IRELAND'S ANIMATION INDUSTRY
WORKPLACE DEMOGRAPHICS
2024-2025

ANIMATION IRELAND

Cultural & Creative Industries Skillnet

National Talent Academy Animation

Coimisiún na Meán

Ireland's Animation Industry Workplace Demographics

2024-2025

CONTENTS

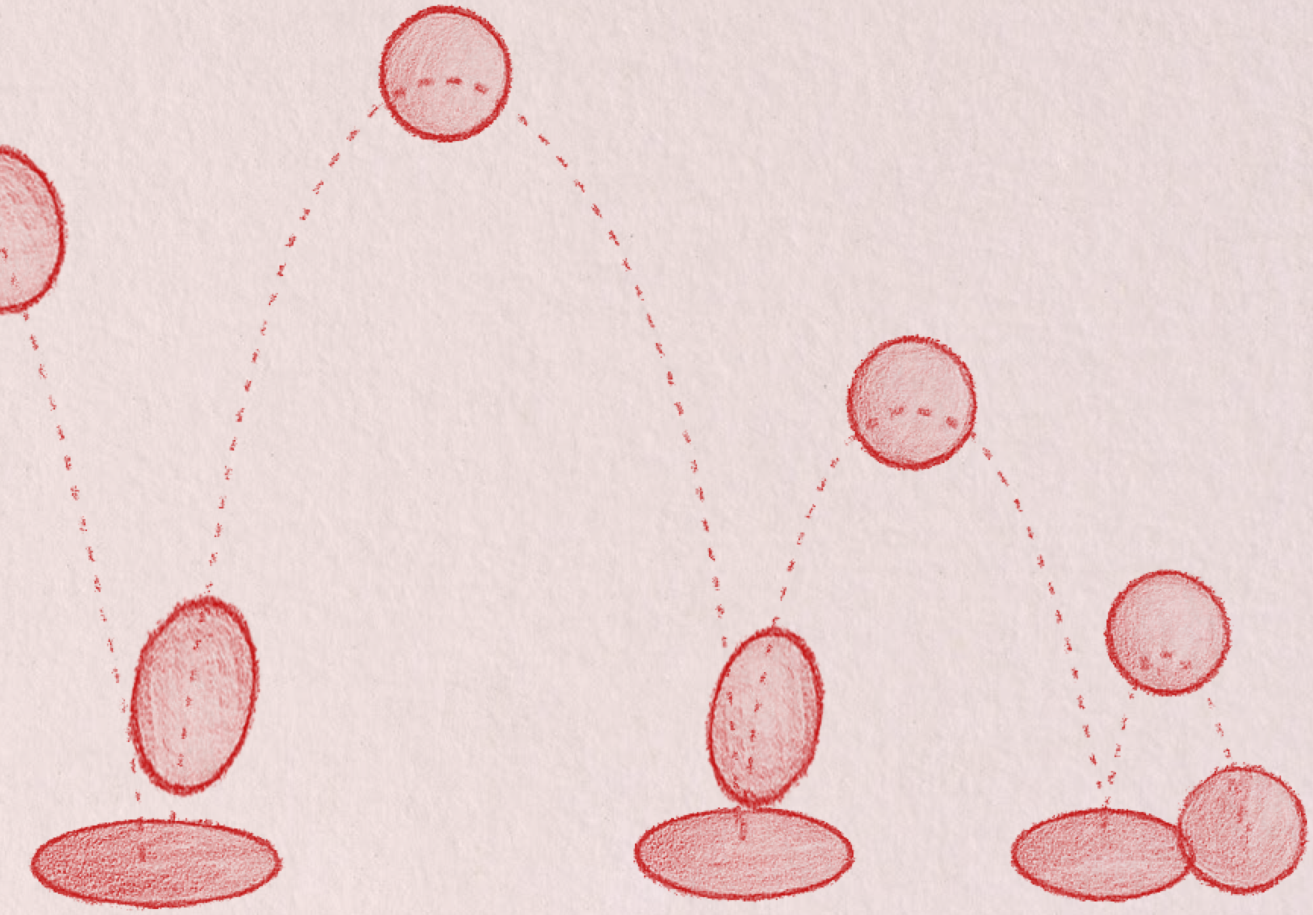
Introduction

Ireland's animation sector has grown rapidly and has achieved great success over the past number of years. The number of people employed in animation across the island of Ireland is approximately 2,000 full time employees working in around 50 studios. Animated films and television series produced by Irish studios have been recognised globally, with multiple awards and nominations at the world's top festivals.
Recently however, times have been challenging with amongst other things, the advent of generative Artificial Intelligence and the global downturn in commissioning. To deal with these challenges, it is essential that the animation sector has access to relevant industry data and statistics. Up to date information is a vital element of any efforts to influence the policies that affect our industry.

This report is another milestone in providing a comprehensive picture of the challenges and opportunities facing Irish animation. The response from industry has been very positive with studios engaging fully in the research phase of the report. Providing a picture of the demographic breakdown and diversity of the animation workforce is an invaluable resource and the recommendations for future research contained in the report will be given serious consideration.

Animation Ireland would like to thank our partners Cultural and Creative Industries Skillnet and acknowledge the support of Coimisiún na Meán and the National Talent Academy for Animation in the publication of this report. Thanks are also due also to the authors of the report, MJ Boland and Ciara Chambers, Delphine Coudray from Animation Ireland, Gareth Lee and Sean Smith from Cultural and Creative Industries Skillnet and the National Talent Academy for Animation's Gender, Equality, Diversity and Inclusion Committee.

Ronan McCabe, CEO Animation Ireland



Executive Summary

Overview

This research project was commissioned by Cultural & Creative Industries Skillnet and Animation Ireland, with the support of Coimisiún na Meán and the National Talent Academy for Animation, to learn more about the current state of the animation sector in Ireland.

The commission included a request for an overview of existing research on the animation sector (and gaps therein), an analysis of the main challenges currently experienced across the sector, the gathering of information on workplace demographics, and the collection of data related to gender, equality, diversity and inclusion.

The research approach for this project consisted of an initial phase of desk-based research and scoping interviews with key stakeholders. Information gleaned during the initial phase informed the development of a fact-finding survey, which was disseminated to members of Animation Ireland during Summer 2025. Of the 46 studios contacted, 30 agreed to participate and 28 completed the survey; it must be noted that not all participants were in a position to answer every question at the time the survey was carried out. The final phase of research consisted of the collation of data, as well as a basic analysis of the results.

The research scope, whilst broad and far reaching, was limited by the capacity of resources allocated, and specific recommendations based on findings from the completed surveys were beyond the remit provided, as was an interrogative analysis of the data. However, there are some specific reflections and recommendations made throughout the report.

Some recommendations for future research and conclusions can be found on page 28, but some work remains to interrogate the results of the survey, and to then use them to inform strategic planning and policy-making across the sector, particularly with respect to GEDI initiatives and training.

Consequently, this report should itself be treated as something of a scoping document - revealing, as it does, the degree to which more information and data is required to get a comprehensive picture of the animation sector, in order to design strategic policies for its future growth and sustenance.

Key findings

Measurement

- The Irish animation sector is now a well-established and mature industry, with **45% of responding studios operating for more than 10 years**.
- Studios are predominantly small, with **62% having 1-10 permanent employees**, and the majority engage freelance staff for short-to-medium term contracts.
- During 2024, **43 different projects were in progress** across all responding studios.
  - 58% of these were on projects with budgets less than €250,000
  - 7% were on projects from €250,000 - €1,000,000
  - 15% on budgets from €1 million to €5 million
  - 20% on projects over €5 million

  Therefore, **distribution of these projects is heavily weighted towards the lower budget end.**
- **50% of studios increased salaries in 2024**, with 80% of those saying these increases had happened across the board.
- This well-established industry is also full of homegrown talent. The workforce (fulltime and contract) is predominantly made up of Irish citizens; **72% of respondents reported that more than half their staff is Irish** (and within that, 34% reported that more than three quarters of their staff are Irish.) The most frequently listed nationalities of staff after Ireland were the UK and Europe.

- There is a sense that the sector is agile, flexible and diverse when it comes to output. **2D & 3D animation are the most predominant types of animation produced**, with almost all respondents working in one of those mediums, or both, as well as in other types of animation (including motion graphic, stop-motion, and immersive). Studios also tend to work across multiple types of content, with almost all working on many different outputs, from short films and features, to commercials and TV series. This suggests an **openness from studios to meet market demands and adapt accordingly**.
- This is also reflected in the genre of work produced - **at least 50% cater to all ages.** Almost **all do at least some work specifically for children.**

Policies and practices

- Almost **60% of studios are very satisfied with the workplace culture** at their company.
- Remote working is now widespread across the sector, whether fully remote (26%), or remote with certain mandatory in-person days (30%). 35% of companies operate an adhoc policy on remote working, or have no policy at all. Only 9% of companies require mandatory days in the office every week. 65% of respondents offer equipment and other support to their remote employees. There is an overwhelming sense that respondents are satisfied with this situation: **82% of companies believe their remote working policy is working effectively.**
- However, it should be noted that many respondents seem to adapt their remote working policies to meet their current stage of production - so staff may be remote during development, and then get temporary office space during the production itself. This indicates a somewhat flexible workplace environment, but also speaks to the **general sense of agility that seems to define the Irish animation sector**.
- There is a recognition of potential burn-out and overtime work:

  67% either monitor overtime hours, or have some informal provisions in place to keep an eye on it. Of course, it may also be the case that employees are not reporting overtime hours truthfully, so even if it is monitored by management, it can be hard to know what is happening during an employee's day-to-day working life.
- The sector is forward-facing with **74% of respondents reporting that they had adopted or trialled new software** in the past twelve months. The most popular of these were Blender and Unreal Engine.

Sectoral challenges

- The business environment remains highly challenging with **91% of studios reporting that it has been harder to secure new business** in the past twelve months, and **64% experiencing increased overheads**. 72% have had to make compromises as a result; 27% on the creative side, whilst 45% have compromised in areas such as reduced pay and tighter budgets.
- **32% (i.e. almost a third) have not hired any new staff in the past twelve months.**
- **74% of respondents agreed that job stability is the greatest concern for people working in the sector**. Other concerns raised included global headwinds impacting commissioning (as summarised on page 18) ; lack of infrastructure (specifically housing) to support employees living in certain regions (for eg., people refusing jobs in specific cities as there is nowhere to live).
- Interestingly, and contrary to global discourse, no respondents **(0%) suggested generative Artificial Intelligence (AI) as the greatest concern for people working in the sector**. Although it is worth noting that it was an open question.
- Almost half of respondents **(48%) are using generative AI as a productivity tool**. Only one respondent (equivalent of 4%) reported using it as a creativity tool.
- **52% of respondents do not have a policy statement in place for the use of generative AI in content production**. **48% either have a policy, or are in the process of making one**. This indicates that **the sector is split down the middle with regards to its approach to this new technology**.
- **82% of respondents believe more training and support is needed for the sector with regards to AI**.
- Likewise, **82% reported needing more training and support for issues related to copyright and IP**.

- Questions around intellectual property (IP) reveal that the Irish animation sector is somewhere between a services industry (producing work owned by others) and a proprietary one (producing work owned by themselves). **40% of respondents work on projects in which they have more than 75% of the ownership. 35% of respondents are working on projects in which 75% of ownership is outside of Ireland.** The rest fall somewhere in the middle.

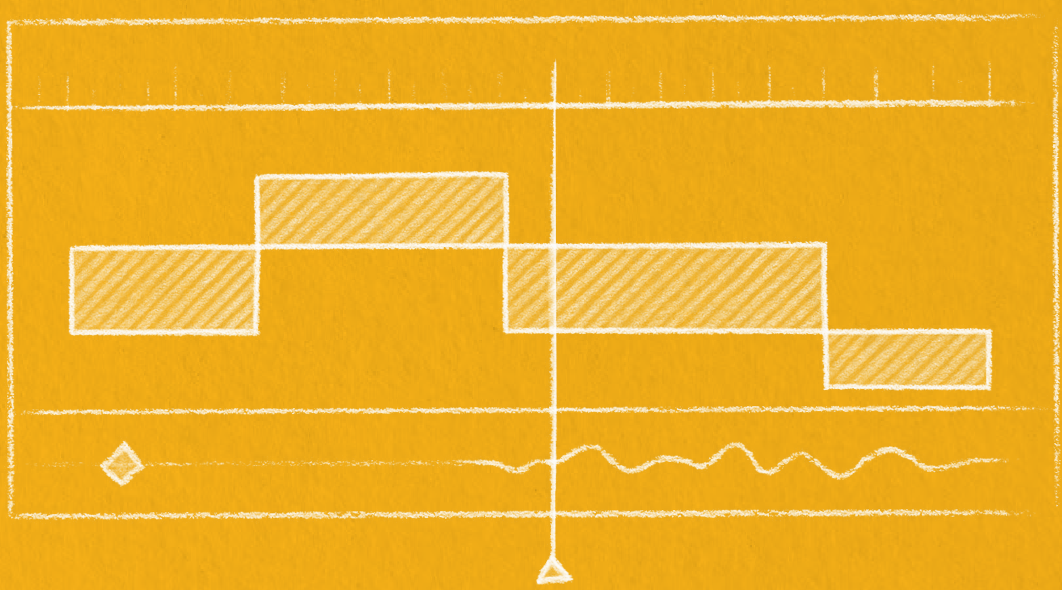
Recruitment & Retention

- Talent pools have broadly remained the same over the past twelve months - studios have largely reported that it is neither easier nor harder to retain and recruit talent.
- Recruitment practices are varied and diverse (including internal recruiters, free online platforms) but a high percentage - **65% - also use word of mouth for finding new recruits**.
- Skills in demand - **68% found storyboard artists and animators the hardest to find**.
- **60% of respondents offer paid traineeships, and 52% offer paid internships.**[1]
- **78% of studios reported experiencing a high level of applications for jobs**, with the majority of these coming for entry-level positions, suggesting the employment market remains highly competitive, and possibly that there is an oversupply of new talent.
- **Less than half of respondents work with schools/youth groups.**
- However, the studios that do engage with local communities and schools are very active in the work they do, with some reporting that they offer workshops, Transition Year (TY) work experience, and philanthropic initiatives.
- Developing relationships at community level is one of the most effective long-term means of engaging diverse communities and promoting inclusion, but given the sectoral challenges outlined, it may be that budgets / resources are too tight for many studios to reach out and work with schools, and this may be an area that needs additional support. It could also be that access to schools with children under the age of 18 is more restricted and includes a lot of red-tape (garda vetting, scheduling conflicts, general administration authorisations, restricted budgets and physical space, etc).

GEDI policies & training

- **100% of respondents believe their company is an inclusive place to work. 77% have a formal GEDI policy.**
- In spite of this perception of inclusivity, less than half (**41%) have a designated member of the team responsible for GEDI initiatives, and 73% do not have a budget allocation for GEDI initiatives**. 53% believe their company's GEDI strategies have been effective, although more than half do not measure the impact of GEDI initiatives.
- **45% believe the current training offered around GEDI is relevant to their company.** Likewise, 45% believe that training initiatives have made a difference to habits and behaviours, particularly in relation to unconscious bias. 30% said they had learned from the GEDI initiatives undertaken by peer companies - a relatively low number, which indicates more scope for peer-to-peer learning.
- It should be noted that some companies have a very small number of permanent staff and special training initiatives at that scale are challenging.
- When it comes to specific strategies for upskilling or recruiting diverse talent, the sector is split down the middle: around half of respondents have specific strategies, and around half do not.
- The gender breakdown of staff is a healthy
  - **48% female**
  - **49% male**
- **63% of respondents offer adjustments to the recruitment process for neurodivergent candidates.**
- 65% of studios answered "prefer not to estimate" when asked what percentage of their staff had a visible or invisible disability.

- Many studios declined to answer questions about age demographics. Of those that did answer, the survey revealed that **61% of staff are aged 25-44**, with only 17% over 45, suggesting there is an issue with retention of people over a certain age, or of recruiting staff aged 45+.
- 58% of respondents had no formal provisions or support for neurodivergent staff.
- An ability to raise money / funding was listed by one respondent as an area that needs more support and training.
- Several respondents suggested that having to complete certain training and upskilling around GEDI in order to receive funding (which may become a requirement of some funding schemes in future) would present unnecessary red tape and believe it should be designed to be more than a "tick-box exercise".



Research Methodology

Phase 1: The first phase of this initiative included desk-based research and a review of existing research of the animation sector in Ireland (as summarised on pages 23-27) and an analysis of gaps within existing knowledge. Some comparisons were made with international studies of the animation sector, although there was an immediate realisation that little data gathering has been done on the European animation industry in the last decade.[2] A large-scale mapping of the sector in the UK was undertaken by the British Film Institute in 2024.[3] Research into GEDI initiatives and/or workplace demographics in international animation sectors, or across other Irish industries, was beyond the scope of this research but such a comparative study would be a valuable tool for developing best practice in the Irish animation sector.

Phase 2: Based on the gaps in knowledge, and key industry trends identified in Phase 1, the authors engaged in scoping exercises (phonecalls, attending conferences) with members suggested by Animation Ireland, and also consulted with the National Talent Academy for Animation's ED&I Subcommittee. The notes and information gleaned during these sessions informed the questions that eventually made up the survey.

Phase 3: Authors created the questions for the survey based on the research undertaken during Phase 1 and Phase 2. Decisions on the questions included were made within the scope of the project, and the request from the funders that there would be specific emphasis on GEDI. Questions were also designed on the basis that the survey would be disseminated to members of Animation Ireland only, and that the respondents would most likely be at a senior level within their respective companies. The decision to target that cohort was due to the fact that the most recent previous reports were more specifically focused on workforce. In addition to this, the nature of some questions (related to turnover, recruitment etc.) required the knowledge and input of members of senior management within respective companies/studios. All data gathered should be understood within that context, and with the knowledge that junior employees, freelance contractors, and others, may have a different experience of the sector than those in senior management. The survey was broken into five key areas of interest (workplace measurement, policy and practices, sectoral challenges, recruitment and retention, GEDI). The survey was designed within the Qualtrics platform, an online survey tool commonly used in academic research. The overall study was subject to a rigorous ethical approval process and received approval from University College Cork's Social Research Ethics Committee, a group of interdisciplinary academic experts with specialist knowledge of data handling and a range of research methods involving human participants.

Phase 4: All of Animation Ireland's members were contacted; 46 studios were informed about the nature, purpose and scope of the survey. 30 organisations agreed to participate and filled out consent forms, as a requirement of the ethical protocols of the study. Studios were informed that as the survey may be time consuming, they would be given the option to save it in order to gather more data during completion. 28 studios completed the survey. Due to workload, some companies were unable to complete the survey before the deadline and others did not feel they had access to enough data to fully represent their organisation, but all companies who contacted the study team expressed an interest in participating in future research. Many of the questions were complex in nature and participants were instructed that if they were unable to complete every question within the survey they should focus on answering questions where they were confident that they could provide reasonable responses. Several queries were raised, some of which offered interesting contextual detail, for example on companies with international subsidiaries. When these questions arose, we asked that companies focussed on Irish-based productions and staff based in Ireland or working on local productions.

Phase 5: As soon as the survey results were gathered, the authors worked closely with a data analyst and Qualtrics specialist (Dr. Rachel Gough) to interpret the information and ensure it was digestible and understandable for readers. Some questions were skipped by more than 50% of respondents, and as these results would thus not provide a fair representation of the sector, they have not been included in the key findings. However, we have included them in the report, as the questions that were skipped can be revealing - for example, it may suggest a gap in the studio's own knowledge, or a reluctance to engage with certain topics. The research gathered in earlier phases was dispensed into sections of the report. The key findings listed in the previous section broadly mirror the five key sections of the survey.

Final comment: As previously mentioned, an in-depth analysis of the survey results is beyond the scope of this report. It should therefore be treated as something of a scoping document - revealing, as it does, the degree to which more information and data is required to get a comprehensive picture of the animation sector, in order to design strategic policies for its future growth and sustenance.

Background

Overview of the animation sector - local and global

IRELAND

- The Irish animation sector has an international reputation for technical excellence and diverse storytelling.[4] Irish animators are involved in the creation of some of the world's most beloved IP, working with global studios and production companies including Apple, BBC, Disney, Netflix, Sky, and Nickelodeon, and gathering critical acclaim and awards recognition in the process.

- Ireland's standing as a global leader in animation is significantly bolstered by Animation Ireland, the country's dedicated trade association. This organisation, supported by Screen Ireland, plays a crucial role in fostering the growth of the animation industry throughout the island of Ireland. Animation Ireland currently boasts 46 member studios, with 40 studios located in the Republic of Ireland and 6 in Northern Ireland.

- Ireland offers a tax credit (Section 481) that incentivises film, TV, animation, creative documentary, post production & VFX, and games development in Ireland. The tax credit is worth up to 32% of eligible Irish expenditure, with an 8% uplift (known as the Scéal uplift) on feature films (including animation) with a global budget under €20M. Projects must satisfy a Culture Test and the Industry Development Test.[5]

- Despite an upward trajectory of growth across the AV sector in Ireland in recent decades, the last number of years have been more linear - a trend that has been reflected globally due to various headwinds including the COVID 19 pandemic, inflation, and industry strikes.

- Evidence gathered in this report suggests that those headwinds are continuing to impact Irish animation studios, with 91% of studios surveyed reporting that it has been harder to secure new business in the last twelve months, and 64% reporting an increase in overheads.

- The most recent economic data on the animation sector in Ireland can be found in *Economic and Skills Analysis of the Audiovisual Sector in the Republic of Ireland, January 2025 (Screen Ireland / Alma Economics).* Within the report, animation, VFX, postproduction, digital games, and VR/AR, are taken as one key segment. Together these subsectors accounted for 3,802 FTEs and produced a total GVA of around €203.7 million. This represents about 20% of the GVA of the total audiovisual sector (€1,061.4m).[6]

- Animation is the largest of these subsectors, but, in line with the AV sector more generally, the period from 2021 - 2023 was somewhat volatile and there was a notable decline in employment during 2022, probably as a result of challenges across the global screen sector during that time (declining content budgets, changing audience habits, etc.). By 2023, the animation subsector had rebounded somewhat with 1,073 FTEs and a GVA of €65.7 million. (the average GVA for the 2021-23 period was €55.6 million)[7]

- On the skills side, the National Talent Academy for Animation offers a wide range of courses and programmes, including shadowing and mentoring schemes, for both new entrants and existing talent.[8] Other opportunities offered by Screen Ireland and the NTAA include the First Credit Short Film Scheme, which is targeted at new and emerging filmmakers, with a budget of €7,000, and includes a heavy focus on skills development.[9] In addition to this, CCIS offers an array of training and skills opportunities to the animation sector, at all levels, on an ongoing basis. For eg., CCIS, in collaboration with Screen Ireland and the NTAA, offers a Graduate Traineeship Programme in Animation, VFX and Games.[10]

- Screen Ireland's competency framework for animation has been a hugely welcome intervention in awareness and knowledge of the sector, and is a helpful tool for everyone across the industry.[11]

- For young people thinking about a future career in animation, there are now 40+ animation courses offered across Ireland at all NFQ levels.[12]

However, the number of graduates entering the animation workforce every year is unknown, and should be measured more effectively, so that an assessment can be made of new entrants and whether there is an issue with over-supply (71% of survey respondents said they received the highest volume of job applications from entry level).

- Family animation remains highly popular with Irish audiences: four of the top ten box office titles in 2024 were animated features - *Inside Out 2*, *Despicable Me 4*, *Paddington in Peru,* and *Moana 2*.[13] (It is worth noting that this tendency towards sequels to existing IP, produced overseas, mirrors the Irish (and European) box office more generally)

GLOBAL

- Animation remains hugely popular with audiences all over the world: in 2024, the global animation box office easily reached pre-pandemic levels, with over 880 million admissions.
- However, European titles have not performed as well as their international counterparts, with only 33 million tickets sold between 2022 and 2024, compared to a pre-pandemic average of 42 million.[14]
- By contrast, Asia is having a bumper year for animation. China has had a string of monumentally successful animation films: in late August 2025, the film *Nobody* became the highest grossing 2D Chinese animated feature of all time ($172 million at the box office), while *Ne Zha 2* earned a record-breaking $2.2 billion earlier in the year (90% of which came from the Chinese audience). Other films like *Demon Slayer: Kimetsu No Yaiba Infinity Castle* (Japan), *The King of Kings* (South Korea) and *Jumbo* (Indonesia) have also enjoyed international success. According to a recent article in *Screen International*, the success of these films has come about due to a confluence of factors, including more accessible technology, changing audience habits, and an exodus of talented emigré animators from the US.[15]
- While not produced in Asia, the other runaway success of 2025 has undoubtedly been *KPOP: Demon Hunters* - a film rooted in Korean culture but made overseas - and has become Netflix's most watched film of all time, suggesting an appetite with older children / early teens for a certain style of animated content. [16]
- Behind all these buoyant numbers though, the headwinds faced by the Irish sector are also blowing across the international landscape. Large animation studios everywhere, from Aardman and Axis in the UK, to Dreamworks Animation and Pixar in the US, have all made job cuts in the last two years.[17] Many of these cuts were the result of companies reducing expenses due to strikes, a shift in consumption habits towards streaming / YouTube, and rising labour costs.

- In addition to this, in the UK, once reliable commissioners are under continued pressure: in July 2025, Sky announced that it will end commissioning of original children's content. With concerns growing about the production of British children's content across the sector (and beyond), a new inquiry into the provision of children's TV and video content in the UK was launched by the UK government in July 2025.[18]

- Some of those concerns relate directly to the ubiquity of YouTube, which is now the most popular destination for children in the UK when they switch on a TV set.[19] This of course presents a myriad of issues for broadcasters and owners of children's IP, and raises questions about distribution strategies for animators everywhere.

- AI continues to be a growing talking point across the animation community (although was not raised as a key concern in this survey). Whilst change in this direction does not seem to have impacted the creative process in any major way yet, articles such as "What if Making Cartoons Becomes 90% Cheaper" (published in the *New York Times* in May 2025), and the emergence of new animation companies such as Toonstar working with AI, will do little to set minds at ease. Likewise, AI-dominated discussions at the International Broadcasting Convention in September 2025, with production workflows, metadata strategies, captioning and dubbing, and virtual sets all discussed in relation to accelerating AI-driven technologies.[20]

- It's worth noting that across Europe, co-productions are becoming increasingly more important for animated films: 42% of all European animated films produced in the past seven years were co-productions, indicating that for many, pooling resources is one way to navigate the challenging climate.[21] Questions about co-production were beyond the scope of this survey, and further research into the prevalence of co-pros across the sector in Ireland - including whether more training and understanding of the process is needed - would be most welcome.

Existing Research of Irish Animation Sector

Animation Ireland: Industry Survey 2021 - 2022 (Animation Ireland, 2022):

- This report provides the responses to a general industry survey circulated to Animation Ireland members in 2021. The survey covered: performance; recruitment and retention; financing / funding; outlook; content & distribution; festivals / markets; community and the role of Animation Ireland.
- Broadly, the report paints a picture of an industry in good health: 66% of respondents had produced more projects than the previous year; 66% had employed more staff; 66% had increased profits; and, 76% had a "positive" or "somewhat positive" outlook for the year ahead. It should be noted that the aforementioned "previous year" (to which comparisons were asked to be made) was 2020 - the first and most disruptive year of the COVID-19 pandemic, when many companies were adapting to global lockdowns for the first time, and the audiovisual industry was in a state of flux. The data gathered in this report should be considered with that context in mind.
- **Recommendations:** Recommendations were not within the scope of the report.

Skills Gaps in the Irish Animation Sector Research Report (Yvonne Hennessy, 2022):

- The objective of this report was to identify skills gaps and make recommendations in the implementation of a competency framework.
- The findings of this report are based on both interviews with animation studios, educators and colleges, and a web-based questionnaire / online survey.
- As the title suggests, the focus is on skills deficits across the sector - it identifies the professional roles most in demand, as well as the key gaps in skills themselves (such as software knowledge and interpersonal/transferable skills). It also analyses structural issues within the skills landscape, such as challenges with on-job training.
- An overwhelming finding in the report was the ongoing breakdown of communication between industry and education: "Most member studios have ceased engagement with third level institutes in Ireland. Most third-level institutes have lost confidence in their attempts to make contact with member studios" (p.22).
- It found that animated content for children under 12 years old dominates the creative output of studios, but it's a type of content that recent graduates seem unenthusiastic about making, although it is unclear why. The report argues that "there is scope and space within the Irish animation industry to create content for a broader, older audience"(p. 22).
- **Recommendations:** 1) Better cooperation and communication between studios and third level institutions, which could be facilitated by the National Talent Academy for Animation. 2) The formation of a new industry-education committee, which would have a remit to bridge skills gaps, agree standards, encourage the sharing of workflows, software practices and pipeline information, and facilitate workplace programmes. 3) Develop better mechanisms (via a dedicated studio officer) to encourage graduates into careers in the sector.

CCIS | Animation Ireland | Fís Éireann/Screen Ireland | Coimisiún na Meán | National Talent Academy - Animation *Animation Industry: Access & Career Development Research Report,* 2023:

- The objective of this report was to address barriers to entry and career progression in the animation industry, in particular for recent graduates and new entrants to the sector.
- The report surveyed current and aspiring animation professionals in Ireland, exploring hiring factors and career progression in the animation industry.
- It found that barriers to accessing employment and progressing within the sector do exist, and particularly impact women, people of colour, those living with long-term difficulties or conditions or those living in regional areas away from key animation hubs.
- Broader societal challenges - such as cost of living and housing shortages - contribute further to these sectoral barriers.
- These barriers pose a significant risk to the long-term buoyancy of the animation industry.
- **Recommendations:** develop new specific supports for the specific needs of the groups listed above; further develop existing supports within diversity and inclusion programmes; more mentoring opportunities for new entrants; education and skills programmes should align more closely with industry; more regional development.

Screen Ireland / Alma Economics, *Economic and Skills Analysis if the Audiovisual Sector in the Republic of Ireland,* January 2025

The objective of this wide-ranging and extensive report was to provide an estimate of the current size and economic impact of the audiovisual sector in general in Ireland, and to review skills requirements (also in general) across the sector in order to identify gaps and opportunities. So whilst very useful, this report is not specific to just animation, and thus lacks a granularity in findings on that specific subsector.

Economic Impact:

- Please refer to pages 6-7 of this report for a summary of economic findings (under section on Irish animation sector).

Skills:

- In the skills analysis (second section of the report), the critical gaps identified in the "animation, digital production and development" segment included: grading, mixing, stop-motion animation, motion graphics, CG imagery, motion design, and programming (p. 49).
- Talent shortages in the "animation, digital production and development" included: senior bank-end engineers, senior digital game programmers, experienced technical directors, mid - senior level unreal engine developers, VFX supervisors, VFX coordinators, animators (at all levels), 3D animators, 3D artists, 2D/3D riggers, motion designers, and software developers. The report found that talent shortages at home have led to an overreliance on the international sector (p. 49).
- Respondents in the animation and games sectors largely found the available skills development opportunities to be relevant for their work; these respondents particularly contrasted the current offer to the past, noting there are now more training opportunities relevant

to their sectors. Programmes such as the Safe to Create, Passport to Production, advanced producer courses, the Indie dev cross-border games prototype fund programme, and the shadowing opportunities offered on Screen Ireland's NTA courses, were all specifically mentioned by respondents (p. 49).

GEDI: pages 67 - 71

- Gender, equality, diversity and inclusion initiatives were not divided by subsector in this report.
- The majority of respondents believed that the audiovisual sector was either completely or somewhat successful in addressing the areas of sexual orientation, race and ethnicity and gender and gender identity. The areas where respondents displayed the most concerns were age, disability and membership of the traveller community.
- While respondents felt measures to improve gender parity have increased, they believed people with disabilities and neurodivergent workers continue to feel left out of the sector.
- Similarly, some respondents reported that people with caring responsibilities find it difficult to work in the sector due to long hours, gaps in employment, and inflexible work patterns – all of which force them to leave the sector.
- A lack of diversity in leadership and management positions in sector organisations was commonly highlighted by survey respondents as being a key challenge to achieving inclusion.

Identified Gaps in Research:

Recommendations for Future Work

- Some important actions have been taken following the recommendations of previous reports, such as the establishment of the Education and Industry Committee, which has been very active in the past number of years. Many of the NTAA's current programmes were born out of recommendations made in the Skills Gap Report (Hennessy, 2022). But, as this report has elucidated, work is still needed across the sector to improve the provision of GEDI measures.
- Better mapping is needed to identify clusters of current activity and to help cultivate new clusters. Regional development and nationwide support was a key concern raised in relation to the AV sector generally in the 2025 Screen Ireland Alma Report - and as is highlighted in that report, knowledge and support of the regional animation sector is currently limited.
- While there is some limited data in the 2025 Screen Ireland Alma Report, more research is needed to establish whether the animation sector is growing, and to identify what aspects of the sector are growing the fastest.
- There is a huge information gap on the relationship the Irish sector has with the international market - where does Ireland fit within the broader landscape? What countries are studios working with the most? Where is business coming from? What type of business is it? Are there content areas and geographic regions Irish animators should be focusing on? Are co-productions growing in prevalence (especially all-island partnerships)? If all of this was better measured, it could be better managed, cultivated, and improved.

- More information is needed on the business aspect of the sector:
    - How does the business pipeline work?
    - What are tools used to win new business?
    - Do studios have the ability and skills needed to win business?
    - Are better business and leadership skills needed?

  Similarly, no research has been undertaken into distribution practices / relationships with distributors, marketing and self promotion, or managing intellectual property. Finding the right distributor and right broadcasters internationally for Irish animation is key to growing success.
- There is no research on whether (or how) Irish animators work with 'new' online platforms like Roblox and YouTube. Understanding how to forge the right deals and right partnerships on these platforms is paramount to success for rights owners.
- There is little granular information on funding - what percentage comes from Screen Ireland (and within that from which funds), and beyond that, where else does funding come from? There was an interesting discussion about funding at Meitheal 2025 - how private equity as a funding option is not really open to the animation sector in Ireland, which still very much follows the pre-sales model. Diversifying funding options requires a high level of business skills.
- Data - and the use of audience data in strategic planning. Is this happening in Ireland, and if not, why not? Of course there may be a creative reluctance to analyse data and plan output accordingly, but data is increasingly important to commissioners and broadcasters.

Survey Results

We have included survey data below so that readers may scrutinise the information gleaned from specific questions. However, please note that this means that multi-response questions will have several entries under the same question number in order to fully represent all of the answers captured. For instance, there are 5 entries listed for Q1 below - this is to ensure that the breadth of responses is fully captured here for close analysis. The number of skipped responses is also included where we thought that data may be useful in relation to a specific question, or to indicate a spread of responses across a multi-option question.

Q1. How many projects did your studio work on in 2024? (Please add number under each category)

21 respondents answered
7 respondents skipped

Responses

- 9 respondents [43%] (Projects between €0–€250k / 250k)
- 3 respondents [14%] (Projects between €250k–€1m)
- 4 respondents [19%] (Projects between €1m–€5m)
- 5 respondents [24%] (Projects over €5m)

Q1. How many projects did your studio work on in 2024? – Projects between €0-€250k / 250k

6 respondents answered
22 respondents skipped

- 1 respondent [16%] worked on **11** projects between €0–€250k / 250k
- 1 respondent [16%] worked on **2** projects between €0–€250k / 250k
- 1 respondent [16%] worked on **3** projects between €0–€250k / 250k
- 1 respondent [16%] worked on **1** project between €0–€250k / 250k
- 2 respondents [33%] worked on **4** projects between €0–€250k / 250k

Q1. How many projects did your studio work on in 2024? – Projects between €250k-€1m

2 respondents answered
26 respondents skipped

- 1 respondent [50%] worked on **1** project between €0–€250k / 250k
- 1 respondent [50%] worked on **2** projects between €0–€250k / 250k

Q1. How many projects did your studio work on in 2024? – Projects between €1m-€5m

4 respondents answered
24 respondents skipped

- 2 respondents [50%] worked on **2** projects between €1m–€5m
- 1 respondent [25%] worked on **1** project between €1m–€5m
- 1 respondent [25%] worked on **1.5** projects between €1m–€5m

Q1. How many projects did your studio work on in 2024? – Projects over €5m

4 respondents answered
24 respondents skipped

- 2 respondents [50%] worked on **1** project over €5m
- 1 respondent [25%] worked on **3** projects over €5m
- 1 respondent [25%] worked on **3–4** projects over €5m

Q2. What is the total number of permanent employees currently in your company (as of July 2025)?

20 respondents answered
8 respondents skipped

- 16 respondents [80%] answered **a) 1-10**
- 1 respondent [5%] answered **b) 11-50**
- 2 respondents [10%] answered **c) 51-200**
- 1 respondent [5%] answered **d) 201-500**

Q3. What is the total number of freelance/contract employees in your company (as of July 2025)? (We understand this is in a constant state of flux)

21 respondents answered
7 respondents skipped

- 13 respondents [62%] answered **1-10**
- 6 respondents [29%] answered **11-50**
- 2 respondents [10%] answered **51-200**

Q4. Please indicate how many employees/freelancers are contracted under the following contract durations: < 3 months

14 respondents answered
14 respondents skipped

- 12 respondents [86%] answered **< 10 employees**
- 1 respondent [7%] answered **10-20 employees**
- 1 respondent [7%] answered **20-50 employees**

Q4. Contract duration: 3 to 6 months

9 respondents answered
19 respondents skipped

- 8 respondents [88.88%] answered **< 10 employees**
- 1 respondent [11.11%] answered **10–20 employees**

Q4. Contract duration: 6 to 12 months

12 respondents answered
16 respondents skipped

- 5 respondents [31.25%] answered **< 10 employees**
- 4 respondents [25%] answered **10–20 employees**
- 4 respondents [25%] answered **50–100 employees**
- 1 respondent [6.25%] answered **> 100 employees**

Q4. Contract duration: 12 to 18 months

8 respondents answered
20 respondents skipped

- 8 respondents [80%] answered **< 10 employees**
- 2 respondents [20%] answered **10–20 employees**

Q4. Contract duration: > 18 months

5 respondents answered
23 respondents skipped

- 5 respondents [100%] answered **< 10 employees**

Q5. How long has your company been operating in the animation industry?

22 respondents answered
6 respondents skipped

- 2 respondents [9.09%] answered **Less than 1 year**
- 3 respondents [13.6%] answered **1-3 years**
- 3 respondents [13.6%] answered **4-6 years**
- 4 respondents [18.18%] answered **7-10 years**
- 10 respondents [45.45%] answered **11+ years**

Q6. Did your studio increase salaries in 2024?

20 respondents answered
8 respondents skipped

- 10 respondents [50%] answered **No**
- 10 respondents [50%] answered **Yes**

Q7. If yes to the previous question, where have those increases happened?

10 respondents answered
18 respondents skipped

- 8 respondents [80%] answered **Across the board**
- 2 respondents [20%] answered **At mid level**

Q8. Did your studio see an increase or decrease in turnover in 2024?

22 respondents answered
6 respondents skipped

- 10 respondents [45.45%] answered **Increase**
- 8 respondents [36.36%] answered **Decrease**
- 4 respondents [18.18%] answered **Neither**

Q9. Did your studio experience increase or decrease in overheads in 2024?

22 respondents answered
6 respondents skipped

- 14 respondents [63.64%] answered **Increase**
- 5 respondents [22.73%] answered **Neither**
- 3 respondents [13.64%] answered **Decrease**

Q10. What percentage of your staff (full-time and contract) are Irish citizens (as of July 2025)?

22 respondents answered
6 respondents skipped

- 8 respondents [36.36%] answered **51–75%**
- 8 respondents [36.36%] answered **76–100%**
- 4 respondents [18.18%] answered **26–50%**
- 1 respondent [4.55%] answered **10–25%**
- 1 respondent [4.55%] answered **0–10%**

Q11. Please identify the other regions from which staff have come

6 respondents answered
22 respondents skipped

Eighteen respondents answered this question (multiple regions allowed). The majority reported staff originating from the **UK (78%)** and the **EU (72%)**, followed by **Asia (39%)** and **non-EU Europe (39%)**. Around one-third (33%) also reported staff from the **USA** and **Other** regions.
Regions specified under "Other" included **South Africa**, **South America**, **Canada**, **New Zealand**, **Jordan**, and **Australia**.

Note: Percentages exceed 100% as respondents could select multiple regions.

Q12. What is the approximate age range across your employee base?

Most organisations employ staff primarily aged **25–44**, with fewer younger (18–24) or older (55+) employees. Only a very small number indicated having employees aged **65+**. Results are indicative, as respondents provided mixed data types.

Q13. What type(s) of animation does the studio produce?

22 respondents answered
6 respondents skipped

- 6 respondents [27.27%] answered **2D animation, 3D animation**
- 4 respondents [18.18%] answered **3D animation**
- 4 respondents [18.18%] answered **2D animation**
- 2 respondents [9.09%] answered **2D animation, Motion graphic**
- 1 respondent [4.55%] answered **2D animation, 3D animation, Stop-motion animation**
- 1 respondent [4.55%] answered **Stop-motion animation**
- 1 respondent [4.55%] answered **Other**
- 1 respondent [4.55%] answered **2D animation, 3D animation, Motion**

graphic, Animated typography, Stop-motion animation, Whiteboard/ infographic animation, Immersive animation

- 1 respondent [4.55%] answered **2D animation, 3D animation, Other**
- 1 respondent [4.55%] answered **2D animation, 3D animation, Immersive animation**

Q14. What type(s) of content does the studio produce?

22 respondents answered
6 respondents skipped

- 4 respondents [18.18%] answered **Feature Film Animation, TV Series Animation, Commercial Animation, Short Film Animation**
- 3 respondents [13.64%] answered **TV Series Animation, Short Film Animation**
- 3 respondents [13.64%] answered **Feature Film Animation, TV Series Animation**
- 3 respondents [13.64%] answered **Feature Film Animation, TV Series Animation, Short Film Animation**
- 2 respondents [9.09%] answered **TV Series Animation, Commercial Animation, Short Film Animation**
- 1 respondent [4.55%] answered **TV Series Animation, Commercial Animation**
- 1 respondent [4.55%] answered **Short Film Animation**
- 1 respondent [4.55%] answered **Other**
- 1 respondent [4.55%] answered **TV Series Animation**
- 1 respondent [4.55%] answered **Commercial Animation, Short Film Animation**
- 1 respondent [4.55%] answered **Feature Film Animation, TV Series Animation, Game Animation, Short Film Animation**
- 1 respondent [4.55%] answered **Feature Film Animation, TV Series Animation, Commercial Animation**

Q15. What type of audience does your studio usually cater to?

22 respondents answered
6 respondents skipped

- 9 respondents [40.91%] answered **All ages**
- 5 respondents [22.73%] answered **Family, Pre-School, Children**
- 1 respondent [4.55%] answered **Family, Pre-School**
- 1 respondent [4.55%] answered **Pre-School, Children, Young Adults, Festival circuit / art house**
- 1 respondent [4.55%] answered **All ages, Festival circuit / art house**
- 1 respondent [4.55%] answered **All ages, Family, Pre-School, Children, Teens, Festival circuit / art house**
- 1 respondent [4.55%] answered **Family, Young Adults, Adult, Festival circuit / art house**
- 1 respondent [4.55%] answered **Family, Children, Teens**
- 1 respondent [4.55%] answered **Family, Pre-School, Children, Teens, Young Adults, Adult**
- 1 respondent [4.55%] answered **Family, Pre-School, Children, Young Adults**

Q16. Do you monitor the number of overtime hours a day your staff are working?

Of the 21 respondents, **48%** reported that they **do** monitor daily overtime, **33%** said they **do not**, and **19%** selected **Other**.
Among "Other," most indicated that overtime is not tracked daily but monitored informally during busy periods. Some offer time in lieu or flexible start times; a few noted overtime is rare or discouraged, with one stating that only company owners work overtime.

Q17. In your opinion, is burnout a concern for staff working in supervisory/senior-level roles at your company? – Other

Of the **22** respondents, **41%** reported **burnout is not a concern**, **36%** said **it is a concern**, and **23%** selected **Other**.
"Other" responses described proactive limits on overtime; that burnout can be more of a concern for owners than contracted staff; and that while inherent in creative fields, culture and processes help manage it.

Q18. How satisfied are you with the workplace culture at your company?

21 respondents answered
7 respondents skipped

- 12 respondents [57.14%] answered **Very satisfied**
- 5 respondents [23.81%] answered **Somewhat dissatisfied**
- 4 respondents [19.05%] answered **Needs improvement**

Q19. Please describe your remote working policy

23 respondents answered
5 respondents skipped

- 6 respondents [26.09%] **Fully remote**
- 4 respondents [17.39%] **Remote with mandatory days on a production-by-production basis**
- 4 respondents [17.39%] **No policy**
- 4 respondents [17.39%] **Ad hoc policy set by production managers/producers/supervisors**
- 3 respondents [13.04%] **Remote with a certain number of mandatory days in office per month**
- 2 respondents [8.7%] **Remote with specified mandatory days in office every week**

Q20. In your opinion, is the company's remote working policy working?

22 respondents answered
6 respondents skipped

Of the 22 respondents, **82%** reported the policy **is working**, **5%** said **it is not**. Among "Other," one noted the policy works but may face challenges during busier periods; another indicated the policy applies to one employee working from a home office.

Q21. What percentage of your freelance contracted workforce is currently working totally remotely (as of July 2025)?

22 respondents answered
6 respondents skipped

- 15 respondents [68.18%] answered **76–100%**
- 6 respondents [27.27%] answered **0–25%**
- 1 respondent [4.55%] answered **51–75%**

Q22. What percentage of your permanent workforce is currently working totally remotely (as of July 2025)?

21 respondents answered
7 respondents skipped

- 9 respondents [42.86%] answered **0–25%**
- 7 respondents [33.33%] answered **76–100%**
- 3 respondents [14.29%] answered **26–50%**
- 2 respondents [9.52%] answered **51–75%**

Q23. What percentage of your freelance contracted workforce is currently working hybrid (as of July 2025)?

20 respondents answered
8 respondents skipped

- 15 respondents [75%] answered **0–25%**
- 3 respondents [15%] answered **76–100%**
- 1 respondent [5%] answered **51–75%**
- 1 respondent [5%] answered **26–50%**

Q24. What percentage of your permanent workforce is currently working hybrid (as of July 2025)?

20 respondents answered
8 respondents skipped

- 9 respondents [45%] answered **0–25%**
- 7 respondents [35%] answered **76–100%**
- 3 respondents [15%] answered **26–50%**
- 1 respondent [5%] answered **51–75%**

Q25. Does your remote working policy offer flexible hours (i.e., can people log in and out as needed while they are remote, as long as the work is completed on time)?

Of the **22** respondents, **59%** reported **yes**, **18%** reported **no**.
Among "Other," some indicated flexibility with conditions (e.g., notifying a supervisor, working within a set range of hours).

Q26. Does your company provide equipment or other support for remote employees?

Of the **23** respondents, **65%** reported **yes**, **17% no**, and **17% Other**.
"Other" indicated case-by-case support; in some instances workstations are supplied; sometimes no equipment but software access is offered.

Q27. Does your company monitor the productivity of remote employees?

Of the **23** respondents, **52%** reported **yes**, **17% no**, **30% Other**. "Other" described informal or outcome-focused monitoring (e.g., targets, progress visibility, timely delivery, communication emphasis).

Q28. Does your company plan to change its remote working policy in the future?

Of the **23** respondents, **52%** reported **no**, **26% yes**, **22% Other**. "Other" indicated changes may depend on productions or clients; policies reviewed case by case; plans to tweak/improve over time.

Q29. If you answered yes to the above question, please explain

7 respondents answered
21 respondents skipped

- We are fully remote while not in production (in development). If/when we go into full production we would likely set up a small office and adopt a hybrid policy. [14.29%]
- Switching this year to a hot-desking approach; studio option for one production led by new entrants who prefer a studio space; housing crisis affects home workspaces. [14.29%]
- Need to move towards a more **hybrid** model. [14.29%]
- Monitor on a production-by-production basis to suit the production. [14.29%]
- Likely to return to an office and offer a hybrid working model in 2026; approach to remote working remains the same. [14.29%]
- Re-establishing a central hub. [14.29%]
- Under continuous review. [14.29%]

Q30. Please list some of the tools you have found effective for the creative process during remote working (select all that apply)

Of the **23** respondents, most commonly used tools included:

- **Email** – mentioned by 17 respondents (~74%)
- **Google Workspace** – 13 (~57%)
- **Microsoft 365 for Business** – 6 (~26%)
- **Slack** – 7 (~30%)
- **Discord** – 3 (~13%)

Other tools reported (each by ~14% of "Other" respondents): **Skype/Teams, SyncSketch, Kitsu, Milanote, Frame.io, Zoom, pCloud,** and **Shotgun**.

Note: Percentages exceed 100% as respondents could select multiple tools.

Q31. Do you agree with the following statement: Job stability is by far the greatest concern for people working in the animation sector in 2025.

Of the **23** respondents, **74%** agreed, **4%** disagreed, and **22%** provided additional context.

Q31 Quotes

- "Housing stability and freedom to choose where to live and work… stable accommodation."
- "As the animation workforce is largely transient… the downturn in commissioning… securing work is the greater concern."
- "It ranges drastically between different people."
- "There is no job stability in animation. The concern is the ability to pivot to new forms of financing and production."
- "I think it's one of three top great concerns: housing, rates of pay, job stability."

Q32. Did your studio experience increased or decreased overheads in 2024?

22 respondents answered
6 respondents skipped

- 16 respondents [72.73%] **Increased**
- 3 respondents [13.64%] **Neither**
- 3 respondents [13.64%] **Decreased**

Q33. Has new business been harder to come by in the past twelve months?

22 respondents answered
6 respondents skipped

- 20 respondents [90.91%] **Yes**
- 1 respondent [4.55%] **Neither**
- 1 respondent [4.55%] **No**

Q34. In your opinion, have you had to compromise on the usual creative standard of your work over the past twelve months in order to win contracts?

Of the **22** respondents, **27%** reported **Yes**, **27% No**, and **45%** indicated **No compromise on creative standards, but compromises elsewhere**.
Percentages may not total 100% due to rounding.

Q35. What percentage of your work is on IP that is 100% owned outside of Ireland?

23 respondents answered
5 respondents skipped

- 9 respondents [39.13%] **0–25%**
- 5 respondents [21.74%] **26–50%**
- 4 respondents [17.39%] **51–75%**
- 4 respondents [17.39%] **76–100%**
- 1 respondent [4.35%] **Unsure**

Q36. What percentage of your work is on IP of which you have all or part ownership?

Of the **22** respondents, the largest group (**36%**) reported **76–100%**; **27%** reported **51–75%**; **14%** reported **26–50%**; **18%** reported **0–25%**.
One "Other" response noted it depends on the year, but the company primarily seeks to retain ownership or shared ownership.

Q37. Has your studio adopted or tested new software in the past twelve months?

Of the **23** respondents, **74%** reported **Yes**, **26% No**.
Tools mentioned: **Blender (incl. Grease Pencil), Unreal Engine, Frame.io, Toon Boom Harmony, Adobe Creative Suite, Substance Painter, Figma, Pixar's Renderman**, and various AI/game-engine tools.

Q38. Does your staff use Generative AI (that you know of)?

Of the **23** respondents, **48%** reported staff use Generative AI as a productivity tool (not in the creative process); **35%** said **No**; **13%** selected **Other**.
"Other" included: not allowed due to privacy/emissions/copyright concerns; rare use for small tasks; AI integrated into productivity tools but not used to replace staff.

Q39. Does your company have a policy statement in place for the use of Generative AI in content production?

Of the 23 respondents, 52% reported No, 30% Yes, 17% Other.
"Other" included policies in development or evolving (e.g., coding policy only; currently being developed; adapting as technology changes).

Q40. Do you believe more training and support is needed for the sector with regards to Generative AI?

22 respondents answered
6 respondents skipped

- 18 respondents [81.82%] Yes
- 3 respondents [13.64%] Other
- 1 respondent [4.55%] No

Q40 – Other
2 respondents answered | 26 respondents skipped

- Yes. Producers need awareness of "hidden" risks around data privacy, etc. [50%]
- AI often gets ~1 in 5 queries wrong; prone to mistakes; still powerful for building tools. [50%]

Q41. Do you believe more training and support is needed for the sector with regards to copyright and IP?

Of the 22 respondents, 82% Yes, 9% No, 9% Other.
"Other" highlighted: need for training regarding AI use; and that while legalities are straightforward, more funding/support for resources would help.

Q42. Do you work with schools and youth/community groups in your locality?

Of the **23** respondents, **48% Yes**, **52% No.**
Activities included workshops (e.g., stop motion), focus groups, career pathway support, tours, work experience, collaborations with drama schools/colleges, talks, exhibitions, and masterclasses.

Q43. How many new staff did you employ in the past twelve months?

22 respondents answered
6 respondents skipped

- 7 respondents [31.82%] **1-5**
- 7 respondents [31.82%] **0**
- 6 respondents [27.27%] **20**
- 2 respondents [9.09%] **6-10**

Q44. Please indicate the numbers that make up the new staff hired in the past twelve months (if applicable)

Recent Graduates / Junior Roles

- Of **11** respondents, **73%** recruited from **Ireland**, **27%** from **abroad**.
- Reported hires ranged **1–25** per company; some hired several graduates at once.

Experienced Staff / Senior Roles

- Of **12** respondents, **83%** recruited from **Ireland**, **17%** from **abroad**.
- Numbers ranged **2–36** per company (short-term and permanent roles).

Q45. Did you find it easier or harder to recruit entry-level staff in the past 12 months?

20 respondents answered
8 respondents skipped

- 13 respondents [65%] Neither
- 6 respondents [30%] Easier
- 1 respondent [5%] Harder

Q46. Is it easier to recruit within Ireland or to recruit from abroad?

22 respondents answered
6 respondents skipped

- 11 respondents [50%] Neither
- 6 respondents [27.27%] Within Ireland
- 5 respondents [22.73%] From abroad

Q47. Did you find it easier or harder to recruit experienced staff in the past 12 months?

22 respondents answered
6 respondents skipped

- 12 respondents [54.55%] Neither
- 5 respondents [22.73%] Harder
- 5 respondents [22.73%] Easier

Q48. Was it easier or harder to retain experienced staff in the past 12 months?

22 respondents answered
6 respondents skipped

- 14 respondents [63.64%] Neither
- 7 respondents [31.82%] Harder
- 1 respondent [4.55%] Easier

Q49. How does your company manage recruitment practices? (Broadly – we understand it's case by case sometimes)

23 respondents answered
5 respondents skipped

- Internal recruiter/HR team – 48%
- Free online platforms – 48%
- Word of mouth – 43%
- Paid-for online platforms (e.g., LinkedIn Pro) – 17%
- Supervisors of the new role managing recruitment – 17%

Other practices included social media advertising, applications reviewed by the Head of Studio and HR, and at least two interview rounds (100% of "Other").

Note: Percentages exceed 100% as respondents could select multiple methods.

Q50. Do you offer internships?

23 respondents answered
5 respondents skipped

- 12 respondents [52.17%] Yes, paid
- 8 respondents [34.78%] No
- 3 respondents [13.04%] Yes, unpaid

Q51. If yes to previous question, how are these resourced?

16 respondents answered
12 respondents skipped

- 8 respondents [50%] Both
- 6 respondents [37.5%] Internally
- 2 respondents [12.5%] External funding source

Q52. Do you offer traineeships?

22 respondents answered
6 respondents skipped

- 13 respondents [59.09%] Yes, paid
- 7 respondents [31.82%] Neither
- 2 respondents [9.09%] Yes, unpaid

Q53. If yes to previous question, how are these resourced?

15 respondents answered
13 respondents skipped

- 8 respondents [53.33%] Both
- 4 respondents [26.67%] Internally
- 3 respondents [20%] External funding source

Q54. Do you experience a high level of applications for jobs?

23 respondents answered
5 respondents skipped

- 18 respondents [78.26%] **Yes**
- 4 respondents [17.39%] **No**
- 1 respondent [4.35%] **Other**

Q54 – Other
1 respondent answered | 27 respondents skipped

- We receive a high level of applications, but they are often ineligible. [100%]

Q55. From which level do you receive the greatest volume of applications?

21 respondents answered
7 respondents skipped

Of the 21 respondents, **71%** reported **entry-level**, **29% mid-career**.

Q56.

Of the **21** respondents, **57%** reported **no struggle**, **43%** reported **struggling**. Among those who struggle, reasons included:

- Difficulty retaining staff from series to series
- Seniors busy/unavailable due to schedules
- Reliance on international applicants facing relocation
- Challenges vary by department
- Short-term contracts lead senior/mid-career staff to seek stability
- Recruitment/retention affected by financing difficulties
- Salary expectations and relocation requirements (e.g., Kilkenny/Ireland)

Q57. Do you consider your company to be an inclusive place to work?

22 respondents answered
6 respondents skipped

All **22** respondents (100%) reported **Yes**.

Q58. Does your company have a formal, written GEDI policy?

22 respondents answered
6 respondents skipped

Of the 22 respondents, **77% Yes**, **18% No**, **5% Other**.

Q58 Quote
"There's no bias here. We just judge people on their showreels."

Q59. Does your company have a designated individual or team responsible for GEDI initiatives?

Of the **22** respondents, **41% Yes**, **50% No**, **9% Other**.

Q59 Quote
"We adopt a fully inclusive approach, not specifically GEDI."

Q60. Does your company have a budget allocated for GEDI initiatives?

Of the **22** respondents, **9% Yes**, **73% No**, **18% Other**.
Other responses included: case-by-case budgeting; included within HR/ hiring budgets; part of full crew engagement budget.

Q61. Has your company provided staff with dedicated training in the workplace around (check all that apply)?

22 respondents answered
6 respondents skipped

- 6 respondents [27.27%] Cultural differences and sensitivities; Accessibility; Inclusivity; Unconscious bias
- 5 respondents [22.73%] No training has been provided
- 3 respondents [13.64%] Training provided, but only for management
- Remaining responses (each 4.55%): various combinations, incl. Unsure and mixed sets across Cultural differences, Accessibility, Inclusivity, Unconscious bias, and Management-only training.

Q62. In broad terms, do you find the current training and workshops around GEDI offered by Screen Ireland/CCIS to be relevant to your company?

22 respondents answered
6 respondents skipped

- 10 respondents [45.45%] Yes
- 9 respondents [40.91%] Sometimes
- 3 respondents [13.64%] No

Q63. Have any GEDI training initiatives that your company has undertaken led to noticeable change in habits and behaviour of your employees?

Of the 20 respondents, 45% Yes, 25% No, 30% Other.
Reported changes included: integrating GEDI into practice; increased awareness; improved recruitment; refocusing on specific issues; making unconscious biases conscious; mandatory training completion; better understanding of minority experiences; greater attention to cultural sensitivity, language, and inclusivity.

"Other" included: small teams preventing formal initiatives; no discernible difference as the workplace was already inclusive, though more formal policy structures established.

Q64. How would your company rate the overall effectiveness of its GEDI strategies (if they exist)?

19 respondents answered
9 respondents skipped

- 8 respondents [42.11%] Effective
- 5 respondents [26.32%] Moderately effective
- 4 respondents [21.05%] No strategy in place
- 2 respondents [10.53%] Very effective

Q65. Does your company measure the impact of its GEDI initiatives?

- **Yes:** 14.29%
- **No:** 57.14%
- **Other:** 28.57%

  Other responses included: not running initiatives due to small company size; measuring gender diversity; meeting broadcaster criteria; tracking certain metrics with follow-up actions.

Q66. Does your company have specific policies to support parents or caregivers?

- **Yes:** 16 respondents
- Paternity leave, parental leave, flexible working arrangements (43.75%)
- Full maternity backfill + paternity/parental leave + flexible working (31.25%)
- Flexible working only (18.75%)
- Full maternity backfill + paternity/parental leave (6.25%)
- **Unsure:** 3 respondents (all noted full maternity backfill)
- **No:** 7 respondents reported a mix of maternity backfill, flexible working, and leave provisions.

Q67. Does your company have specific policies or accommodations to support neurodivergent employees?

- **Yes:** 15 respondents – accommodations included equipment, flexible working, quiet spaces, fidget toys, communication guidelines, and adjusted interviews.
- **Unsure:** 3 respondents – partial accommodations.
- **No:** 9 respondents – varying accommodations were still noted despite "No."

Q68. Does your company have specific policies or accommodations to support employees with visible or invisible disabilities?

- **Yes:** 16 respondents – mainly flexible working, equipment, and recruitment accommodations.
- **Unsure:** 2 respondents – partial accommodations.
- **No:** 6 respondents – some still noted accommodations.

Q69. Gender identity representation across the employee base

Respondents were asked to estimate the approximate gender identity composition of their overall employee base.

- Across studios, the proportion of employees identifying as women ranged from approximately 33% to 100%, with most responses clustering between 40% and 55%.
- The proportion identifying as men ranged from 25% to 70%, most commonly falling between 40% and 50%.
- Representation of non-binary and other gender identities was consistently low, ranging from 0% to 10%, with nearly half of respondents reporting no non-binary or other gender-diverse employees.

Taken together, these findings indicate substantial variation in overall gender composition across studios, alongside a broadly similar pattern in which women and men are present in comparable proportions, while non-binary representation remains minimal.

The data shows that most studios report a broadly balanced workforce, with women representing roughly 40–55% of employees and men 40–50%. These survey estimates are consistent with the overall gender balance figure of 48% female / 49% male reported in aggregate studio headcounts versus self-estimated percentages.

Q70. Distribution of women across seniority levels

Respondents were also asked to estimate how employees who identify as women were distributed across organisational roles. This question focused on the internal distribution of women within each studio—that is, the proportion of women who were employed at entry-, mid-, or senior-level positions—rather than the gender composition of each role overall.

- Reported distributions varied widely across studios. The proportion of women at entry level ranged from 2% to 70%; at mid level from 0% to 100%; and at senior level from 20% to 80%.
- While some studios reported relatively balanced distributions of women across career stages, others showed strong concentration of women within a single tier, reflecting uneven progression pathways and, in some cases, small team sizes.
- Notably, 38% of respondents preferred not to estimate the distribution of women across roles, suggesting either limited access to detailed workforce data or uncertainty in assessing internal role breakdowns.

[Please note for clarity: The 0–100% ranges for women at junior, mid and senior level tiers reflect studio-level variation rather than inconsistencies in the data. In some studios, there were no women employed at mid-level, while in others all women employees were concentrated in that tier. Similarly, entry and senior level distributions show a broad range due to differences in team size, organisational structure, and survey reporting choices.]

Q71. What is the approximate ethnic or racial background representation across your employee base?

- White: 58–100%
- Black/Black Irish: 0–8%
- Asian/Asian Irish: 0–25%
- Mixed/Multiple ethnic groups: 0–20%
- Other ethnic groups: 0–40%

Q72. To the best of your knowledge, what is the approximate representation of employees with visible or invisible disabilities?

- Prefer not to estimate: 65%
- Approximate percentages reported: 5–90%

Q73. Have any of the above groups requested special accommodations?

- No: 60%
- Yes: 15%
- Other: 25% (e.g., flexi-time offered proactively; no information requested)

Q74. Does your company have specific strategies for upskilling and/or recruiting diverse talent?

- Yes: 30% – strategies included supporting junior/diverse talent, targeted upskilling, original storytelling opportunities, and marketing courses to diverse groups
- No: 50%
- Other: 20% – creating a safe space through leadership diversity

Q75. Does your company offer adjustments to the recruitment process for neurodivergent candidates or candidates with disabilities?

- Yes: 63.16%
- No: 5.26%
- Other: 31.58% – mostly "hasn't come up yet" or informal word-of-mouth recruitment

Q76. Are you aware of, or have you learned from, any GEDI initiatives undertaken by other like-sized animation companies?

- **Yes:** 30%
- **No:** 55%
- **Other:** 15%

Q77-Q79. Please respond to the following statement: I have found S481 requirements for GEDI, such as training through online videos, to be informative/relevant/actionable

- **Informative:** 55% Yes, 30% Other, 15% No
- **Relevant:** 50% Yes, 35% Other, 15% No
- **Actionable:** 36.84% Yes, 42.11% Other, 21.05% No
  Common "Other" responses: haven't completed the training; UK-based company; videos a good start but could go further.

Q80. Have the S481 requirements for GEDI had an impact on how the relevant production is run?

- **Yes:** 31.58%
- **No:** 36.84%
- **Other:** 31.58% – includes companies that haven't run full productions yet, already adopt inclusive practices, or are UK-based.

Q81. Readiness for new GEDI obligations tied to funding

- **Yes:** 52.63%
- **Other:** 47.37% – cautious about implementation/bureaucracy; client-driven content; company size. Generally supportive if obligations are realistic and practical.

Q82. Do you work with any of the following organisations? (Tick all that apply)

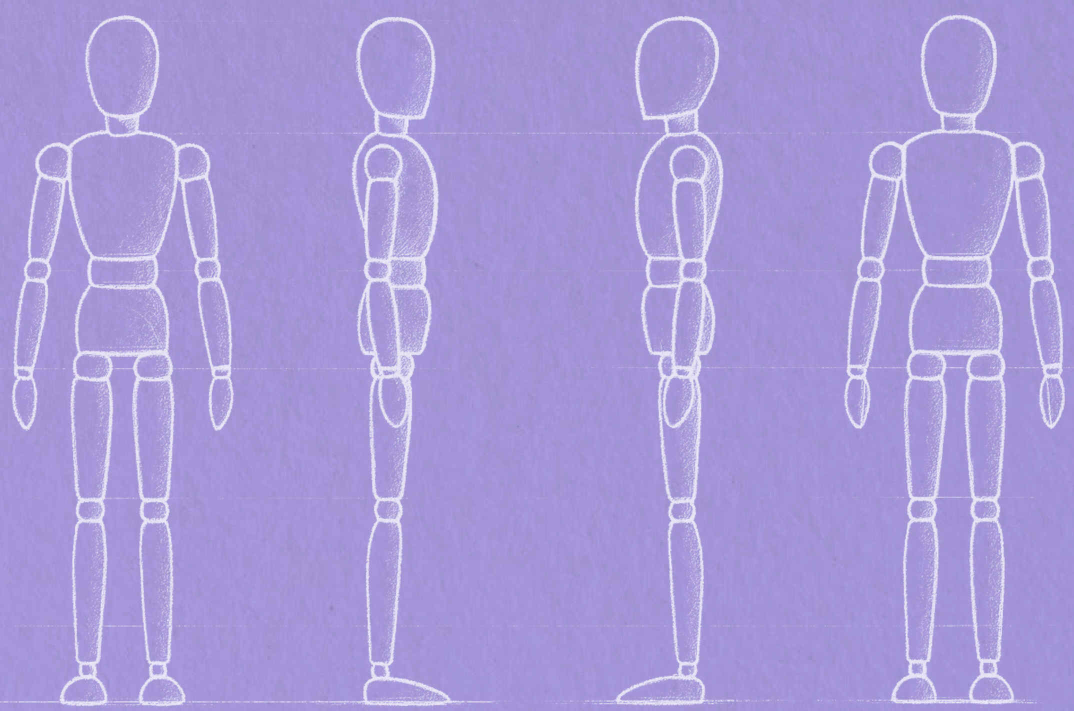
Directly named organisations

- **Safe to Create:** 6 respondents (54.55%)
- **GORM:** 2 respondents (18.18%)
- **Minding Creative Minds:** 4 respondents (36.36%)

Other organisations mentioned

- Employability
- Ability Focus
- Strawberry Words

Notes: Some respondents work with multiple organisations simultaneously (e.g., Safe to Create + Minding Creative Minds, or Minding Creative Minds + GORM).



Conclusions

- Results from the survey indicate that the Irish animation sector is mature, agile and future-facing in the way it works, and diverse in the content it produces.
- The authors have found the sector to be keenly self-aware, cognisant of global trends, and collegial in its general attitude, although there is scope for more peer-to-peer learning.
- The business environment remains challenging and the costs of operating are rising. External economic factors such as the domestic housing crisis, and the global downturn in commissioning of content, is impacting the buoyancy of the sector here. Job stability remains a key concern.
- The sector's engagement with the acceleration of generative Artificial Intelligence (AI) is bifurcated: almost half of the sector is using it as a productivity and time-saving device, and almost half is not using it at all. Half of the sector has a policy in place for the use of AI, and half does not. Nearly everyone would like to have a better understanding of AI and more training in this area.
- IP ownership is also an area of divergence for the sector - some studios are working on projects that are majority owned overseas, and some are working on projects they own themselves. 82% would like more training and support for issues related to copyright and IP.

- People across the sector seem strongly committed to the principles of GEDI, but there does appear to be a gap between this goodwill and supportive sentiment, and the formal structures, budgets, and measurement needed to fully implement and track initiatives.
- Whilst many studios did not answer questions about age demographics, from those that did answer, only 17% of staff were over 45. This is an extremely young workforce, and the reasons for that need interrogation.
- All studios believe they are inclusive places to work, but some practices that are exclusionary by nature (such as word of mouth as a key means of recruitment) persist.
- More research is needed in key areas such as international development, business development, and distribution, as well as on the use of audience data, and new funding models.
- The results of this survey need a full analysis for specific recommendations to be made.

November 2025

APPENDIX

Notes on Stakeholders

About CCIS

Cultural & Creative Industries Skillnet (CCIS) was established in January 2023 as a consolidation and expansion of three existing and established Skillnet Business 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. CCIS designs, develops and delivers responsive, bespoke, flexible and subsidised programmes for industry professionals with defined career paths in mind, which address substantiated sectoral needs. https://www.creativeskillnet.ie/

About Animation Ireland

Animation Ireland is the representative body for the animation industry on the island of Ireland, encompassing forty-seven leading studios that employ over 2,500 full-time professionals. Our members are at the forefront of global animation, producing award-winning content that reaches diverse audiences in over 180 countries. From animated films and television series to innovative digital content, our studios are recognised as world leaders, creating high-value employment and driving significant investment across all regions of Ireland.

Animation Ireland represents the excellence of Ireland's animation content creation and production to both national and international audiences. We position animation as an essential component of Ireland's creative and screen industries, providing a cohesive voice for our studios and advocating for government, policy makers, and stakeholders to support the continued development of a world-class animation industry.

We build strong partnerships to drive innovation, address shared industry challenges, and enhance the competency of our sector through targeted programmes and initiatives in collaboration with education and training partners. By providing vital information and support to our member studios, we enable them to thrive in the competitive global marketplace.

Animation Ireland is proud to manage:

- The National Talent Academy for Animation
- The Animation, Innovation & Immersive Storytelling Development Fund
- The Irish Animation Awards
- Animation Ireland Meitheal

About Coimisiún na Meán

Coimisiún na Meán is Ireland's agency for developing and regulating a thriving, diverse, creative, safe and trusted media landscape.

As the independent media regulator, they are responsible for regulating broadcasters, video-on-demand providers and online platforms established in Ireland. Their wide-reaching remit also includes supporting and developing the Irish media sector.

About the The National Talent Academy for Animation

The National Talent Academies network is an initiative of Fís Éireann/ Screen Ireland.

It includes the National Talent Academy for Film and Television led by Ardán, the National Talent Academy for Animation led by Animation Ireland, the National Talent Academy for VFX led by Cultural & Creative Industries Skillnet and three regional Crew Academies currently managed by the Atlantic Academy (Danú Media) in Galway, Film in Limerick in Limerick and Clermont Enterprise Hub in Wicklow. The network has been established to develop a highly skilled, diverse talent and crew base throughout the country, offering a wide range of activities for the Irish screen industry, including courses, programmes and career opportunities.

The National Talent Academy for Animation provides support and opportunities for new and existing talent through a range of courses and programmes nationwide, creating pathways for career progression to ensure that Ireland consolidates its position as one of the best places in the world to produce animated content.

Notes on Authors

Dr. Mary Jane Boland

MJ is a screen-sector research and policy consultant, and project manager. She currently acts as the Head of Research at Atticus Education, and also works as an advisor to Lord David Puttnam (the Chair of Atticus Education). MJ leads all Atticus Education's collaborative skills programmes with Screen Ireland, NI Screen, and the National Film and Television School (UK), and manages content design for Atticus Education seminars, including identifying key industry trends and statistics, tracking changes in audience habits, and being up to date with all developments in new screen technologies. She has worked with Lord Puttnam on various interventions he has made to legislative debates in the House of Lords on the creative industries, education, and the BBC, and has led several evidentiary submissions to parliament on his behalf, most recently for the UK parliament's Inquiry into British Film and HETV. As well as working for Lord Puttnam, MJ is the Project Manager on Creative Calling - Careers for the Curious, a new initiative piloted by Creative Ireland and supported by Screen Ireland, the Arts Council, Coimisiún na Meán, and managed by Cultural and Creative Industries Skillnet. She will deliver a strategic report on the future direction of next generation initiatives across Ireland's creative sector in late 2025. She also occasionally does screen-sector consultancy work for Olsberg SPI. Before her time with Lord Puttnam, MJ worked across academia and the visual arts sector, having been awarded a PhD in 2013 from the University of Nottingham for her work on the visualization of national identity in pre-Famine Ireland. She has published various academic essays based on her doctoral work. She is a Future Leader member of the British Screen Forum, a member of IFTA, and lives in Dublin.

Dr. Ciara Chambers

Ciara Chambers is Senior Lecturer in Film & Screen Media in University College Cork, President of the International Association for Media & History and a board member of Northern Ireland Screen. She was co-PI on the Make Film History project in partnership with BBC, Northern Ireland Screen, British Film Institute, Irish Film Institute with academic partners UCC and Kingston University. Designed to open up the archives to emerging filmmakers, the project team has produced in two educational resources: a Guide to the Creative Reuse of Archive Film and an e-learning module for educators and filmmakers. Ciara has worked as an advisor to Atticus Education since 2020 and is the UCC anchor on the Screen Ireland-funded Screen Careers for Transition-Year Students. Ciara has worked as a consultant to Reuters/Screenocean and Adam Matthew Digital and has published widely on Irish film history, archives and digitisation. She was scriptwriter and associate producer of *Éire na Nuachtscannán* a six-part BAI-funded television series broadcast on TG4 and producer of the historical play *Souls, Shadows and Secrets*.

Acknowledgements

The authors would like to thank all of the members of Ireland's animation community who enthusiastically engaged with this report, and for their encouragement in what we hoped to achieve with our research. We would also like to thank each and every respondent of the survey for the time they generously gave to provide comprehensive answers to each question. We would especially like to thank Dr. Rachel Gough for her analysis of the survey results and advice on the distillation of data. We would like to thank Dan O'Connell for his patience and artistry in graphic design. Finally, we would like to thank the GEDI committee at the NTAA, Delphine Coudray and all the team at Animation Ireland, and Sean Smith and the team at CCIS, for their ongoing support of this project.

ENDNOTES

1 Traineeships are usually longer, more specific/targeted, and more formalised in structure than internships.

2 The last large-scale mapping of the animation industry in Europe was published by the Council of Europe and the European Audiovisual Observatory (EAO) in 2015: Mapping the Animation Industry in Europe. However, the EAO does release frequent reports on audience engagement with animation, such as a recent report on the performance of animated films at the European box office: Theatrical animation films - Insights into market dynamics 2017 - 2024.

3 Mapping the presence of animation activity across the UK economy: Stage Two report

4 *Irish Animation is thriving thanks to diverse storytelling and new tech*, *Variety*, June 9 2023

5 https://www.screenireland.ie/filming/section-481

6 Screen Ireland / Alma Economics, ***Economic and Skills Analysis if the Audiovisual Sector in the Republic of Ireland***, January 2025, pg 10

7 These figures represent the average from 2021 - 2023. It should be noted that the numbers presented in the Alma report are most likely an underestimation, as smaller productions, like animation shorts, are not eligible for Section 481, and therefore not measurable in the same way. Additionally, broadcaster data is not detailed enough to separate them out, so some of animation's economic impact falls within unscripted or other television in this report. Screen Ireland / Alma Economics, 2025, pgs 25 - 26.

8 https://www.nationaltalentacademies.ie/animation

9 www.nationaltalentacademies.ie/courses-activities-programmes/the-first-credit-short-film-scheme-animation

10 https://www.screenireland.ie/courses/animation-vfx-games-graduate-traineeship-2025

11 https://www.screenireland.ie/skills/competency-framework-animation

12 https://careersportal.ie/courses/coursefinder?txt=animation+

13 https://www.ifco.ie/Website/IFCO/IFCOWebV2.nsf/IFCO-Annual-Report-2024.pdf?openfileResource pg 12.

14 Theatrical animation films - Insights into market dynamics 2017 - 2024.

15 How Trump, Covid and technology have fuelled the Asian animation boom, Screen Daily, 22 September 2025

16 Netflix's Most-Viewed Movie of All Time Is a Cartoon Musical, Bloomberg, 26 August 2025

17 Scottish animation studio Axis collapses with 160 job lost; Aardman Cuts 20 jobs; Pixar Cutting

Nearly 200 Jobs; DreamWorks Animation Hit With Layoffs, Cuts 4% of its Staff
18 Sky Announcement Marks Another Blow to UK Children's Content Creation; New inquiry: MPs to investigate children's TV and video content
19 Media Nations, UK 2025, Ofcom, 30 July 2025. Pg 41
20 *IBC 2025: Universal SI 'features' obscured the gems*, Enders Analysis, 30 September 2025
21 Theatrical animation films - Insights into market dynamics 2017 - 2024.