Cultural & Creative Industries Skillnet

ANIMATION IRELAND

ANIMATION INDUSTRY
ACCESS & CAREER DEVELOPMENT RESEARCH REPORT

Coimisiún na Meán

Fís Éireann Screen Ireland

National Talent Academy Animation

A Fís Éireann/Screen Ireland Initiative

CONTENTS

Cultural & Creative Industries Skillnet

ANIMATION IRELAND

INTRODUCTION

Over the last number of years, the success of Ireland's animation sector has been unparalleled. Employment within the animation sector in Ireland has grown rapidly and there are now over 2000 full time employees working across 40+ studios. Animated films and series produced by leading Irish studios have been recognised globally, with multiple awards and nominations at the world's top festivals. Yet for the continued growth and development of the animation sector in Ireland it is vital that new talent is continually entering the sector, and that those within the sector are able to develop their careers. Key to this is understanding the barriers to entry and progression within the animation sector in Ireland, most particularly as experienced by recent graduates, and ensuring that they are addressed.

Reviews of employment patterns in the creative sector internationally suggest that animation is under-researched compared to parts of the screen industries (CAMEo 2018). The research that does exist indicates that gender, disability, class, race and ethnicity and location are significant factors in career progression. While gender issues are perhaps better researched than other areas, there is also emerging work on race, ethnicity and disability. Other known factors such as class, religion, sexuality, and location are under-researched, with more work required.

This report seeks to address these gaps as they apply to Ireland. In so doing, it draws key conclusions on the current barriers to entry and progression within the Irish animation sector, and proposes a number of recommendations for action. It is hoped that these will jointly support the continued growth, development and success of Ireland's world-leading animation sector.

About this research...

Following the publication of the Skills Gaps in the Irish Animation Sector Research Report in 2022, Cultural and Creative Industries Skillnet (formerly Animation Skillnet) and Animation Ireland conducted further research into access opportunities and obstacles in the Animation Industry, focusing on freelancers, recent graduates, crews and unemployed professionals. The results of this research were compiled into the report therein.

This project was funded by Cultural & Creative Industries Skillnet, Animation Ireland, Coimisiún na Meán (formerly Broadcasting Authority of Ireland), Fís Éireann/Screen Ireland and the National Talent Academy for Animation. The project was undertaken by Laurence Knell and Ronald Macintyre of Strategic Innovation Partners.

Key Stakeholders

The study is a broad mix of qualitative and quantitative research and analysis. It used various methods of research to engage with the industry and audiences. Strategic Innovation Partners engaged with the commissioning organisations and Industry Stakeholders including individual talent and relevant Industry companies and also freelancers, recent graduates, crews and unemployed professionals in the Animation industry:

Cultural & Creative Industries Skillnet

Cultural & Creative Industries Skillnet designs, develops and delivers responsive, bespoke, flexible and relevant skills and talent development programmes to address the ongoing needs of the cultural & creative sectors. Cultural & Creative Industries Skillnet was established in January 2023 as a consolidation and expansion of three existing and established Skillnet networks (Animation Skillnet, Screen Skillnet and Immersive Technologies Skillnet) to support the following cultural and creative sectors: Animation, Visual Effects, Games, Film, TV, Documentary, Post-Production, Immersive Technologies, AR/VR, Virtual Production, Digital Media, Entertainment Events, Music, Theatre and Visual Arts.

National Talent Academy Animation
A Fís Éireann/Screen Ireland Initiative

Established in 2021, **the National Talent Academy for Animation** is an initiative of Screen Ireland, managed by Animation Ireland. Through a range of programmes, the NTAA seeks to engage with and support creative talent in these areas, and provide them with opportunities that will allow them to progress within the animation industry and achieve long term career goals.

Animation Ireland

Animation Ireland is the representative body for the animation industry in Ireland, with forty four member studios. The sector is well spread geographically with members operating in all parts of the island. There are established creative hubs in Belfast, Galway and Kilkenny and other members located in Clare, Cork, Derry, Offaly, Louth and Roscommon. Members are producing 2D and 3D animation for television and feature films for the domestic and international market.

Animation Ireland operates at the centre of a very sophisticated ecosystem and has regular engagement with stakeholders including but not limited to BBC NI, Coimisiún na Meán, Creative Europe, Cultural & Creative Industries Skillnet, IDA Ireland, Imirt, Intertrade Ireland, Northern Ireland Screen, Revenue, Screen Composers Guild, Screen Directors Guild, Screen Producers Ireland, Screen Ireland, Screen Writers Guild, RTE, TG4, Women in Animation and VFX AI.

Coimisiún na Meán

Coimisiún na Meán has been established further to the provisions of the Online Safety and Media Regulation Act 2022 ("OSMR Act 2022").The OSMR Act 2022 was enacted on 10 December 2022. The OSMR Act 2022 amended the Broadcasting Act 2009 to establish Coimisiún na Meán and dissolve the Broadcasting Authority of Ireland ("BAI").

In addition to undertaking the functions of the BAI as the regulator for broadcasting in Ireland, Coimisiún na Meán is to establish a regulatory framework for online safety, update the regulation of television broadcasting and audiovisual on-demand services, and transpose the revised Audiovisual Media Services Directive into Irish law.

Fís Éireann Screen Ireland

As the national agency for the Irish film, television drama, animation and documentary industry, **Fís Éireann/Screen Ireland** is the creative partner to the sector, investing in talent, creativity and enterprise. We are inspired by original storytelling that will emotionally move audiences at home and abroad. Through a wide range of practical funding supports across development, production, distribution, promotion and skills development, Screen Ireland supports the sector at every stage. We support filmmakers in their creative pursuit to share valuable artistic, cultural and commercial stories on screen.

Aims and Objectives

The overall aims and objectives of this action-based research project were as follows:

- Surveying the current/aspiring workforce to acquire up-to-date statistics.
- Engaging with recent or past graduates who have not yet gained access to the industry to identify their needs.
- Consulting with crews on opportunities for career development and mobility within the sector.
- Identifying obstacles for Animation professionals with disability or from minorities as well as compiling an inventory of supports and resources available in Ireland.
- Gathering information and testimonies by means of a questionnaire that the researcher devised, based on their desk research as well as interviews.

INSIGHTS INTO INTERNATIONAL EXPERIENCE

A key issue when considering international experience of barriers to access and progression within the animation sector is the overall lack of meaningful research. It is consequently important to take a broader perspective on those factors which can constrain both access to and progression within the animation sector by looking at research focusing on both the screen industries and creative sectors most broadly.

In examining employment patterns within the creative industries, international research (Cottle and Saha, 2002) has found three overlapping factors which can constrain or enable participation and progression:

» Societal factors that relate to wider inequalities in life chances within society, including conscious and unconscious barriers

» Structural factors that relate to the informal nature of recruitment and the flexible and project-based approach to employment

» Political factors that relate to policy and regulation and their role in promoting diversity and inclusion

While these might appear to stand alone, the concept of intersectionality is highly relevant. Clark (2013) defines intersectionality as:

> *the interaction between gender, race, and other categories of difference in individual lives, social practices, institutional arrangements, and cultural ideologies and the outcomes of these interactions in terms of power.*

The following section explores international research into the various factors impacting on access and progression to the creative industries most broadly, with a particular focus on trends and findings of greatest relevance to the animation sector.

Patterns of employment

Research by the University of the Arts in London (Ball et al., 2010) found that creative sector employment typically falls into three areas:

- Specialists working in the creative sector
- Creatives embedded in industries not normally regarded as creative, and
- Support staff within the creative sector

Drawing on data from a long-term study of over 3500 graduates from 26 UK-based education providers, the UAL report found that over the course of 10 years:

75%
of graduates had worked in the creative sector

77%
of graduates were positive about their current work and the links between the work and what they studied

75%
of graduates had portfolio careers with multiple overlapping roles

45%
of graduates reported working for a period as freelancers or contractors

Approximately
23%
of graduates were self-employed, including 18% who ran a business

42%
of graduates had undertaken unpaid work as part of gaining access to the sector

72%
of graduates had undertaken further study

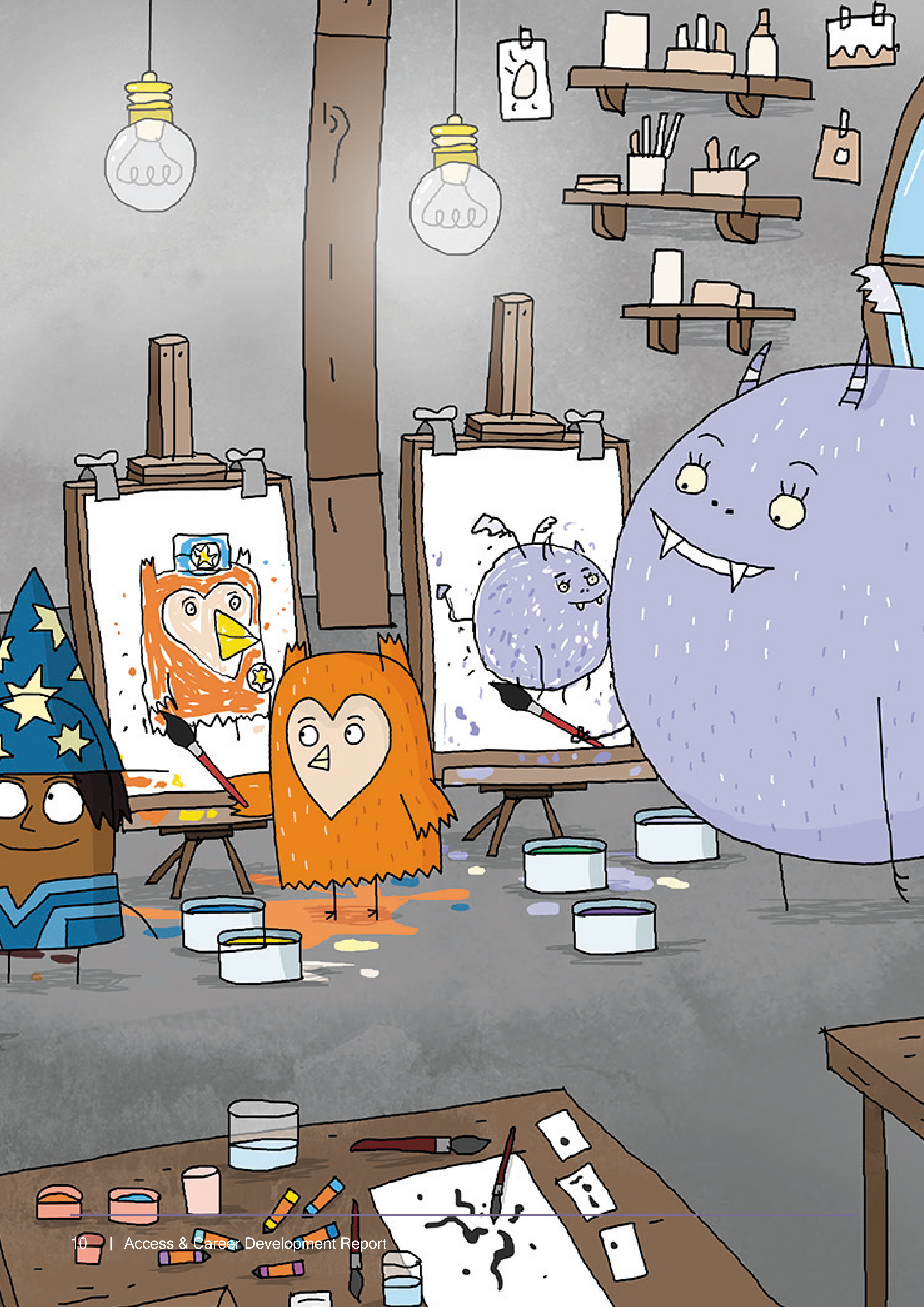
Perhaps counter-intuitively, the UAL report largely presents a) being self-employed, b) taking on unpaid work, and c) balancing a portfolio career with skills development, as positive aspects of a dynamic sector (Ball et al., 2010).

Although graduate outcomes research tends not to take portfolio careers into account, it is vital to consider the inherent flexibility of the employment opportunities and the project-based nature of work which they allow for. Portfolio careers can also better reflect the passive and active employment choices often found in the creative sector (Jackson & Bridgstock, 2019) and there is extensive research into these structural issues (Ashton, 2015).

Ozimek (2020) highlights that the project-based orientation of the screen industries can function as a particular barrier to employment and progression, with uncertain working conditions and the concentration of opportunities in metropolitan centres acting as barriers to many. Drawing on research in the UK, Wreyford et al. (2021, p.39) highlight the following challenges with project-based work:

> *Project-based work… causes issues in terms of hiring. Often hiring decisions are based on close and closed networks, and 'who you know'. Informal and project-based recruitment favours the already-dominant white, able-bodied, neurotypical, upper middle-class men… This 'hiring as cultural matching'… exacerbates both the difficulty of entry into creative occupations and helps to explain the monoculture found in many senior or leadership teams. Underrepresented groups often face a 'one chance' culture, and are expected to be grateful for any opportunity while at the same time being expected to act as a representative for their social group. If they make a mistake not only are their opportunities curtailed, but others might be dismissed by association.*

Along with a reliance on informal processes and networks to gain access to employment, these barriers disproportionately affect those who already experience barriers to employment due to factors like age (older workers), gender, social class, race and ethnicity and disability. There is evidence that workers who come from marginalised groups often find themselves working in particular occupations or sub-sectors, which might link to structural issues within diversity and inclusion in the creative sectors (Ozimek, 2020). International experience has also suggested that the precarious and casual nature of employment in the creative sector more broadly might disproportionately affect women (Wing-Fai et al., 2015). As Wreyford et al. (2021) put it: in the UK, a middle-class male is five times more likely to work in the creative sector than a working-class female.



Diversity and inclusion

Internationally, diversity in animation remains a critical issue. A recent article in Animation Magazine highlights the link between diverse voices in production and diverse narratives on screen (Van Hoose, 2022). Just as on-screen depictions of diversity are important, research into the role of genres within the creative sector suggests that genres can reinforce existing inequalities (Alacovska & O'Brien, 2021), normalising social and structural inequalities.

A review of gender representation on screen and in animation production in film and TV (Smith et al., 2019) found that less than 20% of animated films feature a female lead (and only 3% a woman of colour) – a pattern reflected in production, where numbers involved in story and animation are similar. Similar to the glass ceiling evident in other fields, barriers to progress into senior roles are even more apparent, with only 3% of the 100 animated films in the study having a female director (Smith et al., 2019). Notable exceptions to this include the Irish studios Cartoon Saloon and Lighthouse Studios, both of which have females in leadership roles. It also includes the recently-released animation El Deafo featuring a lead character who experiences a sudden hearing loss, and which was produced by Lighthouse for Apple TV+ with head creative, Gilly Fogg, as director.

Recent research into gender inequality in the Canadian screen sector has drawn upon Intersectional Risk Theory to argue that decisions on gender inclusion are often driven by perceptions of risk (Coles et al., 2021). It suggests that the industry perceives women employees (or anyone who is not a white male) as inherently risky and so to be avoided. These decisions – and the focus on risk minimisation that they embody – have direct consequences for career and progression opportunities and negative outcomes for certain groups and also lead to a preference for casualised or project-based employment by employers.

While gender remains the most studied issue in the creative and screen industries, some emerging studies, including Smith et al. (2019), explore how barriers to recruitment and progression in the sector intersect. For example, Dent's (2020) work on carers' careers in the creative industries finds that carers are underrepresented in the creative sector, with barriers to participation more acute when the carer is a woman and even more pronounced when they are a woman of colour.

Similarly, a recent UK study into disability and animation by Branzanti and Cortvriend (2022) found that only half of the disabled people in the sector disclosed their disability. Less than half of those who participated in the research felt that the industry was a good place for those with a disability to work. There was a sense (almost 60% of respondents) that disability and inclusion could not be discussed, and more than half of participants noted pay gaps associated with disability. Importantly, over 75% of those with a disability felt that the industry discriminated against disabled people, and 62% felt that the sector did not do enough to enforce existing legislation designed to support those with disabilities and enhance their engagement in the workplace. When people without disabilities were queried, 72% agreed that the sector did not do enough to support opportunities for those with a disability.

A recent report into screen industry diversity in Nova Scotia (De Rosa & Burgess, 2021) suggested a number of approaches to help address diversity challenges. Specifically, they refer to the need for clear mentorship opportunities with paid and trained mentors, specific funding for particular groups (relating to social and structural barriers), financial, training and in-kind incentives for organisations to support them to diversify the workforce and support pathways to leadership roles for under-represented groups.

The impact of geographic clustering

The tendency for creative work to concentrate in metropolitan areas is a further important barrier to career entry and progression (Ozimek, 2000). Creative Scotland's review of the animation sector in Scotland, compared the industry there with those in Denmark, Canada and Northern Ireland (McKissack & McLean, 2017). It found that although Scotland is well served by third-level education providers (comparing well with locations like Denmark and Canada), overall the Scottish industry was small, centralised and dominated by a limited number of organisations. Scotland also suffers from the overwhelming dominance of London as the UK's creative hub which can lead to talent leaving the local market (McKissack & McLean, 2017).

The geographic clustering of opportunities can act as a particular barrier when the importance of internships, unpaid roles or low-paid roles as vital entry points or 'rites of passage' into the industry are considered. Research examining opportunities to develop the creative sector in the North-East of England found that access to employment is adversely impacted by social class. In particular, those from working-class backgrounds lacking social and cultural capital struggled to progress in the sector without the means to take advantage of the unpaid roles in London that characterise the industry (CAMEo, 2018).

In contrast, research in the creative industries suggests a role for partnership work in diversifying the workforce. A study of creative clusters in South Africa found that "fused" organisations, that is, organisations that had digital and creative parts of the sector together either within one organisation or between them, had more stable work patterns and a more diverse workforce (Snowball et al., 2021). The link between stable working patterns and diversity links to the earlier issues and highlights the role of flexible working and informal networks to access flexible project-based work as a key barrier

Conclusions

This discussion of international experience of barriers to entry and progression within the animation sector has focused primarily on structural and societal considerations.

Effectively grappling with and overcoming these issues is key to addressing the barriers to entry and progression within the creative economy, and enhancing diversity within the sector (Eikhof & Warhurst, 2013; Eikhof et al., 2018). These findings are confirmed by other studies that found that the precarious nature of employment, the reliance on informal networks and the need for flexibility disproportionately affect women, most particularly when layered with ethnicity and social class (Conor et al., 2015).

One area not discussed, and requiring much further research, is the impact of the COVID-19 on careers in the creative industries including animation. The limited research so far, including that from Khlystova et al. (2022), indicates that the reduction in networking opportunities during the pandemic may have accentuated inequalities and benefited some groups over others.

Research methodology

In order to better understand the barriers to entry and progression within the animation sector in Ireland, a survey was distributed to recent graduates of universities and colleges in Ireland. The survey was open for responses from January to March, 2023 and in total 210 responses were received.

The survey was primarily distributed by Cultural & Creative Industries Skillnet (formed in 2023 through the merger of Animation Skillnet, Screen Skillnet and Immersive Technologies Skillnet), Animation Ireland and the National Talent Academy for Animation to their mailing lists and through key stakeholders including industry bodies, as well as universities and colleges offering courses in animation.

The survey was developed in line with the requirements of the brief and drew upon insights gained from research into experience of barriers to entry and progressions. Many of the key questions were adapted from the Higher Education Authority's Graduate Outcomes Survey and specific demographic questions were framed around accepted terminology and approaches. This includes survey questions on gender and ethnicity which drew upon Irish census categories and in consultation with leading experts in diversity & inclusion, and a question regarding long-term difficulties or conditions which was developed in consultation with the National Disability Authority.

RESEARCH FINDINGS

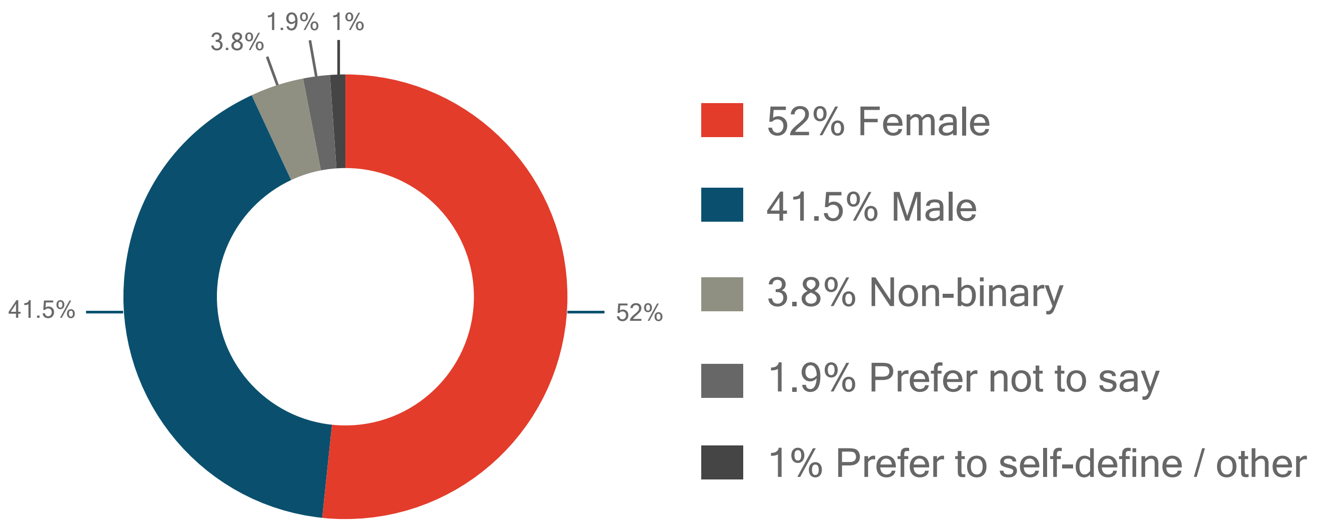
The following section presents the key findings of the research undertaken. It draws together the key themes emerging from the research and highlights specific trends which are discussed further in the subsequent sections.

DEMOGRAPHICS

In total 210 responses were received to the survey. Key demographic indicators of respondents are outlined below.

Gender

Gender breakdown of respondents was as follows:



Only 6.7% of respondents – equivalent to 14 individuals – indicated a gender identification other than Male or Female. It is consequently difficult to draw statistically valid conclusions based on those responses, so care was taken with assumptions made in the subsequent analysis.

While Irish data on the gender mix in animation is limited, research from the US found that only about a third of people working in design, animation and storyboarding identify as female (Smith et al., 2019).

Ethnicity

The largest single group of respondents identified as White Irish (64%) followed by respondents who identified as being from Any other white background (22.5%). No respondents identified as being Irish Travellers or Roma.

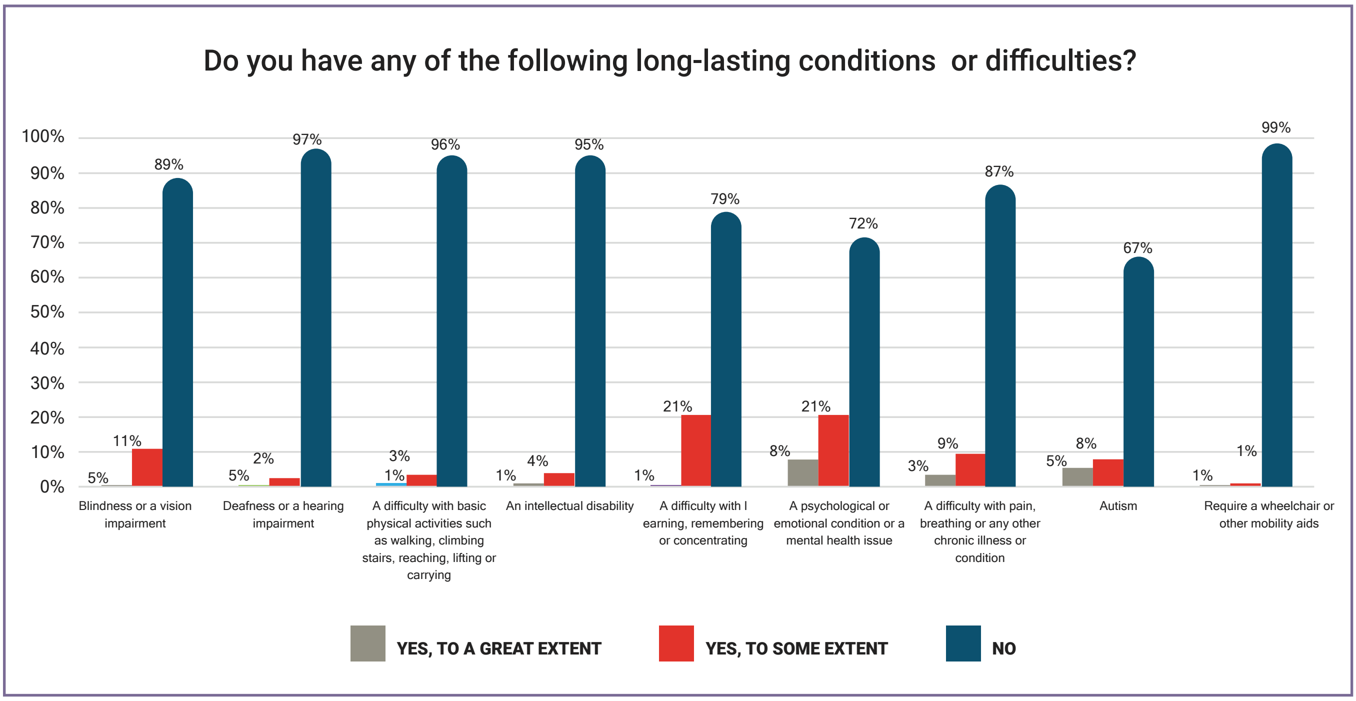
64% White - Irish	**22.5%** Any other white background	**6.2%** Asian or Asian-Irish, including Chinese, Indian, Pakistani, Bangladeshi and other Asian backgrounds
2.4% Mixed background	**1.4%** Black or Black Irish	**2.9%** Other

Disability Status

Of the 210 respondents, 49% indicated that they, to some extent, experienced A long-lasting condition or difficulty. This compares to 12% of the total population aged 20 to 64 who reported in the 2016 Census that they experience some form of disability (NDA, 2019).

The most commonly reported condition or difficulty was A psychological or emotional condition or a mental health issue, experienced by 29% of respondents, followed by A difficulty with learning, remembering or concentrating, experienced by 21% of respondents, Autism experienced by 13% of respondents, and A difficulty with pain, breathing or any other chronic illness or condition experienced by 12% of respondents.

Overall, 27% of respondents indicated that they experience more than one long-lasting condition or difficulty, which could suggest that specific supports or allowances might be required to facilitate the needs of individuals.



Within the reported categories, a distinction emerged on the basis of gender:

- Female respondents were more likely to report challenges with Blindness or a vision Impairment, A psychological or emotional condition or a mental health issue, or A difficulty with pain, breathing or any other chronic illness or condition
- Male respondents were more likely to report experiencing An intellectual disability, A difficulty with learning, remembering or concentrating and Autism.

Disability Status

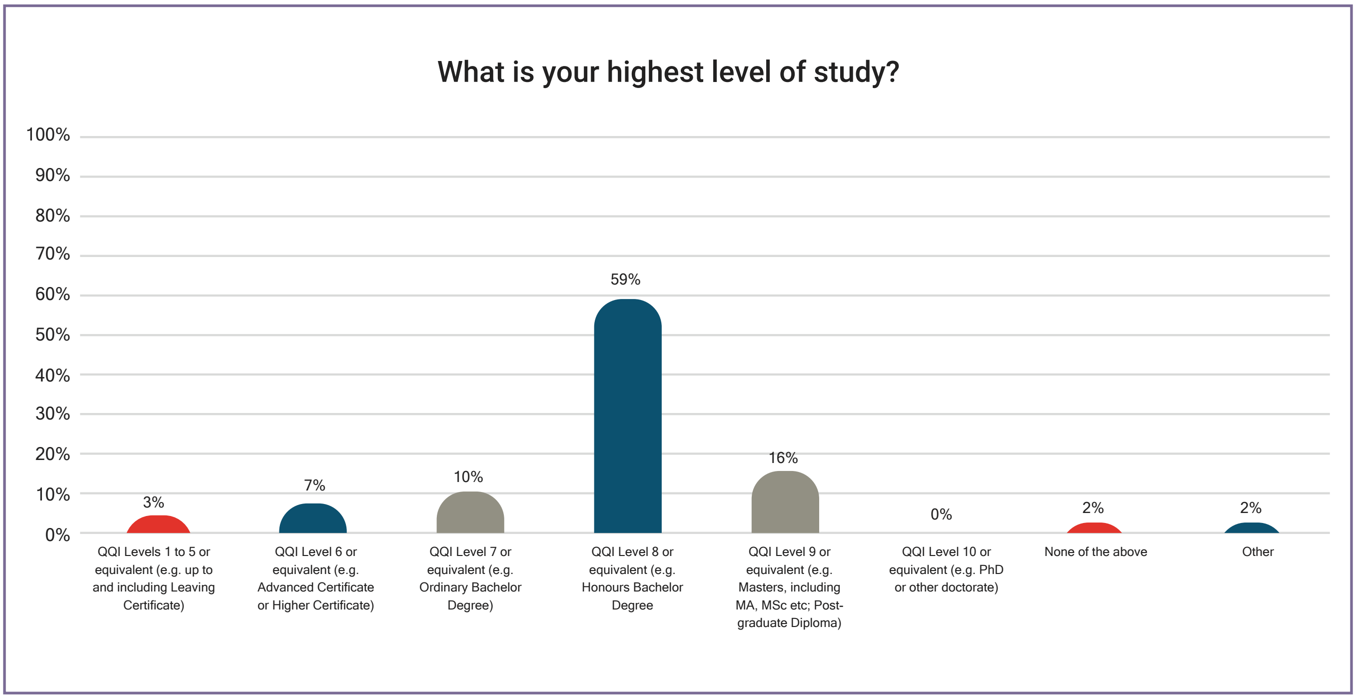
The largest percentage of respondents - 49.4% -indicated that they had studied at a Dublin-based institution. This included Ballyfermot College of Further Education (21%), Institute of Art, Design and Technology (IADT) (15.3%) or Coláiste Dhúlaigh (8%). The dominance of Dublin-based institutions may in itself hint at structural challenges in terms of access to education and training in animation and echoes international research which has considered the geographic focus of the creative sector and the role of clusters within the creative sector (Cottle and Saha, 2002).

College or University	Percentage of Respondents
Athlone Institute of Technology	4.6%
BCFE - Ballyfermot College of Further Education	21.0%
Bray Institute of Further Education	0.0%
CIT - Cork Institute of Technology	0.6%
Clonmel TUS	5.7%
Coláiste Dhúlaigh	8.0%
Dorset College	0.0%
Dundalk Institute of Technology	1.1%
Galway-Mayo Institute of technology	1.1%
Griffith College with Pulse College	4.0%
IADT - Dun Laoghaire Institute of Art Design & Technology	15.3%
Institute of Technology Tralee	0.6%
Letterkenny Institute of Technology	1.1%
Limerick Institute of Technology	1.7%
Limerick School of Art & Design	6.8%
NCAD Dublin - National College of Art and Design	0.0%
NUI Galway	0.0%
St John´s Central College	0.0%
TUD - Technological University Dublin	1.1%
Other	27.3%

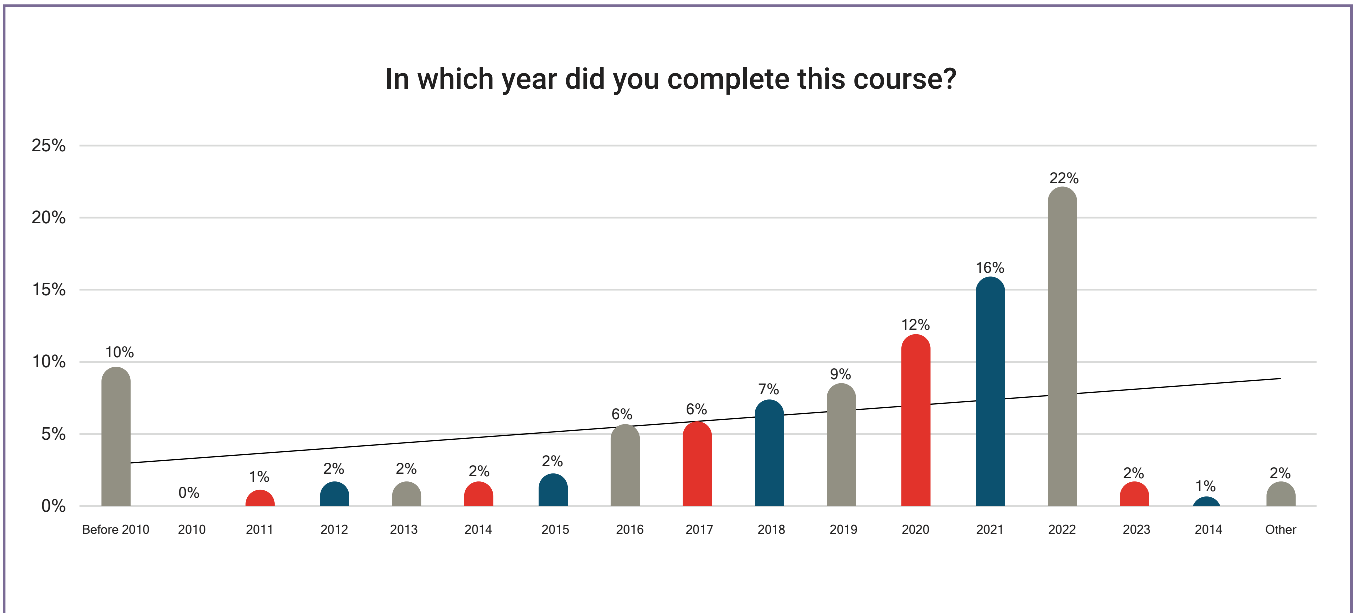
Of the 27% of respondents who selected Other the majority indicated that they had undertaken animation training outside of Ireland, predominantly in the UK but also in France, Spain, India and Brazil. An additional group of respondents indicated that they had undertaken training through private providers such as The Animation Workshop, Idea Academy, keyframeschool.mx, SAE Technology college or Pole 3D France, while a small number indicated that they were self-taught or had no formal training in animation.

Level of Education

The majority of respondents – 59% - indicated that they had completed a Level 8 Honours Bachelor Degree or equivalent. This was followed by 16% of respondents who indicated that they had completed a Level 9 Masters degree or equivalent.



In line with the focus of the research, 80% of survey respondents indicated that they completed their course between 2015 and 2022. Other responses – including those from respondents who are due to graduate in 2023 or 2024 – were integrated into the report to provide the broadest possible data set.



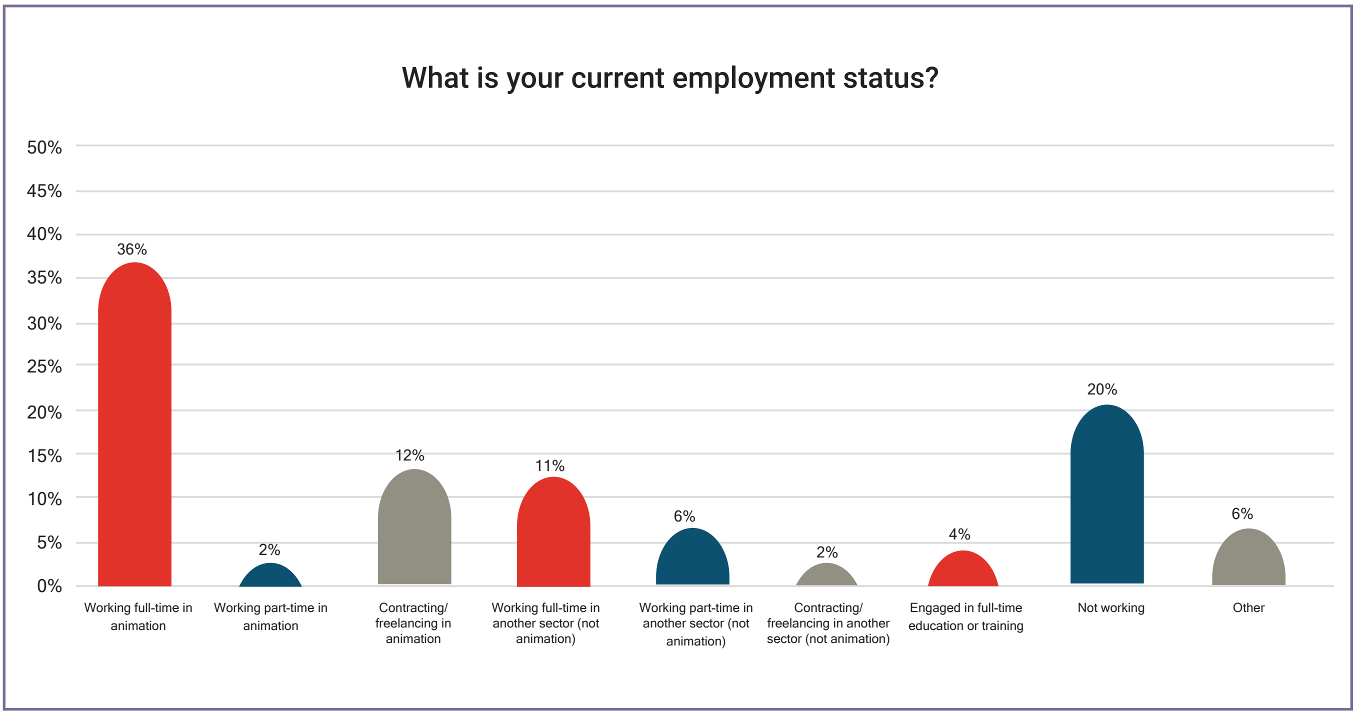
Specialisms

Respondents indicated that the most common specialisms within these qualifications were animation – both 2D and 3D – and various forms of design, including motion design, graphic design and production.

In addition to their formal qualifications, the majority of respondents also indicated that they have completed courses or programmes offered by the Cultural & Creative Industries Skillnet, Screen Ireland or Animation Ireland. Responses indicated that this covered the full range of training options offered by these organisations, but were primarily linked to the development of specific skills (e.g. production management, script reading, rigging, storyboard) or expertise on particular tools or processes (e.g. Toon Boom Harmony, Maya, Zbrush, Python).

CURRENT EMPLOYMENT STATUS AND AMBITIONS

Survey respondents were asked to comment on both their current employment status and their career ambitions. In all, 50% of respondents indicated that they are currently working in animation, either full time (36%), part-time (2%) or as a contractor or freelancer (12%). A further 19% of respondents indicated that they are working in a sector other than animation, either full-time, part-time or as a contractor, while 20% indicated that they are not working. Of those who indicated that they are not currently working, this figure will also include freelancers who are currently between contracts.



A number of key differences emerged when the data were analysed in terms of key demographic categories:

Gender:

» respondents identifying as male were more likely to be in full-time roles in animation than those identifying as female (39% for males compared to 34% for females). In turn, female respondents were more likely than male respondents to be in part-time or contract roles in animation (11% for males compared to 17% for females)

Disability

» Respondents who indicated that they had some form of long-term condition or difficulty were more likely to be unemployed than the overall average (25% compared to an average of 20%) and more likely to be working in a field other than animation (50%) than working in animation (40%)

Education level

» Respondents who indicated qualifications at level 7 or below were more likely to be working full time in animation (42%) than those with qualifications at level 8 or above (33.5%). Equally, those with qualifications at level 8 or above were more likely to indicate that they are not currently working (25%) than those with qualifications at level or below (7%)

Location

» Respondents located in the greater Dublin area (Dublin, Kildare, Meath, Wicklow) indicated a higher rate of employment in the animation sector (55% compared to an overall average of 50%)

Employment status of recent graduates

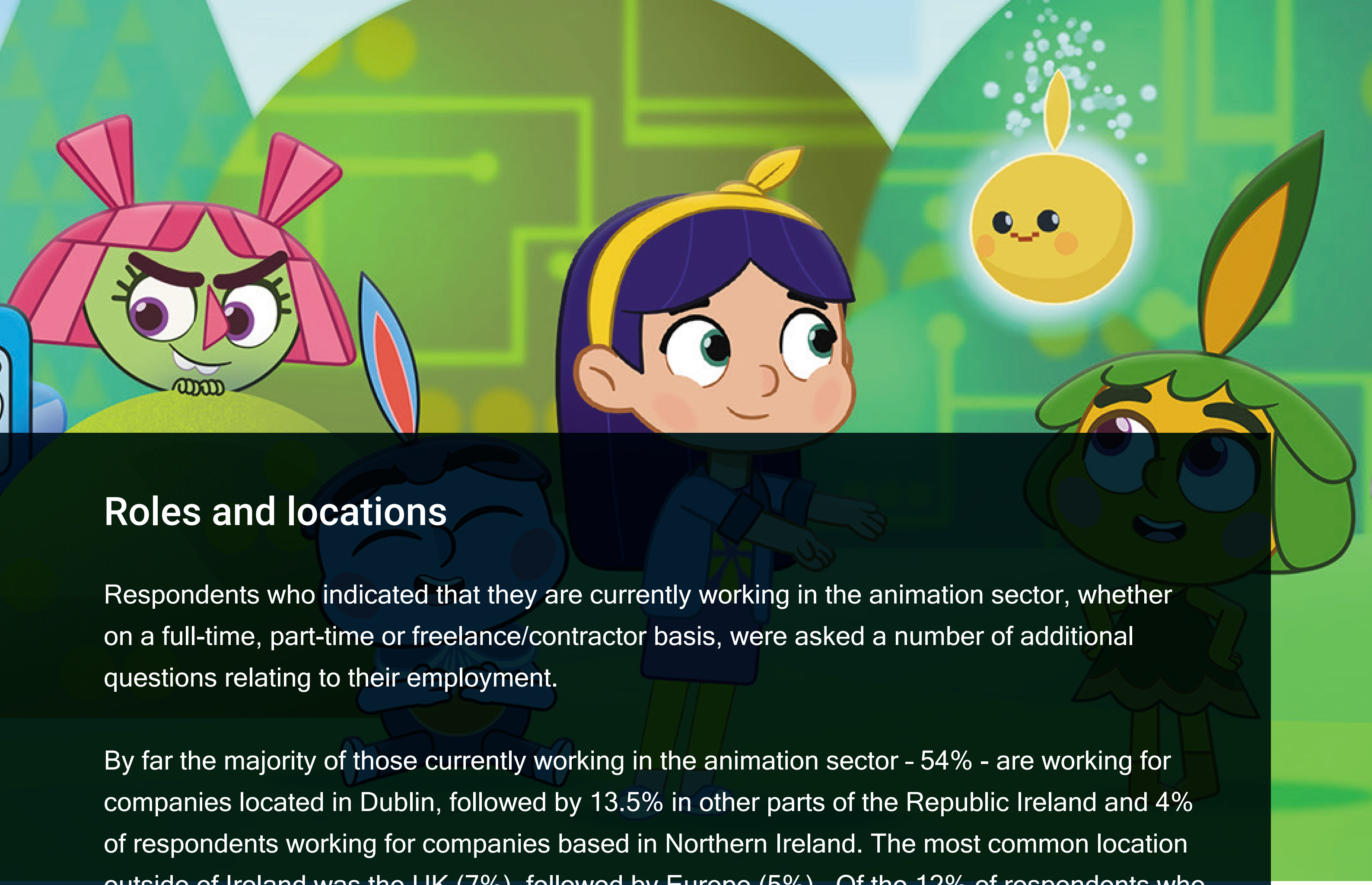
When the responses for current employment status were analysed by year of graduation, recent graduates – those who indicated that they graduated in 2020, 2021 or 2022 – were more likely than average to indicate that they are working part-time in a sector other than animation and less likely to indicate that they are working full-time in animation. While this might be attributed to the impact of the COVID-19 pandemic, it is no-doubt due in part to the challenges associated with gaining entry to the animation sector which are discussed in greater detail below.

Respondents who graduated in 2022 were also more likely to indicate either that they are working full-time in a sector other than animation (20% for 2022 compared to an average of 11%) and more likely to be unemployed (37% for 2022 compared to an average of 20% overall).

EMPLOYMENT STATUS

Year of graduation	Working full-time in animation	Working part-time in animation	Contracting/ freelancing in animation	Working full-time in another sector (not animation)	Working part-time in another sector (not animation)	Contracting/ freelancing in another sector (not animation)	Engaged in full-time education or training	Not working	Other
Before 2010	71%	0%	18%	6%	0%	0%	6%	0%	0%
2010	0%	0%	0%	0%	0%	0%	0%	0%	0%
2011	100%	0%	0%	0%	0%	0%	0%	0%	0%
2012	33%	33%	33%	0%	0%	0%	0%	0%	0%
2013	67%	0%	0%	0%	0%	0%	0%	33%	0%
2014	0%	33%	0%	0%	0%	33%	0%	33%	0%
2015	75%	25%	0%	0%	0%	0%	0%	0%	0%
2016	30%	0%	0%	0%	0%	10%	20%	30%	10%
2017	60%	0%	10%	20%	0%	0%	0%	10%	0%
2018	50%	0%	8%	17%	0%	0%	0%	25%	0%
2019	33%	0%	20%	27%	0%	0%	0%	13%	7%
2020	33%	0%	10%	5%	10%	5%	0%	24%	14%
2021	33%	4%	15%	7%	11%	4%	0%	19%	7%
2022	14%	0%	11%	20%	11%	0%	0%	37%	6%
Other	0%	0%	11%	0%	11%	0%	44%	11%	22%
Average	36%	2%	12%	11%	6%	2%	4%	20%	6%

Of those who selected *Other* for their employment status, a significant number of respondents indicated that they are working in retail or temporary roles, while others highlighted that they are either finishing or have just finished contracts in animation or are working in the screen industry outside animation. This would suggest that temporary contracts form a key route to employment within the animation sector, though it should be understood in the context of the relatively high number of respondents who indicated that they are currently working as freelancers or contractors, as earlier discussed.

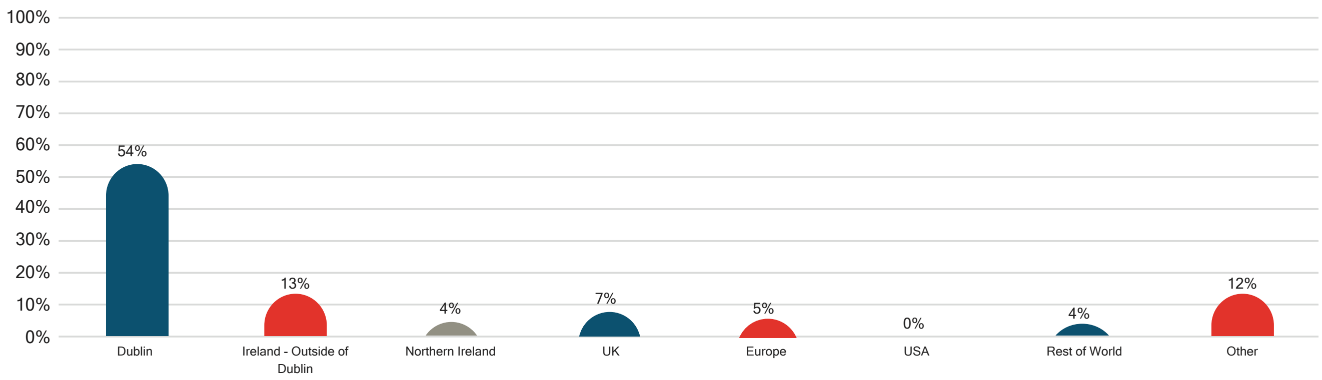


Roles and locations

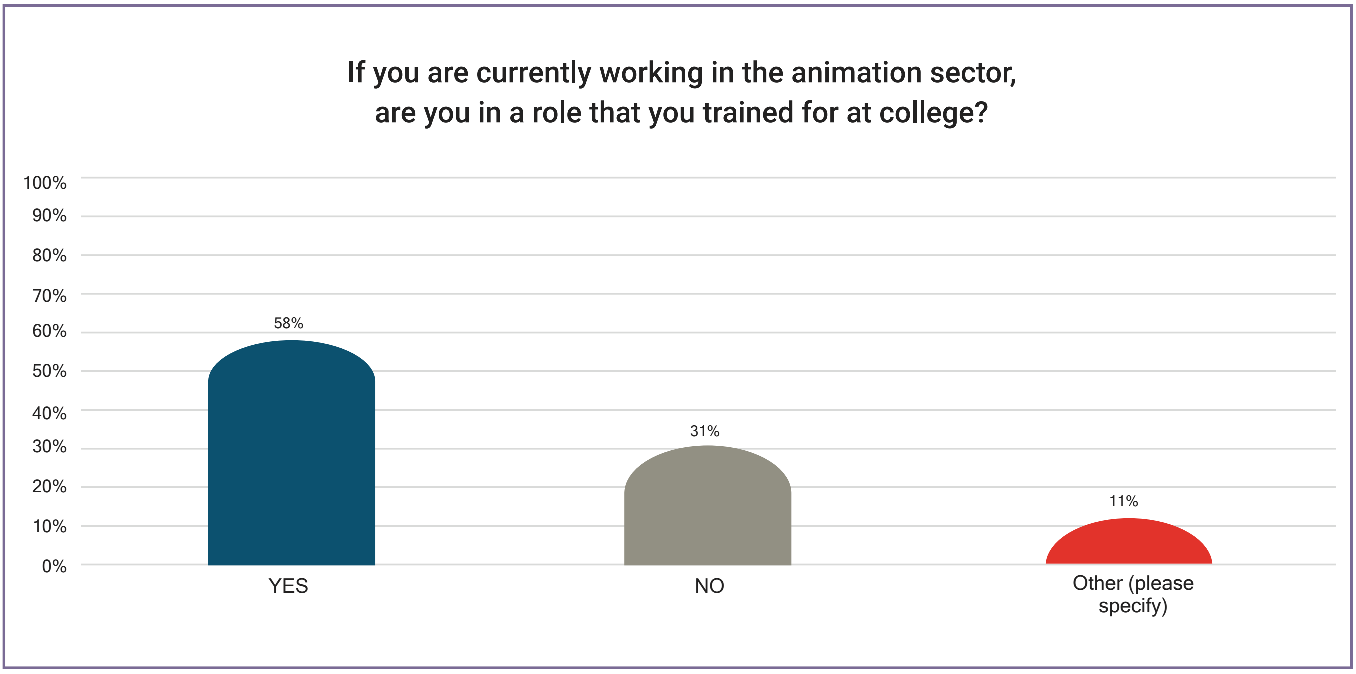
Respondents who indicated that they are currently working in the animation sector, whether on a full-time, part-time or freelance/contractor basis, were asked a number of additional questions relating to their employment.

By far the majority of those currently working in the animation sector - 54% - are working for companies located in Dublin, followed by 13.5% in other parts of the Republic Ireland and 4% of respondents working for companies based in Northern Ireland. The most common location outside of Ireland was the UK (7%), followed by Europe (5%). Of the 12% of respondents who indicated Other, comments indicated that they are working for companies located in Canada, Mexico, Panama and UAE, or else working remotely for companies across multiple locations or else working remotely but without specifying the company location.

If you are currently working in the animation sector, what is the location of the company or organisation that you are working for?



A significant majority - 58% - indicated that they are currently working in a role that they trained for at college, compared to 31% of respondents who are currently working in animation but not in a role they trained for.



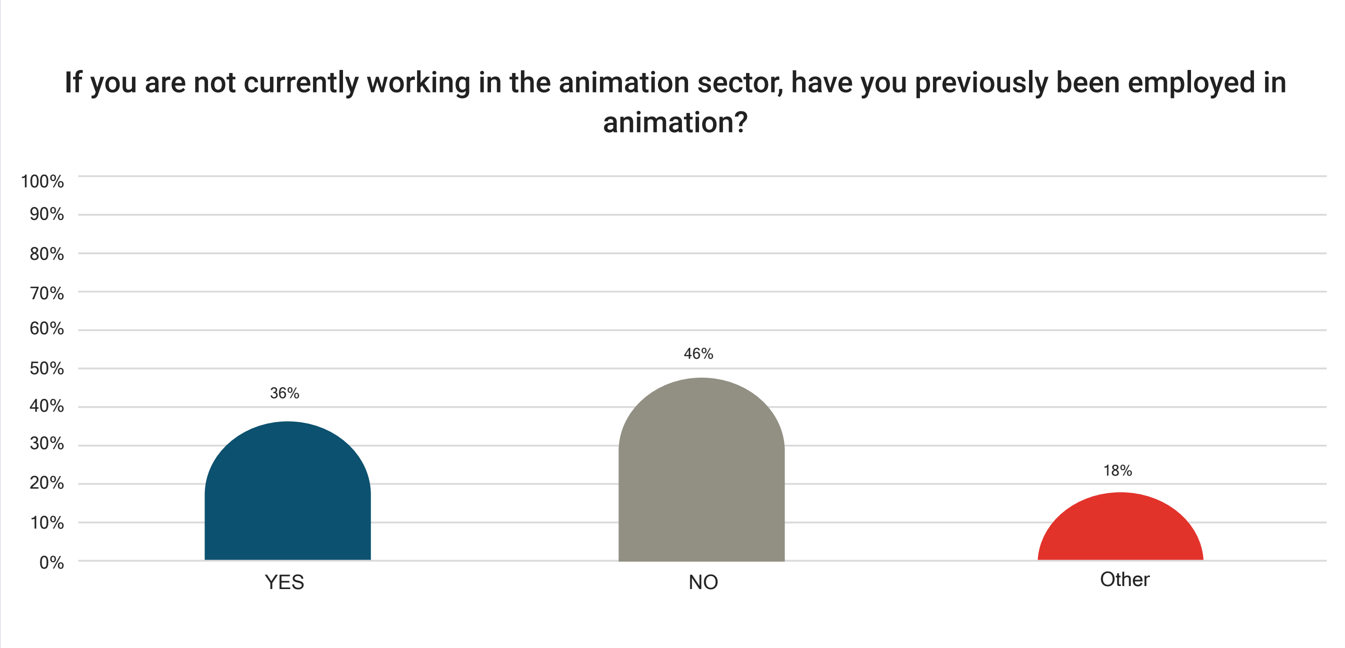
While no notable differences emerged when the data was analysed in terms of gender identification or disability status, a number of factors were evident when other demographic factors were considered.Specifically:

- 65% of respondents with a training/education at Level 8 or above indicated that they are in a role they trained for compared to only 41.5% of respondents with training at Level 7 or below
- 62% of respondents living in greater Dublin (Dublin, Kildare, Meath, Wicklow) indicated they are working in a role that they trained for, compared to 53.5% of those living in Ireland but outside of greater Dublin
- 60% of White Irish or Other White compared to 50% of non-white respondents indicated that they are in a role for which they trained at college

When queried about the actual roles undertaken, the largest number of respondents indicated that they are currently in animator roles, followed by various production roles (assistant, coordinator, manager, designer), or roles as background artists or storyboard artists.

Not working in the sector

As noted above, respondents were evenly split at 50% each between those who are currently working in the animation sector and those who are not. Importantly, however, of those who are not currently working in animation, almost half – 46% – indicated that they had not previously been employed in animation.



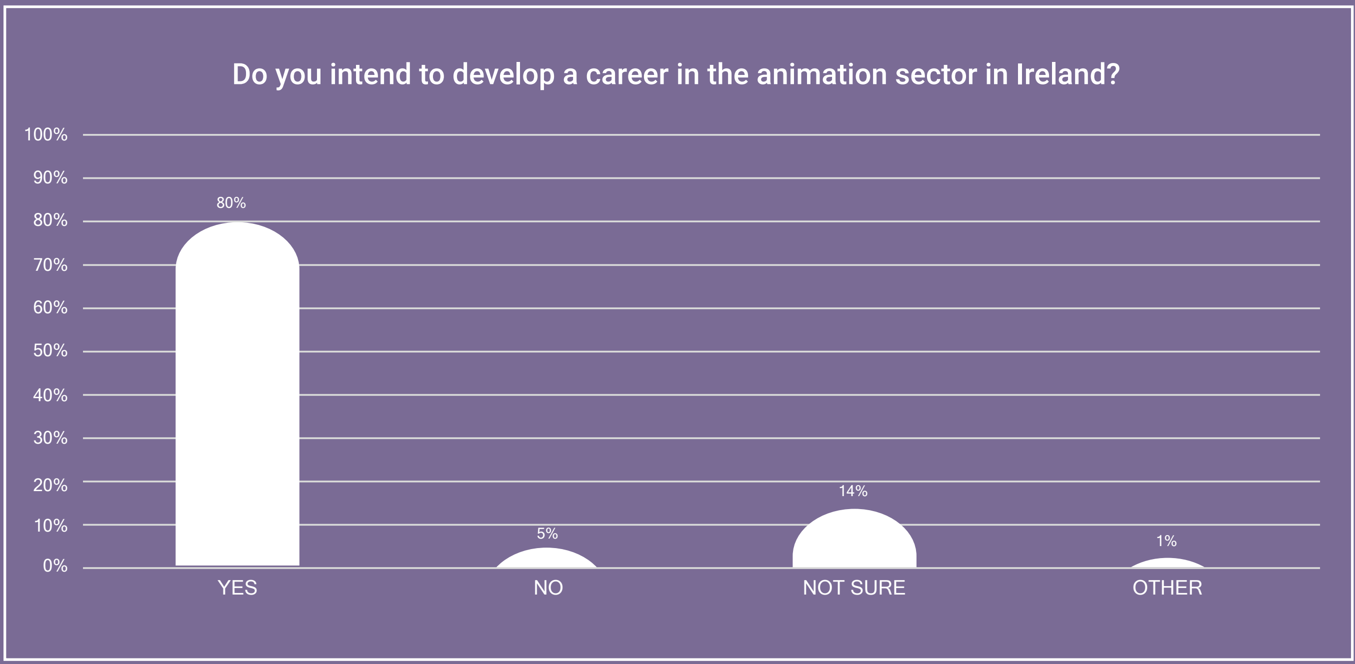
When this was analysed further a number of key trends emerged. Of those who are not currently working in animation and have not previously worked in animation:

- 84% identified as White Irish or Other White
- 73.50% are educated or trained at Level 8 or above
- 51.5% identified as male
- 51.5% live in the Republic of Ireland outside of Dublin
- 60% identified as having a long-lasting condition or difficulty either to some extent or a great extent, most particularly either A psychological or emotional condition or a mental health issue or A difficulty with learning, remembering or concentrating
- 51% are recent graduates (2020, 2021, 2022)

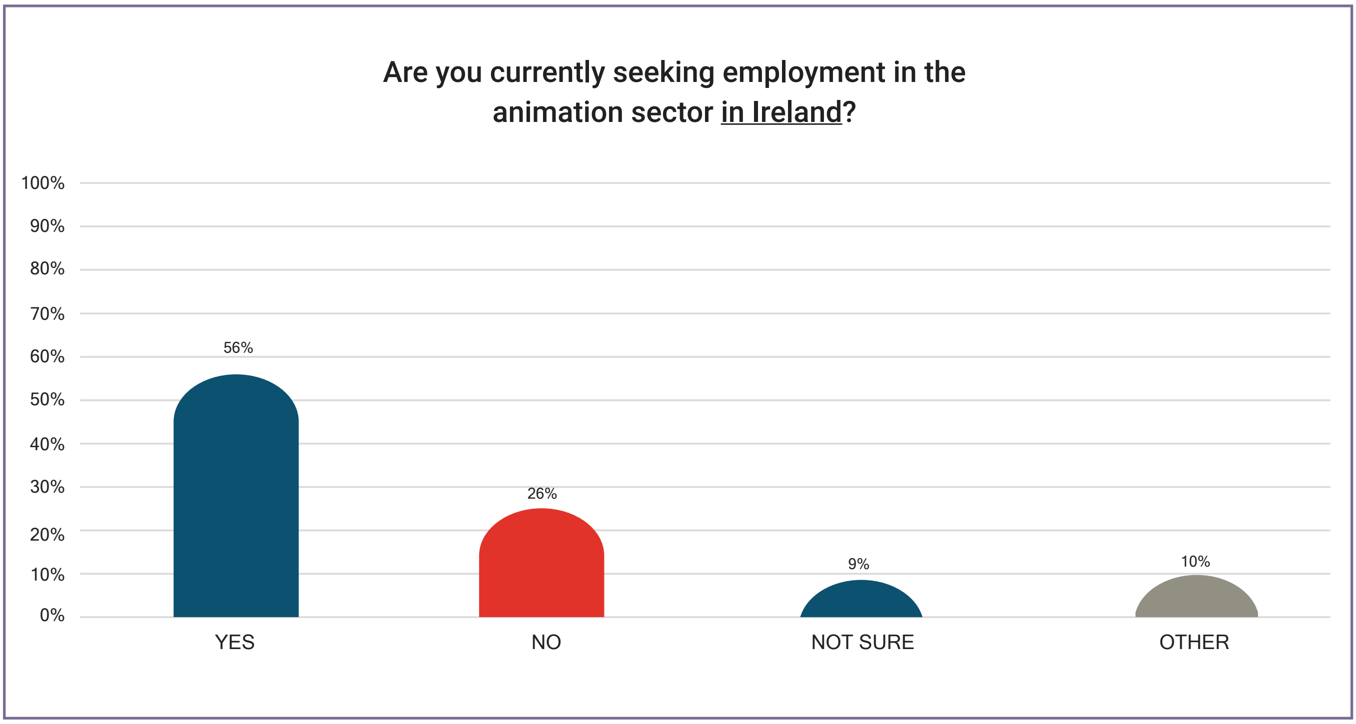
In contrast, however, no notable difference was evident when the data were analysed in terms of the various colleges people had attended for education or training. Taken together, these data suggest a number of structural issues preventing those in key groups to gain employment in the sector.

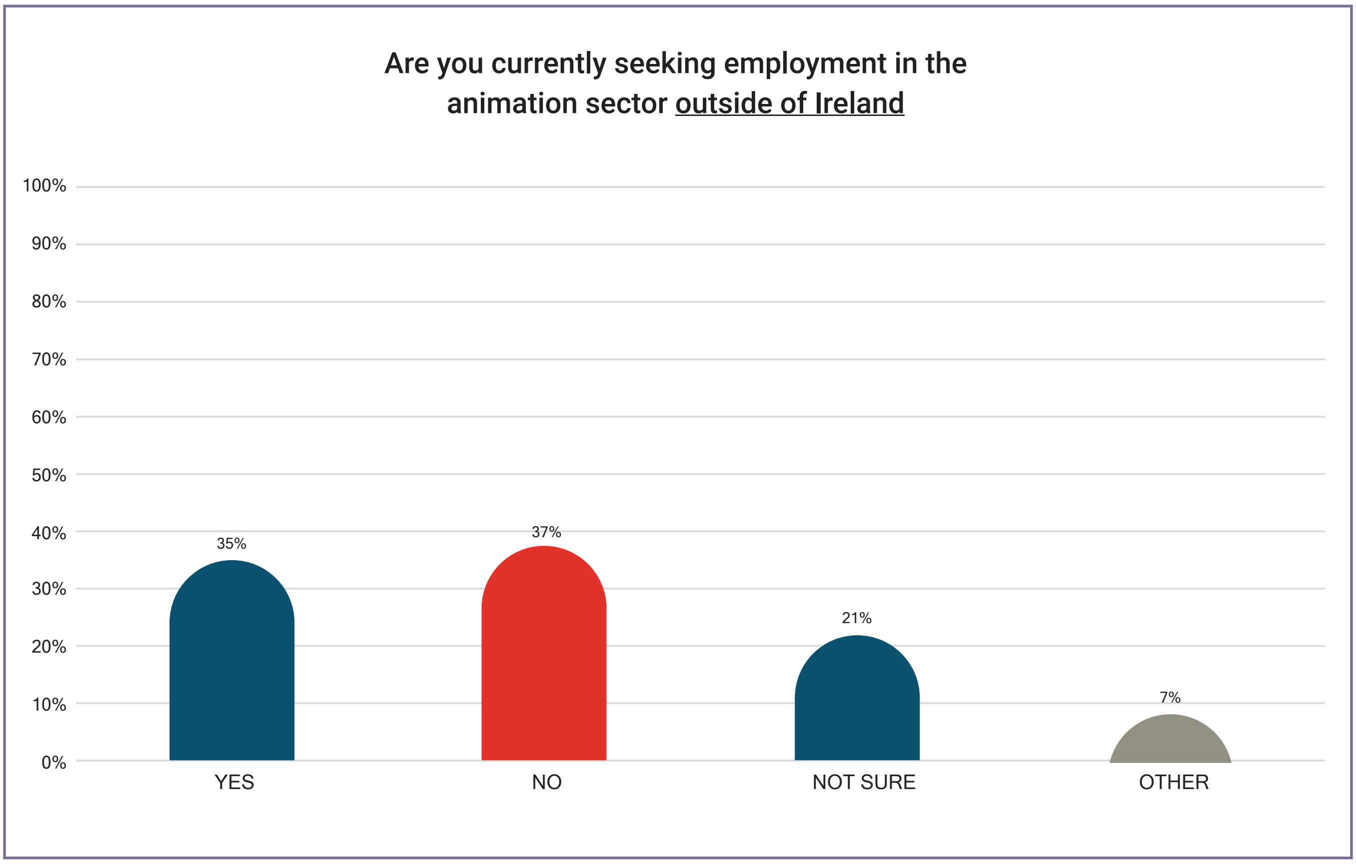
Future Intentions

Survey responses indicated a clear preference and desire among respondents for developing a career in the animation sector in Ireland, with 80% of respondents indicating that they intend to do so. This sentiment was relatively consistent across all demographic groups, and importantly, of those who are not currently employed in the animation sector in Ireland, 76.5% of respondents indicated that they are nonetheless seeking employment in the sector.



While a very high proportion of respondents indicated that they intend to develop a career in the animation sector in Ireland, a somewhat lower proportion - 56% - indicated they are currently seeking employment in Ireland. This compares, however, to only 35% of respondents who indicated that they are seeking employment in animation outside of Ireland.





When analysed further a number of trends became apparent:

Gender

» 57% of female respondents indicated that they are seeking to develop a career in animation in Ireland compared to 53% of males, though male respondents were slightly more likely to be intending to develop a career outside of Ireland (30% female compared to 36.5% male)

Level of education

» 59% of respondents with education/training at Level 8 or above indicated that they are seeking employment in Ireland, compared to 46.5% of those with education at Level 7 or below.

» 37% of respondents with education/training at Level 7 or lower indicated that they are seeking employment in the animation sector outside Ireland, compared to 33.5% of those with Level 8 or above.

Location / Residence

» 64% of respondents based outside of greater Dublin indicated that they are seeking employment in Ireland, compared to only 50% of those based in greater Dublin.

» Interestingly, respondents based in greater Dublin are more likely to be seeking work in the animation sector outside of Ireland than those based elsewhere

Ethnicity

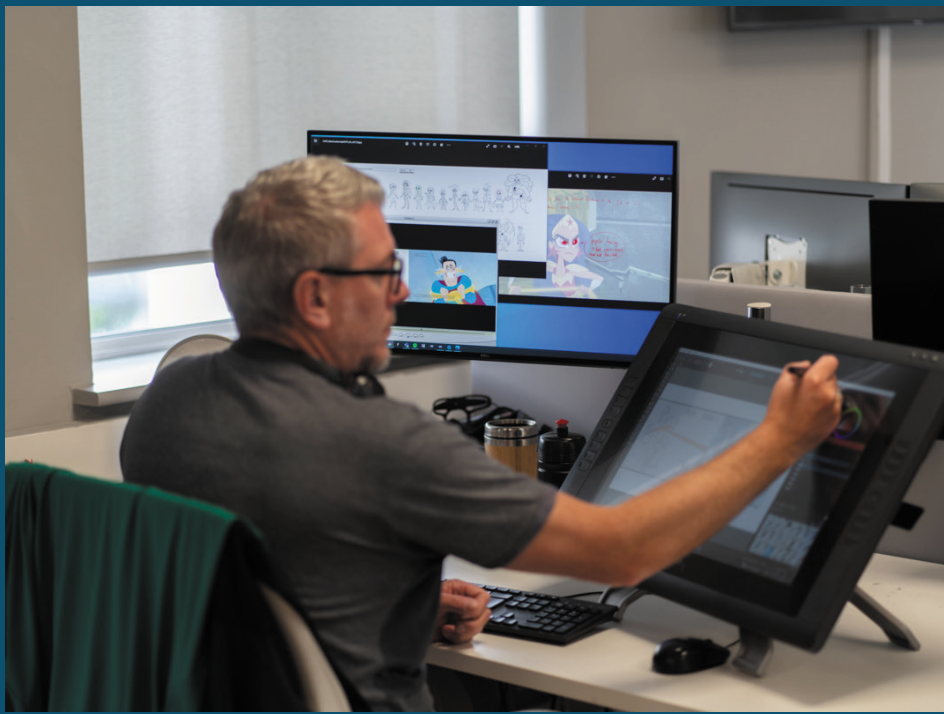
» 57% of respondents who identified as White Irish or other white are seeking employment in the animation sector compared to only 48% of those who identified as non-White

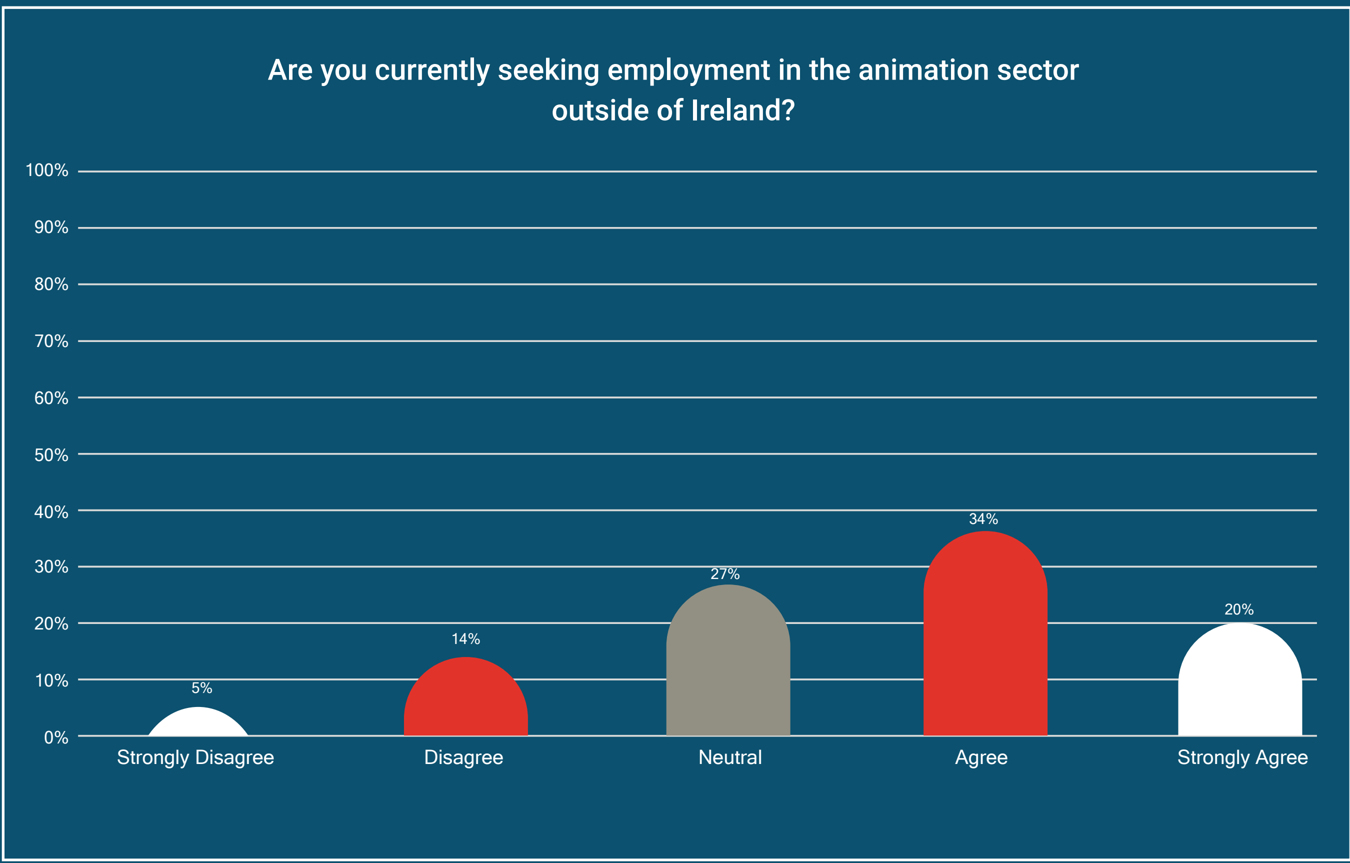
Disability status

» 60% of respondents who indicated that they have a long-lasting condition or difficulty indicated that they are seeking employment in the animation sector in Ireland

I HAVE EXPERIENCED PARTICULAR BARRIERS THAT HAVE PREVENTED ME FROM GAINING EMPLOYMENT IN THE IRISH ANIMATION SECTOR

A key consideration for all respondents was the experience of barriers to either entry to or progression within the animation sector in Ireland. A majority of respondents - 54% - Agreed or Strongly Agreed that they had experienced barriers to gaining employment in the Irish animation sector. This compares to only 19% who either Disagreed or Strongly Disagreed





When this was analysed further, a number of trends emerged:

Gender

- Female respondents were more likely to indicate that they had experienced barriers to employment than male respondents (55% for females compared to 50% for males).
- While the sample the size is too small to draw any specific conclusions, of those respondents who identified as a gender other than male or female, a majority indicated that they had experienced barriers to employment

Ethnicity

- While 53% of respondents who identified as being White - either Irish or non-Irish - indicated that they had experienced barriers to employment, 59% of non-white respondents indicated that they had experienced barriers.
- Interestingly, respondents who identified as White Irish were more likely to indicate that they had experienced barriers to employment than those who identified as White non-Irish.

Disability status

- An above average number of respondents (59%) who identified as having a long-lasting difficulty or condition indicated that they had experienced barriers to employment

Location / Residence

- Respondents from outside of the greater Dublin area were more likely to indicate that they had experienced barriers (59%)
- In contrast, respondents located outside of the Republic of Ireland indicated the least experience of barriers (50%)

Respondents were further asked to comment on the types of barriers experienced. Survey responses indicated that these most often related to:

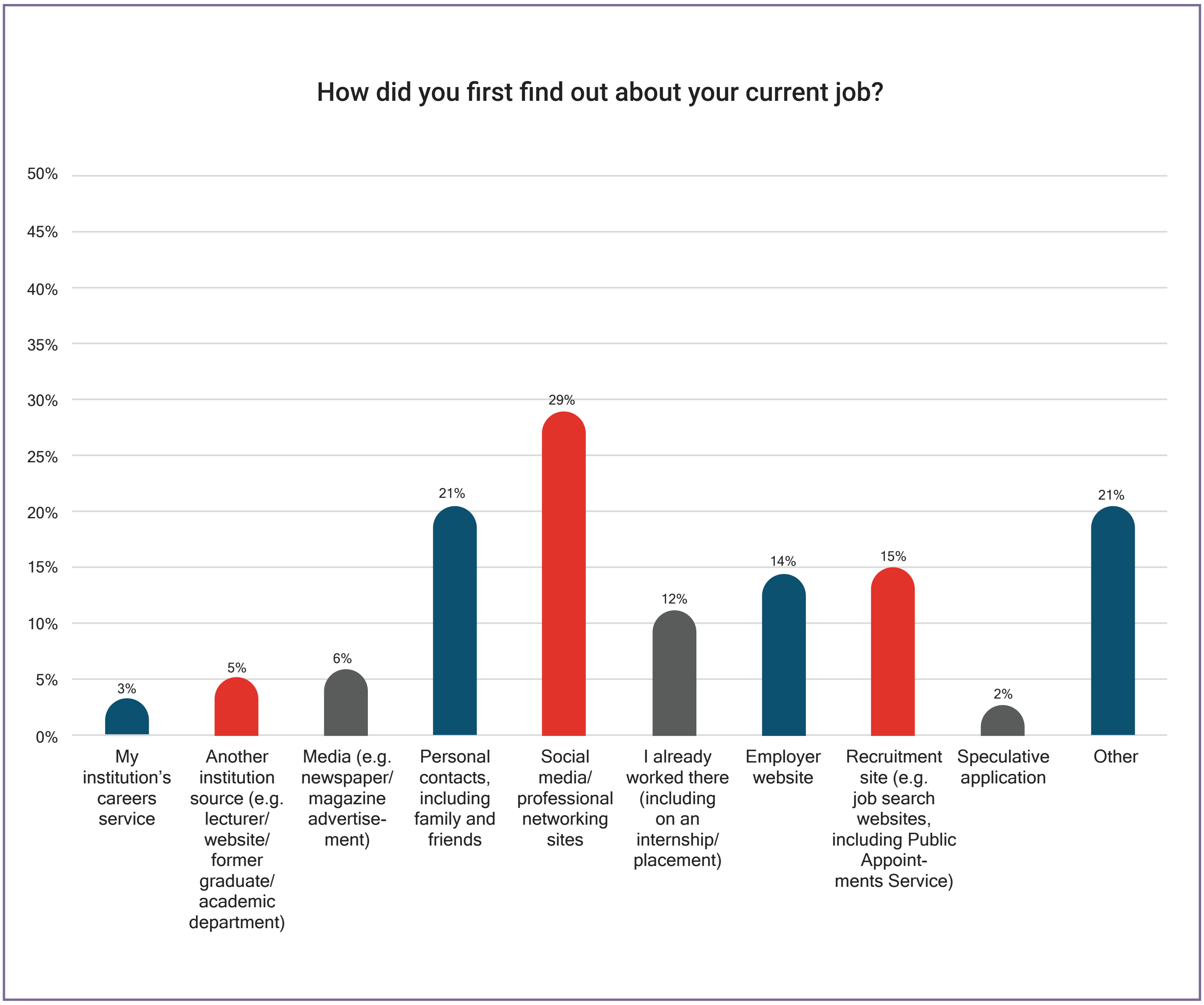
- Challenges in gaining required work experience
- The scarcity of suitable internships or traineeships
- Limited opportunities to engage or network with studios
- A perception that studios are not interested in hiring more junior crew
- Difficulties associated with relocating for in-studio working due to the low availability of affordable housing
- Perceived discrimination on the basis of age and gender

A number of non-Irish respondents indicated challenges gaining work permits or sponsorship, associated with a requirement that even working from home be undertaken in Ireland.

Comments made throughout the survey provided further useful insights as follows:

Some comments suggested that advertised roles often sought a high level of experience for what in reality was a short-term contract at an entry level, while other comments made reference to there not being enough junior or entry level positions available in studios. This includes a perceived lack of internships, most particularly for those from under-represented groups. Other comments highlighted the challenges associated with gaining experience due to short-term and sometimes unpredictable nature of freelance or contracting roles.

The challenges experienced in gaining entry to employment in the animation sector were underscored when respondents were asked how they found out about their current job. The majority of respondents indicated that they had found out about their job through social media or professional networking, followed by 25% of respondents who indicated that they had heard of their job through personal contacts. Of those who responded Other to this question, the majority indicated that they are currently unemployed.


How did you first find out about your current job?
50%
45%
40%
35%
30%
25%
20%
15%
10%
5%
0%
3%
5%
6%
21%
29%
12%
14%
15%
2%
21%
My institution's careers service
Another institution source (e.g. lecturer/ website/ former graduate/ academic department)
Media (e.g. newspaper/ magazine advertise-ment)
Personal contacts, including family and friends
Social media/ professional networking sites
I already worked there (including on an internship/ placement)
Employer website
Recruitment site (e.g. job search websites, including Public Appoint-ments Service)
Speculative application
Other

SPECIFIC BARRIERS TO ACCESS AND PROGRESSION

The key barriers highlighted by respondents can be grouped in seven key categories, each of which is outlined below.

Lack of entry level posts or internships

As previously highlighted, a significant issue noted by respondents is a perceived lack of entry level posts which would enable new graduates to gain meaningful experience, most particularly in 3D animation.

Similarly, while largely positive about the existing internship opportunities, respondents also highlighted challenges accessing internships or mentoring and felt that unpaid options should also be made available.

Challenges gaining experience

A consequence of the perceived lack of entry level roles, is that it is seen as increasingly difficult to gain the necessary experience to develop and progress within the animation sector. Comments by respondents particularly noted this in terms of challenges associated with gaining initial experience and a "foot in the door" to enable them to progress to more senior roles.

Perceived gap between college education and industry needs

Respondents highlighted a perception that the type of education or training offered in Ireland, including by colleges, does not meet the needs of studios. Comments indicated that while basic skills were addressed, greater awareness of evolving industry needs would be beneficial. The gap between what is offered and what is required is consequently regarded as a barrier both to entry and progression.

Precarious employment

The often precarious nature of employment in the animation sector was highlighted by respondents as a significant barrier to progression. The challenge caused by contract work was noted, as were the lack of career development opportunities within roles. Respondent comments noted a desire to have greater consistency in career progression within the animation sector in Ireland.

Perceived Discrimination

A number of respondents indicated concerns about perceived discrimination on the basis of age or disability. This suggests an area where great awareness might be beneficial to ensure that suitable supports or support schemes are made available. A number of respondents did, however, emphasise that this was a perception rather than fully reflective of their own experience.

Pay, conditions and cost of living

Challenges were noted by respondents in terms of pay, conditions and the cost of living. Respondents indicated that they are struggling to balance salaries with the essential costs of living, most particularly housing. Difficulties with finding suitable housing were also noted by respondents. Respondent comments did, however, indicate that rather than being simply a challenge of the animation sector this relates both to the broader cost-of-living and housing crises, and is notably worse in Dublin than elsewhere.

Network

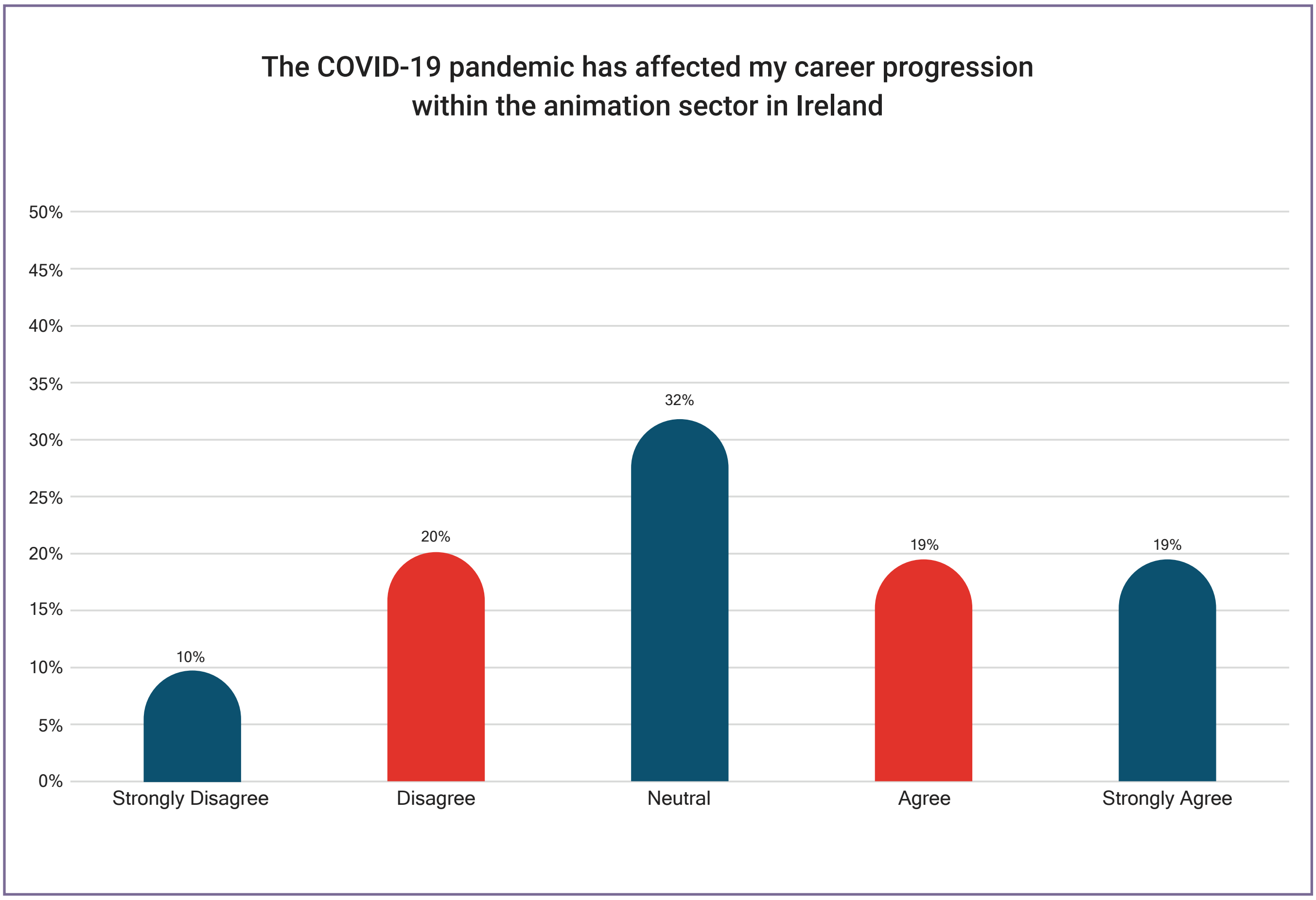
A number of respondents highlighted a sense that it is very difficult to establish a network within the animation sector in Ireland. Respondent comments indicated that perceived consequence of this is that it is considered very difficult to gain employment without an established network.

An important suggestion from respondents to overcome this challenge would be to facilitate additional networking events or opportunities, as well as workshops with professionals already employed within the sector.

IMPACT OF THE COVID-19 PANDEMIC ON CAREER PROGRESSION

Given its overwhelming impact on all aspects of society between 2020 and 2022, respondents were asked to rate how they felt that the COVID-19 pandemic had affected their career progression within the sector. This is an important question in a number of respects. On the one hand, respondents might have felt that they had been unable to take up opportunities or start new roles due to the pandemic. Alternatively, the increased emphasis on working from home during the pandemic meant that work location was in many cases much less of a consideration both for employers and employees. Consequently, opportunities emerged for diverse groups to maintain or progress their careers, including those living remotely, those with various forms of long-term conditions or difficulties, including mobility challenges, or those with family or caring responsibilities.

While 38% of respondents indicated that the pandemic had impacted on their career progression within the sector, 30% of respondents felt that the pandemic had not any significant impact.



A number of key differences were evident when the responses were analysed in greater detail:

Gender

» Female respondents were more likely than males to indicate that they strongly agreed that the COVID-19 pandemic had impacted their career progression (55% for females compared to 45% for males)

Disability status

» A similar pattern was evident amongst those who identified as having a long-lasting difficulty or condition compared to those who do not: 26% of those identifying as having a difficulty or condition strongly agreed compared to 20% of those without a long-term difficulty or condition

Location / Residence

» 23% of respondents living in greater Dublin indicated that they strongly agree compared to 14.5% for those based outside of Dublin

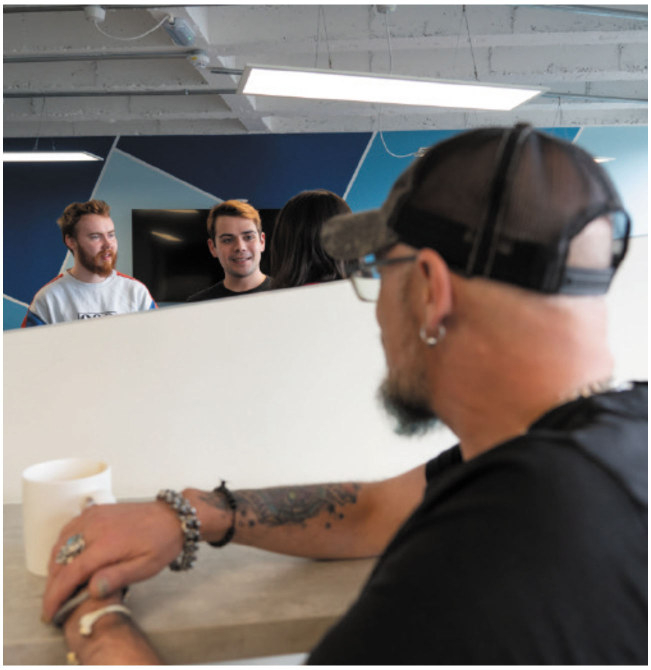
A much more significant difference was evident in terms of ethnicity: 50% of respondents who identified as not being White Irish or non-Irish, indicated that the pandemic had negatively impacted their career progression within the animation sector in Ireland, compared to 36.5% for those who identified as White Irish or White non-Irish. Similarly, 41% of respondents with education/training at Level 8 or above indicated that the pandemic significantly impact on their career progression compared to 29% of those with qualifications at Level 7 or below. This is curious given the overall lower level of participation by those with qualifications at Level 7 or below. Both these findings are counter intuitive and would prima facie appear to contradict international experience. This would therefore warrant further investigation.

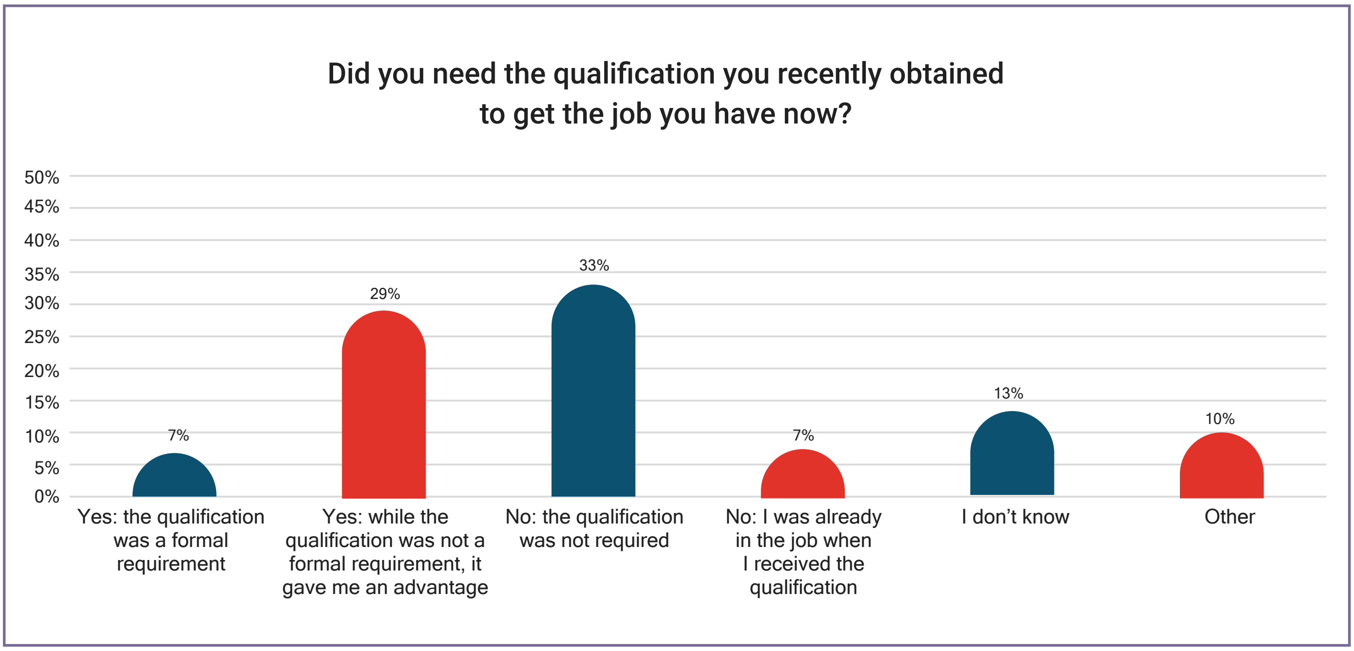
IMPORTANCE AND RELEVANCE OF EDUCATION AND TRAINING

Appropriate and relevant training, education and qualifications are a vital aspect of both entry to and progression within any sector, and animation is no exception. A number of questions focused specifically on issues related to each of these key areas.

Relevance of qualifications

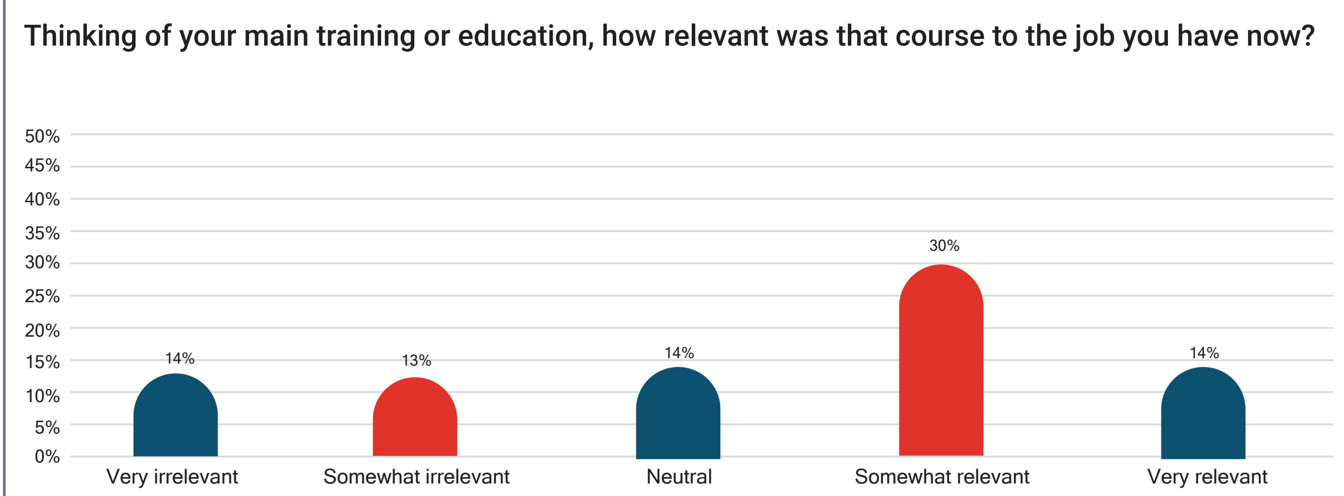
While 36% of respondents indicated that their qualification was either a requirement for their role or was advantageous, 40% of respondents indicated that the qualification was not required. This includes 7% of respondents who indicated that the qualification was not required as they were already in the role when it was received. Strikingly, 13% of respondents did not know whether the qualification was required, which might indicate that entry requirements for some roles are either not clear or are not clearly understood.





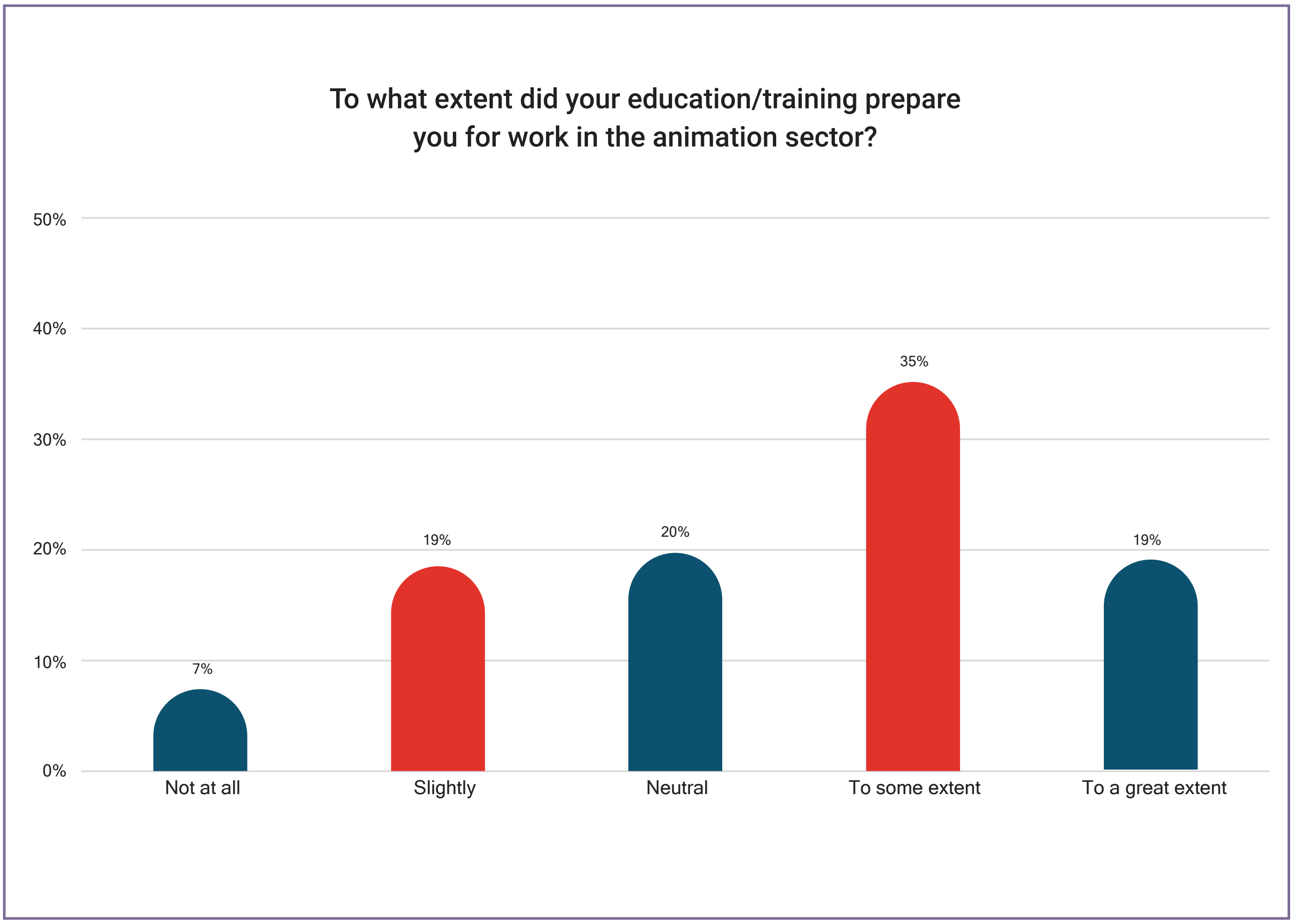
Relevance of training or education

In contrast, 69% of respondents indicated that their main training or education was either Very relevant or Somewhat relevant to their current role, whereas 27% indicated that their main training or education was either Very irrelevant or Somewhat irrelevant.



Preparation for work

When queried about the extent to which their education or training prepared them for work in the animation sector or enhanced their employability, respondents were in general less positive. While 54% indicated that their education or training prepared them To some extent or To a great extent for work in animation, 56% indicated that their recently completed course enhanced their employability.


To what extent did your education/training prepare you for work in the animation sector?
50%
40%
30%
20%
10%
0%
7%
19%
20%
35%
19%
Not at all
Slightly
Neutral
To some extent
To a great extent


Thinking of the course you have recently completed, to what extent do you agree that the course enhanced your employability within the animation sector in Ireland?
50%
40%
30%
20%
10%
0%
3%
7%
34%
43%
13%
Strongly Disagree
Disagree
Neutral
Agree
Strongly Agree

Respondents who identified themselves as being either female (60%) or from a non-White background (63%) were more likely to indicate that the course enhanced their employability within the animation sector in Ireland than others. No significant differences were apparent based on location of residence or having a long-lasting condition or difficulty.

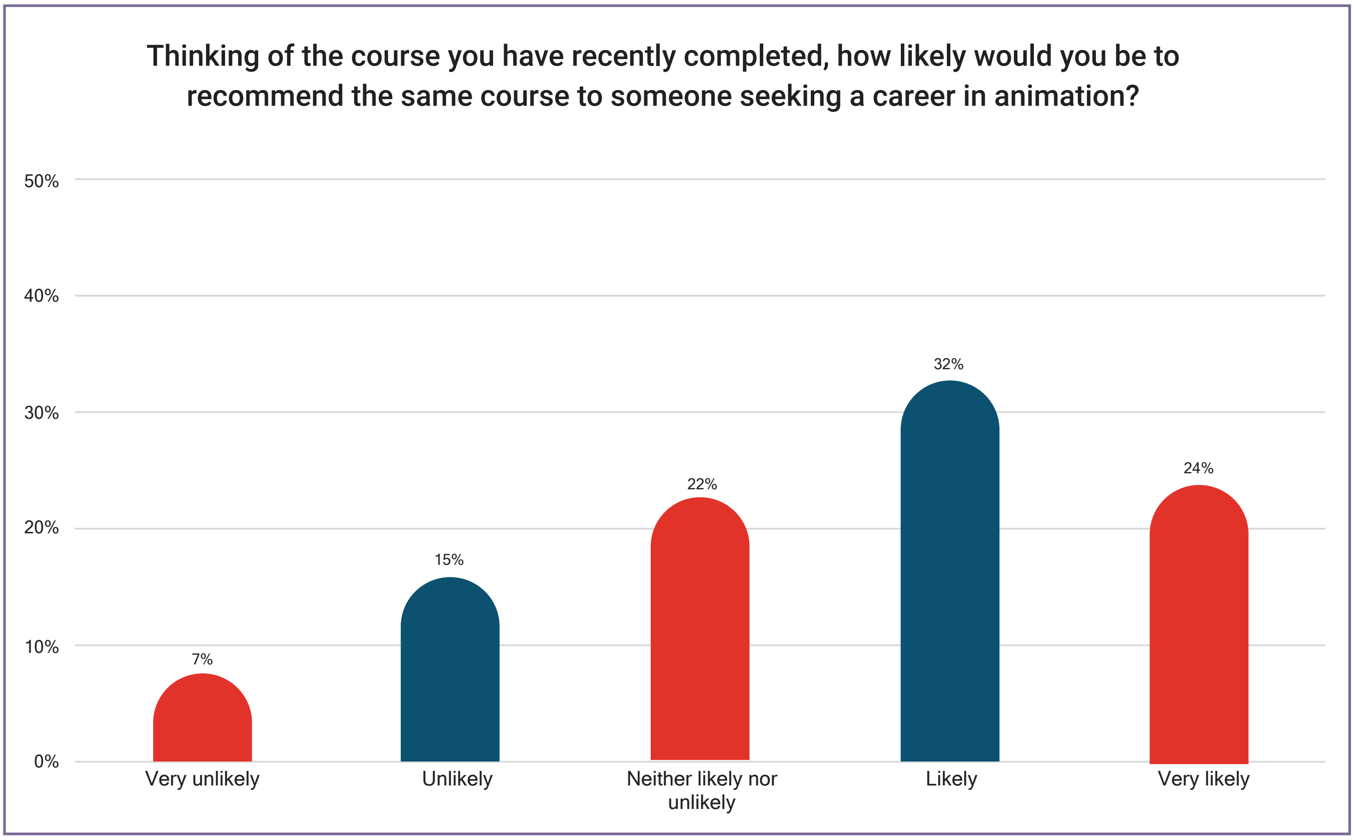
When asked to comment on the employability benefits achieved from their course, respondents highlighted a number of key aspects, including:

» the industry insights and experience gained
» the breadth of experience
» further development of their specialism
» team working skills
» networking opportunities
» digital skills
» knowledge of the production process and pipeline

An important point to note relates to a contrast between the comments received and the various responses relating to the requirement of training courses, course relevance and the impact on employability. While survey responses largely emphasised the importance and relevance of formal training and education, respondent comments highlighted that challenges nonetheless remain. These related both to the need to have up-to-date, relevant skills in animation, as well as in emerging areas such as software engineering for animation and CG animation. In this sense it would appear that while qualifications act as a formal entry requirement, industry-specific skills and experience are still necessary to actually gain entry to the sector. This might suggest that there is a divergence between the training and preparation provided by colleges and the expectations of employers.

Course Recommendations

Despite this, the majority of respondents indicated that they were either Likely (32%) or Very Likely (24%) to recommend their course to someone seeking a career in animation.



In order to better understand the underlying trends, the responses from those who indicated that they were either Unlikely or Very Unlikely to recommend the same course were analysed. From this it was apparent that:

» Males were less likely to recommend their course than females (Male respondents: 26% Unlikely or Very Unlikely; Female respondents: 17% Unlikely or Very Unlikely)

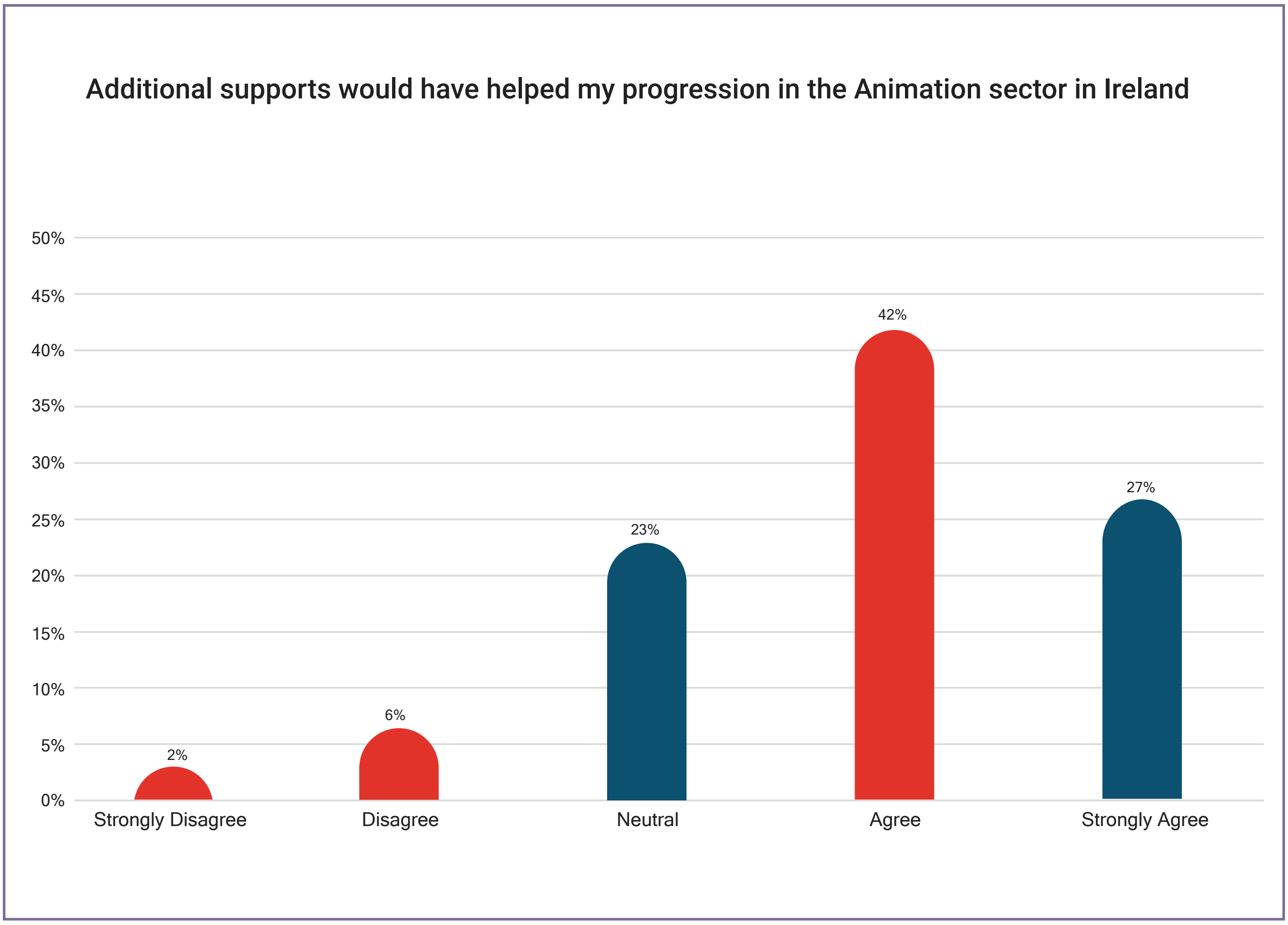
» 30% of respondents who identified as having a long-lasting difficulty or condition were Unlikely or Very Unlikely to recommend the course, compared to 21% of those who did not identify as having a long-term condition or difficulty

» Respondents who identified as being White Irish or White Non-Irish were less likely to recommend their course (23% Unlikely or Very Unlikely) than other groups (13.5% Unlikely or Very Unlikely)

ADDITIONAL SUPPORTS

An important link can be made between the perceived barriers to progression within the animation sector in Ireland noted earlier and the desired additional supports.

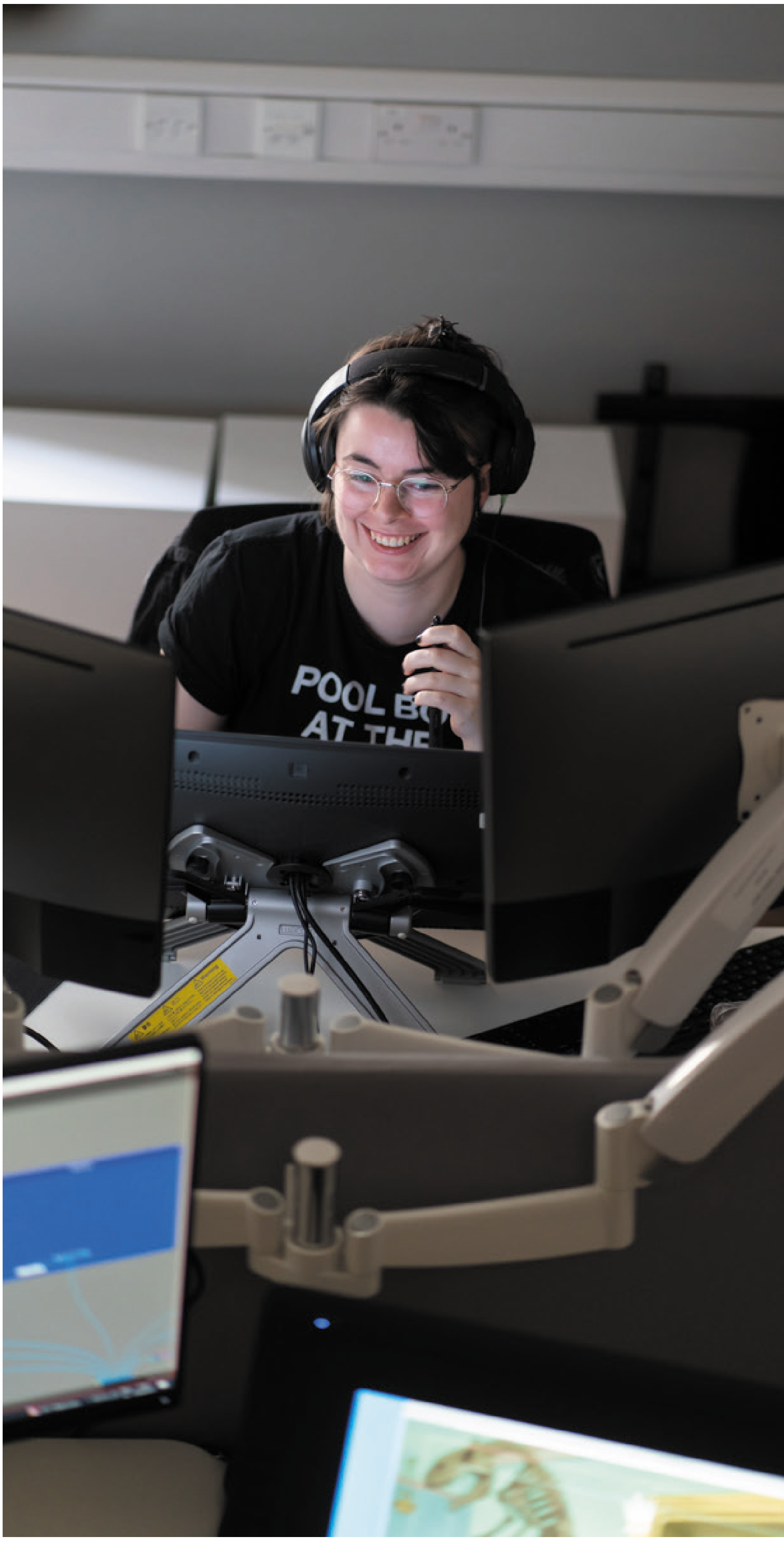
A significant majority of all respondents - 69% - perceived that additional supports would have helped their progression in the animation sector in Ireland, whereas a strikingly low 8% Disagreed or Strongly Disagreed on the need for additional supports.



This sentiment was shared across all demographic categories considered, though female respondents were slightly more likely than male respondents to Agree or Strongly Agree (71% female compared to 64% male) and those who identified as being non-White were significantly more likely to Agree or Strongly Agree (82%) than those who identified as White Irish or White Non-Irish (67%). Curiously, those with Level 8 qualifications or higher were more likely to Agree or Strongly Agree (71%) than those with education or training at Level 7 or lower (63%). No significant differences were evident based on disability status or location. This would suggest a further opportunity to develop supports for graduates in order to better progress their careers in animation in Ireland.

In a subsequent question, respondents were asked to comment on the additional supports they feel would be most beneficial to enhance their career progression within the animation sector in Ireland. The key aspects highlighted included:

» A role-oriented curriculum
» CPD opportunities
» Internships and traineeships
» Networking
» Mentoring
» Signposting and careers advice



CONCLUSIONS AND RECOMMENDATIONS

This report has summarised research into barriers to access and progression within the animation sector in Ireland. In many ways our findings suggest that the structural and social barriers to careers in animation typically found elsewhere also apply in Ireland, though with specific contextual nuances. Drawing on the points discussed, a number of key conclusions emerge.

Barriers to accessing employment and progressing within the sector are real and these barriers have multiple tangible impacts. While these barriers can potentially impact anyone looking either to gain employment or to progress within animation, certain groups are particularly affected, including women, people of colour, those living with long term difficulties or conditions and those living in regional areas away from the key animation hubs. In this regard it is also vital to acknowledge the importance of intersectionality, and the particularly adverse effects resulting from this.

While many of the barriers identified are specific to the animation sector, broader societal issues cannot be ignored. The COVID-19 pandemic has had a significant impact on access and progression within the animation sector, and those who graduated in recent years have been particularly impacted. Equally, the current cost of living crisis and housing shortages are noted as having a significantly negative impact on those seeking to enter or grow their careers in the sector.

While the impact of these barriers to access and progression cannot be understated, it is also vitally important to emphasise the significant risk that they pose to longer-term growth of the animation sector in Ireland. Unless the sector can attract, retain and develop new talent on a continuous basis it will fall behind competitors globally. This will have multiple flow-on effects, not least of which are impacts on creative output, co-productions and investment.

Yet the solutions to these challenges are not simple, nor are they straightforward. Many lie outside the remit of agencies supporting the sector and, indeed, the studios looking to recruit talented crew. Nonetheless, action is needed to ensure that these challenges are addressed.

Recommendations

A number of recommendations emerge from the research. These include the following key points:

- Specific supports are needed for those in under-represented groups - including those with long-term conditions or difficulties, those with varying gender identification and those not identifying as White - whether Irish or non-Irish. These supports should be developed in a consultative fashion and, where possible, involve representatives of various stakeholder groups in order to better understand their needs and challenges

- To help address these challenges, the existing suite of diversity & inclusion programmes for the animation sector should be maintained and developed to ensure maximum awareness within the sector

- Consideration should be given to the development of entry and re-entry pathways for those seeking to develop a career in animation at differing life stages

- Consideration should be given to developing particular supports for new graduates in order to ease their entry into the sector. A key challenge highlighted in the research related to difficulties gaining experience, and initiatives in the form of additional internships and placements should be considered. Ideally, these would be supported by mentoring opportunities for new entrants to support their growth

- As new technologies rapidly emerge, steps should be taken to ensure that approaches to educating and preparing students to enter the animation sector remain aligned with the needs of studios and employers. Longer term growth of the sector will require graduates to be as “job ready” as possible and consequently more attractive to potential employers

- Consideration should be given to further developing and strengthening educational opportunities outside of the greater Dublin area. This would have a number of key benefits, particularly strengthening the animation sector outside of the main metropolitan area while also further supporting students during a period when housing shortages are particularly acute

Limitations

While aiming to be detailed, this research by necessity has a number of significant limitations that must be borne in mind. First, there were only limited responses from individuals in some groups, including those with a gender identification other than male or female, Irish travellers and people with certain disabilities. Second, the focus of the research was on recent Irish graduates. The views of those already established in the industry were not specifically sought and it is conceivable that they might hold differing views. This is particularly so in terms of factors such as age discrimination which would conceivably not be so acute for recent graduates in younger age groups.

Third, the research did not include the views of employers or studios in the sector. Fourth, the research did not seek the views of those working in colleges or universities and actively engaged in developing future animation talent. In terms of both of these limitations, this was a conscious decision not to replicate views already captured in the Skills Gap Report, 2022. Equally, the newly-established Education & Industry Consultation Forum draws together the views of a range of key sector stakeholders. It will also act as an important forum to gain insight into future needs and opportunities, so informing understanding of key trends and industry requirements.

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THANK YOU