisual sector (distinct from video distribution as such). In our view, this proposal should be considered. The question should be posed, whether video-tape libraries being units which distribute audiovisual products should not be part of the analysis. The normal sequence of the economic exploitation of a motion picture is the following

cinema \Rightarrow video (selling and renting of video-tapes) \Rightarrow Pay TV \Rightarrow TV

The various substitution relations between the different ways of motion picture exploitation should be taken into consideration in scrutinizing the audiovisual sector.

Otherwise, this subsector does not pose any problems as regards the allocation of enterprises.

3.2.3 Motion picture projection (NACE Rev. 1: 92.13)

The cinema projection sector has changed in recent years as so-called multiplex-cinemas have been established. Turnover in this sector is characterized by 'box office' receipts, advertising receipts and sales of sweets, drinks, icecream, etc. Also sales of merchandising products in so-called cinema-shops (CDs, videos, posters, etc.) are of increasing importance, especially in multiplex-cinemas which have a tendency to develop from *traditional* cinemas into entertainment centers (cinemas, bars, shops, video games, etc.).

Motion picture projection is characterized by the large share of part-time employees like projectionists, cashiers, icecream-sellers, etc., often working less than 20 hours a week. This influences the total level of labour costs per employee.

Problems did not occur with regard to the allocation of enterprises.

3.2.4 Radio and television activities (NACE Rev. 1: 92.20)

Taking the turnover and persons employed as a basis for comparison, the branch of radio and television activities ranks first in the audiovisual sector of most countries. The sector consists of a few large nation-wide TV enterprises that dominate the market. In addition, each country has a largely differing number of (mainly local) radio stations. In particular in Belgium, but also in a

number of other countries, non-commercial radio seems to be of a certain importance, which is reflected by some relevant variables (turnover, persons employed).

The turnover of radio and television activities mainly consists of public licence fees and advertising receipts. As for pay TV channels the main part of turnover comes from subscribers.

New forms of television activities like video-on-demand and pay-per-view have to be borne in mind (cf. below).

In this sector the distinction between permanent and temporary staff seems to be of less importance than in the motion picture and video production sector, but it is not negligible in the case of own productions of the television enterprises. The number of freelancers and also of unpaid people like volunteers, who take part in the production of televisual works, seems to be remarkable. Though freelancers are not part of the employees, they could not be neglected for the measurement of productivity.

3.2.5 General remarks on classification

In general the classification of NACE is at the moment well applicable in the audiovisual sector. In the surveys themselves, there seems to be no need for further inclusions. Most states had no major problems with the classification. The allocation of some subitems was a problem, though.

Recent offers such as *pay-per-view* and *video-on-demand* and their classification should be part of future discussions. Pay-per-view rather seems to be in line with the concept of audiovision: an audiovision enterprise determines the daily programmes and the user decides himself whether he will make use of the programmes offered. If he makes use of an offer he will be required to pay a specified price differing for the individual programmes. On the contrary, video-on-demand is characterized by retrieving digitized data from a database and transferring them (via lines) to the user. Only in his terminal, which can be either a television set or a computer monitor, the data will be reassembled. In this case, any user of the database has the opportunity to compile his own programme from the stock of data available. The database can however be used for other purposes as well, e.g. homebanking and teleshopping, and for online services such as CompuServe and America online. Here, various activities of the telecommunication sector (NACE 64), the information sector (NACE 72) and the audiovisual sector (NACE 92) are interlinked. However, the question remains unsettled whether multi-media enterprises can be adequately allocated in the existing system of classification.

3.3 Comments on variables

In the following, some important variables will serve as examples to show the problems which came up in conducting the pilot study, their impact on the national and international comparability of the data, and first ways of improving the situation which we consider practicable from a methodological point of view with the aim of enhancing the comparability of data at least at the national level. The variables breakdown of turnover, breakdown of purchases of goods and services, investment and employment were selected for this initial analysis.

3.3.1 Breakdown of turnover

The variable *turnover* was covered in a very detailed breakdown in the pilot study (see pages 4 and 5 of annex 1). Though, on the one hand, this is useful and important for covering economic changes in a given area statistically and getting a deep insight into production results, it might, on the other hand, cause an enormous burden on the respondents. Data collection in this area should therefore be restricted to information that can be derived from the accounting documents of enterprises.

Generally speaking, the variable *breakdown of turnover* caused widespread problems (especially in smaller firms) in the pilot study. As we see it, this was mainly due to the following two reasons:

- Many firms did not hold accounts at this level of detail.
- On the whole, the questionnaire seemed to be very complex. Even though many enterprises needed only a few cells to fill in their turnover in the required breakdown, the enterprises had difficulties in understanding and relating the contents of the variables to their own enterprises. However, it seems that the subitems of turnover listed cover its essential components (Spain is of a different opinion, though).

The second problem can be solved rather easily by

1. designing specific questionnaires for the sector with the aim to reduce the optical effect of complexity and the large number of items to be dealt with and understood by the enterprises though not being relevant to them. In our view, the preparedness to complete the questionnaire and thus also the quality of response can be enhanced this way.
2. using the conventional terminology at the national level without affecting the contents.

The only solution to the first problem, however, seems to be the coverage of turnover in a less detailed breakdown. On the whole, it thus appears desirable with regard to the coverage of the turnover subitems to provide a very detailed list of possible categories and to leave to the countries the decision as to whether that detailed breakdown should actually be covered. For surveys whose results should be comparable at an international level, it is necessary at the same time to develop a minimum list of a small number of turnover subitems which can be covered in all countries; such a

list would have to be highly aggregated compared with the current model questionnaire. It has to be covered as a minimum requirement, so that international data comparability could be achieved to some degree, though at an aggregated level only. Some proposals in this context have been made in chapter 3.2 of this paper; they are to be further elaborated on the basis of the national final reports.

That detailed breakdown had another disadvantageous effect for the conduct of the pilot study, i.e. some countries adjusted the questionnaire to their national requirements, situations, and terminology generally applied there. This was even necessary in order to increase the enterprises' willingness to respond and thus to improve data quality. It will have to be examined thoroughly what impact those national adjustments have on the contents of the terms used and, consequently, on data comparability. Generally, conflicting objectives may arise here, i.e. any improvement in the quality of national data may lead to a deterioration in international comparability.

3.3.2 Purchases of goods and services/intangible investment/fixed production

Contrary to the turnover section, the *purchases of goods and services section* of the model questionnaire did not require a very detailed breakdown (cf. page 6 of annex 1). Also, purchases of audiovisual products were covered in a more detailed breakdown only for TV enterprises. For projection enterprises and for distributors, there was just one audiovision-specific item each. Three other, rather general, items were covered, too.

Nevertheless, that question too caused considerable problems in some countries. This is probably due to two reasons: First, data in the breakdown required are not available in the accounting files of the enterprises - as is the case for turnover, too.

Second, that breakdown seems not to be appropriate for the audiovision sector, as only a specific section of purchases is explicitly asked for, while other considerable purchases are grouped under the *other* heading. This may lead to misunderstandings on the part of the enterprises as regards the contents of the terms used, since it may happen that they miss specific headings they already know.

Therefore, we have so far not decided whether a recommendation should aim at covering less items or at using an even more detailed breakdown; in the latter case, however, it would have to be ensured that the enterprises are able to answer the questions. We agree to the recommendation of the Netherlands "to explore the nature of purchases of enterprises in the audiovisual sector a little further".

The problem of correctly covering the purchases of goods and services has to be considered in the context of correct coverage of intangible investments. After evaluating the national final reports, it seems that in the individual countries there are no general rules as to whether acquired film rights are treated as purchases of goods and services or as intangible investments. Consequently, some enterprises evaluate film rights as purchases, whereas others evaluate them as investments.

Moreover, even within an enterprise there seem to be individual decisions in individual cases as to whether a specific film right is considered as intermediate consumption or intangible investment. Expenditures on film rights thus are a problem that has an impact particularly on the variables *intangible investment* or *purchases of goods and services*, and thus indirectly on gross value added. The allocation of acquired film rights cannot be performed by statisticians but has to be reserved to the enterprises, depending on the intended use of the film right (in case of permanent use in the enterprise it will be an investment, otherwise it will be a purchase), unless in the individual countries there are specific government regulations based on motives other than statistics. It has to be checked in detail whether the quantitative results of the pilot study may indicate regular features at the national level. Altogether, the effects on data comparability both at national and at international level are considerable. The only recommendation that can be given at this point is that in every country the national situation should thoroughly be analyzed again before regular surveys are conducted.

A similar problem arises for *self-produced audiovisual works* which, unless they are sold, are included in the computation of the value added aggregates either as self-produced fixed production or as increase in stocks of finished products.

The overall complex of *film rights* and its different treatment as purchases or investment, or, for self-produced films/programmes, as fixed production or running costs, requires in-depth analysis based on the quantitative results of the pilot study.

It is however foreseeable already now that consistent application of national accounting concepts will lead to serious impairments of the audiovision-specific information value of the data; one reason is that it is not possible to explain those differences to the enterprises. The other possible solution is to collect the data with regard to subject-matter, e.g. to ask for the total of acquired film rights without distinction between purchases and investment. Although this would increase the respondents' willingness to respond and improve international data comparability, it would not be possible any more to meet some requirements of national accounts. Mixed solutions, however, would further complicate the questionnaire.

3.3.3 Employment

For the statistical coverage of the *labour* factor in the audiovision sector, two sets of problems should particularly be emphasized:

a) concept of persons employed permanently or temporarily

In particular for the area of motion picture production, but also in the field of radio and television activities, it should be taken into account for the coverage of persons employed that in many cases the production of a film is a unique event. Actors and technical staff are employed for a production carried through only once. A distinction between permanently employed persons and temporarily

employed persons in the questionnaire should thus be considered at least for the above areas. because, for an overall examination, the number of persons employed can vary greatly from one period to another. For the areas of projection and distribution, that distinction is of minor importance and can be disregarded in the questionnaire. However, the term *temporary* alone can pose problems. It is a concept used rather in motion picture production, which is particularly characterized by the fact that projects are carried out only once. As a result of the privatization of the television industry, the production of televisual works has become more important than motion picture production in many national economies in recent years. Although in that sector, too, many projects are carried out on a one-time basis, there may be permanent employment for some actors and technicians, in particular for television series or game shows.

b) Freelancers and volunteers

Persons who take part in the production of a motion picture or televisual work may do this either under an employment contract (wage and salary earners) or as freelancers on a fee basis. In addition, at least some persons seem to participate in projects without any financial compensation just out of interest or to learn, e.g. as volunteers in radio and television enterprises or in production enterprises.

Obviously, in some countries, freelancers are often employed in the areas of production and radio and television activities, while in other countries similar activities are performed by wage and salary earners. This has an impact first on the total number of persons employed, as freelancers are not part of the persons employed, and second on the structure of the operating costs of an enterprise, because payments made to freelancers are part of the purchases of services, rather than part of the wages and salaries, which, in turn, has an effect on the gross value added of the individual enterprise.

Thus a general recommendation would be to cover separately the number of freelancers and other persons not belonging to the persons employed (e. g. volunteers) and also to set up special categories for the payments made to such persons. This would significantly increase the transparency of the use of the *labour* production factor.

However, it is particularly important, as mentioned by Spain, to define the various types of staff more precisely and clearly in order to avoid doubts arising in the interpretation of the definitions.

4. Conclusion

In the audiovision pilot study, many problems arose both for the national statistical institutes and the respondents.

In our opinion, some of these problems can rather easily be overcome, while others are due to the specific features of the audiovisual sector and can only be solved using specific concepts tailored to

this sector. With regard to some problems, however, we are in doubt whether this sector can completely and adequately be covered by statistical tools.

The main factors that influenced the quantitative results of the pilot study, with an impact on international comparability, are:

- The great differences in conducting the pilot study in the individual countries (see chapter 2). It should however be possible to substantially reduce the resulting differences in the information value of the results if surveys were conducted on a regular basis.
- Problems on the part of the respondents concerning the questionnaire. Many countries reported that the respondents considered the questionnaire to be too complicated, too detailed and too long. The main reason is that much of the information is not readily accessible to enterprises. To some extent, though not entirely, this might be explained by the fact that the audiovisual sector consists of rather small enterprises, especially in the production sector. But the large enterprises had substantial difficulties too. Most of the problems were caused by the variables breakdown of turnover, breakdown of purchases and employment.

Thus a first important recommendation for the regular conducting of surveys in the audiovisual sector is to split up the questionnaire into subquestionnaires. At least for the projection area, it is possible to develop a much simpler questionnaire. This can be done also for radio and television activities, and for enterprises operating in the radio sector only, a special questionnaire may additionally be developed, too, i.e. one questionnaire for radio and television activities and one for radio activities only. In any case, radio enterprises should adequately be covered in the questionnaire.

For production and distribution, too, subquestionnaires may be developed. It should be taken into account, however, that separating the two sectors is difficult as there are enterprises engaged in both production and distribution. For each subquestionnaire, the relevant categories of activity, turnover, investment, employment and purchases of goods and services have to be chosen.

Performing that separation however does not solve the problem that information broken down to the level required in the pilot study is not available at the enterprises. In particular for the breakdown of turnover, but also for some other variables, adjustments to the categories generally used by enterprises have to be made. This means that in this respect, too, the subquestionnaires must considerably be simplified at least for some countries.

By performing the two measures above and taking account of the issues mentioned under chapter 3, it would be possible in our opinion to set up a basis at the national level for conducting regular surveys.

For international data comparability, too, it would certainly be desirable to develop subquestionnaires including the improvements mentioned. If it should turn out, however, that - also considering the issues mentioned in chapter 3 - the accounting systems used in the individual

countries differ greatly, it would be indispensable to apply highly simplified approaches at the EU level. Although one should not reduce things to the smallest common denominator, too ambitious approaches are bound to fail.

5. Prospects and evaluation of the study

The experience acquired in the pilot study shows that, at least in some countries, enormous problems arose, which were partly due to the ambitiousness of the pilot study. Thus it is absolutely necessary to develop a realistic approach if pilot studies are to be carried through in other areas. A pilot study that is too complex may provide nothing more than methodological findings, although in this respect, too, the numerous problems arising do sometimes not allow to clearly detect possible solutions. The pilot study has clearly shown that, for some countries, quantitative data at EU level can be used only to a very limited extent. As a conclusion, it may thus be stated that the design of a pilot study has to be as easy as possible, in particular if most countries have no or little experience regarding the economic sector in question. This is the only way to both develop the methodology and obtain quantitative data.

As regards the further development of the approach used in the pilot study, this paper has shown some opportunities to be further examined and some problems. It has to be checked thoroughly whether findings reported by a particular country can be transferred to other countries. Part of the proposals submitted by the Netherlands, for instance, are fully supported by Germany. Also, the quantitative data must be analyzed in detail as regards the question whether they permit to draw specific conclusions even if problems are not explicitly mentioned in the final reports. Therefore it is planned - after finishing the preliminary evaluation of the final reports - to contact the participating countries by sending them a list of questions asking for their comments on specific problems and proposals for improvement.

This might lead to the conclusion that, in this sector, statistical standard concepts are not sufficient for a detailed examination. For some key variables, there are substantial delimitation problems. This regards the variables *employment* (temporary/permanent; freelancers), *investment* and *purchases of goods and services* (film rights, freelancers), with the relevant impact on gross value added. While, in the national sphere, the respective national concepts may produce informative results, international comparability of the data is continuously decreasing. The differences between the situations in the individual countries are considerable, which makes it very difficult to provide clear information. Thus the question arises whether harmonized European audiovision statistics (i.e. based on specific variables of the audiovision sector rather than general variables) can actually be set up. The international comparability of the relevant data would in any case be quite limited.

Just to avoid misunderstandings: Because of the importance attributed to the audiovision sector, we do support regular surveys in that sphere. They are useful for intertemporal comparison at the

national level and can provide important information on the development of the sector and its subsectors over time. Problems will arise particularly for the comparison with other sectors of the same national economy and for the international comparison of the audiovision sector.

Finally, we would like to quote four statements which, in our opinion, are well suited to describe the experience acquired by individual countries with regard to the pilot study:

Finally it shall be stressed that Danmark statistik see the survey as a supplement to the register-based general statistics, and the contents of the survey shall be a set of questions concerning key variables (Denmark).

It is recommended that considerable thought be given to the relevance and usefulness of the pilot survey results before any decisions are made on the implementation of further audiovisual surveys. Initial consultation with UK data users has shown that although there may be an interest in integrated European statistics in this sector, the demand is not considered sufficient to offset the burden on industry (United Kingdom).

The pilot survey showed that a large number of problems arise from the fact that the audiovisual services are a relatively new area of study. This makes that there are still many things to find out in the field, and many things that need settling (Netherlands).

It is apparent from this and other studies that the audiovisual sector is one which is very closed in, hard to penetrate and difficult to survey (Belgium).

SECTION I

GENERAL CHARACTERISTICS OF THE ENTERPRISE

1.1. Identification of the enterprise

NAME

ADDRESS

Telephone

Fax

Telex

Number of local units on the domestic territory

1.2. Legal status

(Please mark only one box)

Sole proprietorship ☐

Partnership ☐

Company with share capital ☐

Association ☐

Public establishment ☐

Other (please specify) ☐

1.3. Do you have the majority control of another audiovisual company concerning:

(Please mark the boxes)

Production ☐

Broadcasting ☐

Telecommunication ☐

Other (please specify) ☐

1.4. Year of the business start-up

1.5. Date of closure of last accounting period

Day

Month

Year

Length of this accounting period in months

SECTION II

MAIN ACTIVITY OF THE ENTERPRISE

Please specify your main activity during the last accounting year. Please mark only one box for main activity.

	Main activity	Secondary activities
- Local, national, or international TV channel		
• Satellite television	<input type="checkbox"/>	<input type="checkbox"/>
• Landbased hertzian television	<input type="checkbox"/>	<input type="checkbox"/>
• Cable television	<input type="checkbox"/>	<input type="checkbox"/>
- Radio	<input type="checkbox"/>	<input type="checkbox"/>
- Operator of cable network	<input type="checkbox"/>	<input type="checkbox"/>
- Motion picture and video production	<input type="checkbox"/>	<input type="checkbox"/>
- Central purchasing of rights office	<input type="checkbox"/>	<input type="checkbox"/>
- Motion picture and video distribution	<input type="checkbox"/>	<input type="checkbox"/>
- Motion picture projection	<input type="checkbox"/>	<input type="checkbox"/>
- Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		

SECTION III**OPERATING INCOMES**

Please indicate below your current operating incomes during the last accounting year (exclusive VAT).

Turnover	_____
Change in stocks of finished products (Final stock - initial stock)	_____
Fixed production	_____
Operating subsidies	_____
1. Total (of proceedings positions)	_____
2. Operating balance (deficit)	_____
Total (1 + 2)	_____

SECTION IV**OPERATING COSTS**

Please indicate below your operating costs during the last accounting year (exclusive VAT).
The total indicated (Total (1 + 2)) must be equal to the total indicated in the section III.

Labour costs	
Gross wages and salaries	_____
Social security contributions	_____
Goods and services expenses	
Purchase of goods and services	_____
Change in stock of goods and services (Final stock - initial stock)	_____
of which change in stocks intended for resale or for the further provision of services (Final stock - initial stock)	_____
Duties and taxes (other than VAT) relating to production	_____
1. Total (of proceedings positions)	_____
2. Operating balance (profit)	_____
Total (1 + 2)	_____

SECTION V**BREAKDOWN OF TURNOVER**

Please break down your turnover indicated in section III according to the types of products sold (including exported products)

5.1. Production of advertising and institutional films

- Production of advertising films _____
- Production of institutional films _____

5.2. Production of motion pictures

- Upstream flow of receipts from the distributors of motion pictures _____
- Pre-sales or sales of rights of projection on motion pictures to TV stations _____
- Pre-sales or sales of rights of projection on motion pictures to video editors _____
- Receipts from derived rights on motion pictures _____
- Other receipts (please specify)

5.3. Production of television works

- Presales, sales of rights, producers part of rights (of TV fiction works, of cultural works, of documentaries) _____
- Sales of television production works of sports programmes _____
- Sales of television works "on set" (news programmes, shows, gameshows) _____

5.4. Other services connected to the production (post-production, technical services) (please specify)

5.5. Distribution

- * Receipts from the distribution of motion pictures

- in cinema halls

- to TV channels

- to video editors

- * Receipts from the distribution of audiovisual works (including video)

- * Other receipts from distribution (please specify)

5.6. Projection of motion films or video works

- * "Box-office" receipts from cinema halls

- * Advertising receipts from cinema halls

- * Other receipts from cinema halls (drinks, sweets, ice creams, posters,) (Please specify)

- * Receipts from video projection

5.7. Radio and television

- * Advertising receipts

- * Public licence fee

- * Receipts from subscription, payment (TV, cable) contribution, subscriptions received by the radios

- * Commercialisation of radiophonic or televisual works for own account (retransmission rights)

- * Other television receipts, radio, cable (please specify)

5.8. Other receipts (not elsewhere classified)

- * Other receipts (please specify)

TOTAL

SECTION VI

PURCHASES OF GOODS AND SERVICES

Please breakdown your purchases of goods and services indicated in section IV according to the different products (including imported products, excluding stocks)

- * Repayments made by the cinema halls of the "book office receipts" to the distributors

- * Repayments by the distributors of the "producer part" to the producers

- * Purchase by the TV channels of transmission or retransmission of motion picture works rights

- * Purchase by TV companies of the rights of broadcasting or rebroadcasting (of TV fiction works, of cultural works, of documentaries):

- * Purchase by TV companies of the rights of retransmission of sports events

- * Purchase by TV companies of the rights of broadcasting or rebroadcasting works "on set": (news programmes, shows, gameshows)

- * Purchases of telecommunication services

- * Purchases of goods and services for resale

- * Other purchases of goods and services (please specify)

TOTAL

SECTION VII

EXPORTS

Have you exported over the last accounting year?

yes ☐

no ☐

If yes, please indicate the total amount

and the amount exported to:

- * intra community countries
- * european extra community countries
- * other countries (please specify)

SECTION VIII

IMPORTS

Have you imported during the last accounting year?

yes ☐

no ☐

If yes, please indicate the total amount

and the amount imported from:

- * intra community countries
- * european extra community countries
- * other countries (please specify)

SECTION IX

FIXED PRODUCTION (cost of own production of audiovisual works and not sold within the same period)

Please breakdown, where possible, the fixed production indicated in section III, according to the different products.

- * Fixed production of motion film works
- * Fixed production of televisual works
- * Other fixed production

TOTAL

SECTION X

INVESTMENTS

Have you made any tangible or intangible investments during this last accounting year?

yes ☐

no ☐

If yes, please indicate below the amounts (investments acquired or created or brought in):

Intangible investments

- * Motion pictures
- * Televisual or video works
- * Other intangible investments

Tangible investments

- * Land, existing building and structures, construction, building conversions
- * Transport material
- * Installation and equipment

TOTAL

SECTI (1

EMPLOYMENT

11.1. Persons employed on 30.09.1992; this heading concerns all persons employed by the enterprise on 30.09.92 including irregular salary earners of film or audiovisual shootings.

	Full time	Part time	Total
Non salary earners (self-employed persons/and employers)			
Permanent employees			
Temporary employees			
Total			

11.2. Wage and salary earners of 1992

Please indicate below the average number of employees during 1992.

Synoptic table on pilot survey "audiovisual services"

Page 1

Country	Austria	Belgium	Denmark	Finland
Kind of survey	new survey	new survey	new survey	exploitation of 1992 national pilot survey and other sources
Statistical unit	enterprise	enterprise	enterprise	enterprise
Reference year	1992	1992	1992	1991
Sampling frame	register of the statistical office	from the National Statistical Institute	business register of the statistical office	business register
Survey design	sample, stratified by NACE and size class of employees	complete enumeration	sample	complete for enterprise with 10 or more employees, else sample
Mail or interview	mail	mail and additional telephone interviews	mail	
Enterprises included in the survey	199	428	600	172
Valid answers	24	75	177	49
Obligation to provide information	no	no	no	no
Questionnaire/definition of variables	based on Eurostat documents	Eurostat questionnaire	all in all similar to Eurostat questionnaire	based on model questionnaire by INSEE and Statistics Canada
Separate questionnaires	no	no	yes: 5	no
Table programme			complete but confidentiality problems	adapted, as far as possible
Grossed results	yes (additionally ungrossed)	no	no but possible	yes
Variables with special difficulties	<ul style="list-style-type: none"> - year of business start-up - breakdown of labour costs 	<ul style="list-style-type: none"> - subdivisions of the most variables - employment section - wages and salaries 	<ul style="list-style-type: none"> - operating balance, especially change in stocks and fixed production - breakdown of turnover - breakdown of purchases - employment section 	<ul style="list-style-type: none"> - breakdown of turnover
Other remarks		questionnaire was too detailed and complex	enterprises found the questionnaire to detailed and time consuming to fill in	Eurostat questionnaire together with the table programme would probably been too detailed

Country	Spain	Greece	Ireland	Netherlands
Kind of survey	new survey	new survey	part of the statutory Annual Service Inquiries	new survey
Statistical unit	enterprise	enterprise	enterprise	enterprise
Reference year	1992	1992	1992	1992
Sampling frame	register of the national statistical office supplemented by two other sources	updated register of relevant professional organisations	1988 Census of Service frame	business register of the statistical office
Survey design	complete enumeration	92.12 complete, else sample stratified by employment size class	complete enumeration	complete for enterprise with 10 or more employees, else sample
Mail or interview	mail (interviews if mail was not successful)	interview	mail, follow up visits from field officers	mixture of telephone interviews and mail
Enterprises included in the survey	3 431	425	202	?
Valid answers	1 523	390 (?)	89	?
Obligation to provide information	yes	yes	yes	no
Questionnaire/definition of variables	following Eurostat documents with some amendments to national situation	in accordance with Eurostat documents, some questions modified or added	largely similar to Eurostat documents	largely similar to Eurostat documents
Separate questionnaires	no	no	no	yes: 4
Table programme	almost complete but some tables modified and confidentiality problems	complete	not in the specified breakdown	complete
Grossed results	yes	yes	yes	yes
Variables with special difficulties	<ul style="list-style-type: none"> links with other enterprises breakdown of purchases expenditure section 	<ul style="list-style-type: none"> breakdown of expenditure stocks cost of production hours worked 	<ul style="list-style-type: none"> breakdown of turnover breakdown of purchases wages and salaries with respect to part time/full time division operating subsidies 	<ul style="list-style-type: none"> breakdown of turnover fixed production
Other remarks			distribution (92.12) and TV/radio (92.20) not included in the survey	

Synoptic table on pilot survey "audiovisual services

Page 3

Country	Portugal	Sweden	United Kingdom	
Kind of survey	new survey	utilization of existing sources	new survey	
Statistical unit	enterprise	enterprise	enterprise	
Reference year	1992	1992 and 1993	1992	
Sampling frame	register of the statistical office	-	register of the statistical office	
Survey design	complete enumeration	complete enumeration	sample, stratified by main economic activity and turnover	
Mail or interview	mail	-	mail	
Enterprises included in the survey	817	-	300	
Valid answers	280	-	64	
Obligation to provide information	yes	-	no	
Questionnaire/definition of variables	based on Eurostat documents but adapted to national situation; some additional questions	-	largely based on Eurostat documents but some definitions adapted to national situation	
Separate questionnaires	no	-	yes: 2	
Table programme	complete obligatoric table programme, no optional tables	as far as possible but only a limited table programme	rather complete	
Grossed results	results of the 280 valid answers	-	partly	
Variables with special difficulties		-	<ul style="list-style-type: none"> - breakdown of turnover - breakdown of purchases - employment section 	
Other remarks		-	questionnaire was too complex and time consuming	