

Accel- erate Anima- TION

animation art and craft: responding to the creative animation
sector's practice and professional development needs

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Animate Projects has developed the Accelerate Animation programme in partnership with London College of Communication, University of the Arts London and with support from Jerwood Charitable Foundation.

Animate Projects is supported by ais London and The Foyle Foundation.

“The recession has catalysed a lot of changes. It’s brought a need for a **different type of creativity**. It isn’t possible to use the hammer blow of cash to shock and awe audiences and we’ve been looking for **other ways to engage** with people. There’s a new sense of **collaboration** and that’s **changed how we’re working**. We’re doing projects that aren’t quite square pegs – **everything now** is a little bit of **an odd shape** and needs quite a considerable amount of negotiation – and **creative negotiation** – to decide what it’s going to be.”

Chris O’Reilly, founder and co-director, Nexus Productions

Executive Summary

1

The Accelerate report attempts to map the changing landscape of contemporary creative animation and its practitioners, who are engaged in extraordinarily diverse activities, across and between the arts and the creative media industries. The findings will help inform the creation of Animate's new professional development programme, Accelerate Animation, for independent, creative animators working across a broad range of cultural and commercial practice.

2

In beginning to identify what is required to help develop and maximise the sector's potential, the report provides evidence of the breadth of work that animators are undertaking across the creative industries and the new ways in which animators collaborate and work outside traditional models. It confirms that this distinctive and diverse sector exists.

3

The report includes the findings of a survey that asked animators about their practice and their development needs and profiles based on interviews with 22 animators and producers that evidence the wide range of different organisation – studios, collectives, partnerships, and individuals - that comprise the sector.

4

Our findings highlight a complex sector with a highly skilled workforce of animators that is making a substantial contribution - with public and economic value - to the creative industries and culture of the UK, but which, in the absence of public policy, strategy and investment, finds itself isolated and struggling to sustain or develop.

5

Traditional models of production, practice and career have changed, with animators working for new platforms, in different commercial and artistic contexts, in studios, as freelancers, and in partnerships and collectives.

6

It is a skilled workforce, but post-graduation support for practice and professional development can be hard to locate and what support does exist is often general rather than focused on the particular or specialist needs. By far the most substantial barrier to enable people to develop independent, creative projects is a lack of funding for independent work. Animators are enjoying creative, commercial and critical success through a very broad range of activities, across commercial and cultural projects, in the UK and internationally, but without institutional recognition and support this is proving unsustainable.

7

Animators are locally networked, but the sector lacks a national framework and voice.

8

The Accelerate report identifies three related areas as immediate priorities:

- **Knowledge and network**
finding ways to enable the sector to consolidate, harness, develop, strengthen and extend existing networks; forging links between communities, organisations, higher education, exhibitors, and with audiences.

- **Developing skills and talent**
initiatives that enable established and experienced parts of the sector to more readily share experience; opportunities for people to develop their creative and business skills, particularly through independent projects; learning from the approaches taken in other sectors.
- **Advocacy**
a voice for the sector that can promote greater understanding about its work, its public, cultural and economic value; to lobby for recognition of independent, creative animation, in public policy, strategy and investment; to more effectively engage audiences with the work of animators through public events and online platforms.
- **Delivery**
"The dots need to be joined. Until they are, independent, thriving animation has no hope in the UK". Survey response

We need to work collaboratively and in partnership to deliver these objectives, and Animate Projects has secured funding from Arts Council England's Grants for the arts programme for some initial networking, knowledge sharing and lab activities through spring 2014.

We will work in partnership with existing networks and harness the experience and expertise of Animation Alliance UK members. And we will continue to seek dialogue with public bodies with a remit for support of creative media practice production, skills development and training, most particularly Arts Council England, BFI, Creative England, Creative Skillset and Cultural & Creative Skills.

‘ Animators are LOCALLY NETWORKED, BUT THE SECTOR LACKS A NATIONAL FRAMEWORK AND VOICE. ’

‘ THE REPORT INCLUDES THE FINDINGS OF A SURVEY THAT ASKED ANIMATORS ABOUT THEIR PRACTICE AND THEIR DEVELOPMENT NEEDS AND PROFILES BASED ON INTERVIEWS WITH 22 animators AND PRODUCERS. ’

‘ IT IS A SKILLED WORKFORCE, BUT POST-GRADUATION SUPPORT FOR PRACTICE AND PROFESSIONAL DEVELOPMENT can BE HARD TO LOCATE. ’

1 Introduction

The Accelerate report attempts to map the changing landscape of contemporary creative animation. There has been very little research on animation as a creative business practice and with this report we have gathered evidence of the work people are doing, how that is organised, the kinds of portfolio careers people are making for themselves, and the contribution animators make to the creative UK's creative industries, culture, and economy.

The research is intended to inform the creation of a new professional development programme, Accelerate Animation, for independent, creative animators working across a broad range of cultural and commercial practice. The Accelerate initiative aims to address the gaps in professional and practice development support for creative animators and the urgent needs that have arisen from changing models of production, practice, and career.

The Accelerate Animation programme - in partnership with higher education and other agencies, and working closely with the sector itself - will help equip animators, artists, creative producers and businesses to succeed in this fast changing context, and to maximise their creative and economic potential and impact.

The Accelerate Animation programme aims to:

- Assist early career and established animators to develop their creative and business skills
- Facilitate a bridge between higher education and professional practice
- Offer access to crucial peer and professional networks
- Provide development support beyond the basics of industry practice
- Provide opportunities for training and development not readily available to freelance workers such as personal effectiveness and impact, presentation and negotiation skills, understanding markets and audiences.

The report includes the findings of a survey that asked animators about their practice and their development needs. We also had more detailed conversations with 22 animators and producers to profile and evidence the range of different organisations – studios, collectives, partnerships, and individuals - that comprise the sector, and we held a round table discussion, with animators, producers and educators, that explored some of the broader issues that frame the development of animation practice.

We hope that the report will help the sector better understand itself and what it needs to realise its potential. And we hope that it will also inform others about the sector and its value, not least those who develop strategic policies for support of art, film and creative media, so that its needs can be met.

We believe this report makes a powerful case that animation, and its practitioners, makes a substantial and vital contribution to the creative industries, and significantly contribute to the UK's reputation as a centre of creative excellence. There are strong cultural and economic reasons to invest in the sector's development. The public value of independent animation is extensive, intrinsic and instrumental.

There are many reasons why independent animation merits public support and investment, not least that it has a significant cultural value in its own right. And yet animation is surprisingly absent from general policy on arts, film and the creative industries. In part, this is down to the lack of a collective voice: in this instance, our diversity has not been our strength, and makes it difficult for our case to be heard by policymakers.

So, whilst Accelerate Animation will provide and signpost opportunities for training and development, it is also intended to be a space for advocacy and discussion, and we hope that this report will initiate a dialogue between animators and stakeholders.

Gary Thomas

Animate Projects/Animation Alliance UK
November 2013

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2 Creative animation craft

Digital technology and the explosion of screen-based culture mean that we all encounter 'animation' in different forms many times every day.

The contributors to this report – by taking the survey, participating in the round table discussion, or being interviewed for the profiles – are engaged in extraordinarily diverse activities, across and between the arts and the creative media industries. They make music videos, independent films, commercials, apps, games and interactive installations.

This diversity is a fundamental strength, and whilst we're doing quite different things from each other, we understand these respective activities and that there

are connections. As a sector, the challenge is to be able to communicate the value and importance of what we do to others, and in that, the term 'animation' itself can hinder as much as it helps.

"The animation industry' is an easy phrase to use, because we know each other. When we started Nexus in 1997, we were just at the end of the real sense of the cottage industry; it wasn't a proper thing. It was always the same people and it was a very tight little community. It feels to me like that's just completely gone and it's a much more complex area that we all work in."

Chris O'Reilly, founder and co-director,
Nexus Productions

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In our round table discussion we considered what term might best encapsulate the creative practice that we are engaged in: animation that isn't children's television and feature films.

What we do is independent, cultural, innovative, adult, critically engaged; we recognised that we often have to describe what we do differently according to context.

In this report we've used 'creative animation' as a default term – without wanting to suggest that other forms of animation are not 'creative'. What the Accelerate programme aims to support is those engaged in the creative application of animation craft skills.

"That's the thing that is enduring - craft, and that in a sense that's really all that animation is. When we're talking about the animation industry, we're talking about the craft of animation being applied into different areas. And there are areas that it can be applied to that it hasn't been yet. It feels to me that one of the interesting things that Accelerate is able to do, and that Animate's history has always been about as well, is supporting people to develop their animation craft skills at a high end, and to be the leading edge of animation craft skills. Then you don't get into an area of defining whether it's art, or not, or independent, or experimental, or avant-garde or whatever, all those phrases. I think the craft is the intrinsic thing."

**Chris O'Reilly, founder and co-director,
Nexus Productions**

‘IT FEELS TO ME THAT ONE OF THE INTERESTING THINGS THAT ACCELERATE IS ABLE TO DO, AND THAT ANIMATE’S HISTORY HAS ALWAYS BEEN ABOUT AS WELL, IS SUPPORTING PEOPLE TO DEVELOP THEIR ANIMATION CRAFT SKILLS AT A HIGH END, AND TO BE THE LEADING EDGE OF ANIMATION CRAFT SKILLS. THEN YOU DON’T GET INTO AN AREA OF DEFINING WHETHER IT’S ART, OR NOT, OR INDEPENDENT, OR EXPERIMENTAL, OR AVANT-GARDE OR WHATEVER, ALL THOSE PHRASES. I THINK THE CRAFT IS THE INTRINSIC THING.’

3 Methodology

We set out to map the changing landscape of current animation practice:

- To evidence the breadth of work that animators are undertaking across the creative industries
- To profile the new ways in which animators collaborate and work outside of traditional models
- To identify what is required to help develop and maximise the sector's potential.

The development of the Accelerate Animation programme is informed by Animate's more than 20 years experience in working with a wide range of animation talent to make a work for cinema, broadcast, gallery and digital platforms, as well as through our ongoing discussions with artists, animators, educators, programmers and producers.

In 2011, responding to the need for a collective voice for the sector, we established the Animation Alliance UK to act as a network and focus for sharing information and discussion, to advocate for the support of independent animation in the UK, and to lobby for investment in production, training and archive. Members include animators, producers, festival and cinema programmers, researchers, and academics. Animation Alliance UK has responded to consultations by Arts Council England, BFI and DCMS, to ensure that the sector's voice is heard.

In scoping the programme's initial framework and aims, we worked closely with the animation team at London College of Communication. Kath Shackleton (All Animated), worked with us on the research and Amanda King advised on the report's framework.

We undertook an online survey, interviewed 22 animators and producers about their work, and held a round table discussion with producers and academics to address some issues in more depth.

We have also drawn on comments made at *Start Me Up*, a public event at the Apple Store, Regent Street, London, in October 2012, to mark the launch of the Accelerate initiative and an evaluation of *Test Flight*, a pilot writing workshop.

3.1 Survey

The survey was live from 5 February until 8 March 2013, promoted through social media, Animation Alliance UK, and other cultural organisations. Whilst primarily aimed at animators, we were also interested to hear from producers and others with a professional interest in independent animation, so not all questions were relevant to all respondents.

We asked a range of questions about background, professional careers, independent work (self-initiated or commissioned) and about the kind of development support that respondents would find useful for themselves or for new entrants to the industry.

We received 324 responses.



We set out to

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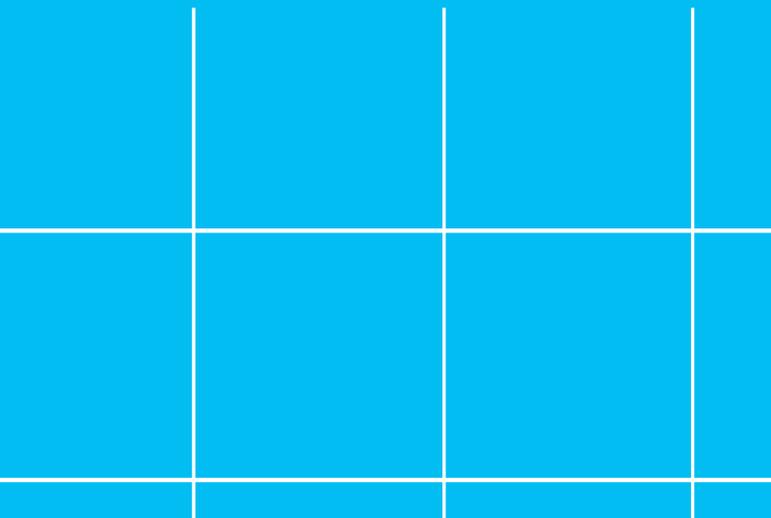
the changing

LANDSCAPE

of current

animation

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3.2 Profiles

We spoke in more depth to 22 animators and producers about their work, experience and perspective. Interviewees were selected to illustrate a variety of business model, with a range of organisational scale and geographical spread.

3.3 Round table

We invited producers and representatives from higher education to take part in a discussion at Animate's London office, courtesy ais London, on 8 March 2013. We wanted an opportunity for a more in depth discussion about the challenges facing the sector, with a particular focus on what the transition between higher education and professional practice.

Abigail Addison, *Animate Projects*

Helen Brunson, *freelance producer*

Yannis Konstantinidis, *NOMINT*

Chris O'Reilly, *Nexus Productions and Nexus Interactive Arts*

Kath Shackleton, *Fettle Animation, All Animated*

Tim Shore, *London College of Communication*

Gary Thomas, *Animate Projects*

Paul Ward, *Arts University Bournemouth*

3.4 Start Me Up

We launched the Accelerate initiative with Start Me Up, a panel discussion during the London International Animation Festival in October 2012, at the Apple Store Regent Street, London. The panel, chaired by *Animate's* **Abigail Addison**, comprised artist **Phoebe Boswell**, producer **Claire Spencer Cook** (*Nexus Interactive Arts*), animator **Joseph Pelling** (*This Is It Collective*), and animator and lecturer **Susi Wilkinson** (*London College of Communication, Central Saint Martins College of Art and Design*).

"I wish I'd known the importance of collaborating, learning, and continued learning. There's an attitude in your mind when you graduate that you've learned and therefore now you work. It took me a while to realise that, and then start to begin trying to learn off more senior directors, or people who had different practices. That was the most important lesson I learned." **Joseph Pelling**

"A lot of very ambitious projects get made in the UK for nothing, basically, because people love what they're doing so much that they're doing it. That work gets noticed, and then the makers get hoovered up by LA." **Claire Spencer Cook**

"There are so many different roles in the industry, that I think the starting point needs to be: what do you want to end up doing? Then, what do you need to learn to be able to do that?" **Susi Wilkinson**

A transcript of the full discussion is available at the Accelerate website.

3.5 Test Flight

We ran a pilot writing workshop for six animators to develop scripts for short animated films, led by writer Tony White, and supported by Jerwood Charitable Foundation. The workshops involved collaborative sessions, presentations and mentoring. Industry professionals nominated potential participants as people who would benefit from the opportunity to hone their skills. Animators: Tony Comley, Stephen Irwin, Belle Mellor, Matilda Tristram, Matthew Walker and Zane Whittingham. There is information about the animators' experience on the Accelerate website.

‘ I WISH I’D KNOWN THE IMPORTANCE OF COLLABORATING, LEARNING, AND CONTINUED LEARNING. THERE’S AN ATTITUDE IN YOUR MIND WHEN YOU GRADUATE THAT YOU’VE LEARNED AND THEREFORE NOW YOU WORK... ’

4 Summary findings

“For all the discussions around technological innovation and entrepreneurship, wealth-generating innovations are rarely made by chief executives but by highly skilled employees working diligently in a field they have established long-term expertise in.”

Tom Campbell, BOP Consulting, Culture Professionals Network, guardian.co.uk, 2 April 2013

i) A creative animation sector exists. It is a complex sector with a highly skilled workforce of animators who are successful through their own endeavours. But in the absence of a public policy strategic framework and investment, it is struggling, and its own resourcefulness has limits.

ii) The survey and profiles provide strong evidence of a significant ‘creative animation’ workforce enjoying creative, commercial and critical success through a very broad range of activities. People work across and between sectors, in the UK and internationally. It is a committed workforce, locally networked, but lacking a national framework and voice.

iii) Animators work between and across commercial and cultural categories – 55% of survey respondents said they worked in advertising, film, digital, television, interactive and gallery. The diversity of creative animation practice, and how animation is part of many different cultural and commercial fields, may have contributed to a lack of clarity and recognition for the sector. The extent and impact of animators’ work to date needs to be more clearly articulated.

“The animation world has changed, so that it is ubiquitous, it is everywhere and is taken for granted.”
Sean Vicary, animator

iv) The structures around animation practice are changing. Studios still exist, but they now work for new platforms, and in different commercial and artistic contexts. Animators work independently as freelancers, but are also working through partnerships and collectives.

“ PEOPLE ARE BEGINNING TO UNDERSTAND HOW ANIMATION WORKS IN DIFFERENT MODELS TO THE FILM INDUSTRY. ANIMATION IS A MASSIVELY COLLABORATIVE PROCESS; IT’S NOT JUST ABOUT A DIRECTOR AND A PRODUCER. MAKING ANIMATED FILMS WITH ANY SCALE AND AMBITION RELIES NOT JUST ON ONE ARTIST, BUT DOZENS. ”

v) Animation has a skilled workforce, with 92% of animators educated to degree level. Animation has its own creative and business practice, with its own particular development and training needs, distinct from those of filmmakers or visual artists. Support is required for both emergent as well as mid-career and established animators, and that people need different kinds of support at different stages in their career.

vi) However, existing support for practice and professional development can be hard to locate and what support exists is often general rather than focused on the particular or specialist needs. Opportunities for animators to acquire and develop their professional creative practice are limited and more usually focus on software training or more traditional roles and modes of production.

vii) The lack of funding to enable people to develop independent, creative projects was by far the most substantial barrier to development that respondents identified, emphasising the importance of personal work. 86% of survey respondent self-fund their independent, creative work. Animators from the UK are gaining substantial international profile but this has been achieved without institutional recognition and support and this is neither sustainable nor desirable. Studios that support their directors' independent endeavours can only do so when their economic circumstances allow. And while it is only those directors based in supportive studios, or those successful enough to subsidise their own practice, that can make work, the UK is failing to capitalise and diversify of its animation talent, culturally and

The **animation WORLD**
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ubiquitous

economically. Those who persist may succeed, but it will take decades to get where public support might get them in a few years.

viii) A detailed analysis of the economic impact of animation was beyond the scope of the research, but the evidence indicates that creative animation practice plays a significant role in the creative and cultural economies.

‘ **STUDIOS STILL EXIST, BUT THEY NOW WORK FOR NEW PLATFORMS, AND IN DIFFERENT COMMERCIAL AND ARTISTIC CONTEXTS.** ’

‘ **Animation has a SKILLED WORKFORCE, WITH 92% OF ANIMATORS EDUCATED TO DEGREE LEVEL.** ’

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5 Action plan

We have identified three related areas as immediate priorities for action:

- Knowledge and Network
- Developing Skills and Talent
- Advocacy.

Knowledge and Network

Animators informed us that they found information about the sector and opportunities difficult to find.

- We will identify ways in which we can help enable the sector to consolidate, harness, develop, strengthen and extend existing networks, forging links between communities, organisations, higher education, exhibitors, and with audiences.
- We want to quickly establish ways in which we can share and signpost relevant information in ways that are complimentary and collaborative.
- We want to utilise online platforms to bring together people and to share knowledge and exchange ideas.

"Seek out anyone prepared to talk about or teach you their work and process and how they do it. Listen to a fraction of the stories that came before yours and you will benefit enormously."

Sue Goffe, producer, Studio AKA

"At university I found the most important things I learned were not from the tutors but from the other students. It's interesting to see how many people help on your projects and to think about how you can continue this." **Karolina Glusiec**, artist

"Try to do lots of different projects with different people." **Anne Wilkins**, animator

6 TRY TO DO LOTS OF DIFFERENT PROJECTS WITH DIFFERENT PEOPLE. 9

Developing Skills and Talent

Animators reported that the most useful things they had learned in their careers came often from the other animators and mentors.

- We will harness the evident good will, expertise and talent of the animation sector to establish develop an Accelerate 'faculty' of leading figures willing to share experience, and fostering discussion and debate, peer-to-peer and mentored learning.
- In partnership, we will develop and support opportunities for people to develop their creative and business skills, most particularly through a 'laboratory' approach to the development of talent and actual projects.
- We will encourage animators to learn from other sectors - film, craft, visual arts and other parts of the creative economy - and advocate for the recognition and inclusion of animation within existing professional support schemes for creative practitioners.

"Animation is no longer an artistic backwater but a massively broad industry that integrates into the digital economy so lauded by the Government. You can't have a cutting edge animation industry if you don't support its practitioners' most artistic endeavours." **Chris O'Reilly**, Nexus Productions

"Short form animation provides the development arena needed for animators to hone and perfect their craft outside of the confines of the commercial industry. Although not particularly commercially viable, the techniques and skills developed in short form feed directly into the commercial industry. British auteur animation, in its own right, is something to be culturally proud of." **Survey comment**

Advocacy

Animators told us that support to make and show work was the best way to develop their practice but that public funding was difficult or impossible to secure, and that the UK had fewer exhibition outlets and opportunities.

- We will seek to further advocate and promote greater understanding about the sector, our work and its cultural and economic value.
- We will lobby for recognition of independent, creative animation, in public policy, strategy and investment, most particularly by seeking dialogue with the British Film Institute, Creative England, Arts Council England, Creative Skillset, Creative and Cultural Skills and other national and regional agencies.
- We will seek to ensure that public investment in areas such as programming and international marketing effectively benefits creative animation by responding to consultations and reviews and by giving voice to the sector's concerns
- We will seek to more effectively engage audiences with the work of animators and the Accelerate programme itself, through public events and making resources available online.

"For whatever reasons, tactically and strategically the Animation industry lost a central voice a while ago that could articulate and aggregate its needs to funders. This was in contrast to say, Games (who have two strong and vocal trade associations) and who of course, recruit animators by the bucket load. The reason there's plenty of training for filmmakers is due to the film industry's self-organisation and ability to demand through representative bodies."

St John Walker, Head of Development, Creative Skillset, comment on Future animation: new studios and a 'new breed of creativity', Culture Professionals Network, guardian.org.uk, 10 October 2012

Delivery and Partnership

We need to work collaboratively and in partnership to deliver these objectives, and Animate Projects has secured funding from Arts Council England's Grants for the arts programme for some initial networking and knowledge sharing activities through spring 2014.

Our partners will include the three regional animation networking organisations supported through the animation organisations supported through Creative England's Film Networks funding - All Animated (Yorkshire and the North), Wonky (Bristol) and Animation Forum West Midlands - Flatpack Festival (Birmingham) and Show Me the Animation (Bristol).

We will harness the experience and expertise of Animation Alliance members in developing and delivery of the Accelerate programme, and we will especially continue to work with higher education, including London College of Communication, Bournemouth College of the Arts, Royal College of Art and others.

We will engage with the broader film, art and animation sector, for example, through members of CAN: Cinema Arts Network, the Contemporary Visual Arts Networks and with Visual Arts UK.

‘Animation is no longer an artistic backwater but a massively broad industry that integrates into the digital economy so lauded by the Government.’

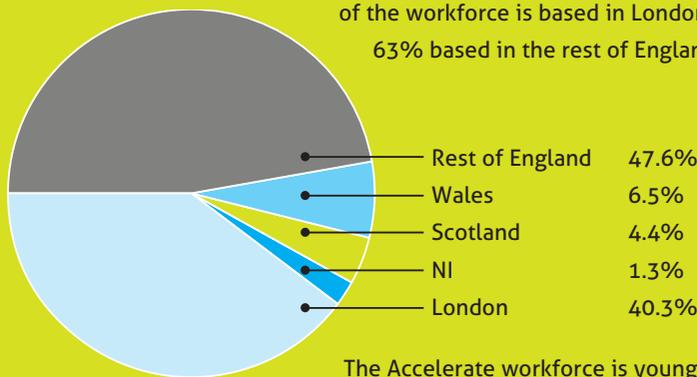
6 Survey responses

The full responses and comments are at [online at: accelerateanimation.com/survey](https://accelerateanimation.com/survey)

Workforce

Survey respondents indicate a workforce that works within and across different sectors, most broadly the creative industries and visual arts.

Geographic spread is similar to that of the broader animation sector, with a substantial but not majority of people based in London. In the visual arts, 22% of the workforce is based in London, with 63% based in the rest of England.



The Accelerate workforce is younger than the general animation labour market and significantly younger than the creative media sector as a whole.

	Accelerate	Animation	Creative Media
16-24	19.3%	5%	9%
25-35	39.3%	42%	32%
36-49	32.1%	37%	39%
50+	8.4%	16%	20%

The Accelerate workforce - 58% male, 42% female – has the same gender balance as creative media generally.

Work patterns

For most respondents, animation is substantially their professional role, and all or a large part of their full-time job for 65%.

It is an established workforce, with 51.1% having worked in animation for over five years, and 37.3% between one and five years.

11% are new entrants and 8% of respondents said they were full or part-time students.

25% undertake long-term freelance contracts; 47.5% work on short-term freelance contracts, compared with a visual arts workforce that is 47% freelance.

Animators work across a very wide range of projects across 'cultural' and 'commercial' practice and across film, visual arts and the creative industries.

"We need support for entrepreneurial, as opposed to job seeker, animators." **Survey comment**

"Don't imagine that you are going to get a job just sitting at a desk with a lightbox and your pencil. If you've got the passion and the energy to beat your own path then I think it can be a lot more interesting than just assuming that you are going to automatically jump into something. Think imaginatively and creatively around your plans, don't hold any ideas too rigidly."

Samantha Moore, animator

"Everything is going to come from your independent films. Making our independent films was in a way like making a better student film. For us it was a big splash into the world of animation, and it made it much easier to pitch on jobs and commissions."

Joseph Pelling, animator, This Is It Collective

"People starting out should stick with working on what is true to them, and not bend overly to fashion, market forces or what others say. Fashions change, and there is enough commonality of human experience for all work to connect with an audience." **Paul Bush**, artist

“ We need SUPPORT FOR ENTREPRENEURIAL, AS OPPOSED TO JOB SEEKER, animators. ”

“The animation world is much busier than it used to be; if you want to be noticed you have to get out there and meet people. Don’t wait for permission from other people – get out there and make your work. And learn from it.” **The Brothers McLeod**, animators

55% said they also worked in industries ‘other than animation’, including film (36%), illustration (31%), graphic design (25%), museum/gallery (21%), photography (14%) and web design (13%). They work in music, theatre, education, fashion, writing, publishing and business.

We suggested 14 options to the question ‘**What kind of projects do you work on?**’ Animators work in music videos (37%), advertising (41%), television (37%), children’s television (34%) and gaming (12%). 76% make independent films for festivals and cinema. 18% work on feature films and 25% make work for gallery exhibition.

Animators make work for digital platforms, with 45% working on online projects and content, 20% on interactive projects, 20% on web/social media and 18% on online content.

17% said they also worked in other categories of activity, and these included software development, theatre, live performance and architectural visualisation.

Responses to the ‘**What is your Job title**’ question elicited a wide range of answers, some of which aligned with Creative Skillset’s outline of animation industry disciplines, but there were many which indicated the shifts in production models that have taken place. For example: media producer, content developer, and the specificity of ‘After Effects animator’.

Accelerate animators get most work from the UK, but from Europe, North America, and the rest of the world too.

‘THE HARDEST PART FOR ME IN ANIMATION HAS BEEN LEARNING THE BUSINESS SIDE OF THINGS. I AM CONFIDENT CREATIVELY, BUT TURNING MY IDEAS INTO A VIABLE BUSINESS HAS BEEN QUITE A CHALLENGE.’

Training

It is an educated workforce.

92.2% of respondents are educated to degree or post-graduate level.

For animation in general, 92% are graduates. Only 57% of the visual arts workforce is educated at degree level and above.

70.8% studied animation or related subjects, compared with 61% in animation generally.

In response to our question about skills gaps for new entrants, everything on our long list of suggestions met with strong responses. Identified as most important were:

- understanding how the industry works
- finance and funding
- how to get freelance work
- different business models
- IP/copyright knowledge
- practical business skills in general
- gaining initial professional experience.

Job interviews, CVs, showreels and self promotion online were low priorities.

“Animators need to have a business model that has a future not depending on applying for ‘funding’ and ‘grants’ for their work. When I say business model, I mean even from working at home in the bedroom. They need to know who is spending money on animation, why and how to approach these potential clients.” **Survey comment**

‘If you can get past the first three years it gets easier. It has taken us three years to get enough work together to show potential clients just what we can achieve.’

“Setting up a new animation company is a big challenge. Establishing a style that works commercially, technically and creatively, learning how long projects take from inception to getting the money in the bank, how to get your work out there and how to plan and manage the workload effectively. Oh – and how to stay sane in the process!”

Zane Whittingham, Fettle Animation, animator

“The hardest part for me in animation has been learning the business side of things. I am confident creatively, but turning my ideas into a viable business has been quite a challenge. I advise others to get their work SHOWN. Show it to everyone – as many people as you possibly can. Only by showing your work and meeting people, do people get to know about what you do.” **Chloe Rodham**, animator

For their own development support, the creative skills identified were writing, pitching, Cross/multi-platform and interactive, directing, writing, pitching, and collaboration with artists from other disciplines. Character animation, backgrounds, motion graphics were least popular.

Around 35% of respondents had taken training in the past two years, fewer than the 47% of animators who had recently undertaken training in Creative Skillset's Labour Report, which also found that 53% of animators' training was paid for by their employer. Respondents commented that self-improvement was important to keep skills fresh, recognising the demands of a changing industry. Most training undertaken was one-off, including specific software, and often online.

Keeping updated on changes in the industry, actually making work, and the funding and time to support that, networking/sharing, and opportunities to collaborate were mentioned as important ways to maintain and develop skills.

The need for funding - for production, training in skills and business, and networking - was emphasised. Most popular ways of learning were workshops, master classes, intensive courses, networking events and professional development grants. 75% said they would be prepared to pay for training, with the caveat that it should be affordable and useful.

“It takes a long time to learn what you're doing and establish a style. You're not necessarily going to have that style established when you graduate. In fact I'm still learning.” **Stephen Irwin**, artist

“If you can get past the first three years it gets easier. It has taken us three years to get enough work together to show potential clients just what we can achieve.” **Vicky Brophy**, Wonky, producer

“Getting experience is key. Go out into the industry and learn from other people.” **Sandra Salter**, animator

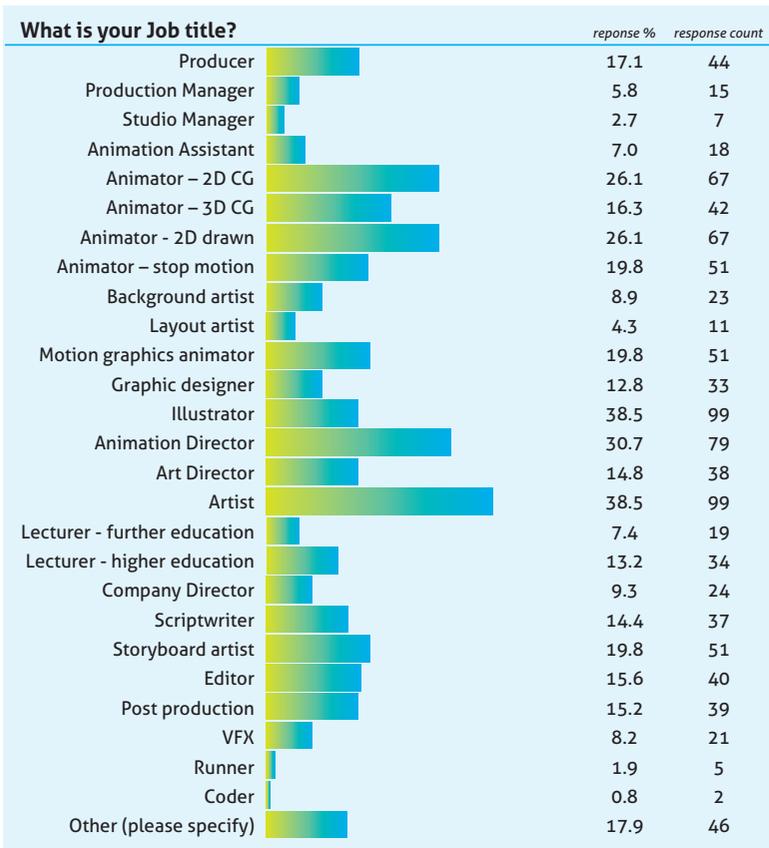
What kinds of projects do you work on?	reponse %	response count
Short, independent films – for festivals/cinema	75.8	200
Music videos	36.7	97
Advertising	41.3	109
Television	37.1	98
Commercial production	27.7	73
Corporate video	29.5	78
Online projects/content	44.7	118
Mobile content	18.2	48
Web/social media	20.1	53
Gallery projects	24.6	65
Feature films	17.8	47
Interactive media	20.1	53
Gaming	12.5	33
Children's television	34.5	91
Other (please specify)	17.4	46

The *average budget* to make a piece of work was between

£1,000 - £5,000 (39%)

with **only 2%** working with budgets *of over*

£50,000



Independent, creative practice

We already know that UK animators achieve international success and respondents' experience further evidences this, citing 72 awards including 15 BAFTA nominations, nine BAFTA wins, an Oscar, and prizes from major UK and international festivals including: Edinburgh, Annecy, Encounters/Animated Encounters, London International Animation Festival, Berlin, Clermont-Ferrand, SXSW, Sundance, Hiroshima Animation Festival, Holland Animation Festival, Tampere, Ottawa International Animation Festival, Oberhausen and Cannes.

"Stay true to what you want to do. Don't be blinded by the technical too much. Remember your core skill of storytelling and message - then add a bit of soul into that too!" **Mike Maloney**, Creative Director, Art and Graft

"To someone about to graduate I would say just keep working. Don't graduate and stop doing your own work. Work with your friends and build up relationships. If you're scared and nervous about your work you're probably doing something right."

Eamonn O'Neill, Late Night Work Club, animator

43% premiere their work online (personal websites, Vimeo and YouTube), with 30% premiering at film festivals. 4% show their work first on television. 62.7% of respondents said their work is a mix of commercial and personal projects. Only 7.1% of respondents said they work only on commercial projects, and 28.2% work on independent, creative projects only.

Around half make the work on their own, with others most likely to work with a musician, an animator, an assistant animator and a couple of actors. And most take more than one role - artists, animator, producer, illustrator, editor, scriptwriter.

"It is, of course, useful to get to know the market and the industry and how it works in general, BUT, art/independent animation cannot be pitched the same way as commercial projects and, when it comes to pitching ideas/proposals, the projects which are more art based simply fail, because they just don't fit the particular scheme, even though you follow all the rules and guidances of submitting the proposal, writing it, etc. When you are a student, you are hardly ever advised how to pitch to galleries or how to look for residencies, but everyone keeps on telling you how to send your showreel to producers, etc, which, for artists simply does not help at all." **Survey comment**

"I would like to be better at networking with other animators to create work with so we could share the production workload. I do everything on my own from script to screen (I have to as the budgets I receive are so low) and I feel the work suffers from a lack of critique and short deadlines." **Survey comment**

Funding

Only 36 respondents had received funding to make work, though many had also never applied to Animate, Creative England, ACE or BFI.

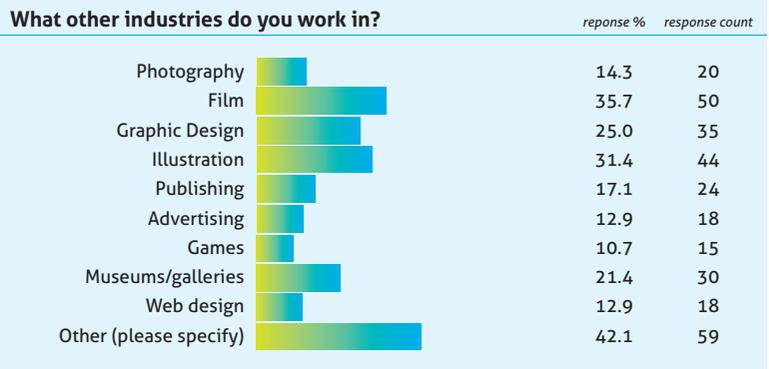
86% self-fund their work. Only 13 said they'd received grants. Other sources include commissions both in the UK (20 responses) and internationally (9), UK and international residencies (7), with studio support (3) and crowdfunding (2) trailing.

Grants and commissions came from a wide range of sources, most notably The Wellcome Trust, with 3 respondents receiving support of £20,000 - £30,000. UK Film Council was named once (£12,000), Arts Council England twice (£2,000 and £7,000), Creative Scotland and Arts Council Wales once each (£7,000, £10,000) and BFI once (for a feature). Channel 4 was mentioned in relation to its Random Acts 3' low budget (c £3k) commissions through Lupus Films and Animate Projects, and other sources included small sums from higher education, international trusts. One respondent noted their success in securing private investment of £15,000.

"It is not training that is missing in UK, but MONEY to make projects. Experience comes from producing projects." **Survey comment**

Animators endeavour to sell their work and occasionally do so, although the lack of platform and showcasing opportunities was cited as a barrier. 38 respondents have licensed films to a UK broadcaster; 28 to an international broadcaster. 12 have sold work to collectors and 18 have had work acquired by museums. 53 had been paid a fee for showing work in an art gallery/museum and 36 had shown work online and been paid to do so. 'Other' responses included DVD rights, print sales, education use and fees for image reproduction.

The average budget to make a piece of work was between £1,000 - £5,000 (39%), with only 2% working with budgets of over £50,000.



Several people commented that things had changed dramatically over the past few years, one noting that their first commission for Channel 4, in 1999, had been for £65,000, whilst producers for Channel 4's Random Acts series now offer much less.

'In kind' support was often greatly in excess of actual cash budgets, and animators were not paying themselves for their own time.

“ IT TAKES A LONG TIME TO LEARN WHAT YOU'RE DOING AND ESTABLISH A STYLE. YOU'RE NOT NECESSARILY GOING TO HAVE THAT STYLE ESTABLISHED WHEN YOU GRADUATE. IN FACT I'M STILL LEARNING. ”

7 Profiles

We spoke to 22 animators and producers about the work they do, their organisation, their views of the current 'state of play', and their thoughts about development needs.

It is by no means an exhaustive selection and is not intended to be representative. It does, however, indicate the strength and breadth of independent animation in the UK, and the variety of organisations that make up the sector – studios, collectives, individuals – that work in the animation sector. It includes larger, well-established and well-known studios (Nexus Productions and Studio AKA), smaller studios and agencies (Arthur Cox, Art and Graft, Fettle), collectives (Wonky, This Is It), and individuals, including freelance animators and visual artists, experienced, mid-career and emergent talent.

What characterises the selection is that all are engaged in both commercial and cultural/personal practice. The studios support their directors to make personal films and undertake art commissions; artists run workshops and undertake commissions. And their work breaks through the traditional boundaries of animation work, into live action, app development, design, multi platform, interactive and online projects.

Interviewees consistently stressed the importance of persistence, maintaining creative independence, and the value of support and guidance from peers and mentors.

The profiles are online at:
accelerateanimation.com/profiles

- **Art and Graft**, London
- **Arthur Cox**, Bristol
- **Ruth Barrett**, London
- **Henry Cruickshank**, Edinburgh
- **Brothers McLeod**, Stratford upon Avon, Warwickshire
- **Paul Bush**, London
- **Fettle Animation**, Marsden, West Yorkshire
- **Karolina Glusiec**, London
- **Stephen Irwin**, London
- **Late Night Work Club** (Eamonn O'Neill), London and international
- **Samantha Moore**, Shrewsbury, Shropshire
- **Nexus** (Chris O'Reilly), London
- **Joseph Pelling / This is It**, London
- **Mikey Please**, London
- **Kelly Richardson and Mark Jobe**, Whitley Bay, North Tyneside
- **Chloe Rodham**, Newcastle
- **Sandra Salter**, Ludlow, West Midlands
- **Second Home Studios**, Birmingham
- **Studio AKA** (Sue Goffe), London
- **Sean Vicary**, Cardigan, Wales
- **Anne Wilkins**, Warrington, Cheshire
- **Wonky** (Vicky Brophy, Miki Cash), Bristol

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PLATFORM,
INTERACTIVE and
ONLINE PROJECTS

Animate Projects (previously animate!) is a producer/curator led agency based in Derby and London. Animate has been commissioning and producing animation for over 20 years, initially supported through a Channel Four/Arts Council England scheme and more recently through a range of partnerships, including Jerwood Charitable Foundation, Arts Council England's managed funds and Grants for the arts, the National Trust, Channel 4's Random Acts, BFI and the Wellcome Trust. Animate is a trusted agency for creativity in animation practice, championing animation practitioners who work across the creative industries in the UK, providing specialist support to develop their professional practice, and offering partners, clients and funders, our expertise, knowledge and connections within the cultural sector to produce high quality, creative projects.

London College of Communication is part of the University of the Arts, London. In a rapidly changing media environment, new technologies are changing how animation is created, understood and experienced. Animation has diversified and is found everywhere. Animation at LCC is creative, exploratory and playful - a place to test boundaries and explore animation in new combinations and contexts.

Animation Alliance UK, established in 2011, is a group of independent animation professionals that exists as a network and focus for sharing information and discussion, to advocate for the support of independent animation in the UK, and to lobby for investment in production, training and archive. Its members work across a very wide range of projects across 'cultural' and 'commercial' practice and across the breadth of film, visual arts and the creative industries.

Credits

Abigail Addison, Animate Projects, Animation Alliance UK

Bettina Fung, Animate Projects

Amanda King, consultant

Kath Shackleton, consultant, All Animated

Tim Shore, formerly London College of Communication

Gary Thomas, Animate Projects, Animation Alliance UK

Susi Wilkinson, London College of Communication

Accelerate Animation

accelerateanimation.com

Animation Alliance UK

animationallianceuk.org

Animate Projects

animateprojects.org

London College of Communication

www.arts.ac.uk/lcc

