



Report on the Voice Over Industry



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State of the Voice Over Industry

Introduction

At the beginning of each new year, Voices.com presents a comprehensive overview of industry statistics that directly affect voice actors, including updates on broadcast television, radio, podcasting, video games, audiobooks, and other mediums and applications. Current trends are reported on and are diligently sourced for accuracy.

How to use this information

When reading this document, bear in mind that the need for voice over is directly related to the current status of each medium or application. For instance, you'll note that because MP3 player, satellite radio, and cellular phone sales are up, the demand for voice acting in podcasts, radio advertisements, audiobooks and more will naturally increase as a result of the success of the respective technologies. The key players in the industry are outlined below for your convenience to identify the unique roles that are played within voice over as a profession.

Key Players

Voice Talent and Voice Actors

- A voice actor is the producer of the creative vocal work that is recorded and used for a variety of applications including commercials for radio, television, telephone, podcasts, audio books, video games and more.

Voice Over Coaches and Instructors

- A voice over coach is a person who is either a teacher of voice, instructor of voice acting, or has extensive practical experience working as a professional voice actor who applies their knowledge and methodology through the teaching of their craft.

Audio Engineers and Producers

- An audio engineer is a person who is highly skilled in the field of audio production, including recording, editing, mixing and mastering. As an audio engineer, this person is usually employed by a larger recording studio or can also be a freelance producer who works independently, running their own production studio.



Voice Over Agents and Talent Agencies

- A voice over agent is a person who promotes and represents a voice actor, presenting their voice over work for consideration when a job that the voice actor is suited for becomes available. An agent can be independent or part of a voice talent agency that operates similarly to a quintessential talent agency, meaning a company that employs several people as agents to build a brand and manage a variety of talent, not just voice actors.

Casting Directors

- A casting director, specifically a voice over casting director, is someone who has an ear for picking the best candidate for a particular job. It is the responsibility of the casting director to "cast" the right person in a role for a client who usually has little interest, ability, or lacks the confidence to "pick" the right voice to represent their company, project, or brand.

Unions

- A union is a governing body that regulates terms of employment for their customers. Unions may take action on the behalf of their clients in cases where agreements are breached. A voice actor pays union dues or fees to be affiliated with a union in order to receive particular services, benefits, or opportunities exclusive to the union. While some unions have an open door policy allowing anyone to join so long as they meet membership fee requirements, there are other unions that are "invitation only" or other criteria. Being part of the union is not mandatory and there are more non-union voice actors in the world than there are unionized voice actors.

Online Marketplaces

- A voice over marketplace is a location, typically based online, where voice actors can feature their voices and audition for job opportunities to acquire voice over work. As the term "marketplace" implies, portals that perform this function connect buyers and sellers, for the purposes of this article, buyers and sellers of voice over services. Voice over marketplaces serve both the buyer and seller, and in some instances, facilitate communications and or transactions between the two. As a voice over marketplace consolidates both talent and job opportunities, it is an integral part of any voice actors marketing efforts as well as the most convenient and effective source for clients to find voice actors and buy their services.

Clients

- Clients who purchase voice over services can be from any industry, country, and speak a variety of languages. Since the need for audio production is universal as well as the need for voice overs, the global market of clients creates an enormous demand for voice actors who provide quality voice over recordings to represent their company, organization, or event.



Television

TV ad spending in the U.S.A. totaled more than 64 billion dollars in 2005

Source: Advertising Age Magazine June 26 2006

Broadcasting 2007: Report on the Industry

The Canadian Association of Broadcasters (CAB) is the national industry association that represents Canada's private broadcasters - including private television and radio stations and networks, and specialty, pay and pay-per-view television services.

- 101 Television Stations
- 49 Analog Specialty Stations
- 13 Pay-Per-View Services

Source: Canadian Association of Broadcasters November 2007

Radio

Broadcasting 2007: Report on the Industry

In Canada, there are:

- 184 Private Commercial AM Stations
- 465 Private Commercial FM Stations

Source: Canadian Association of Broadcasters November 2007

Current History of Broadcasting in the US

- The number of FM stations passed the number of AM in 1983; in 1998 there were 6,179 commercial FM stations on the air, and 2,400 noncommercial stations.
- The Corporation for Public Broadcasting was established in 1968 as a not-for-profit, nongovernmental agency to finance the growth of noncommercial radio and television; by 2003 the PBS network served more than 200 television and nearly 800 radio stations.

Source: The Columbia Encyclopedia, Sixth Edition



Radio Reaches 233 Million Listeners per Week, According to RADAR® 95

- Radio has strength and stability, reaching 233 million listeners over the course of the week according to the RADAR 95 December 2007 Radio Listening Estimates.
- The 7,200+ RADAR Network Affiliated stations reach 82 percent of all people aged 12 and over.
- Ninety-five percent of adults age 18-49 with a college degree and an annual household income of \$50,000 or above, tune into radio over the course of a week.
- They also reach 85 percent of adults 25-54 in households with a college degree and an annual household income of \$75,000 or above.

Source: Arbitron Inc. December 10, 2007

1 in 5 Listeners Visit Local Radio Websites

According to The Media Audit, their study (conducted between fall 2006 through spring 2007 in 88 local U.S. markets) finds that Entercom Radio in Buffalo, New York ranks as the second highest radio web site group behind Cincinnati Clear Channel with an 8.5% reach with adults 18+, followed by: Clear Channel Radio in Lexington, Kentucky (8.2%), Clear Channel Radio in Tampa-St. Petersburg, Florida (7.7%), and Clear Channel Radio in Houston, Texas (7.6%).

Among the top five local radio groups, the largest increase was observed with Clear Channel in Lexington, where unique monthly web site visitors increased by 163%. A year-over-year analysis also reveals that 21 local radio station clusters achieved or exceeded a 6% market reach with their aggregated web sites.

Source: New Communications Review, December 17 2007

Internet Advertising in Canada

The growth of spending on internet advertising has increased dramatically versus growth for television, and radio. Internet advertising revenues are increasing rapidly in Canada and in other countries around the world, including the UK and the US.

In Canada, internet ad revenues increased from \$176 million in 2002 to \$1.0 billion in 2006, based on a compound annual growth rate of 55%. By comparison, television ad revenues have increased over the same period by 5.7%, while radio has increased by 6.5%.

Source: Canadian Association of Broadcasters November 2007



Future of Satellite Radio

- By 2010, 20.1 million households will listen to satellite radio

Source: Forrester Research

Podcasting

Podcast Market Research

- 6.6 Percent of adults downloaded audio podcasts within the last 30 days
- 37% of the US population has heard of podcasting (up from 22% in 2006)
- 13% of the US population has listened to a podcast (up from 11% in 2006)
- 11% of the US population has watched a video podcast (up from 10% in 2006)
- Podcast listeners in the US are nearly even between men and women with 51% being male and 49% being female in 2007
- 12.3 million U.S. households will be listening to podcasts by the end of the decade

Source: Forrester Research

Podcast Advertising

Ad spending on podcasts will reach \$300 million, while social network ad spending is expected to rise to \$2.5 billion worldwide by 2010, from just \$350 million in 2006.

Source: eMarketer



Audiobooks

Audiobook Sales on the Rise Nationally

This year's survey showed a 6 percent increase over 2005 with audiobook sales now estimated at \$923 million in North America.

The Audio Publishers Association (APA) released the results of the 2007 APA Sales Survey, conducted to gather data and measure the growth of the audiobook industry. Independent research firm Lewis & Clark Research surveyed audiobook publishers during the summer of 2007, analyzing reported consumer sales data from 2006 and comparing current statistics against the previous year's findings.

Source: Audio Publishers Association

Audiobook industry worth \$2 Billion

The audio book industry is a \$2 billion dollar industry and growing. Sales within this industry grew by a huge 150% in just 1 year by the end of 2005.

Source: Audio Publishers' and CDs

Audiobooks: This Growing Market Is Great News For Voice Talent

The demand for audiobooks is expected to skyrocket from today's approximately 4,000 per year to a whopping 24,000 over the next four years.

Source: Blackstone Audio

Animation

Celebrity Voice Actors in the Animation Studio

- **Competition.** The trend of casting well-known actors in newly released animations is reducing demand for career voiceover actors.
- **Qualifications?** Career voice actors maintain that their specific training in mike techniques and vocal acting make them more qualified than their immensely famous counterparts.
- **Commitment.** Many animation fans criticize big name actors for not putting the same effort into their performance as they would in a 'real life' movie.

Source: Animation World Magazine



Videogames

Advertising in games is expected to rise to \$800 million in 2009 from nearly \$120 million in 2004.

The Game Initiative announced today that 250 executives from advertising agencies, game developers and publishers participated in the first annual Advertising in Games Forum in New York City.

- \$266 Million, or more than one-third of advertising in games in 2009, will come from "advergaming," when advertisers create a game around a product rather than place their brands within a well-known title, according to Yankee Group senior analyst Mike Goodman at the Advertising In Games Forum.
- Mitch Davis, chief executive of video game ad network Massive Inc., told the audience video game advertising would top \$1 billion in the United States by 2010, and approach \$2.5 billion worldwide.
- 100 million game capable cell phones are currently in the marketplace. 65% of the population owns a cell phone. And the turn over or replacement rate of cell phones is every 16 months, reported Anita Frazier, Entertainment Industry Analyst, NPD Group, at the Advertising In Games Forum. Every cell phone being sold on the market today is game capable. So within 16 months all cell phones in the marketplace should be game capable.
- Best selling game title of all time: Grand Theft Auto Vice City with 6.5 million units, followed very closely by Super Mario 64 on the N64 which is about 6.0 million units, according to Anita Frazier, Entertainment Industry Analyst, NPD Group, at the Advertising In Games Forum.

Source: The Yankee Group 2007

Video Game Advertising: Getting to the Next Level, June 2007

The use of video games as an advertising medium will grow substantially in the next five years. Worldwide spending on video game advertising will rise from \$692 million in 2006 to \$1.9 billion in 2011, with half of the spending occurring in the US.

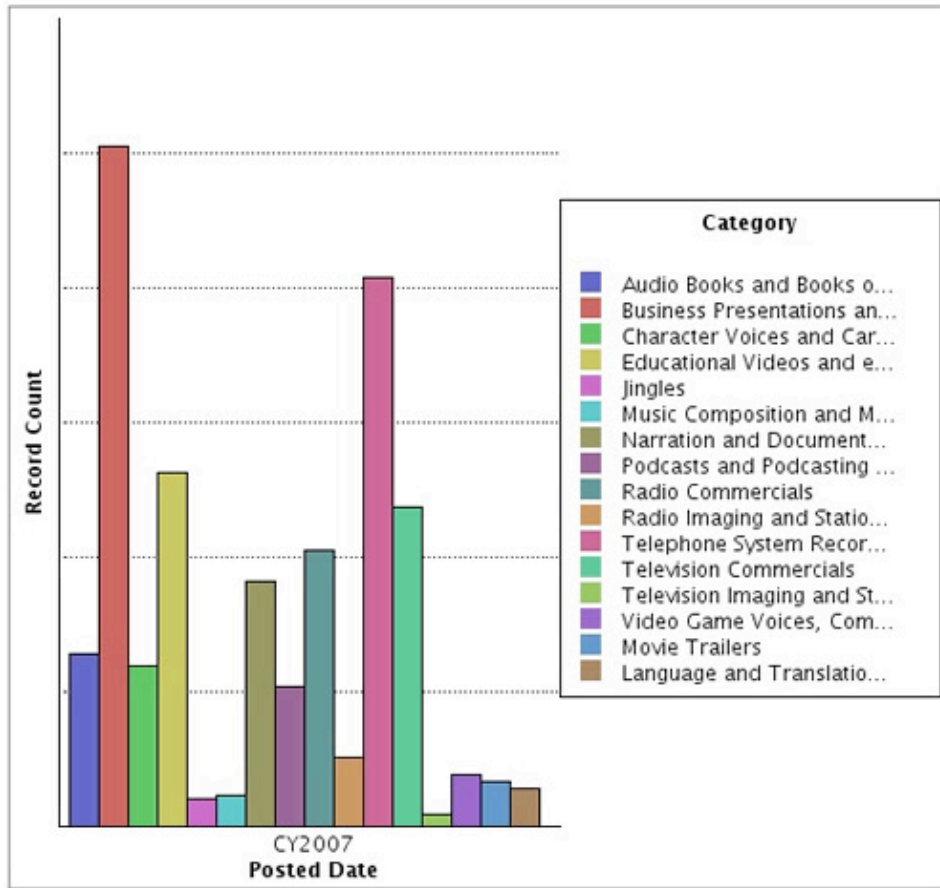
A number of factors are fueling interest in advertising on this medium. A widening audience, especially women and older gamers, the growth of games with online connectivity, and the need for game developers to offset escalating production costs will be the primary drivers of growth.

As this shift in consumer behavior continues, advertisers are likely to begin tailoring their budgets to this new reality.

Source: eMarketer

Industry Research

Online Job Postings at Voices.com



Voices.com is an online marketplace where businesses and voice talent connect. The chart above demonstrates the various types of voice-over work procured through the online service. Note that internet-related audio productions were categorized as “Business Presentations”.

Source: Voices.com for the Period between January 1, 2007 and December 15, 2007



Vox Daily

Vox Daily is a blog that offers daily dose of voice acting news, articles, tutorials, interviews, intelligent conversation and business ideas.

- Vox Daily has been read 83,908 times

Source: FeedBurner, December 2007

Vox Talk

The voice acting entertainment podcast covering voice acting news, business tips, technology, and an assortment of voice actor contributions. This show is produced weekly.

- Vox Talk podcast has been downloaded 20,575 times

Source: FeedBurner, December 2007

Voice Over Experts

The educational podcast featuring renowned voice over coaches from US, Canada and abroad. Join us each week for pearls of wisdom and tricks of the trade to improve your voice over career.

- Voice Over Experts podcast has been downloaded 14,535 times

Source: FeedBurner, December 2007

The Market for Online Voice-overs

Talent is in demand for Web advertising, audiobooks; business is competitive.

The explosion of online advertising has rippled across many industries, in some cases unexpectedly. Voice-over artists are among those who are benefiting. As multimedia hits the Web, the demand for voice talent is surging.

Salaries

- High-paying contract jobs with residuals can range from \$150,000 or \$200,000 a year.
- Nonunion freelance jobs fall between \$150 and \$500.

Source: Goliath Business News



Opinion

How Has The Industry Changed?

The voiceover industry has undergone quite a revolution. In the past, advertisers paid little attention to the voice behind their commercial. Now, they are paying huge amounts of money for top notch voice actors. Advertisers and software sound designers have finally recognized how vital the right voice really is. A case in point: celebrities who, ten years ago, wouldn't be caught dead doing voiceover, are now happy to use their voices in advertising, animated films, CD ROM games. . . and are being paid quite handsomely for their services.

Source: The Voice Factory

Current Trends in Voice Casting

- 1. Celebrity voices are indeed hot.** There's no stigma attached to doing voice work anymore. It's low-stress (no make-up or hairstyling), and with the residuals it can be amazingly lucrative. So, stars are popping up all over the place: Richard Dreyfuss for Honda. Julia Roberts for AOL. Gene Hackman for Oppenheimer Funds and Lowe's.
- 2. Voices are skewing younger.** Even for products where the target market isn't so young. The industry people I talked to (all of them well over 30, it should be noted) complained about the twentysomething whippersnappers coming to power at the ad agencies.
- 3. Announcers are out, "real people" are in.** This is perhaps the broadest trend in voiceovers, and it's been building for 10 years or so. There's far less call these days for the traditional announcer type—the guy with the booming baritone and the clean, well-rounded tones.
- 4. The talent pool has widened.** Because "real person" is the hot voice type, there's much more room in the industry for ... real people. You no longer need to have that perfect, clear-as-a-bell voice and that carefully honed intonation. It's more about what you bring to the table as an actor and improviser. Even technology is on your side: It used to be that one pro skill was to vary delivery speed precisely, thus shaving off specific amounts of time on cue. Now, with all the studios going digital, you don't need to worry about it—they just compress the clip to shave off a quarter of a second if need be.
- 5. It's less about reading, more about inhabiting a character.** Joan Bogden is one of the best voice talent coaches in the country. Her approach is more about psychology than about diaphragms and larynxes. She urges students to approach the read with a cinematic mindset: Who is my character? What am I feeling?

Source: The Voice-Over Gets a Makeover Goodbye, "voice of God." Hello, Julia Roberts. By Seth Stevenson



Establishment of Specialists

Within the voice-over industry, loopers are an elite group. Of the 3,000 or so professional voice-over actors in the United States, just 200 to 300 have regular gigs cleaning up studio releases in post-production, said Burt Sharp, 74, a dialogue replacement agent in Van Nuys, Calif. "Not everyone can do this kind of work. You need someone who has a voice that sounds similar to the original but can also achieve the nuances of emotion; sometimes in just two or three words," he said.

And it is far cheaper to hire a voice actor than to bring the original back. A typical looping contract is around \$700 for up to four hours of work, a fraction of what a name actor would demand, said Sharp. Plus, most actors simply don't want to replace their own dialogue after a movie is done shooting. "I guess they figure their work is done and who cares about some cursing or some garbled lines".

Though most looping is just for scattered words or phrases, other jobs can be more arduous. For one of his early film looping jobs, Bob Bergen, who's the voice of Porky Pig, replaced a lead actor's entire performance in the science-fiction flick "Gor." "They decided in post-production that they just didn't like this guy's surfer dude voice and they wanted an all-American sound, so they hired me," he said.

Bergen remembers sitting next to the actor at the film's premiere. "He said, 'I can't believe how different my voice sounds on film.' That was nice."

Source: Columbia News Service

Outlook for 2008

Future is Bright for the Voice Over Industry

Voice acting is finally becoming part of the mainstream. The days when voice actors were referred to as "voice talkers" or asked, "So, what is it that you do?" are fading quickly into the history books as mass media embraces the art and profession of voice over. The combination of technological progress, public awareness and celebrity endorsement have elevated voice acting to a new plateau and social status within the broader entertainment industry.