Media workers’ profiles, working conditions, daily routines, skills, and mobility in Brussels. A quantitative survey

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Part of Work Packages 4, 5 & 6:
Report of analysis
**Media Clusters Brussels** – MCB – is a collaborative and interdisciplinary research project of the Brussels Capital Region involving three leading universities of Brussels, VUB, ULB and USL-B. The aim is to analyse the many facets of the media industry located in the Brussels Capital Region and explore the development of clusters.

The Projet de Plan Régional de Développement Durable / Ontwerp van Gewestelijk Plan voor Duurzame Ontwikkeling for Brussels (2013), approved by the Brussels Regional Government on 12th December 2013, identifies the cultural and creative industries as one of the four key sectors of the metropolitan economy, and more specifically proposes a media city at Reyers as the first strategic cluster (Pôle Reyers) to develop. However, despite the fact that the Brussels Region is committed to foster the development of the media sector, there is up until now hardly any empirical data available about the structure and dynamics of the media industry in Brussels. This project aims at creating socio-economic value for the media industry in the Brussels Region and beyond by providing decision-makers with the in-depth knowledge they need regarding the media industry in Brussels while accompanying the phases of implementation of the Pôle Reyers. The overarching research question is: How can the structure and dynamics of the media sector in the Brussels metropolis be enhanced to improve its social and economic roles?

MCB is divided in six **Work Packages**. Work Package 1 offers a general overview, definitions and common framework of the project. Work Packages 2 & 3 focus on Brussels media institutions by studying Brussels' media clusters from a macro and socio economical perspective. Work Packages 4 & 5 focus on the media workers within Brussels from a micro perspective and Work Package 6 on the communities the media workers form to create interactions and communities of learning from a meso perspective. These three points of interest, media institutions, media workers and media communities, enable MCB to grasp all dynamics of media clusters in Brussels.

More information on the Media Clusters Brussels project is available on the Internet ([www.mediacclusters.brussels](http://www.mediacclusters.brussels)).

The project is financed by Innoviris under the Anticipate programme (Prospective Research – Anticipate – 66 – 2014/2018).
Key Findings

What are the characteristics of the data analyzed?

- The results presented here come from an online survey of 577 respondents of the four media sub-sectors.
- Though the data on the population is partial, the sample is deemed representative in relation to the research objectives.

What are the main results of the survey?

- Results show a highly educated workforce (95% of higher education and more than 50% have a master’s degree), with somewhat poor working conditions, which vary across sectors and companies.
- The audiovisual is the dominant sub-sector, followed by press and advertising, though the survey shows that “new media” might not be relevant as a sector as many workers perform new media task within companies of other sub-sectors.
- This workforce is very mobile on a day to day basis, it is highly skilled (especially in social and technical skills, less in skills related to digitization) and performs a diversity of tasks which include mainly mediated content production along with management, HR, administrative and other types of tasks.

Conclusions and summary from the perspective of the 7P’s framework

- Yes, Brussels is an important place for media workers.
- Proximity is somewhat important at the city level as well as for smaller companies (to be located next to bigger once).
- Brussels is very pertinent for media workers with an over-representation of the audiovisual sub-sector.
- The profiles of media workers are very diverse, though four profiles come out in all the four subsectors: the journalist, the communication professional, the manager, and the technician.
- Path-dependency is more difficult to assess using this data, though the historic presence of public institutions and bilinguism seems to have influenced the sector.
- Policy also has influence on media workers as many of them are civil servants (more than in other sectors) and some companies prefer to locate themselves close to Brussels but at the border of it, in Flanders.
- Altogether, in terms of performance, Brussels has a highly skilled, mobile and agile workforce with working conditions that could be improved that performs multiple tasks on a day to day basis and produce multiple contents in different formats and types.
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Introduction: sample diversity and survey representativity

This report\(^1\) analyzes the results of an online survey (n=577) focusing on the media workers of Brussels with a focus on their profiles, working conditions, daily routines, skills, and mobility. Since the approach is transversal and aims at analyzing a variety of media workers in a diversity of settings, companies, clusters and environments. It is the result of a 4 years process (2014-2018) and builds on previous deliverables of the Media Clusters Brussels research project. First, a theoretical framework was fashioned, building on the scientific literature on the sociology of (media) work and professions. Within this context, the report set the basis for the study of workers from a critical perspective. It showed that the study of workers’ profiles should include an attention to basic sociodemographic characteristics of media workers (age, gender, nationality, etc.) and crossing them with their professional trajectories (diploma, field of study, occupation), as well as their repartition within the sub-sectors of Brussels’ media industry. Research also called for a focus on working conditions and daily routines which included an attention to income, working hours and the tasks workers perform as well as their sentiment towards them. The report also highlights the importance of (self-)assessing the diversity of workers’ needed skills in three main areas: communication and social skills, (self-)management and creativity skills, and technical and technological skills. Finally, the research project focusing on geographical repartition of media production in Brussels and the potential existence of media clusters in the city called for more insights on workers’ specific mobility, not only going to (and coming back from) work but also during the week as they travel in the city for work.

After the theoretical framework was set up, a “first census” was conducted through statistical data provided by public bodies to evaluate the population of workers in the city and gather first insights that would help build the survey. Data from public bodies showed that there is more than 16,000 media workers in the city, working either as employees of companies located there or as self-employed living in the city. It provides hints that there is a diversity of workers as companies are very diverse within the sectors analyzed. Audiovisual activities in Brussels provide work for more than 6,000 people especially in the production of content and its diffusion as major public and private French- and Dutch-speaking broadcasters are located in the city. According to this data, the second and third sectors are advertising and print media with both more than 3,000 workers and the new

\(^1\) This is report is part of work packages 4, 5 & 6 of the Media Clusters Brussels research project. More information and other deliverables are available at [http://www.mediaclusters.brussels](http://www.mediaclusters.brussels).
media sector with around 2,500 workers mainly in data processing and other technical activities.

Finally, a methodology was set up (see Deliverable 4.3b of this project) to go from research objectives to research questions and hypotheses to variables to finally end up with actual survey questions. To do so, we used the “7P’s framework” created for this project (Komorowski, 2017) which proposes that media cluster analysis would benefit from focusing on 7 parameters: place, proximity, performance, pertinence, profile, policies, and path-dependency. Below is a summary of how we related each parameter of the 7P’s model of analyses to research questions and hypotheses.

Table 1. Summary of RQ’s and hypotheses for the survey.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Research questions</th>
<th>Hypotheses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place</td>
<td>What is the location of workers workplaces and residencies?</td>
<td>Location of workers in the city depends on media sectors and types of companies</td>
</tr>
<tr>
<td>Proximity</td>
<td>Are there more workers of the same sectors in specific areas?</td>
<td>Proximity is dependent on sectors and value chain characteristics</td>
</tr>
<tr>
<td>Pertinence</td>
<td>What are the proportions and amounts of workers in each sector?</td>
<td>Strong media workforce in Brussels, strong audiovisual sector</td>
</tr>
<tr>
<td>Profile</td>
<td>What are the profiles of media workers?</td>
<td>Profiles depend on and influence working condition in companies and sectors</td>
</tr>
<tr>
<td>Path-dependency</td>
<td>Are there historical and institutional factors influencing the presence of workers?</td>
<td>Historical factors (presence of public media and multiple languages) influence the presence of workers</td>
</tr>
<tr>
<td>Policy</td>
<td>Are there incentives and hindrances given by public bodies and companies to workers?</td>
<td>Public bodies and companies encourage workers to create more, better, original media content</td>
</tr>
<tr>
<td>Performance</td>
<td>What are workers' specific skills with regards to content production?</td>
<td>Highly skilled and educated workforce producing many content</td>
</tr>
</tbody>
</table>

From a methodological standpoint, we also had to decide how the survey would be carried out, disseminated and analyzed. Because we aimed at grasping the complexity of media workers and activities in such a big city, we aimed at making the survey available to as many people as possible therefore assessing diversity more than “just” focusing on statistical representativity. The survey was made available online from October 2016 to June 2017, and disseminated through professional associations, on social networking sites (targeting specific groups) and during media-related events. Given the difficulty of reaching a workforce spread out in many companies, and sectors of activities and the inexistence of listings or repositories, the amount of answers received, and the repartition of respondents was satisfactory. Moreover, because the aim of the general project was to
get a first comprehensive look at the media industry and dynamics in Brussels, as well as to provide policy advice to decision makers of the city, we decided to focus on descriptive statistics and didn’t plan on doing inferential statistics such as hypotheses testing, regressions or factorial analyses.

Once data was gathered, it was first downloaded and formatted into an Excel spreadsheet. We first cleaned the data by looking at each individual response. We deleted unfinished questionnaires (with less than 70% completion rate) and a few fake and humoristic responses. In total, the responses were brought down from more than 650 to 577, which is still a good rate according to the resources available and the potential pool of media workers in Brussels (i.e. around 16,000).

We then compared the survey results to three key variables (gender, occupation and media sector) to see if we were indeed representative of the media sector. In general, the survey can be regarded as representative. The survey is very close to the census in terms of gender as both have a proportion of 57% of males. There is a slight difference in the number of females since the survey had an “other” category as well as a possibility of not answering the question for respondents who didn’t feel comfortable with the usual dichotomic vision on gender. We also aimed at including workers from all sectors of the media industry and it seems that we have succeeded to do so. There is, however, an over-representation of workers of the audiovisual sector and an under-representation of members of the advertising sector, which calls for a careful interpretation of some of the results. Having said this, we are confident that we were able to reach people from all sectors and sub-sectors of the media industry. Finally, we have a potential over-representation of independents over employees, but it is hard to tell as census data on self-employed individuals (because of change in the data gathering process by public bodies over the years) wasn’t entirely convincing. Furthermore, the balance is also hard to assess as census data doesn’t include job seekers, students, unpaid interns, etc. We are, however satisfied with the diversity of individuals we were able to reach in order to understand the complex shape of the current media sector in Brussels today.
Table 2. Comparison of the survey and the census (in %).

<table>
<thead>
<tr>
<th>Variable</th>
<th>Category</th>
<th>Census</th>
<th>Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>Male</td>
<td>57</td>
<td>57</td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>43</td>
<td>40^2</td>
</tr>
<tr>
<td>Sector</td>
<td>Audiovisual</td>
<td>42</td>
<td>56</td>
</tr>
<tr>
<td></td>
<td>Print</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>New media</td>
<td>17</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>Advertising</td>
<td>21</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>Media in general</td>
<td>/</td>
<td>6</td>
</tr>
<tr>
<td>occupation</td>
<td>Employee</td>
<td>91</td>
<td>55</td>
</tr>
<tr>
<td></td>
<td>Independent</td>
<td>9</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td>Business owner</td>
<td>/</td>
<td>11</td>
</tr>
<tr>
<td></td>
<td>Intern</td>
<td>/</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Student</td>
<td>/</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Share holder</td>
<td>/</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Job seeking</td>
<td>/</td>
<td>4</td>
</tr>
</tbody>
</table>

After cleaning the data, we made a first intuitive analysis that consisted in looking at the results for each question. We established census representativity by looking at the age, gender, social, economic and working status of the respondents. Finally, we conducted the analysis by crossing the control variables (age, gender, etc.) with the other variables of interest regarding working conditions, professional trajectories, skills, and mobility. Finally, in the conclusion of the analysis, we used our data to answer the research questions and provide reflections on the 7P’s in the hopes to help policy makers to take courageous decisions that would be beneficial in the near future to the media industry in Brussels and its workers.

^2 3% of other / unanswered.
Identity card: a balanced population

As stated above, the profile of the sample gathered coincides with data from the census. The sample is also close to general statistics on employment in Brussels regarding gender and age (see figures 1 & 2). Out of the 577 surveys collected, 57% of respondents have indicated being males for 40% of females. This is representative of the media sector in Brussels — 57% males, 43% females (Wiard & Domingo, 2016: 15) —, and relatively close to the general employment of Brussels, as statistics show that employment in the Region is about 46% females and 54% males (BISA, 2017: 11). In our sample, 7% of the respondents are under 25 years old, 65% are between 25 and 49 years old, 25% between 50 and 64 and 3% is over 64. This a quite close to general regional statistics on age and employment, which shows that 5% of Brussels working population is under 25, 71 is between 29 and 49 and 24% is between 50 and 64 (Actiris, 2016).

The individuals in the sample are mostly Belgians (87%), with a minority of non-Belgians, mainly Europeans (9%), including French (3%) and Italian (2%) citizens. In terms of languages 65% of individuals have stated that they have French as a native language and 27% have Dutch. This is higher than in the general population and is due to the presence of major public and private Dutch-speaking media companies in the city (Komorowski, 2017; Wiard & Domingo, 2016), hence another sign that Brussels and his surroundings are in fact the home of media clusters. Interestingly, 9% of the individuals have indicated having two languages as a mother tongue, which suggests that some of our respondents were educated in multilingual environments.

Finally, in terms of residency, 61 % of the respondents live in Brussels, 25% in Flanders and 14% Wallonia. This is coherent with the fact that Brussels has a big intake of daily commuters who come to work in the city and that Brussels as a media cluster exceeds its actual geographical borders (see the media companies located in Vilvoorde for example). The Brussels Institute for Statistics and Analysis (BISA) showed that in 2015 out of the 694.883 total workforce of the region, 217.839 (31%) come from Flanders and 120.808 (17%) from Wallonia (BISA, 2017: 13). Furthermore, non-residents of Brussels working in the city come mostly from its neighboring provinces: Flemish Brabant (14%) and Walloon Brabant (6%).

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4 This coincides with the data existing on journalists of the professional association of Journalists (AJP), which showed in a study that they are mostly of Belgian nationality (94%) with French (3%) and Italian (1%) minorities (AJP, 2013: 17-22)
Figures 1 – 6. Sociodemographic data collected.

**Gender**
- Female: 57%
- Male: 40%
- Other/Unanswered: 3%

**Age**
- Under 25: 7%
- 25 - 49: 25%
- 50 - 64: 65%
- Over 64: 3%

**Nationality**
- Belgian: 87%
- EU27: 4%
- French: 3%
- Italian: 2%
- Unanswered: 1%
- Outside EU27: 2%

**Mother Tongue**
- French: 58%
- Dutch: 26%
- Seen but unanswered: 2%
- Other: 4%
- Bilingual FR/NL: 3%
- Bilingual FR/other: 4%
- Bilingual Other: 3%
- English: 2%
- German: 2%

**Region of residence**
- Bruxelles: 61%
- Flandre: 25%
- Wallonie: 14%

**Province of residence**
- Bruxelles: 59%
- Brabant flamand: 3%
- Brabant wallon: 3%
- Anvers: 3%
- Namur: 3%
- Flandre-Orientale: 3%
- Unanswered: 6%
- Hainaut: 5%
- Liège: 4%
- Other: 14%
Professional situation: Highly educated workers, varying working conditions

The sample shows that media workers in Brussels have relatively high education degrees. More than half of the respondents have a master’s degree or something equivalent at the university level (51%); 11% a 4 or 5 years long degree outside of the university and 2% have a PhD. 28% of the other respondents have a 3 years education degree (8% Bachelor or equivalent at university and 20% outside university). Only 5% of the respondents have not pursued a higher education. As hypothesized, this is a strong an indication that the media workforce of Brussels is highly educated (as in other western countries).

*Figure 7. Repartition of highest diploma obtained by respondents (n=577).*

532 out of the 577 respondents have answered the question regarding their field(s) of study and indicated one or multiple background(s) (some have multiple diploma from different fields of study for a total of 777 clicks). Journalism education is the most cited background (182 individuals) followed by cinema and audiovisual production related studies (137, see figure 8). These numbers are high and might be due to the fact that other types of communication and media-oriented studies such as advertising (24 individuals) are more recent in Belgium than the former. This is also arguably why there are also so many individuals having studied non-media related topics such as political sciences (42).
As was shown in the introduction, most respondents of our survey have indicated being employed by a company, though several individuals stated working as freelancers (134, 23%). Even if this imbalance invites us to interpret the data carefully, the other answers we gathered show the diversity of situations when it comes to media production. Public data at the national and regional level seldom considers this diversity of employment, solely distinguishing employed or unemployed, sometimes forgetting freelancers, students working, volunteers, retired individuals still "producing" (mediated content) and the combination of some of these characteristics. 524 respondents of the survey have answered the question for 623 clicks. There are more than 10% of business owners (63), 29 students, 25 individuals seeking jobs and a few shareholders of companies, as well as volunteers, trainees or retired individuals (see figure 9). Furthermore, 44% of the individuals in our sample work for a public institution, which shows the importance of the public broadcasters RTBF and VRT in the city (Figure 10).
Our census previously published argued that Brussels media workforce has seen an increase of individuals registered as freelance workers and a slight diminution of employees over the last few years, indicating a deterioration in working conditions in the sector (Wiard & Domingo, 2016). This is confirmed by results of the survey (Figures 10 – 13) which show that even though media workers of the Capital/Region have a high education, the majority of them still have fixed-term and temporary contracts (60%). Furthermore, out of the 134 individuals having indicated working as a freelancer, 31% of them work for only one company which would confirm the well-known “fake independents” phenomenon (AJP, 2008: 7-12) within news media companies, though this should be verified through case studies and interviews. Overall, most independents (51%) work for only one or two companies.

Figures 10 – 11. Media workers type of contracts and companies.
Figures 12 – 13. Amount of companies’ media workers own (as owners) or work for (as freelancers).

From the outside, it might look like media workers have a regular schedule, as the average of paid hours is 38.08 hours per week, for 453 respondents who get paid for producing media (out of 575). However, once data is explored in detail (see figure 14 and 15), we can see that many of them have part-time contracts and some are overworked. Indeed, 101 individuals work more than 42 hours a week and 110 work less than 38 hours. Furthermore, many of the respondents do extra work for no pay, with an average of 17.20 hours (n=234 respondents). Regarding journalists, the respondents who have indicated in the survey producing news or current affairs content every day or almost every day (see below) are proportionally more prone to work more than 42 hours per week (28.06% of them versus 19.75% of the other respondents)\(^5\).

Figures 14 & 15. Average amount of paid and unpaid labor per week.

\(^5\) The specificities of journalists’ working conditions (such the “fake independents” hypothesis) will be assessed in D5.3: case study of journalists.
Finally, the majority of the 453 respondents who have indicated getting paid for their work make between 1500 and 3000€ per month, while 15% of these make less than 1500€ per month (-500€ = 3%; 500 – 1000€ = 4%, & 1000 – 1500€ = 8%). Unsurprisingly, it is the people who make the least money who are the most dissatisfied about their salary. Results indicate that the majority of those earning over 1500€ per month are satisfied with their salary (see figures 16 & 17).

*Figures 16 & 17. Average income of the respondents and sentiment towards it.*
Within the media industry: a multiplicity of jobs, tasks, and stakeholders

Further insights can be gathered when focusing on the data provided by our respondents regarding the sub-sectors they are involved in within the media industry, as well as their job titles, daily tasks and routines and their (self-)assessment of skills.

We first asked the respondents when they entered the media sector. 3% of them have entered the industry within the past year⁶, which is a consistent number over time. Indeed, 12% started working in the media industry between 2011 and 2015 (2.5% per year). Since 1991 it seems that the amount of entries in the industry is constant. Results indicate that there is professional mobility (change between one job to another) as 6% of them have changed job between 2016 and 2017 and 17% have obtained a new position between 2011 and 2015.


As stated previously, most of our respondents work for the audiovisual sector. More than the fact that audiovisual production and diffusion necessitate a high amount of means and workers to operate, this seems to be due to the fact that big media related companies and institutions (RTBF, VRT, RTL-TVi, Medialaan, VideoHouse, etc.) are based in and around Brussels. Altogether 324 respondents have indicated working in the audiovisual sector (56%). The second and third sectors are print (117, 20%) and new media (114, 20%), followed by advertising (52, 9%) which seems to be slightly under-represented according to census data (see figure 20)⁷.

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⁶ This is also another potential limitation of this study, as people that entered the sector recently might be less connected than others, and therefore have not reached the survey through social media or professional associations.

⁷ Because we hypothesized that the professional situations of media workers are complex and that they can work in multiple sectors, answers for sectors and sub-sectors were not mutually exclusive. This means that individuals (n) could click (t) on multiple sectors and sub-sectors. Therefore, “n=320, t=520) means that
Interestingly, some individuals selected multiple sectors. There is a strong variation between sectors as 71% of the individuals of the audiovisual sub-sector only clicked on that possibility, while only 44% of the print sector, 27% of the new media sub-sector and 19% of advertising have done the same. This indicates that the audiovisual sector has well defined boundaries while it isn’t the case for the other. Furthermore, 62% of respondents have only chosen one sector. Outside of the audiovisual sector, only 18% of respondents have only selected one sector. It concurs with the current state of the media industry, as print media companies are now also producing content for the web and advertising campaigns are now created for multiple formats (including digital ones) from the beginning. This questions the idea that “new media” is a sector in itself as all media sectors are now (at least partly) digital and confirms the idea that audiovisual content creation is more specialized, therefore requiring a higher degree of specialization (from cameramen, journalists, producers, film makers, etc.).

Within each selected sector, participants had the opportunity of selecting the sub-sector(s) they were working in (figures 21 – 24). Within the audiovisual sector (320 individuals selecting it or “n” and 520 sub-selections or “t”), the production of content for television was the most selected (t=236) followed by the same activities for radio (t=106). There is a big minority who spend time in the production of films (t=98) with a smaller minority of workers involved in music producing and recording (t=29). The repartition in the print sector seems more evenly distributed, though the main subsector selected is working for “daily newspapers” (t=67) closely followed by magazine “weeklies and monthlies” production (t=51). 33 individuals have indicated producing content for the web, and 21 for news agencies.
Figures 21 – 24. The different sub-sectors selected by individuals working having clicked on one or more sectors.

For the new media sub-sector, most respondents indicated working in website development and content production (t=77), while others produce content for social media (t=48) or blogs and portals (t=20) or develop mobile apps (t=22) and video games (t=12). Finally, the advertising sub-sector is divided between those who produce the advertisements for the press (t=12), broadcasting (t=24) or the web (t=28), those who facilitate that production (t=12 for media planning 12 and t=9 for display advertising) and those involved in other communication activities in relation to advertising, such as public relations (t=13) and corporate communication (t=16).

As showed in work package 2, Brussels’ media sector is characterized by a small amount of big companies located in the city limits or right outside of them, as well as a large amount of smaller companies or one-man operations (Komorowski, 2016), taking the

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8 Which concurs with the idea that there is digital media production but that NACE and NISSE codes are not up to date on the matter, which is why it does not appear in our census (see D4.2).
shape of a long tail distribution. The amount of companies that respondents to the survey have mentioned working for when they were not self-employed corresponds to this idea: a few companies where mentioned many times, and many were mentioned one, two or three times. Media companies in Brussels mentioned by 5 respondents or more include public broadcasters RTBF, VRT and BX1, the news agency Belga, private broadcaster RTL, as well as private press companies Rossel (Le Soir, La Capitale), Mediafin (L’Echo, De Tijd), IPM (La Libre, La DH), and Roularta (weekly magazines such as Trends, Le Vif, or Knack). Two other companies mentioned more than five times are located at the outskirts of Brussels, in Vilvoorde: Medialaan (owner of the TV channel VTM), and Videohouse (audiovisual production and post-production company). Since, representing all mentioned organizations in a conventional graph would be difficult, we have put them as a “wordcloud” below.

Figure 25. Wordcloud of the companies mentioned by respondents.

Employees of these companies as well as the self-employed of Brussels have a variety of functions and participate in different ways to the city’s media environment. In an effort to approach this, we first asked respondents to provide their job titles. The visualization below shows the jobs most cited by respondents in the language chosen for the survey (English, French or Dutch). It shows the wide diversity of positions within the media sector, as well as the linguistic diversity of respondents. The majority of job titles mentioned relate directly to content production in one way or another (e.g. “journalist”, “rédacteur” or

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9 This Wordcloud and the next one where made with the “word cloud generator” (www.jasondavies.com/wordcloud/). The size of the words varies depending on the amount of times it was cited. Bigger words were cited by more respondent (according to logarithmic function. Size = Log n if n=amount of times the or job title is cited).
“producer”). Even though we haven’t formally set up a classification prior to the survey\(^\text{10}\),

Even though we haven’t formally set up a classification prior to the survey\(^\text{10}\),

it appears that different groups of related professions emerged in the results mixing all

three languages of the survey\(^\text{11}\). A large proportion of respondents are involved in

journalistic work, and with a diversity of specificities (such as “eindredacteur” in Dutch,

“video journalist” in English or “correspondent permanent” in French). 16.29% of the total

of respondents declared being journalists (“journali*”), which corresponds to 20.94% of

the ones that gave their job title. A second portion of job titles that can be linked together

are the communication professionals (such as “chargé de communication”, “content

managers”, and “creatives”). Another group of job titles includes the professions

responsible for the technical aspects of mediated content production and post-production

(such as “cameramans”, “editors”, “IT engineers”, and other types of technicians). A fourth

group includes those involved in management in one way or another (“producers”,

“rédacteurs en chef”, “executive producers”, or “CEO’s”). This reveals the complexity of

media content production, diffusion and facilitating processes and the wide spectrum of

tasks and skills involved.

\textit{Figure 26. Wordcloud of the companies mentioned by respondents.}

In order to get a better understanding of what these job titles imply, the survey contained

questions regarding the tasks that respondents perform on a daily basis. Naturally, the

\(\text{\textsuperscript{10}}\) Other than the sectorial classification at the company level, which isn’t precise enough in this case.

\(\text{\textsuperscript{11}}\) We have chosen not to translate job titles in the analysis, as jobs do not perfectly match in the three

languages. It also highlights the multilingual nature of Brussels’ media workforce.
most cited task is the production of media content (279 responses, 64.73% of the 431 responses to the question). However, most respondents are multi-taskers since the 431 respondents (or 74.69%) who have answered the question have selected 1020 tasks, for a mean of 2.37 tasks per person (25.40% = no selected tasks, 32.58% = one task, 42.11% two or more tasks). Evidently, other important tasks involve the management (133, 30.86%) and diffusion (120, 27.84%) of content, but media workers also perform administrative (78), research (70), business management (67), client relations (63), or technical tasks (61), all less than 20% each.

*Figure 27. Tasks the respondents have indicated as “main task(s)” in their daily work (n=431, t=1020).*

Production practices vary in terms of format and type of content produced for the media content producers (n=279). This is visible in the amount of time that the respondents spend for each of these. Texts and videos are the dominant formats since the majority of respondents produce them every day (respectively 121 and 89 for a total of 210). In terms of type of content, half of the content producers (140) work on news and current affairs every day, where other types of content are less present (entertainment=35, informational=58, Cultural=29, promotional=21).
In the survey, we also investigated how respondents felt about different skills related to their daily tasks. A first observation is that respondents felt relatively comfortable regarding self-management and creative tasks (81% of them can use innovative methods, 93% feel comfortable multitasking, and 88% feel they can reflect on various tasks given to them). However, they felt less comfortable using advanced computer software (62% agree or strongly agree on the fact that they can use them) and programming (only 17% of agreement) which shows their uneasiness with technological tasks related to digitization. Finally, media workers feel they have good communication and social skills as speaking the languages required, communicating with clients and speaking and working with other all have at least 80% of agreement.

\[12\] N represents here the amount of respondents who were presented to the question because they indicated producing mediated content previously, n is the amount of individuals who actually answered and t is the total of responses.
Figure 30. Media workers’ self-perceptions of their skills

- I can work together with others.
- I can comfortably speak within groups (e.g. during meetings).
- I can easily communicate with clients or the public if necessary.
- I can speak the languages that are required by the job description of my job.
- I can do programming (e.g. web, softwares, apps).
- I can reflect on tasks given to me and see if they are beneficial for the company or myself.
- I can manage multiple tasks at the same time.
- I can use innovative methods and ideas for my company and myself.
- I can use advanced computer softwares (e.g. editing software, design, data visualization).

(n=436)
Within each media sub-sector: few variations in profiles, more in terms of working conditions

Though subdividing the sample questions even more its representativity, it is interesting to note that is seems that there might be variations across media sub-sectors (audiovisual, print, new media, and advertising). Though this should be investigated further and considered more as potential hints rather than definitive results, it seems that there might only be few variations in terms of profiles within each media sector (gender, nationality, background, etc.) but greater differences in terms of working conditions.

*Figures 31-34. Gender repartition within each of the four sub-sectors.*

Though there isn’t a significant variation of gender across each sub-sector, there are slightly more females in print (40%) than in other sub-sectors (38% for new media, 35% for the audiovisual sub-sector and 33% for advertising). The same observations were made in terms of nationality. The audiovisual sector has the highest percentage of individuals with Belgian nationality (92%), followed closely by the press (85%), new media (85%), and advertising (83%).
The individuals of the audiovisual sub-sector show a different configuration in one main area: the highest diploma obtained. If the print (71%) and new media (67%) sub-sectors are mostly made up of individuals having a master’s degree (followed by advertising with 56%), the audiovisual sub-sector barely reaches 50%. Looking at the data, it seems to be due to the fact that the audiovisual sub-sector requires much more individuals specialized in infrastructure management as well as technicians (electricians, operators, cameramen, sound technicians, etc.), for which the formal education required (and existing) in Belgium is often a 3 years degree (and more rarely a four years’ degree). The same observation can be made for the types of studies that individuals have pursued in each sub-sector(s). If the print sector is composed in majority of persons having studied journalism, the others are more diverse. In the audiovisual sub-sector, the main group are people has studied cinema or television.

Figure 35 & 36. Diploma obtained by sub-sector and field of study
Finally, a majority of workers of the audiovisual sub-sector work for a public institution, which isn’t the case for the other sectors. This might explain why the salary is relatively higher in this sub-sector though it is impossible to confirm at this point, as the graph (figure 38) doesn’t account for the amount of part-time workers and other specific cases in the various sub-sectors.

Figures 37 & 38. Public/private and salary repartition by sub-sectors.
Media workers’ geographic repartition and mobility: rooted in the city, living all over

To grasp media workers’ daily life, their routines and habits, the survey analyzed the repartition of workers across the city. To do so, we asked media workers of Brussels the postcodes of where they (mainly) worked and where they lived. Regarding workplace, the municipality with the most respondents is Schaerbeek (109=18,9%) which isn’t surprising because it is where the two public broadcasters and other audiovisual companies are located (see also MediaPark.Brussels in Komorowski et al., forthcoming). In second place comes the city center (postal code 1000, 98 individuals=17,0%). Both these areas are followed by municipalities surrounding the center such as Ixelles (45=7,8%), Etterbeek (24=4,2%) and Anderlecht (11=1,9%). Surprisingly, 23 (4,1%) workers have stated working right outside the city/region in the north-east municipality Vilvoorde. Verification of the data shows that it is due to the fact that two big Dutch-speaking companies (Roularta and Media House) have decided to locate themselves there to be in the region of Flanders but close to the city/region.

Figures 39-41. Multiple views of the distribution of media workers’ workplaces in and around Brussels’ municipalities based on survey responses.
As opposed to what we hypothesized, respondents didn’t always live close to their workplace. If the majority lives in Brussels (342 out of the 557 respondents who have accepted to give the postal code of where they live), there is a strong minority who lives outside of the city/region (215), scattered mainly in the two Brabants but living sometimes further away. Furthermore, individuals who live inside the city do not seem to inhabit the municipalities that they work in, as Ixelles becomes the municipality with the highest residents (61), while Brussels’ center and Schaerbeek drop down respectively to 35 and 56 respondents.

*Figures 42 – 45. Multiple views of the distribution of media workers’ residence in Brussels’ municipalities based on survey responses.*
This substantial amount of individuals who do not live in the municipality they work in or even in the city/region of Brussels brings about questions related to commuting to and from work as well as other trips during working hours. We therefore asked the respondents for how long they traveled everyday to and from work. 60% of the workforce lives in Brussels – with around 25% of the workers coming from Flanders (mainly Flemish Brabant) and around 15% from Wallonia.
Residency of respondents by region and commuting time (one trip only).

Figures 46 & 47. Residency of respondents by region and commuting time (one trip only).

Media workers having answered the survey spend a lot of time commuting, as the majority of all respondents spend more than one hour commuting every day, even those living in Brussels. Brussels’ media workers use a diversity of transport means (985 clicks on transport modes for 469 individuals, for a mean of 2.1), the car being the most common, followed by public transport, walking and bicycling. This is congruent with research on mobility which becomes increasingly multimodal in Brussels (Hubert, Lebrun, Huynen, & Dobruszkes, 2013).

Figures 48 & 49. Means of transportation used by respondents and trips during working hours.
Data from the survey indicates that media workers are very mobile, not only to and from work, but also during working periods. The majority of workers has to make work-related trips within the city or its vicinity during working hours several times per month and more than 35% of Brussels’ media workers have to make work-related moves several times per week.

Figure 50. Days spent working at various offices by amount of respondents.

<table>
<thead>
<tr>
<th>Workplace / days working there</th>
<th>0</th>
<th>0.5</th>
<th>1</th>
<th>1.5</th>
<th>2</th>
<th>2.5</th>
<th>3</th>
<th>3.5</th>
<th>4</th>
<th>4.5</th>
<th>5</th>
<th>5.5</th>
<th>6</th>
<th>6.5</th>
<th>7</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>At home</td>
<td>33</td>
<td>58</td>
<td>69</td>
<td>16</td>
<td>31</td>
<td>9</td>
<td>21</td>
<td>9</td>
<td>19</td>
<td>1</td>
<td>24</td>
<td>2</td>
<td>8</td>
<td>1</td>
<td>17</td>
<td>318</td>
</tr>
<tr>
<td>At main office</td>
<td>10</td>
<td>4</td>
<td>8</td>
<td>3</td>
<td>22</td>
<td>13</td>
<td>34</td>
<td>19</td>
<td>53</td>
<td>20</td>
<td>144</td>
<td>9</td>
<td>4</td>
<td>1</td>
<td>25</td>
<td>402</td>
</tr>
<tr>
<td>At another office</td>
<td>21</td>
<td>15</td>
<td>20</td>
<td>6</td>
<td>12</td>
<td>2</td>
<td>5</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>3</td>
<td>103</td>
</tr>
<tr>
<td>Co-working space, cafe, etc.</td>
<td>22</td>
<td>13</td>
<td>16</td>
<td>4</td>
<td>2</td>
<td>2</td>
<td>6</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>74</td>
</tr>
<tr>
<td>On the move</td>
<td>21</td>
<td>50</td>
<td>56</td>
<td>22</td>
<td>23</td>
<td>6</td>
<td>16</td>
<td>4</td>
<td>4</td>
<td>2</td>
<td>9</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>6</td>
<td>223</td>
</tr>
</tbody>
</table>

It is clear that media workers are very mobile. This mobility is logically co-dependent on where it is that media workers live. However, there is a relation between where media workers of Brussels live and the sector they work for. People coming from Flanders come more for audiovisual, advertising and new media activities than for print. This is congruent with the fact that the audiovisual public broadcaster is located in Brussels and the private broadcaster (VTM) is located at the outskirts of Brussels but that isn’t the case of some Dutch-speaking print companies (located in Flemish Brabant or in near Antwerp).
Conclusion (and back to the 7 p’s)

In over 25 pages and 50 visual representations of the data collected through the online survey, we have tried to provide a clear, new, original and comprehensive look at Brussels’ media workforce, while staying as objective and critical towards our data as possible, and in a readable manner for scholars, policy makers and citizens alike. Despite the limitations of our sample, we are confident that the diversity individuals having answered the survey and the amount of time they carefully spent responding brings a detailed look at what media workers do on a day to day basis, as well as what their profiles, skills and working conditions are.

In an effort to streamline this deliverable to the other MCB reports, as well as to provide a clear picture to the readers, we are now going to try to go back to the 7 parameters used as dimensions for the general research project, in order to answer the research questions and hypotheses set out for this study in light of the data analyzed (see Figure 51 for a summary). We are also giving a specific focus on the Reyers area (location of the future media park).

The first parameter we were interested in was place. We translated that parameter for the media workers in a research question focusing on the workplaces and residences of Brussels’ media workforce and hypothesized that the location of workers in the city depends on the media sub-sectors and companies. This turned out to be true as a lot of workers live in the city or around it. This is specifically true for the audiovisual sub-sector as many workers work around Reyers (a very audiovisual centered area). We also found indications that some workers of Flemish-speaking audiovisual media companies are located right at the outskirts of the city (mainly in Vilvoorde) showing that they want to benefit from being on Flanders ground but that being close to the city-region is still important to them. The Region of Brussels-Capital is therefore an important place for media workers. Having said this, it seems that many media workers still live outside the city limits and commute (mainly by car). Media workers are also a very mobile workforce that travels a lot during working hours. Enhancing public transportation from the two Brabants (as with the R.E.R) to specifically targeted areas (mainly Reyers, the city center and areas in the south-west of the center such as Saint-Giles and Ixelles) could help reduce the traffic pressure not only for media workers but for all citizens. Their high mobility during the day also calls for a reinforced public transport system during week-days especially since the new project at Reyers aims at bringing together journalists, media entrepreneurs, students and new inhabitants.

The second parameter we were interested in is proximity. Proximity seems to be at first only important for small companies of the audiovisual sub-sector (such as those located
around Reyers). For the other sub-sectors, we have found no indication that close proximity exists as those companies are located all over the city (even though they cluster in more central municipalities of the city as it is often the case). However, when taking a step back and looking at the surrounding cities and provinces, it seems that proximity does matter, but at the level of the City/Region. What is important for workers is to work and live close to each other, but at the City/Region level (less at the municipal level, and not at the national level).

The third parameter of MCB was pertinence. This parameter related to place but put an emphasis on the proportion and quantity of media workers. After looking at our results, it is clear that Brussels is pertinent as a media cluster for media workers. In Brussels, there is a significant number of highly skilled and educated workers. They work for many companies (big and small) or for themselves. If their profiles and working conditions vary (see below), they are very active, working extra hours in various workplaces and traveling a lot for work during the week. In terms of proportion, the biggest sub-sector of the city is the audiovisual sector, which is not surprising as producing and diffusing audiovisual content necessitate heavy infrastructural means and big companies. Previous deliverables highlighted the low proportion of “new media” in the city. However, data from this survey shows that there are in fact many workers producing mediated content for the web. This is due to the fact that these workers work in companies that do not (up to now) qualify themselves as mainly “new media” companies (such as newspapers also producing content for the web). Furthermore, categories used by public institutions to collect data (mainly NACE codes) have to evolve to take into account these types of companies and workers.

The fourth parameter (and an important focus of this deliverable) was profile. Our main hypothesis was that different profiles may have diverse working conditions and vary across sub-sectors of Brussels’ media industry. First of all, even though we thought we would find different profiles, we were astonished by the wide diversity of individual trajectories. Looking at the job titles respondents gave us, the companies they work for, and the main tasks they routinely execute on a day to day basis, we found four main categories of media workers in Brussels: the journalists, the communication professionals, the managers, and the technicians. These individuals execute multiple tasks on a daily basis, the most important being mediated content production, as well as management, administrative, HR or maintenance tasks. Having said this, media workers of Brussels media industry have common characteristics. First, they have almost all followed some sort of higher education (95%) with more than half of the respondents holding a master’s degree which is way higher than we hypothesized. They have expressed having good social and linguistic skills, they work well in groups and with other peers, and possess technical skills. They have stated, however, lacking some of the skills related to digitization (such as using advanced
software and knowing computing languages). Though this gap might just be generational, it is important to keep in mind that there might be a need for training and education in that regard.

After the profile parameter, the research objectives of MCB pushed us to gather insights regarding **path-dependency**. There, we were interested in the historical and institutional factors that influenced the presence of media workers in Brussels and their working conditions. Answering this parameter at the level of media workers wasn’t the first objective of the survey, since the data gathered comes from media workers directly and not policy makers, business owners, scholars and other experts. Having said this, we found three main insights. First, at a historical level, it seems that the presence of political and cultural Belgian institutions in Brussels has pushed public media located there. Many respondents have indicated working for public media (either national such as RTBF and VRT or regional such as Bruzz and BX1). A second historical factor has to do with bilinguism: results show that, even though Brussels is mostly a French-speaking city, many respondents have answered the survey in Dutch, indicated their job titles in Dutch and stated that they work for Dutch companies. Finally, the amount of individuals working for companies located literally at the borders of Brussels indicate that some Dutch-speaking companies made the choice the be located in Flanders but next to Brussels. This needs to be investigated further but it is clear that there are some historical and institutional reasons behind it.

The sixth parameter of the 7P’s framework is **policy**. This deliverable wasn’t focused on this parameter neither. As stated earlier we have noted that there are more individuals working for a public institution in the media sector, mainly in the audiovisual sub-sector than in other industries. This comes from the fact that public media in Belgium are highly subsidized. As no other clear policy incentives could be identified with this data, policy makers might want to take this insight into account when creating policies that could attract all sorts of media workers, including the ones missing, i.e. people from the new media sub-sector with software, editing and computing skills (see D6.3 for more information on the matter).

The final parameter of this research project was **performance**. As shown above, Brussels’ clearly is a cluster for media workers place, proximity and pertinence. With performance we aimed at going one step further by assessing the workers’ skills, specifically in relation to mediated content creation. The survey shows that there is indeed a diversity of content producers working on different types of formats and different types of content. Again, this workforce is highly educated and holds many skills, they are able to multi-task and do a variety of tasks, though, again, they might be missing some skills in terms of digitization. If it can be judged as a performant workforce for Brussels’ industry, there seems to be a
deterioration in working conditions. The workforce is educated and skilled but in many cases workers don’t have a stable job, which can hinder their performances.

For this report, and in the context of this survey, we have tried to grasp Brussels’ media workforce strengths and weaknesses, their habits and routines, their working conditions and their skills. Results indicate that Brussels’ media workers are highly trained, mobile and hardworking, though their working conditions are not always optimal. If a lot of them live in Brussels some come from Flanders (mostly to fuel Dutch-speaking media companies) and Wallonia. Added to the fact that they move a lot during working hours, they are very mobile. With the skills they have, they can do a variety of task and jobs that are, in Brussels, mainly revolving around four categories: journalists, communication professionals, managers and technicians. Even though there is a wide variety of companies, a few big players dominate the market especially in the biggest sub-sector of the city: the audiovisual sub-sector. This survey of media workers shows that there is an imbalance in Brussels between sub-sectors, which isn’t necessarily negative. It does mean however that policy makers will have to take that into account when building the future media park in Reyers. Do they want a highly specialized cluster focusing on audiovisual content and revolving around a few big institutions? Or do they want a more agile cluster with a workforce that is trained to evolve and adapt to the continuous changes brought forth by digitization? This is a question that will need to be answered before the new buildings of the RTBF and VRT are build, and before the early adopters move into the new “media city”. Nevertheless, this first online survey focusing only on media workers (and not the larger category of cultural and creative industry’s workers) and on all media workers (not only a specific category such as journalists or creatives) shows that this workforce is mobile, agile, skilled, fragile. Future research is therefore needed to assess how specific types of workers adapt to a certain environment and on how individuals could participate to Brussels growing media industry and the media park at Reyers.

Figure 51. Summary of the results of this deliverable, based on the “7P’s framework”.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Research questions</th>
<th>Hypotheses</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place</td>
<td>Workplaces' and residencies' locations?</td>
<td>Location of workers in the city dependent on sectors and types of companies</td>
<td>This is true, specifically for the audiovisual sub-sector in Reyers. Most of the workers live close to their workplace (in the city or close to it). There is a presence of Flemish-speaking companies at the border of the region. This very mobile workforce has a big use of infrastructure for mobility.</td>
</tr>
<tr>
<td>Proximity</td>
<td>Proximity of workers in same sectors?</td>
<td>Proximity is dependant in sectors and value chain characteristics</td>
<td>This is somewhat true, especially when looking at the city level instead of the neighborhood level. There is a small amount of big companies that smaller operations and freelancers cluster around.</td>
</tr>
<tr>
<td>Pertinence</td>
<td>Proportions and amounts of workers in each sector?</td>
<td>Strong media workforce in Brussels, strong audiovisual sector</td>
<td>Yes, it is true. Here is a strong, highly skilled and educated workforce working in Brussels. There is a higher proportion of workers in the audiovisual sector, and more people working for new media than expected.</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Profile</td>
<td>Profiles of media workers?</td>
<td>Profiles depend on and influence working condition in companies and sectors</td>
<td>There is in fact a diversity of profiles, working for companies operating in various languages. 15% of workers make less than 1500€ and that’s without retired, jobless and students meaning that even though they are educated, their income aren’t very high. From the survey, 4 main profiles emerge in Brussels: journalists, communication professionals, technicians and managers. They are present in all 4 sub-sectors. They have good social and technical skills but lack in technological (digital) skills.</td>
</tr>
<tr>
<td>Path-dependency</td>
<td>Historical and institutional factors influencing workers?</td>
<td>Historical factors (presence of public media and linguistic division) influence presence of workers</td>
<td>Yes, there seems to be historical factors influencing the proportion of media workers in the city, mainly the presence of public institutions and media companies, and the bilingual nature of Belgium and Brussels.</td>
</tr>
<tr>
<td>Policy</td>
<td>Incentives for media workers (and their companies)?</td>
<td>Public bodies and companies encourage workers to more, better, original media content</td>
<td>There seems to be incentives at the institutional level, as a lot of public servants are located in Brussels. Yet, it seems that most of the focus at the regional and national level is in the audiovisual sub-sector.</td>
</tr>
<tr>
<td>Performance</td>
<td>Workers’ specific skills? Implicated in content production?</td>
<td>Highly skilled and educated workforce producing many content</td>
<td>Yes, Brussels’ media workforce is performant. It holds many skills and produces a diversity of content in terms of formats and content types. This workforce is also able to multitask, and to do non-media related tasks related to management, administration, HR, client relations, etc. However, the worsening working conditions might lead to a decrease in performance.</td>
</tr>
</tbody>
</table>
References


