
**INCLUSION AND
DIVERSITY** in UK

**VISUAL EFFECTS
ANIMATION AND
POST PRODUCTION**

SEPTEMBER 2019





UK SCREEN ALLIANCE



ANIMATION UK

UK Screen Alliance and Animation UK

UK Screen Alliance is the trade association that represents Visual Effects (VFX), TV & Film Studios, Post-Production and Animation in the UK. It is the membership organisation for over 100 leading employers in this sector and its primary purpose is advocacy for its member companies and the wider screen industries.

UK Screen Alliance was formed in 2016 when two long-established organisations, the UK Screen Association, (founded in 2003) and Animation UK (founded in 2008) joined together to pursue mutually agreed goals on behalf of their members. The UK Screen Association members come from a lateral layer of facility and service providers to the film, TV and commercials sectors; whereas the Animation UK membership is an industry vertical comprising independent entertainment companies specialising in production, distribution, development, financing and brand development of animated content for features, TV, commercials and short-form, aimed at all age groups. The animation members are content focussed and IP generating with strong export potential. They have a downstream revenue business model comprising merchandising and licencing. Whereas the facilities-provider membership is more focussed on inward investment from overseas producers or offering services to UK producers.

UK Screen Alliance's animation and facilities membership intersect across many common interests, particularly those of workforce, migration & visas, skills development and talent pipeline from schools through college and university into jobs and apprenticeships and of continuing professional development.

www.ukscreenalliance.co.uk www.animationuk.org

Access:VFX

ACCESS:VFX is a global, industry-led, non-profit comprised of 40 leading employers, industry bodies and educational establishments in the VFX, animation and games industries. It focuses on actively pursuing and encouraging inclusion, diversity, awareness and opportunity under its four pillars of Inspiration, Education, Mentoring and Recruitment.

ACCESS:VFX has united over 100 passionate people (many from competing companies) around the common goal of addressing the lack of diversity in the VFX industry. Together they have run more than 50 events and reached thousands of potential future employees of primary school age and above across the UK, USA and Canada - working with organisations including We Are Stripes, Into Film and This Ability.

www.accessvfx.org

Acknowledgements

UK Screen Alliance would like to thank all the people who responded to our inclusion survey or who shared it with their colleagues.

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Introduction

This survey into inclusion and diversity in VFX (Visual Effects), Animation and Post-Production was conducted by the UK Screen Alliance for four reasons:

- Two years have passed since the inception of Access:VFX, a major inclusion initiative for VFX and animation. It is important to gauge its effectiveness and obtain intelligence to inform the way forward.
- The Creative Industries Council introduced an eight-point Diversity Charter¹ in July 2019, of which point number one is “Collect relevant and meaningful data on diversity and inclusion”. An evidence-review by CAMEo in 2018² found only 3 publicly available sources with granular workforce diversity data for VFX or animation, namely the Creative Skillset surveys of 2012, 2014 and 2015. This dearth of recent and detailed diversity data is also mentioned in the recently published Annual ScreenSkills Assessment 2018-19³. To fill this gap UK Screen Alliance intends to produce regular accessible statistics about the workforce in VFX, animation and post-production and believe we are the organisation in the best position to engage with employers to do that effectively.
- UK Screen Alliance obtains comprehensive data on gender from its regular workforce survey, but this yields little in terms of disability and ethnicity data. The small amount of BAME data that came from the 2018 survey suggested that VFX is more diverse than average for the film & TV industry. We needed to verify this with a larger sample.
- There are currently several groups proposing or consulting on creating legislative links between eligibility for screen sector tax credits and diversity criteria, and we have used our survey to make a data-informed response to these proposals.

We chose to concentrate on the sectors of VFX, animation and post-production as these companies make up three of the main constituent parts of our membership. Whilst there are differences between these three sectors, they share a notably different *modus operandi* for employment to the rest of the film, TV and commercials industry, in that they have a higher proportion of PAYE employees who are either permanent or on fixed term contracts. This enables opportunities for strategic workforce recruitment and long-term development within companies. Whereas, short-term freelancing is the dominant mode of engagement in Film and TV production and for on-set crew roles.

Many roles in VFX and animation require a blend of creative and STEM skills and talent is in global shortage. In July 2019, the then Home Secretary, Sajid Javid accepted the Migration Advisory Committee’s (MAC) recommendations to place virtually all artist and production roles in our sectors onto the Shortage Occupation List. Until recently our intake of new recruits has been primarily university graduates, but industry involvement in further education and apprenticeships is creating a successful non-graduate route, free from student debt. This opens our industry to more socio-

¹ CIC Diversity Charter <https://www.thecreativeindustries.co.uk/media/533578/creative-industries-council-diversity-charter-final.pdf>

² CAMEo (2018) Workforce Diversity in the UK Screen Sector: Evidence Review, CAMEo Research Institute: Leicester. <https://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/bfi-workforce-diversity-in-uk-screen-sector-evidence-review-2018-03.pdf>

³ <https://www.screenskills.com/media/2853/2019-08-16-annual-screenskills-assessment.pdf>

economically disadvantaged communities, who hitherto would not have considered or even been aware of the careers available.

The largest employers in the VFX and animated features sector are global businesses and have offices in creative hubs like Montreal, Vancouver, Los Angeles, New York, mainland Europe, India and Australia. Their approach to workforce strategy is also global encompassing active and widespread engagement with university liaison visits, recruitment fairs, graduation shows, festivals and conferences in the UK, Europe and the world in general. It therefore seems likely that the manifestation of inclusion in these companies will have a very different dynamic to companies that crew-up mainly locally or through informal networks, as is commonplace in other parts of film & TV. The recruitment focus in VFX, post and animation is firmly on talent and potential. It is quite rightly less about, “who you know” as the gateway to getting a job.

Broadly drawn diversity statistics for the whole industry mask these important differences between employment practices in VFX, animation and post-production and the rest of the industry. We consider it is important to drill-down and discover detailed data to identify best practice and the optimum action necessary to ensure inclusion in each individual sector of film & TV.

In 2015 Creative Skillset (now ScreenSkills) conducted a survey⁴ which indicated a figure of 3% for BAME diversity for the film industry as a whole; considerably lower than the 14% BAME⁵ figure for the full working population. This 3% figure is also cited in “A Skills Audit of the UK Film and Screen Industries”⁶ report by the Work Foundation commissioned by the BFI in 2017 and has been quoted by the Film Diversity Action Group (FDAG) in their proposal⁷ for diversity criteria to be part of the qualification for screen sector tax credits. There is also a proposal from a group led by Sir Lenny Henry, which asks for an additional representation tax credit for productions meeting diversity criteria. The prologue to the Labour Party consultation in July 2019 into Diversity, Inclusion, and the Film and High-end TV Tax Reliefs⁸ references the lack of dependable current data and emphasises “growing concern from across the Film and TV industries about the lack of diversity and representation”.

A recently published ScreenSkills Assessment⁹ of the demography of the screen sector workforce draws from the ONS Labour Force Survey of 2017 and indicates that the BAME percentage for the screen industries is 10% compared to 13% in the UK economy. It also suggests that 10% of the screen industries workforce have work-limiting health problems or disabilities, compared to 14% in the UK economy. However alternative statistics from a House of Commons from 2018 briefing paper suggests 22% of the working-age population has a disability.

⁴ Creative Skillset 2015 Employment Survey

https://www.screenskills.com/media/1562/2015_creative_skillset_employment_survey_-_march_2016_summary.pdf

⁵ ONS 2011 Census of England & Wales. The often-quoted (sometimes mis-quoted) comparison statistic of 13% BAME is for the full England & Wales population not just working age)

⁶ A Skills Audit of the UK Film and Screen Industries – The Work Foundation for BFI -Carey, Crowley, Dudley, Sheldon and Giles http://www.theworkfoundation.com/wp-content/uploads/2016/10/420_A-Skills-Audit-of-the-UK-Film-and-Screen-Industries.pdf

⁷ FDAG website <https://filmdiversity.net/report/>

⁸ Labour Party consultation into Diversity, Inclusion, and the Film and High-end TV Tax Reliefs, July 2019 https://www.tom-watson.com/consultation_on_film_and_tv_tax_relief

⁹ Annual ScreenSkills Assessment 2018-19

<https://www.screenskills.com/media/2853/2019-08-16-annual-screenskills-assessment.pdf>

The ScreenSkills Assessment does not give sub-sectoral figures for demographic data and calls for further research at sub-sectoral levels.

UK Screen Alliance and Animation UK are committed to achieving inclusion and representation of diverse groups in the workforce and are already engaged in action in conjunction with Access:VFX to achieve that aim in VFX and animation. We consider that any proposals for legislation to incentivise change, must be informed by detailed, reliable and recent statistics in order to baseline the facts and to establish the appropriateness and effectiveness of any such intervention on both an industry wide and sub-sectoral level.

The UK Screen Alliance Workforce Survey of 2018 obtained only partial data on the ethnic origins of the VFX, animation and post-production workforce. Most companies do not routinely database BAME data about their employees, as there is no requirement in law to do this. Very few companies in our sample were able to provide ethnicity data and most of the information came from a single large company. However, we were pleasantly surprised to find a figure of 15% BAME for VFX, but with the caveat that it may be a result of relatively high representation in one exceptional company rather than being a true picture of the industry. It was however sufficiently different to the oft-quoted 3% figure for the film industry to be intriguing.

We felt it needed further investigation and in 2019 we have now done that utilising different methodology to encourage a wider participation from more employees and freelancers self-identifying their ethnic origins and many other characteristics. The results are presented in this report.

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INCLUSION & DIVERSITY in UK

VFX, ANIMATION & POST PRODUCTION

VISUAL EFFECTS



ANIMATION



POST PRODUCTION



BAME WORKFORCE:

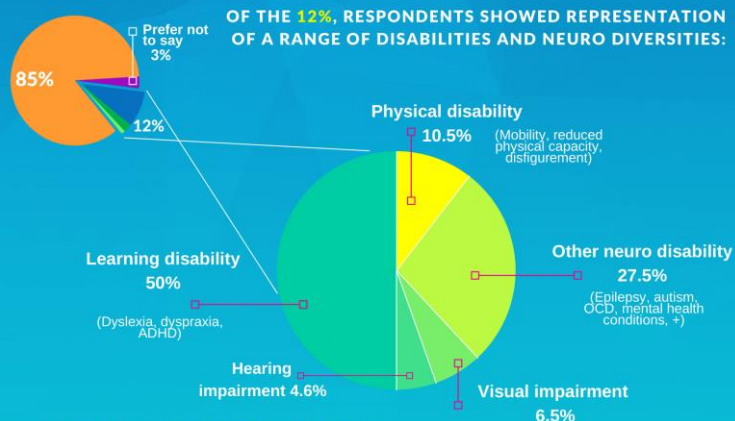


VISUAL FX 19%
ANIMATION 14%
POST PROD 18%

GENDER DEMOGRAPHICS



12% OF RESPONDENTS FROM ACROSS ALL 3 SECTORS SAID THEY HAVE AT LEAST 1 PHYSICAL, OR NEUROLOGICAL DISABILITY.



MOST COMMON: DYSLEXIA & ADHD



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Executive Summary

From our survey conducted in July 2019 of more than 1,150 workers in VFX, animation and post-production, we have been able to reveal a portrait of diversity that will challenge many of the preconceptions about these three sectors and their progress in achieving an inclusive workplace. There has been significant improvement in some respects, but the report highlights areas where action is still required.

We demonstrate a significantly higher percentage of ethnic diversity than the overall level of diversity, or lack of it, within the whole film and TV industry. We attribute this in part to more permanent employment models and a strong commercial imperative to discover latent talent in all communities, through the provision of opportunity and collective action to achieve this.

Diversity in Visual Effects (VFX)

Our survey finds VFX to be probably one of the most ethnically diverse parts of the film & TV industry, as its workforce is 19% BAME. This exceeds the percentage of people of colour in the working age population of England & Wales (14%) and is considerably higher than the often-quoted average for the whole film sector of 3% and a more recent assessment of this at 10%.

Even though the majority (88%) of jobs are in London where the BAME population is 40%, recruitment for VFX and animation is not just local; it is global. Around a third of the workforce are EU citizens and 13% are from non-EEA countries. Our survey shows that approximately a quarter come from the UK nations and regions with the remaining quarter coming from London and the South East. Using this recruitment pattern and weighting it by the BAME ratios of the working populations from each of the UK regions, we estimate that around 18% represents an appropriate and proportionate BAME ratio for VFX.

The percentage of BAME workers within our international workforce is also coincidentally 19%, where predominantly white European recruitment is balanced by people of colour from non-European countries and therefore does not affect the overall BAME ratio.

The gender balance in VFX is quite unequal with just 34% being women, who are concentrated in administration and production management roles. Only 27% of creative artists were women. Men were more likely to be found in senior and mid-level roles than women. However, women make up 45% of senior management roles.

14% of the VFX respondents identify as LGB+ and less than 2% specified their gender as transgender, non-binary or another preferred description. Within the whole UK population, persons identifying as LBG make up 2%.

The VFX workforce is highly qualified with 83% of workers being either graduates or post-graduates (29%). On average they are more qualified than their parents. For almost half of VFX workers, neither of their parents have a degree.

17% of the VFX workers who were educated in the UK attended a private or fee-paying school. This is well above the UK average of 7%. It is fair to assume that these workers come from the more socio-economically advantaged areas of society. However, of the VFX workers who were educated in the UK, 50% attended non-selective state secondary schools.

Diversity in Animation

Gender diversity achieves parity in animation with 51% of workers being women. In production management, women make up 89% of the workforce. Women are well represented in senior creative production roles (55%) and creative artist roles (49%). However only 14% of technical support roles are held by women.

21.5% of animation workers identified as LGB+, more than 10 times the ratio in the UK population. 3% specified their gender as either transgender, non-binary or some other preferred description.

The jobs in animation are more geographically dispersed than VFX or post-production with 27% of our respondents working outside London.

Of the three sectors we analysed, animation is the least ethnically diverse with 14% BAME. However, this is in line with the percentage of people of colour in the working age population of England & Wales, but by analysing the regional pattern of recruitment in animation, a proportionate target of 16% BAME would be reasonable.

The animation workforce is highly qualified with 93% of workers having a degree and 26% also being post-graduates. For almost half of animation workers, neither of their parents obtained a degree.

9% of animation workers from the UK were educated at a private or fee-paying school. This is above the UK average of 7%. However, 54% of animation workers educated in the UK attended non-selective state secondary schools.

Diversity in Post-Production

Gender representation in post-production is higher than expected with 45% women. In common with the other sectors we analysed, women make up a high proportion in administration (62%) and production management roles (85%). They are least represented in technical support (12%) and in creative artist and operator roles (34%). However, 64% of senior management roles are held by women.

12% identified as LGB+ and 1% specified their gender as either transgender, non-binary or some other preferred description. Post-production had the highest percentage of respondents choosing not to disclose their sexual orientation (7%) of the three sectors we analysed.

18% of workers in post-production are BAME. Using the geographic distribution of where post-production workers grew up, a proportionate BAME target would be 19%.

There was a slightly lower percentage of graduates and post-graduates in the post-production workforce than in VFX or animation, however the workforce is still well qualified with 79% of workers being either graduates or post-graduates (20%). For 66% of post-production workers, neither of their parents have a degree.

10% of post-production workers from the UK were educated at a private or fee-paying school. This is above the UK average of 7%. However, 56% of post-production workers from the UK attended non-selective state secondary schools.

Aspects of diversity common to all the three sectors

The following aspects of diversity and inclusion were analysed across VFX, animation and post-production combined.

Whilst the overall ethnicity representation picture is encouraging, just 8% of senior management roles are held by people of colour with 17% in Junior roles and 22% in Mid-level roles. BAME representation is highest in technical support or administrative roles.

The skilled international migrant workforce, which is mostly in VFX and animation, makes little difference to overall BAME representation level. Whilst 50% of non-EEA migrants are BAME, this is balanced by EEA migrants who are mostly white.

Less than 1% of our sample identified as transgender.

2% of workers identified as having a physical disability (e.g. sensory or mobility impairment) and a further 1% identified with both physical and mental conditions.

9% of the workforce identified as having at least one neurological condition, with Dyslexia being the most common (6.5%) followed by ADHD (2.2%), OCD (1.5%) and Autism (1.3%).

The overall percentage in our workforce survey reporting a disability was 12%, which is below the UK average of 17% for working age people.


































8.5% of people say they job share, and this was most common in creative artist and operator roles and least common in senior creative production roles.

3% were sole carers for children and 2% were sole carers for dependent adults.

The highest concentrations of privately educated employees can be found in senior management and the over 55s. In the 25-34 age range, the percentage is 8%, just slightly above the UK average, but the percentage in this age range who attended selective state funded secondary schools is the highest of the groups analysed at 38%. At least 50% of workers in all age groups, other than the over 55s, attended non-selective state secondary schools.

We discovered that 81% of respondents classed their workplace as “Highly inclusive” or “Mostly inclusive. However, on average, women and minority groups were slightly less likely to rate their workplace as “Highly inclusive”. This effect is most evident for people with disabilities, which was also the group that was most likely to rate their employer as “Not at all inclusive”.

Priorities for action

	Animation	VFX	Post-Production
Gender balance			
Women in creative/operator roles			
Women in senior creative roles			
Women in senior management			
BAME representation overall			
BAME in creative/operator roles			
BAME in senior management			
LGB+ representation & inclusion			
Disability representation & inclusion			
Socio-economic opportunity			
Regional opportunity			

Recommendations

This survey has revealed a substantial amount of data, some surprising insights as well confirming some predictions. It is essential that it is repeated regularly to monitor progress and reveal trends. We recommend that it is conducted on a biennial basis at least.

The Annual ScreenSkills Assessment 2018-19 recommends further research into diversity in the subsectors of the screen industry. It states that further research is needed at sub-sectoral level into the relationship between diversity and skills shortages. We agree and would also propose research into educational journeys into, and career development within, our sector and how these are influenced by socio-economic and cultural pressures within diverse communities.

We feel that UK Screen Alliance's trusted and close relationship with the employers that make up our membership, puts us in a unique position to drive engagement with research and surveys and to provide insight into our specialist areas. However, a regular survey of this kind requires a level of resource that is scarce in a small trade body like UK Screen, which is entirely funded by member subscriptions. The data gathered adds to the overall body of evidence for the screen sector and we propose that rather than totally centralising the research function, a more federated model should be adopted with funding made available to allow smaller trade bodies to undertake targeted sub-sectoral research within an agreed overall sectoral framework.

We know from our other research activity that we can achieve good insights and accurate data directly from the HR departments of our member companies. This is especially true of gender and citizenship data but yields little data on ethnicity or disability and none at all about LGBT+ or socio-economic background. We want to encourage all companies in our sector to gather and database the ethnicity of individuals in their workforce and to record educational qualifications and other socio-economic indicators in a structured manner than can be easily aggregated and analysed.

This report has indicated that the key areas on which to focus our inclusion and diversity efforts are different in the three subsectors we analysed. There is also the need for action plans with both short-term and long-term horizons.

Within animation, where the gender balance is near parity, the key area to address is BAME representation overall and especially within creative roles. This is being addressed via the long-term Access:VFX schools outreach and careers advice programme. There should also be efforts made to increase BAME representation in senior management, via mentoring and coaching.

In VFX, the ethnicity statistics overall are appropriately proportionate, but could be more consistent at all levels of seniority. Mentoring and coaching should be targeted to achieve this. Better BAME representation is needed in creative artist roles and senior management. Again, a long-term strategy of schools outreach and careers advice can address this.

There is evidence of better representation of women in creative roles in VFX at junior levels. This more balanced intake is encouraging, but programmes need to be in place to ensure success in promotion for women at a similar rate to the men. Furthermore, we should expand programmes to encourage women to return to the workforce after the birth of their children. We cannot afford to lose their experience. Return to work schemes will help, but we must also ensure that working practices and hours are sympathetic with the needs of those who care for children or dependent adults.

In post-production, there needs to be better representation of women and BAME in creative and operator roles. There also needs to be better BAME representation in senior management. For VFX and animation, there is now a campaigning body in Access:VFX working to address these issues; the equivalent organisation in post-production is Rise, which is still at an early stage of its development and to date has concentrated on gender alone. We encourage Rise to widen its scope to cover all areas of inclusion and to collaborate with Access:VFX where economies of scale could reap benefits.

Disability representation in all three sectors needs improvement. Commuting in London and other large metropolitan areas is a daily challenge for the able-bodied, let alone anyone with mobility or sensory disabilities. We ask that those with responsibility for transport policy, increase the accessibility to urban workplaces for disabled people. This may be less of a problem if more businesses from our sector were based outside of the metropolitan areas, where they are currently clustered.

We advise more mental health awareness programmes to help employers make further reasonable adjustments to the workplace and working conditions. However, it is difficult to make these adjustments if the disability remains out of sight from the employer. There should be protocols developed to enable information gathering by employers from individuals in the workforce about any invisible disability, such as neurological conditions, in a trusted way which is not unintentionally perceived as discriminatory.

Sensory impairments should not preclude people from audio visual industries, nor should it exclude them from creative roles. For instance, colour blindness need not be an impediment to jobs like modeller or rigger. We need to build this into our recruitment and outreach strategies and avoid making blanket assumptions.

We should investigate innovative schemes such as Exceptional Minds¹⁰, an autism education organisation in California which provides technical instruction in the digital arts while fully integrating behavioural training into the curriculum. People with autism are often of above average intellect and their neurodiversity frequently translates into creativity. Exceptional Minds have now opened a professional VFX studio in Los Angeles crewed by its alumni, which is an approved vendor for Disney, Fox, HBO, Marvel Studios, Netflix, Paramount, Universal, and Warner Bros.

The London-centric concentration of VFX presents challenges for regional opportunity. The cost for new entrants moving to London is a barrier to socio-economic mobility. The Creative Sector Deal strategy of clustered regional hubs should be further encouraged and incentivised.

Apprenticeships provide a more socio-economically inclusive route into our industry, without the need for student debt incurred via the university route. Whilst we would welcome greater flexibility to expand the apprenticeship levy to other forms of training and professional development, the more permanent employment models in VFX, post-production and animation mean that apprenticeships can work within the current funding rules.

Several apprenticeships for VFX, Post and Animation are in development and efforts must be made to speed their passage through the IfATE¹¹ so that they can start delivery as soon as possible. The mechanism for the transfer of excess apprenticeship levy between companies should be

¹⁰ <https://www.exceptionalmindsstudio.org/generalinfo.html>

¹¹ Institute for Apprenticeships and Technical Education.

<https://www.instituteforapprenticeships.org/apprenticeship-standards/?routes=Creative-and-design>

streamlined. Currently it is cumbersome and off-putting to smaller companies which could easily take on apprentices funded by the larger companies, thereby increasing the scope for upskilling the whole industry. This is something we know that larger companies in our sector are willing to do even though they would be funding competitors. UK Screen Alliance has created a match-making service called the ALT scheme to facilitate these levy transfers.

We predict that apprenticeship starts in VFX, post-production and animation could see significant increases by 2021, once the new standards have been approved for delivery

The NextGen Skills Academy forms a vital part in our skills pipeline at age 16 to 18, feeding into apprenticeships and degree courses. It is active across England and not just in the areas where the employers are clustered, providing regional opportunity for students wanting to pursue careers in VFX, Games and Animation. About half of our successful apprenticeship applicants have come from NextGen courses. We feel this important industry-supported successful programme should be expanded and have its future fully assured against any adverse pressure from the post-16 qualifications review and the introduction of T-Levels.

Whilst the three sectors analysed, show improving representation for women and ethnic minorities at entry level much more can be done to improve the diversity of applicants. We support the campaign to reintroduce creative subjects back into the school curriculum Schools outreach and careers advice are being addressed by the Creative Careers Programme and specific sub-sectoral initiatives like Access:VFX.

To date, Access:VFX has received virtually no public funding for its extensive programme of outreach. It has just got on with the urgent task of making a difference without being held back by the administrative inertia that often comes with applying for public funds. There is huge enthusiasm and commitment from its participants and organisers, but it needs to scale-up to continue its momentum. It currently has no permanent staff and relies on huge quantities of goodwill. To amplify its good work, it needs to have permanent dedicated resources. We feel that some public funding will be needed to do this.

The Access:VFX strategy of tackling inclusion from the grass roots is a long game so patience is needed. The programme is already underway, and we are seeing encouraging early results. We know that by spreading the word to fresh and diverse communities of young people, providing **Inspiration**, sparking **Aspiration**, will lead to **Application**.

If we are successful, a new wave of diverse, inspired, emerging talent will sweep through our industry. It will be an unstoppable, irreversible, generational change that will reach all levels. Not a problem that requires the everlasting intervention of quotas, or carrot-or-stick incentives; but a change that persists because inclusion will have rightly become the new normal.

Methodology

In early July 2019, UK Screen Alliance in conjunction with Animation UK and Access:VFX circulated a SurveyMonkey online poll of employees and freelancers. The aim was to fill in gaps in the data from the 2018 UK Screen Alliance workforce survey, which is collated from returns from the HR departments of member companies. Whilst the UK Screen Alliance Workforce Survey has a large sample size (>5,000) and gives good insights into gender diversity and nationality, it yields very little data on ethnicity or disability. This is because these characteristics require individuals to self-identify are therefore not routinely databased by companies.

Our July 2019 SurveyMonkey questionnaire¹² was distributed to UK Screen Alliance and Animation UK member company workforces via their HR departments. We also emailed the MDs of non-member companies to ask them to distribute the survey link to their staff, which was also publicised via our social media channels and those of our partner organisations.

The survey was entirely confidential. We did not ask respondents to identify the company they were working for. All questions had the option of “Prefer not to say” other than the eligibility pre-screening questions.

The questionnaire included two pre-screening questions to determine if the respondents were currently working either as an employee or as a freelancer in the VFX, animation or post-production industries. Respondents not meeting these criteria were not counted.

In total we received 1,332 responses, of which 1,155 were deemed to be valid. Not all respondents completed the full survey, but all the key questions received at least 1,050 individual responses.

Estimates vary for of the full population working within VFX, post-production and animation but the Annual ScreenSkills Assessment 2018-19 puts post-production and VFX together as 17,000¹³ employees. The estimated direct employment in VFX is 8,140¹⁴ therefore post-production employs around 9,000 The estimated total direct employment in animation is 1,790¹⁵. The overall engagement rate for this survey is therefore 6%. The lowest engagement came from post-production and we advise treating statistics from this sub-sector as indicative only.

Table 1- Valid responses and engagement rate

Sector	Estimated population	Valid survey responses	Engagement rate
Animation	1,790	338	19%
VFX	8,140	672	8%
Post Production (excluding VFX)	9,000	145	1.6%
Total	18,930	1,155	6%

¹² See Appendix B of this report for the survey questions

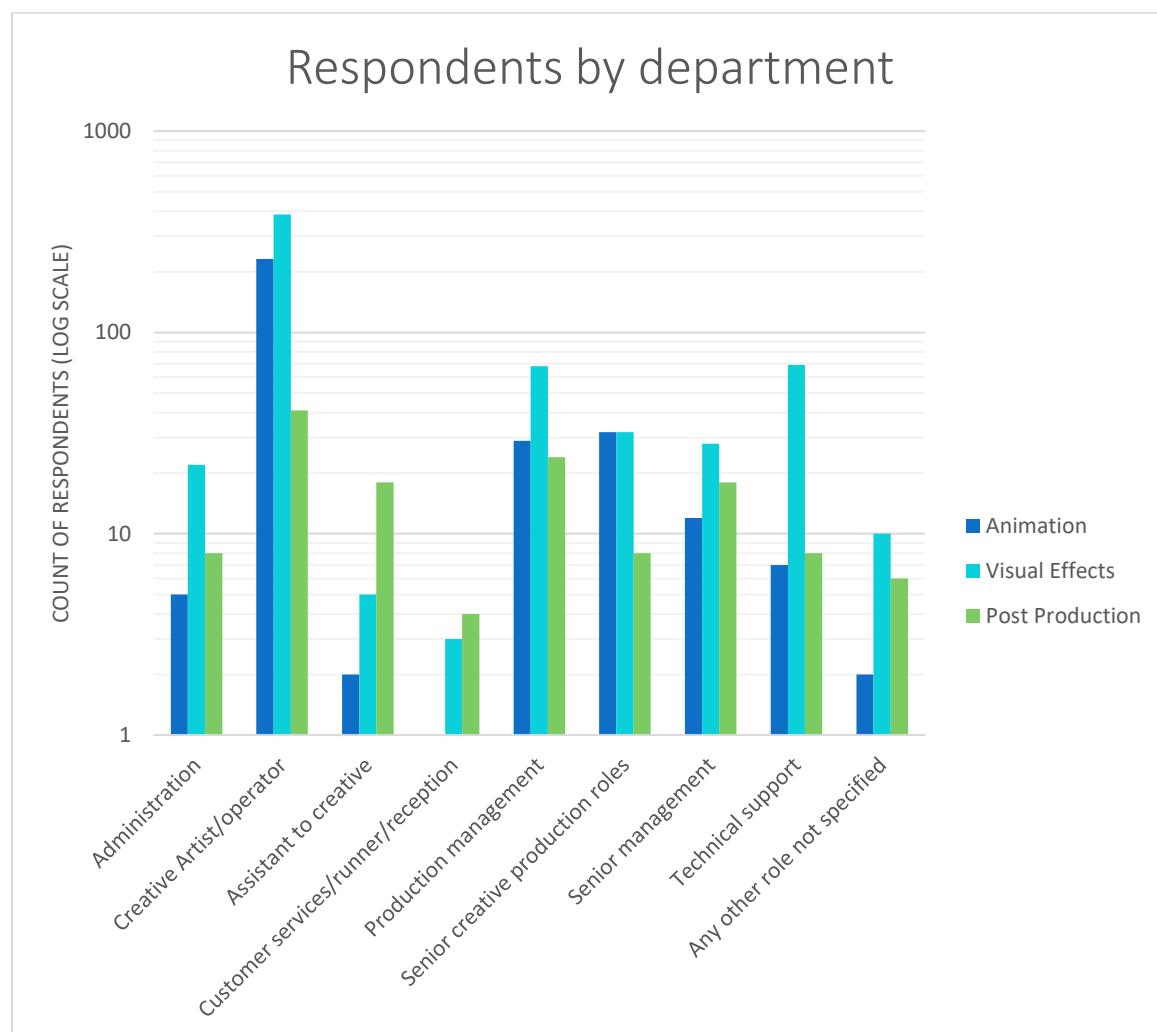
¹³ Annual Screen Skills Assessment 2018-19 calculates employment in screen industries from DCMS Sector Estimates 2017, Employment release 2018 and the ONS Labour Force Survey 2017.

¹⁴ BFI Screen Business report 2018

¹⁵ BFI Screen Business report 2018

Respondents came from all levels of seniority, age groups, departments and citizenship groups. By far the largest group of responses were from the creative artists and operators with 658 respondents.

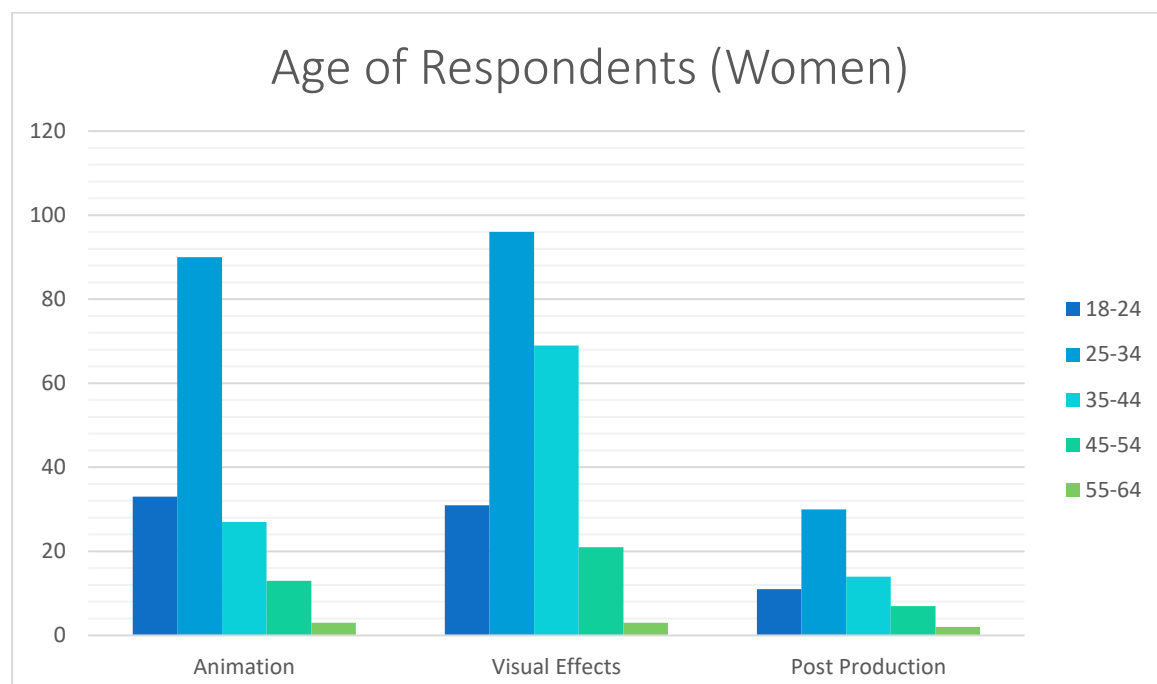
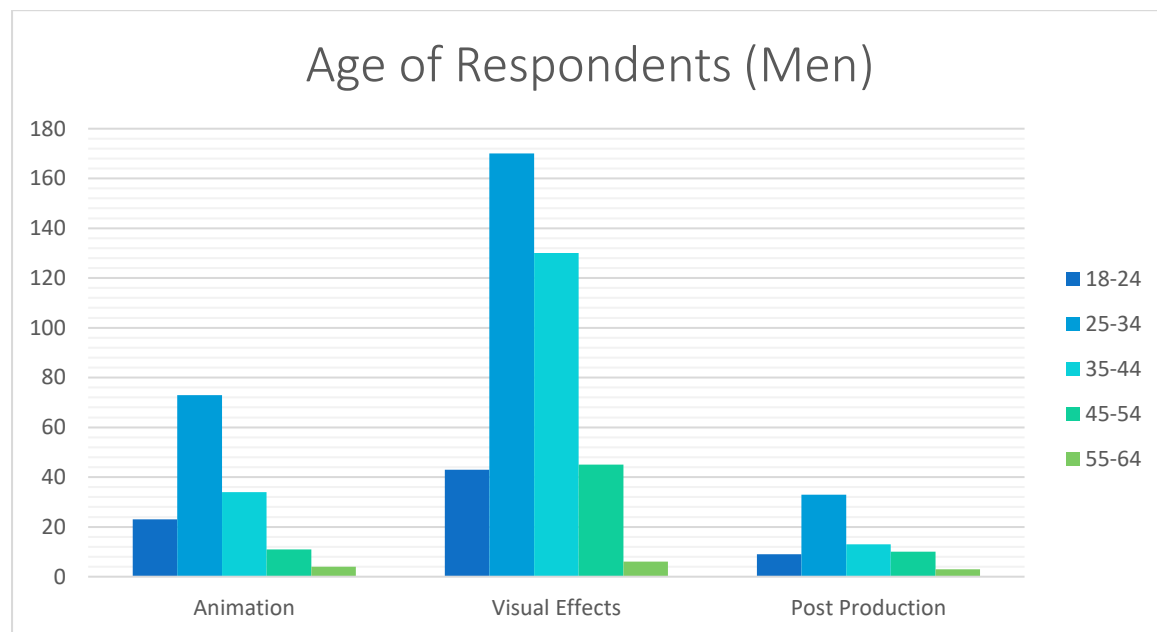
The majority of the responses were from London and the South East, but there were a good proportion of responses from some regions. Respondents from Animation were much more regionally diverse than those from VFX or Post, which is in line with our understanding of the concentration of these kinds of businesses across the UK. However, the sample size was insufficient in all regions other than London to publish a regional breakdown without risking confidentiality or being misleading.



Survey results

Age

The age profiles of animation, VFX and post-production workers bear a remarkable similarity. This is predominantly a young industry with the highest proportion of the workforce being in the age range 25-34 and very few people over the age of 55. Our results for VFX show a relatively higher proportion of people in the range 35-44 than either animation or post-production. There is a close correlation of the age ranges across genders, with the exception being a higher proportion of 25-34-year-old women in animation.



Gender

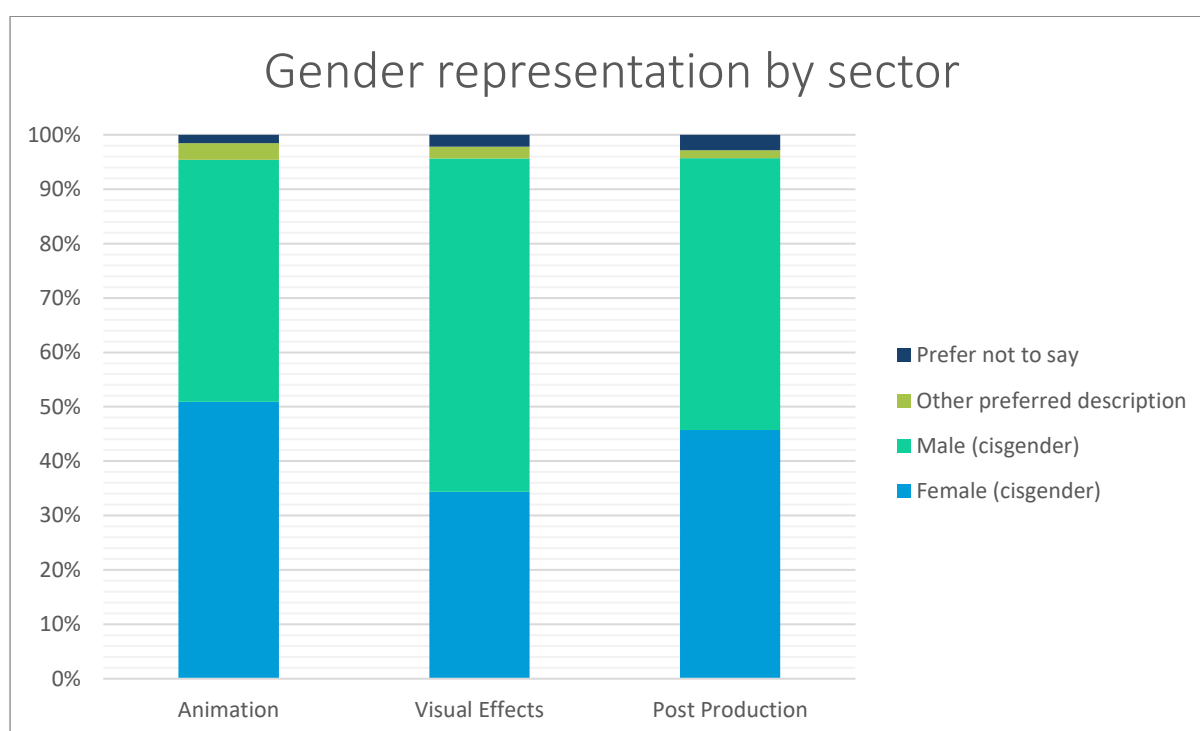
UK Screen Alliance's 2018 Workforce Survey indicated that there were 27% of women working in VFX, with a higher 40% in animation and a lower 28% in post-production. Our 2019 Inclusion Survey shows a different pattern. Animation achieves better than parity (51%) and post-production is not far behind (46%). The least representation of women was found in VFX (34%).

Table 2 - Comparison of 2018 and 2019 data on gender

Sector	Percentage of Women	
	UK Screen Alliance Workforce Survey 2018	UK Screen Alliance Inclusion Survey 2019
Animation	40%	51%
VFX	27%	34%
Post Production	28%	46%

We do not think that in the space of a year, the representation of women has increased by such a large percentage and there may be an element of survey bias here with women being more energised than men to respond to a survey about inclusion, particularly in post-production. Whilst the pattern of representation is the same between the two surveys, we are more inclined to trust the figures from our 2018 survey as it was collated from accurate data provided by the HR departments of companies and had a sample size of 5,400.

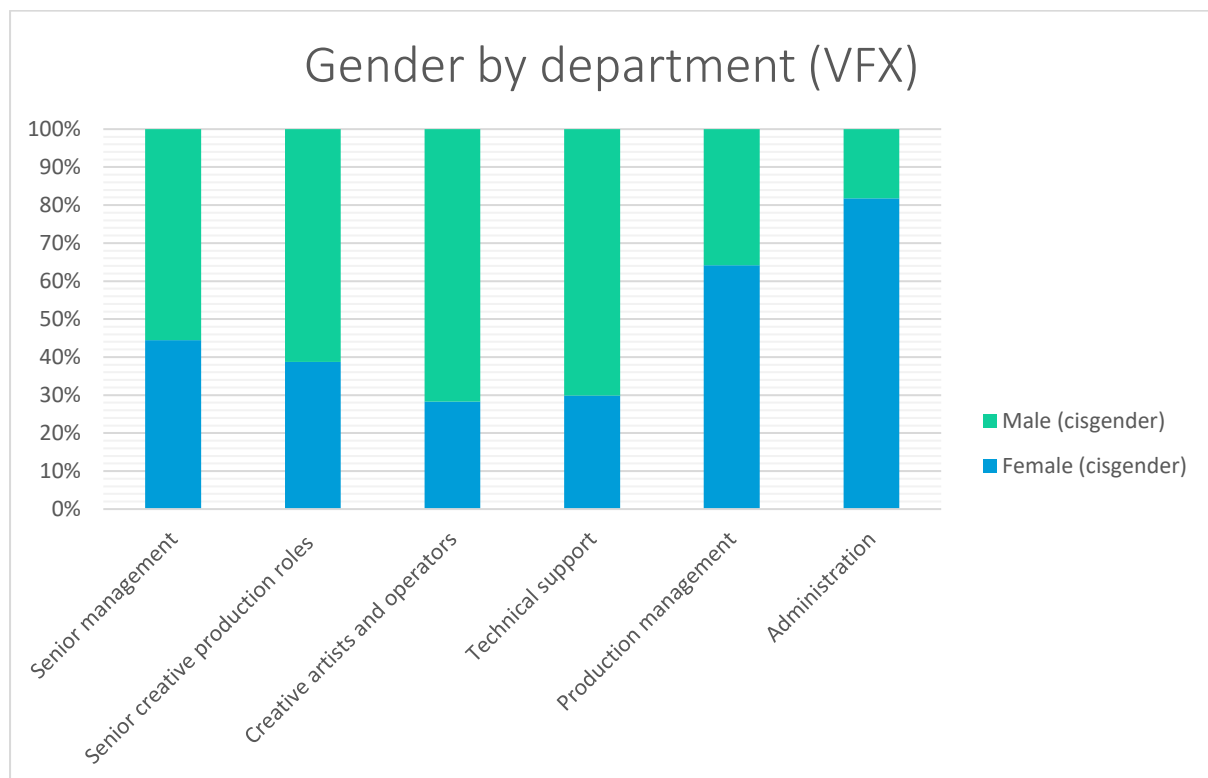
Our survey also includes respondents who identify as "Transgender Male", "Transgender Female" or "Non-binary". In total less than 1% described themselves as transgender or non-binary. In the analysis presented in this report, we combine those respondents into "Other Preferred Description" for confidentiality and disclosure reasons.



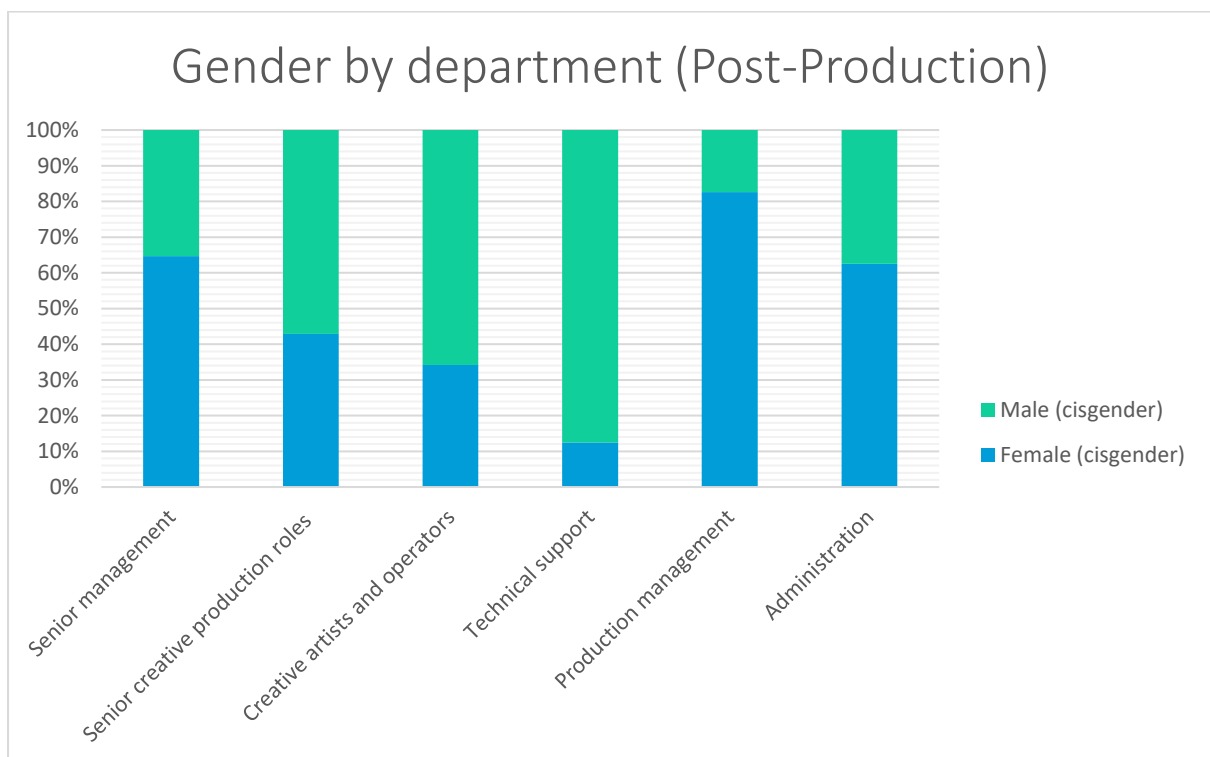
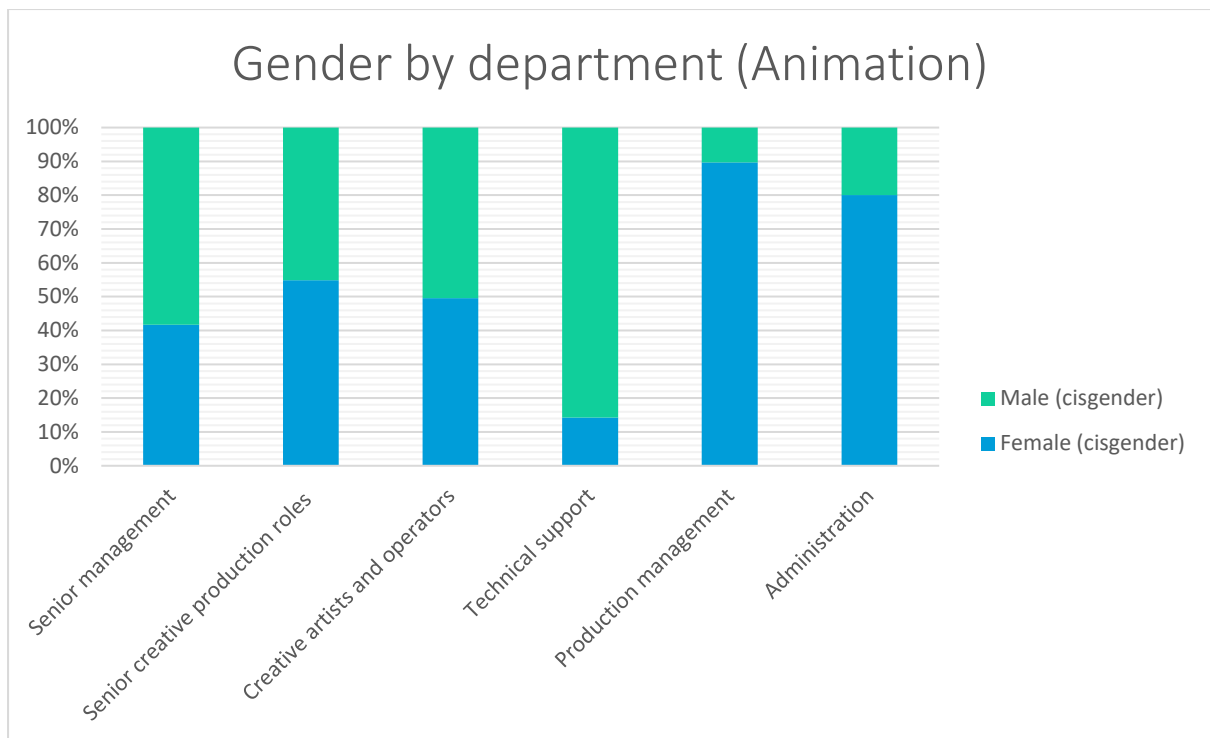
When we conduct a deeper analysis to reveal greater granular detail, we have not displayed responses from people who identified as other than cisgender in order to maintain their confidentiality. We have also not shown small departments with few respondents as one or two people can make a huge difference in percentage terms.

In VFX, the department with the highest ratio of women is Administration (82%), followed by Production Management (64%). The department with the least representation of women is Creative Operators and Artists with 27%. This is the largest department overall and the results in this survey for the Creatives bear a striking similarity to the overall result in our 2018 Workforce Survey (also 27%). This suggests that we have had a relatively higher engagement rate with this current survey from women in administrative and production management roles.

It is worth noting that women make up 44% of senior management roles and our survey shows a pleasingly high proportion of women in Technical Support roles, although this quantitative data is contradicted by anecdotal qualitative evidence.



Animation follows a similar pattern to VFX except for Creative Artist (49%) and Creative Production roles (55%) where there are a higher proportion of women than equivalent roles in VFX. Women make up an exceptionally high proportion of Animation Production Management roles (89%). The area where there is the least proportion of women in animation is in Technical Support (14%).



In post-production, once again women make up most of the Production Management (85%) and Administration roles (62%) but only a small proportion of Technical Support roles (12%). Women make up just 34% of Creative Artist and Operator roles. However, there are a higher proportion of women in senior management roles in post-production than in either animation or VFX (64%).

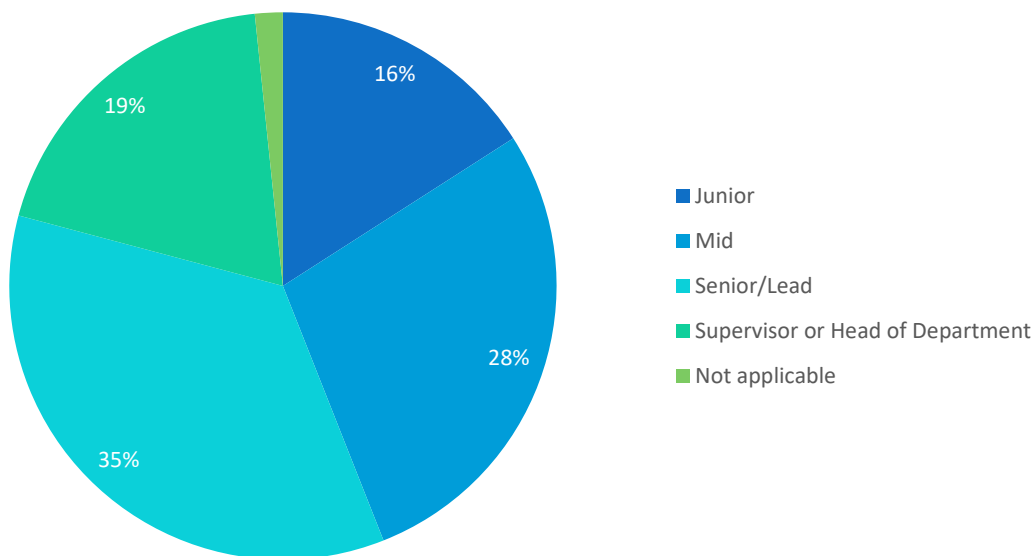
There is a common pattern across all three sectors when it comes to representation of women in senior and mid-level roles. Men are more likely to be found in senior roles or mid-level roles (54%) compared to women (44%). Junior level roles account for 16% of male workers whereas 26% of the female workforce are in junior roles. These statistics echo the statutory Gender Pay Gap quartile reporting¹⁶ by large companies in our sector, which show many more men than women being employed in the top 25% of roles which attract the highest salaries.

Table 3 – Reported Gender Pay Gap data 2018/19 from the largest VFX and post-production companies

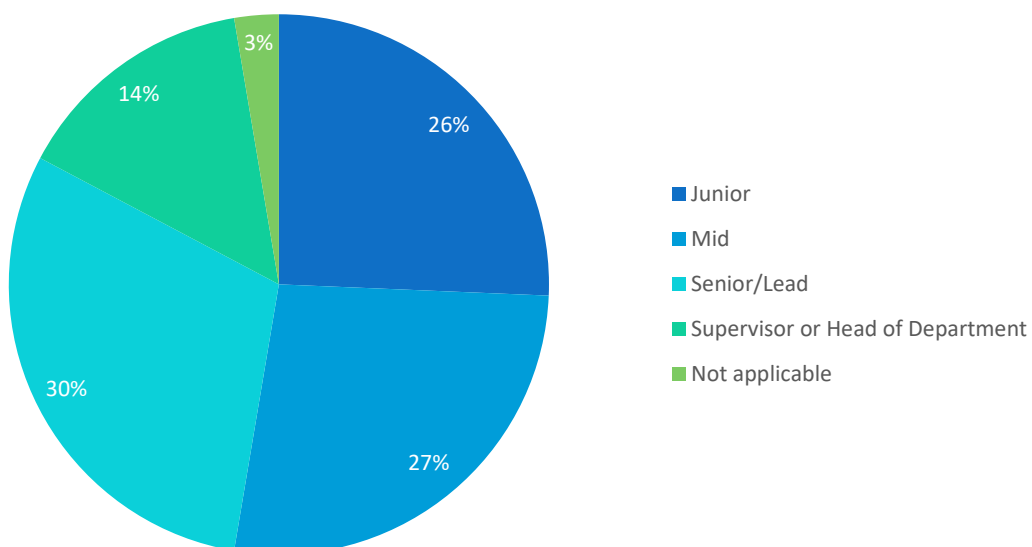
Employer	Employer Size	% Difference in hourly rate (Mean)	% Difference in hourly rate (Median)	% Women in lower pay quartile	% Women in lower middle pay quartile	% Women in upper middle pay quartile	% Women in top pay quartile	% Who received bonus pay (Women)	% Who received bonus pay (Men)	% Difference in bonus pay (Mean)	% Difference in bonus pay (Median)
DELUXE 142	250 to 499	12.9	12	37.5	40	28.8	24.1	30	29.2	27	-3.9
DOUBLE NEGATIVE	1000 to 4999	23	29.8	40.2	28	18	16.5	5.9	7.6	-61	-179.8
FRAMESTORE	1000 to 4999	21.1	24	37	30	23	15	13.5	8.4	-5.1	-5.6
MOVING PICTURE COMPANY	500 to 999	31	33.3	42.5	35	20.4	13.6	8.8	16.2	34.7	-36.2
THE FARM POST PRODUCTION	250 to 499	-1.1	15	33	24	22	25	7	7	30.4	-88.5
THE MILL	250 to 499	28	31	38.7	41.9	23.9	16.3	32.2	18.5	72.7	43.2
INDUSTRIAL LIGHT & MAGIC (UK)	500 to 999	25.6	28.4	40.9	16.5	13.4	11.1	58.7	64.9	-7.6	32.5

¹⁶ <https://gender-pay-gap.service.gov.uk>

Seniority (Men)



Seniority (Women)



"Although it might be more inclusive than other industries there is still not a whole lot of diversity specially in managerial or supervisor positions."

White male senior VFX artist

"We have an almost 50/50 split, however this is not across all roles, especially roles in management."

White male junior animator

"Too many women in production [management], too many men in creative lead roles."

Mixed ethnicity female senior creative in animation

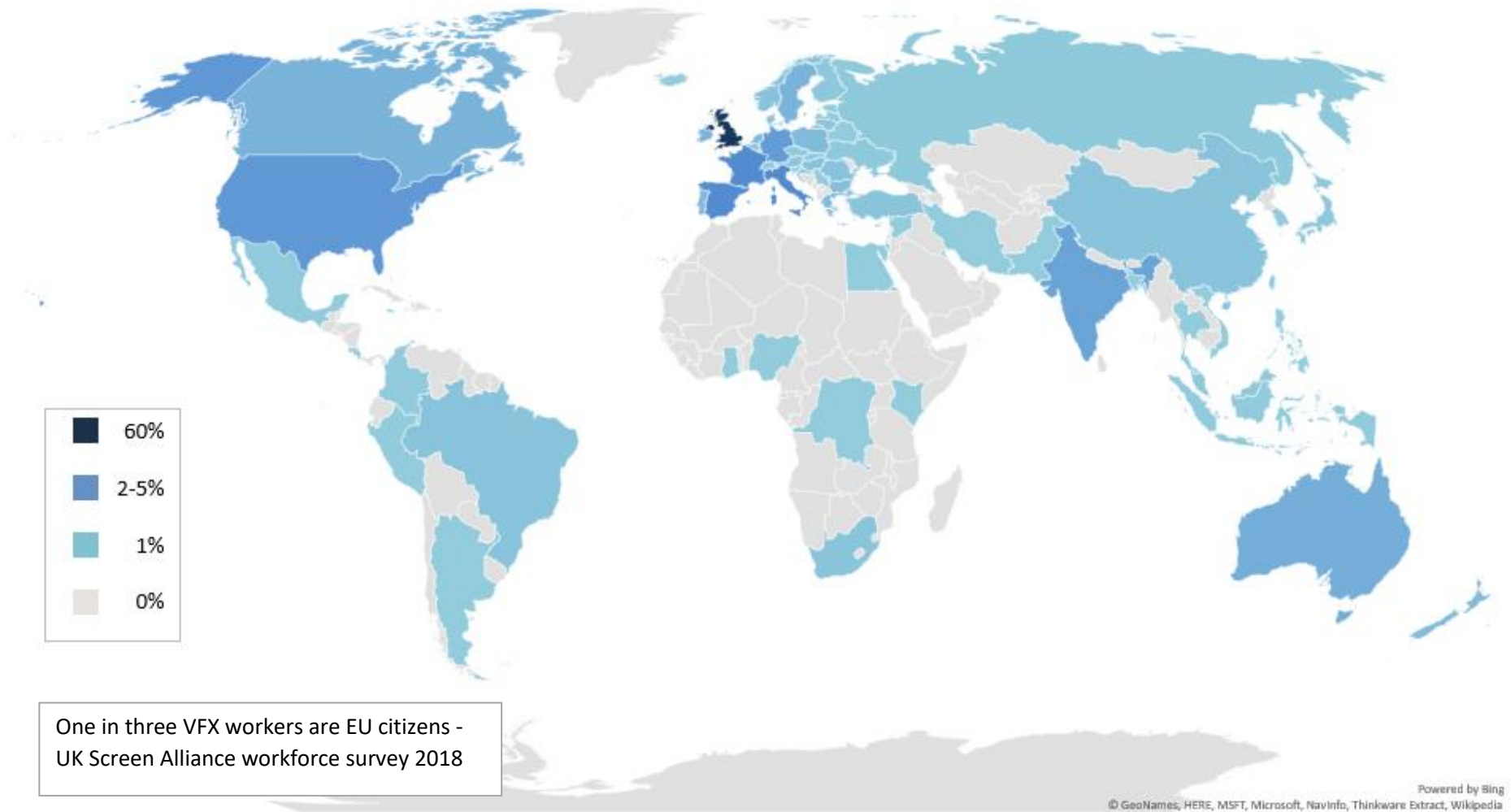
Women (especially women of colour) are few and far between when it comes to creative roles in the industry. It still feels like a boys' club.

Black female creative artist in animation

I have worked for three large VFX companies in London, the 1st and 3rd are pretty good on being inclusive. The 2nd company I worked for was something of a boys' club, with a large imbalance of middle-aged white males in creative supervisor roles. Generally, these companies still have more males in these roles and more women in production.

White male senior creative artist in VFX

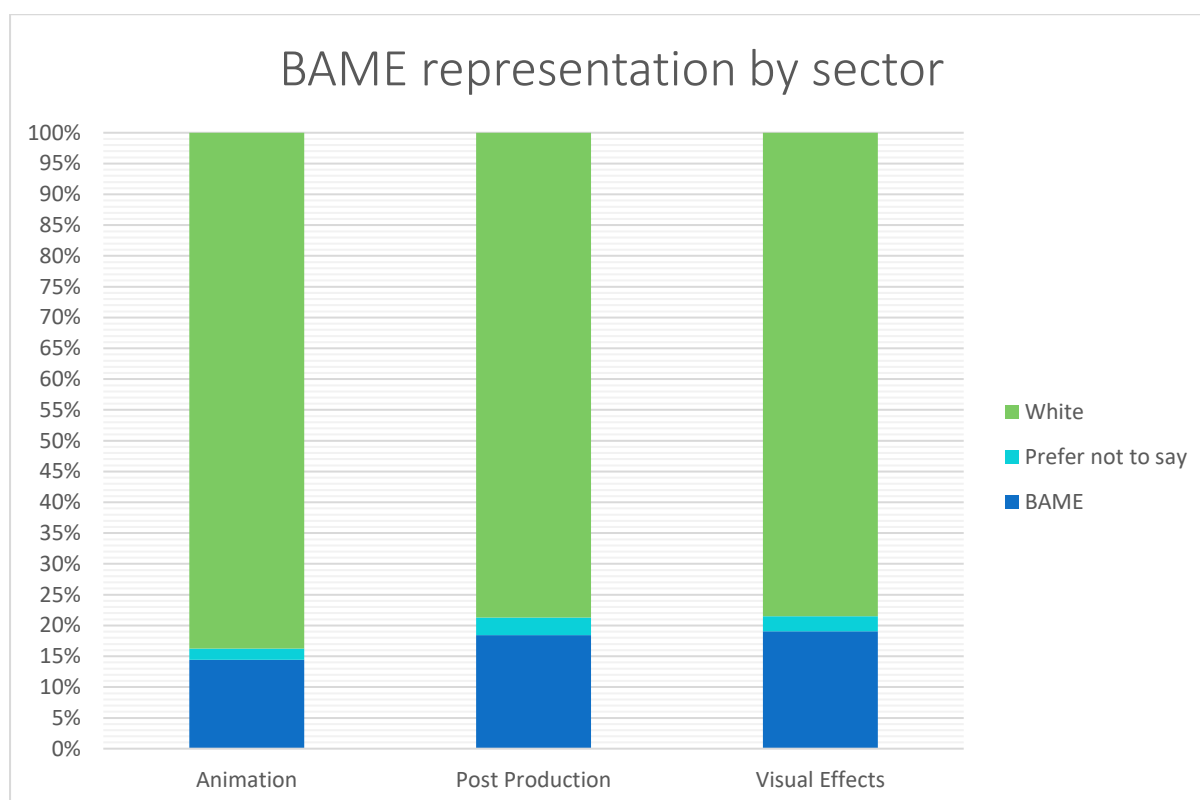
Country of origin of the UK's VFX and Animation workforce



Ethnicity

The VFX and animation workforces are known for being very cosmopolitan. The UK attracts the best talent from all over the world with representation from more than 70 nations, so it should not be a surprise to find it to also be one of the most ethnically diverse parts of the film and TV industry.

The percentages of BAME workers in the surveyed sub-sectors are considerably in excess of the often-quoted figure of 3% for the whole film industry, coming in at 18% overall. At a sub sectoral level, VFX is the highest with 19% BAME, with post-production close behind at 18%. Animation is 14% BAME.



Although there is a similarity in the overall BAME ratios between subsectors, there is a difference in the ratios of self-identified ethnic groups. In post-production there are higher proportions identifying as Black African, Black Caribbean and Mixed White/Black Caribbean than any other. The Black and Black Mixed population is less well represented in VFX, where the most numerous BAME populations are Asian Indian and Asian Chinese. Within animation, the highest BAME category represented was 'Other Mixed Ethnicity'. We have not presented these figures either in tabular or graphical form for disclosure reasons.

The obvious question here is, “what should the target for BAME representation be?” Should the BAME percentage be in line with that of the areas in which these businesses operate or the areas from which they recruit?

The BFI’s Diversity Standards¹⁷ (Section B3) includes a figure of 20% BAME for project staff other than heads of department. This is one of a number of possible criteria needed to qualify for BFI funding. It is also the aspirational inclusivity target figure used by ScreenSkills for its training programmes.

VFX jobs are overwhelmingly are predominantly within London, where the BAME percentage is estimated at 40%¹⁸. However, most recruitment for VFX and animation casts its net far wider than local residents and has a global focus when trying to discover and attract the talent with the most potential. Whereas post-production has more of a UK focus to its recruitment.

The working age percentage for people of colour across the country is 14%¹⁹. In which case, all 3 of our analysed sectors already equal or exceed that.

If we consider the region of origin of the UK workers in our survey, current recruitment is skewed towards London and the South East but 48% come from other regions and nations of the UK. A proportionate percentage for people of colour based on sub-sectoral recruitment patterns calculates as 18%²⁰ for VFX, 16% for animation and 19% for post-production. Therefore, this was exceeded in VFX but was narrowly missed by 1% by post-production and by 2% by animation. This is obviously a very rough and ready calculation but even allowing for a wide margin of error, VFX, animation and post-production are well on the way to achieving proportionate representation of people of colour according to the prevailing pattern of recruitment. If recruitment becomes more localised to where the jobs are currently (i.e. London), we would need to increase the target towards 40%, but the current political wind is blowing in the direction of more job creation in the regions, in which case the BAME target should move towards the national working age average of 14%. Separate analysis of our international workforce (presented later in this report) shows that it currently makes little difference to the overall BAME percentage.

Whilst the overall picture of ethnicity picture in these sectors is encouraging, it is also important to consider the seniority of the roles of BAME workers, and how they can be appropriately represented in all departments and at all levels in the workforce. In the three sectors we analysed, overall, we discovered just 8% of senior management roles are filled by BAME employees. The largest percentage of BAME workers in any department can be found in Technical Support (24%).

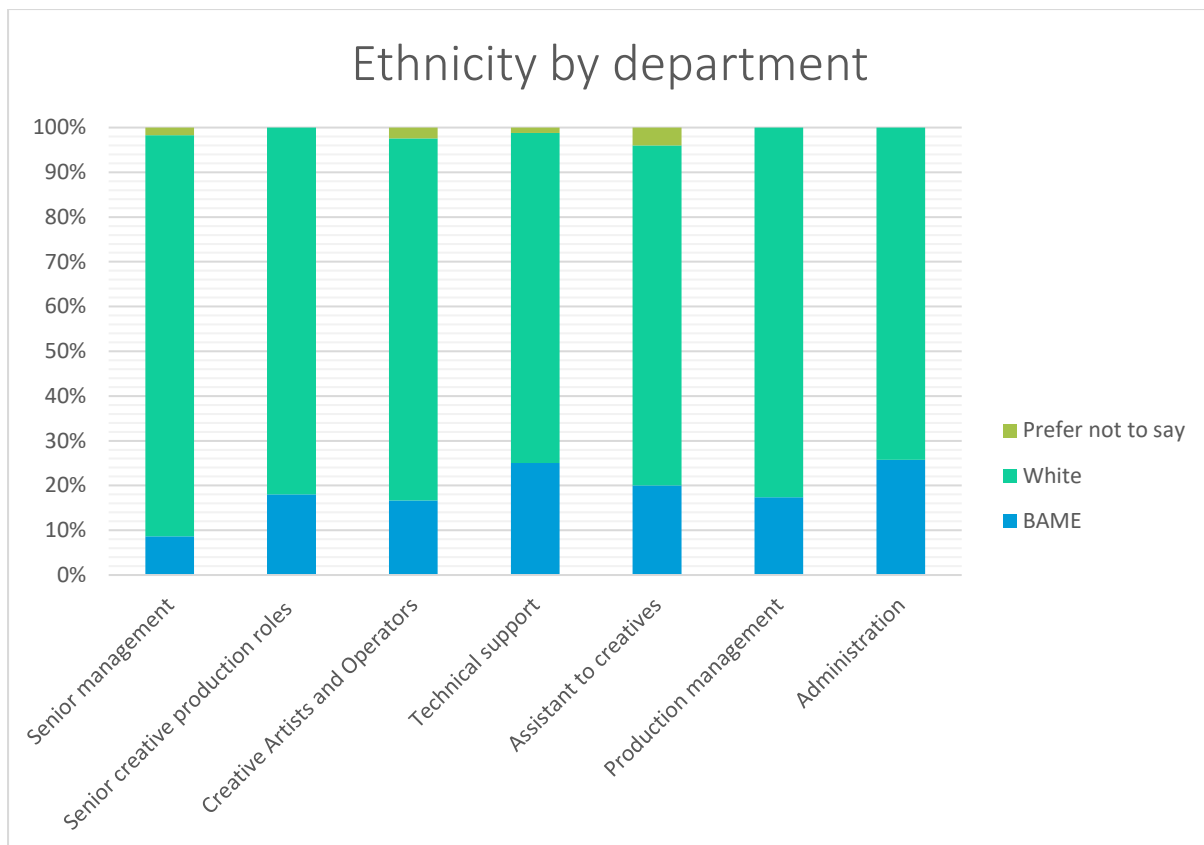


¹⁷ <https://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/bfi-diversity-standards-criteria-2019-07-23.pdf>

¹⁸ ONS UK Census 2011 for England & Wales

¹⁹ ONS UK Census 2011 for England & Wales

²⁰ Using the measured regional recruitment pattern for UK workers in our survey and then scaling this by the ONS ethnicity data for working age population in each region.



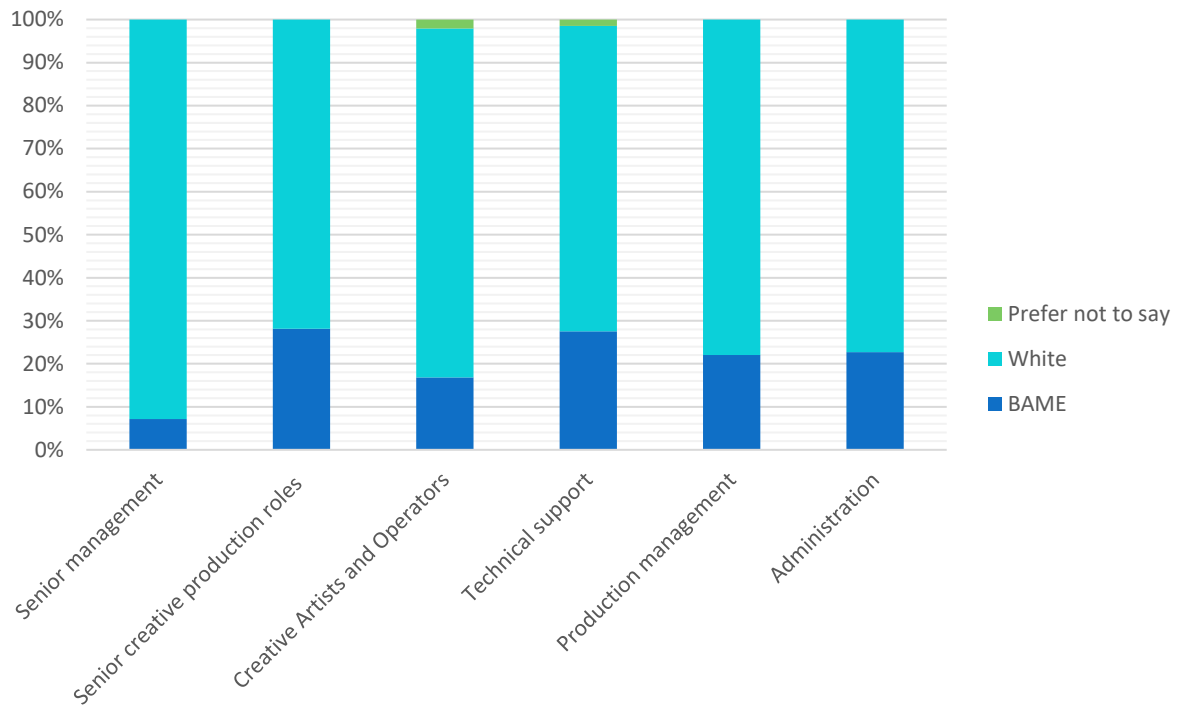
There were some differences as well as similarities between the three sectors. At this level of granularity, we need to caveat our results for some departments as having a wide margin of error due to small sample sizes. These were for animation; Technical Support and Administration; and within post-production; Senior Creative Production, Technical Support and Administration. All departments within VFX yielded a reasonable sample size.

There was a slightly higher proportion of senior managers in post-production who identified as BAME than in animation or VFX, but people of colour are underrepresented in all three sectors in top management roles. VFX showed a higher than average proportion of BAME in senior creative production roles and in technical support. Also, in VFX, there was a slightly above average representation of BAME in production management and administration but a below average representation in creative artist roles. Creative artists make up the largest number of respondents in the VFX sample (64%).

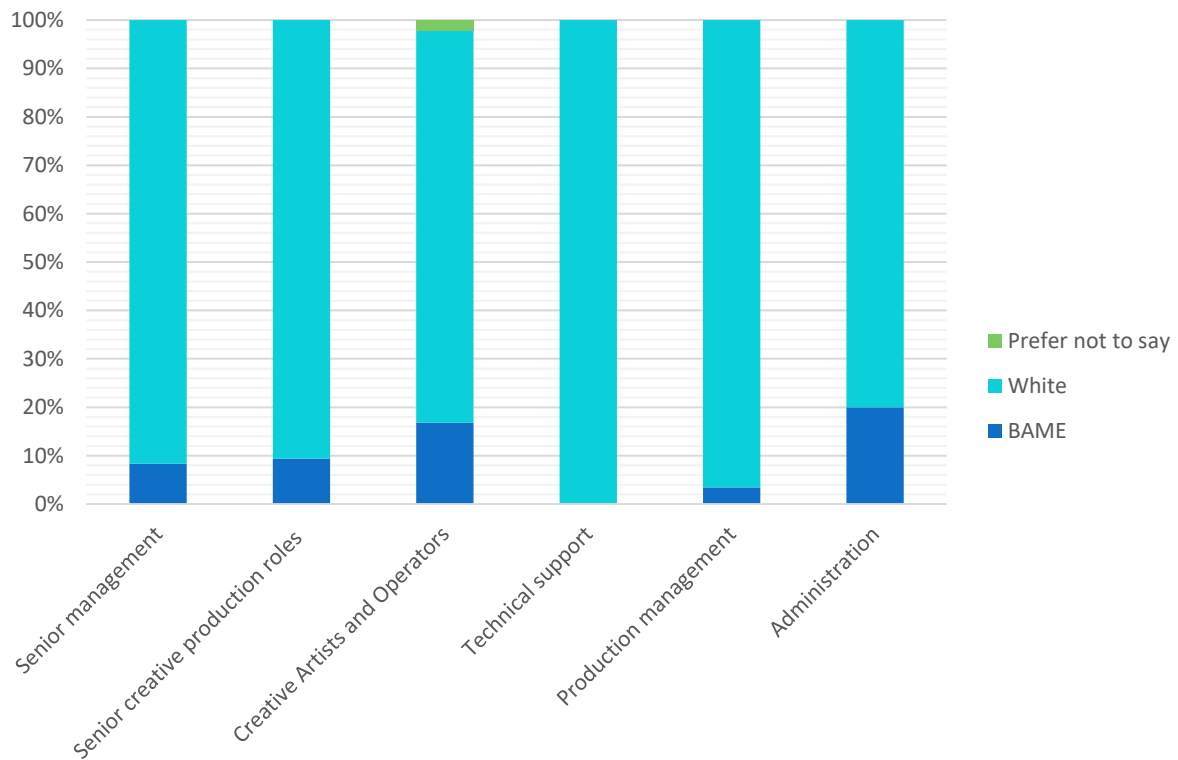
In animation, whilst the number of respondents from technical support was too small to give an accurate picture, it should be noted that we found no BAME representation at all. Creative artists made up 73% of the total animation sample and therefore in terms of numbers, contained the largest group of people of colour.

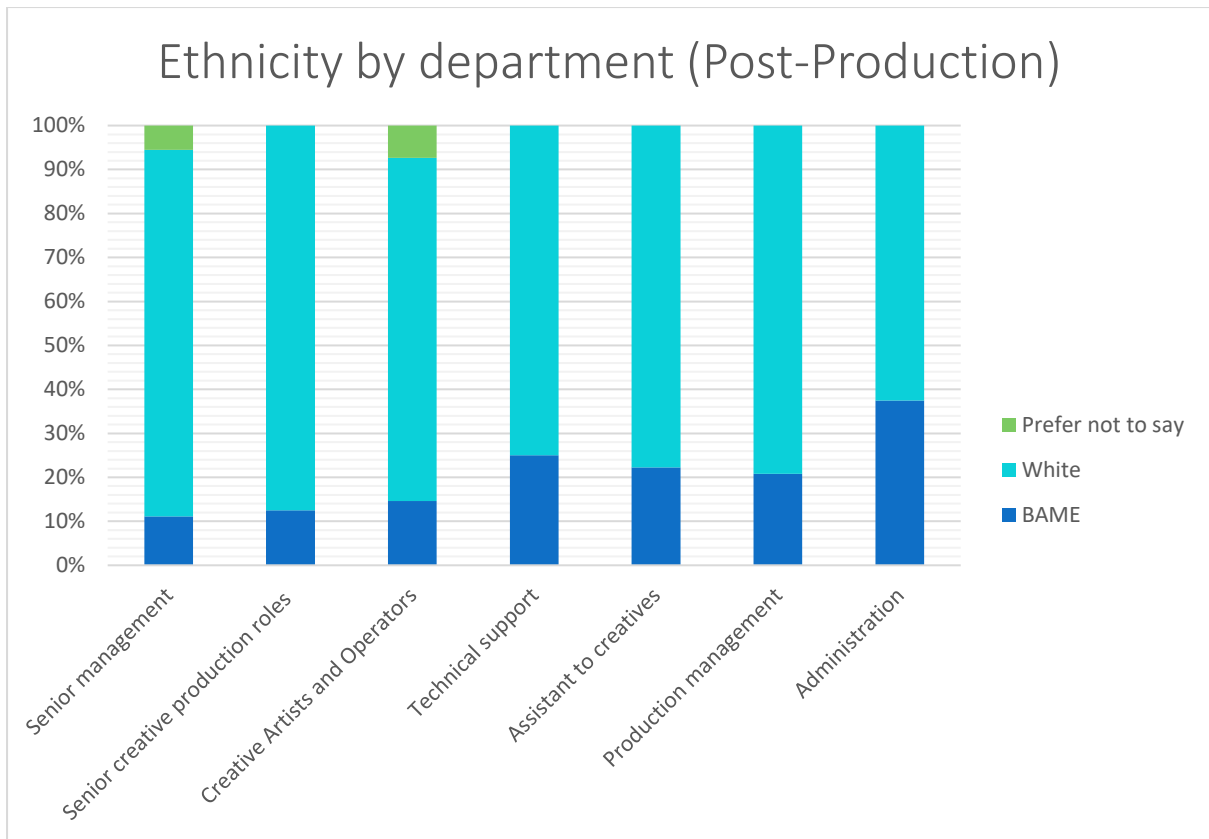
In post-production, creative operators make up 33% of the sample. We were able to analyse an additional department of “assistants to creative”, where there was above average BAME representation. Although there appears to be high representation of BAME in administration, the sample size is small and should be treated with caution.

Ethnicity by department (VFX)

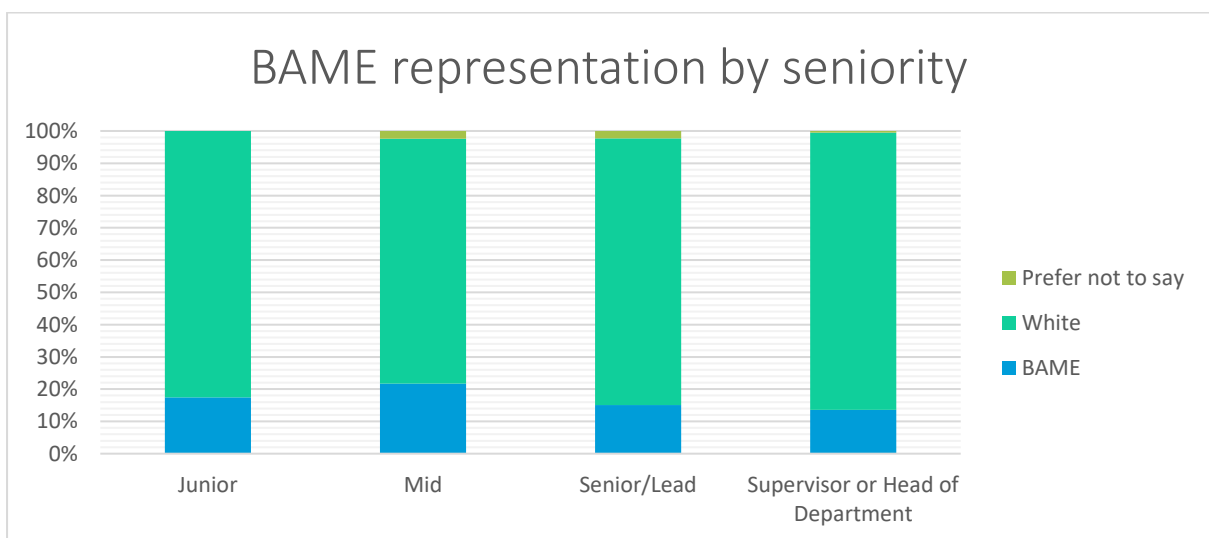


Ethnicity by department (Animation)

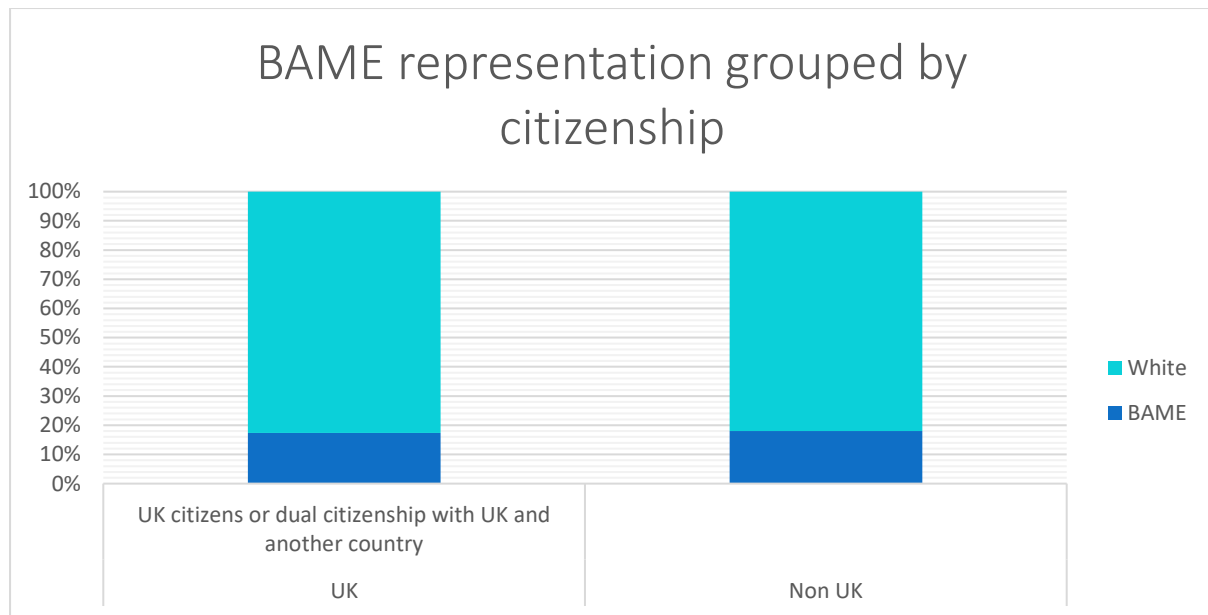




Within VFX and animation jobs are often formally advertised as being Junior, Mid or Lead Level, but we asked respondents from all sectors to identify the seniority of their role. Our analysis showed at the highest percentage of BAME workers are of Mid-Level (22%) followed by Junior-Level (17%). Supervisor or Head of Department Level shows the least BAME representation (14%). Whilst overall top management roles show the least diversity, there is better diversity at departmental head level. People of Black and Black Mixed ethnicity are represented at Junior and Supervisor levels but are notably lacking in Mid and Senior levels, where BAME representation is more likely to be Asian.

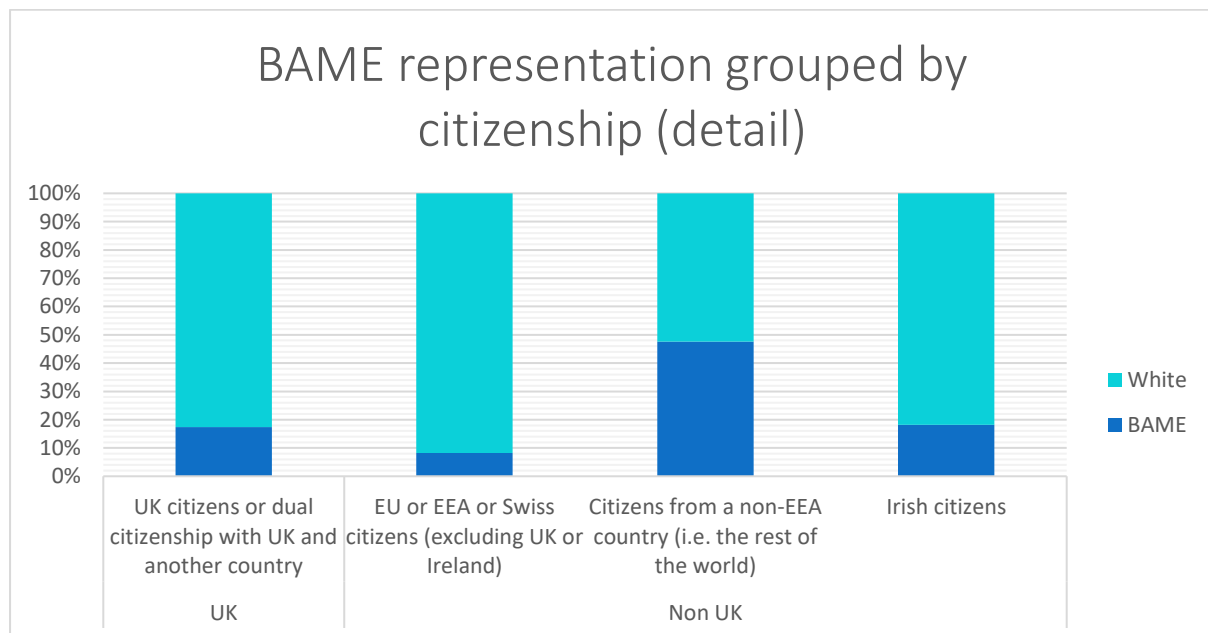


One in three VFX workers are from the EU/EEA and in animation this is one in five²¹. VFX also employs 13% of its workforce from outside of the EEA. Our survey shows that the BAME percentages are virtually identical between UK and non-UK citizens and therefore our migrant workforce neither increases nor decreases the overall BAME ratio.



As Free Movement ends following Brexit, how might a reduction in EEA migrant workers might affect our BAME statistics? Further analysis reveals that skilled VFX/animation workers coming to the UK from Europe are overwhelmingly white (95%), whereas non-EEA skilled migrants are just 55% white with sizable groups identifying with Indian or Chinese ethnicity.

It therefore seems that any reduction in recruitment from Europe as a result of applying visa restriction following Brexit may result in a small increase in the BAME percentage overall, if recruitment from the UK can maintain the current percentage of new BAME recruits.

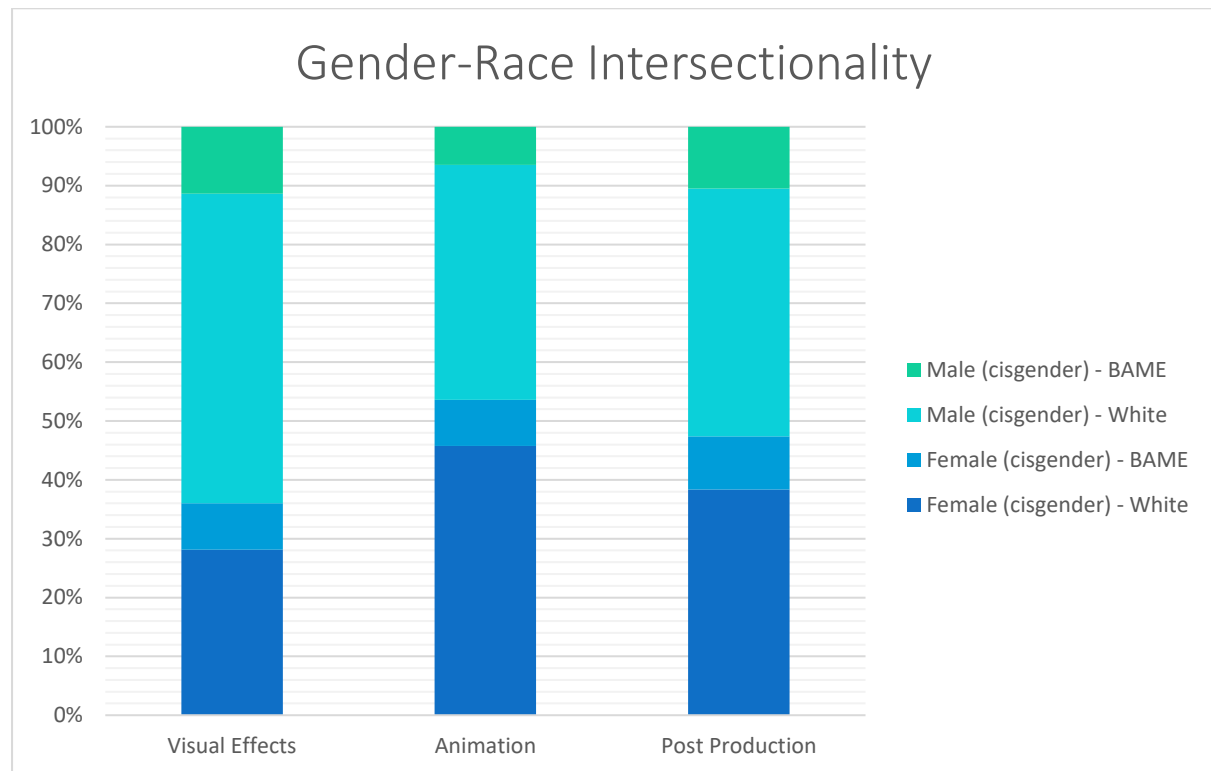


²¹ UK Screen Alliance workforce survey 2018

Gender/Ethnicity Intersectionality

For reasons of confidentiality and simplicity of the presentation of the data, we have only examined intersectionality for persons identifying as cisgender.

Our data shows that there is roughly equal representation for persons of colour within each gender for each sub-sector.



Overall, Women of colour make up 8% of the VFX workforce, 8% of animation and 9% of post-production.

BAME men are 11% of the VFX workforce, 6% of animation and 11% of post-production.

Within VFX, 22% of the women are also BAME, compared to 18% of the men who are BAME.

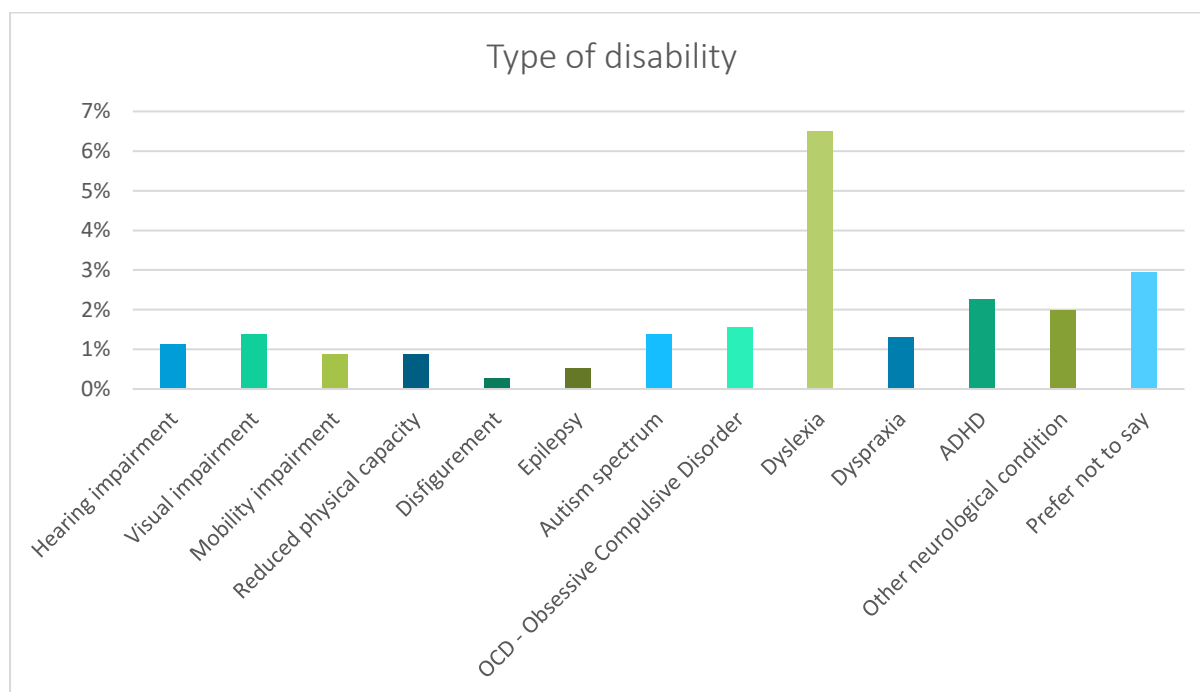
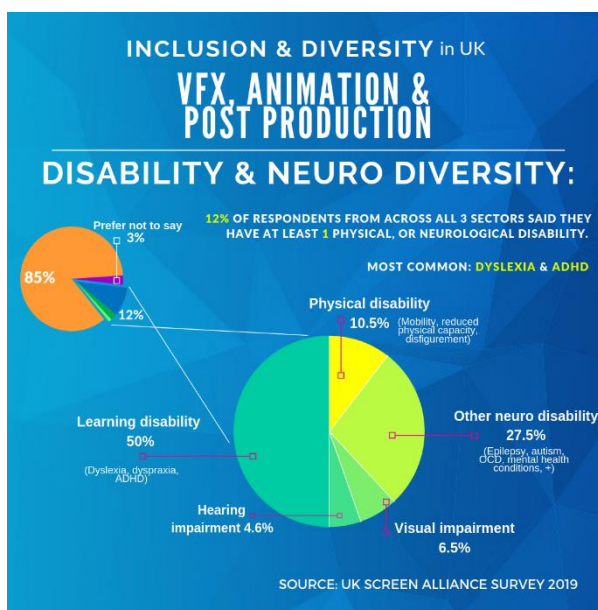
In animation, 15% of the women are BAME, compared to 14% of the men.

For post-production, 19% of the women are women of colour and 20% of the men are BAME.

Disability & Neurodiversity

17% of working age people in the UK are reported to have a disability²². We asked respondents which physical, sensory or neurological conditions²³ they identified with, or if they were able-bodied with no neurological conditions. We found neurological conditions to be present in 9% of our sample and physical disabilities in 2% with a further 1% having both neuro and physical conditions. A very small proportion of respondents identified as having between 3 and 6 neuro or physical conditions.

The most common condition declared was Dyslexia (6.5%) followed by ADHD (2.2%). It should not be surprising to find a relatively high percentage of neurodiversity in a creative industry sector, where the ability to think differently or to be attentive to minute detail is often an advantage.

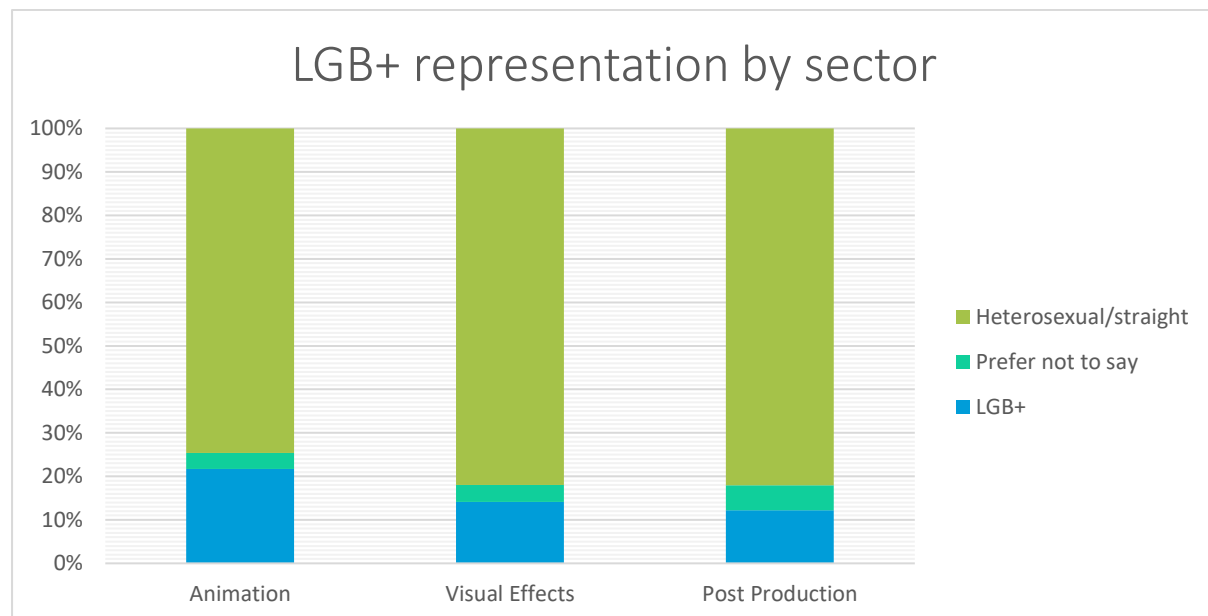


²² Department of Work & Pensions - Characteristics of disabled people in employment - 2017
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/753091/ad-hoc-statistics-characteristics-of-disabled-people-in-employment-april-to-june-2017.pdf

²³ Neurological conditions include mental health conditions <https://www.geniuswithin.co.uk/information/>

Sexual Orientation

The sector showing the least proportion of people identifying as Heterosexual, was animation with 21.5% identifying as Lesbian, Gay, Bisexual or another preferred description. The lowest was in post-production (12%). However post-production had the highest percentage of people who preferred not to disclose their sexual preference. Within the UK population, 2%²⁴ identified as LGB in 2017.



People identifying as Gay or Lesbian was constant across the sectors at 6-7%. The only major difference was a higher proportion of Bisexuality (9.5%) and Pansexuality (4%) in animation.²⁵

I feel this is a safe and supportive environment to work in, particularly for LGBTQ+ people.

Queer white female creative artist in animation

"[Company redacted] has created a strongly diverse and accepting company culture with efforts made in supporting Pride but also with clearly very socially and ethnically diverse recruitment."

Straight white male senior creative artist in VFX

We have a lot of people working here of different genders, backgrounds and orientation and it feels very welcoming and pleasant irrespective of where you have come from or how you identify... you do still come across the odd inappropriate or ignorant comment from some co-workers, though I imagine that is more a societal issue and less to do with our industry or workplace specifically.

Queer white female working as creative artist in animation

²⁴ ONS Sexual Identity. 2017.

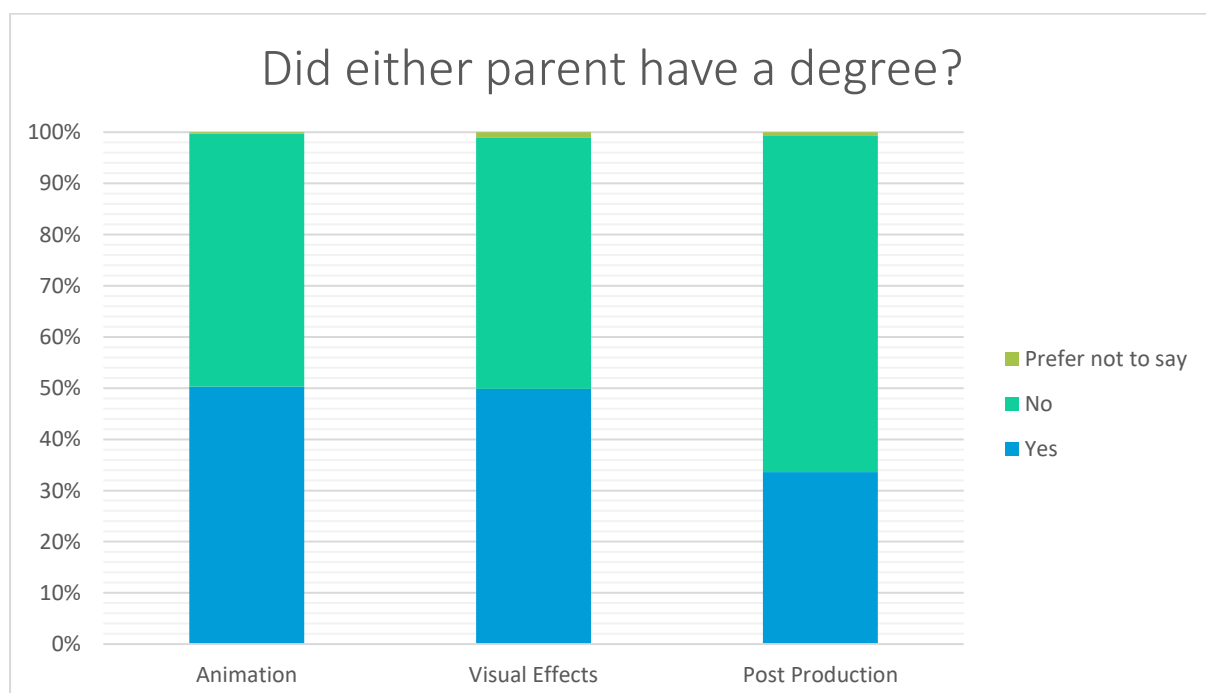
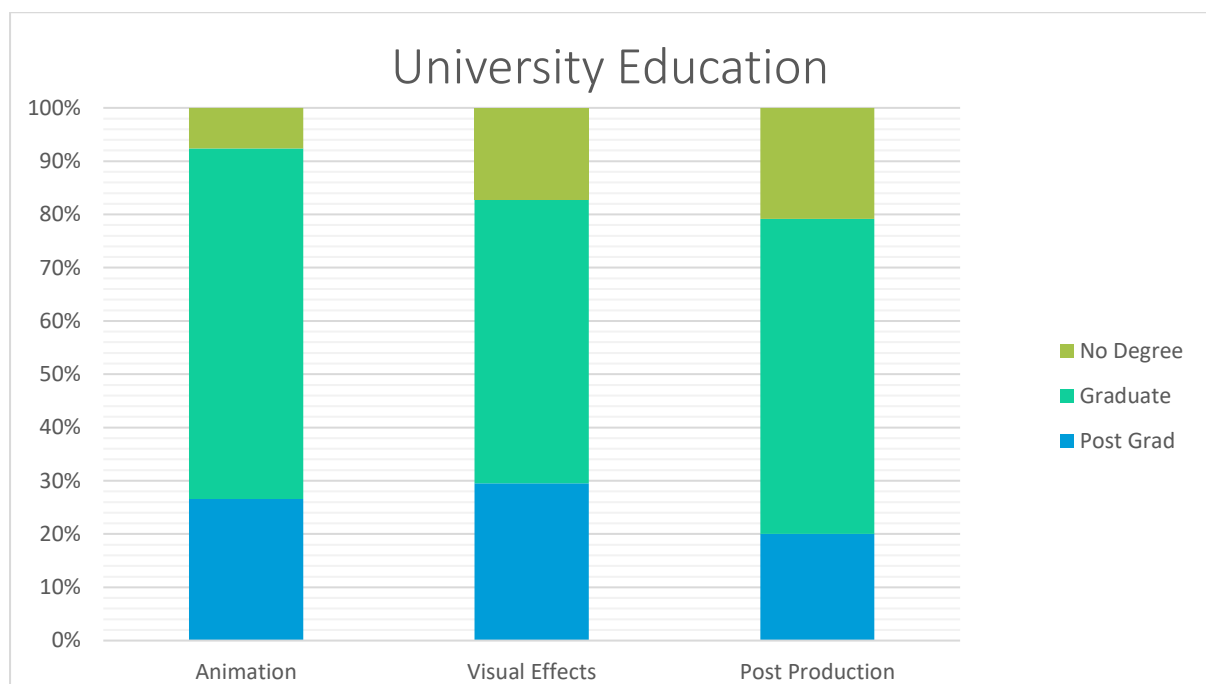
<https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/sexuality/bulletins/sexualidentityuk/2016>

²⁵ Transgender is analysed separately in the Gender section of this report.

Education and Social Mobility

The VFX, animation and post-production workforces are educated to a very high level, with 85 % having a degree or post graduate qualification. The highest sub-sectoral percentage of graduates is in animation (93%) and the least in post-production (79%). VFX has the highest percentage with post graduate degrees (29%).

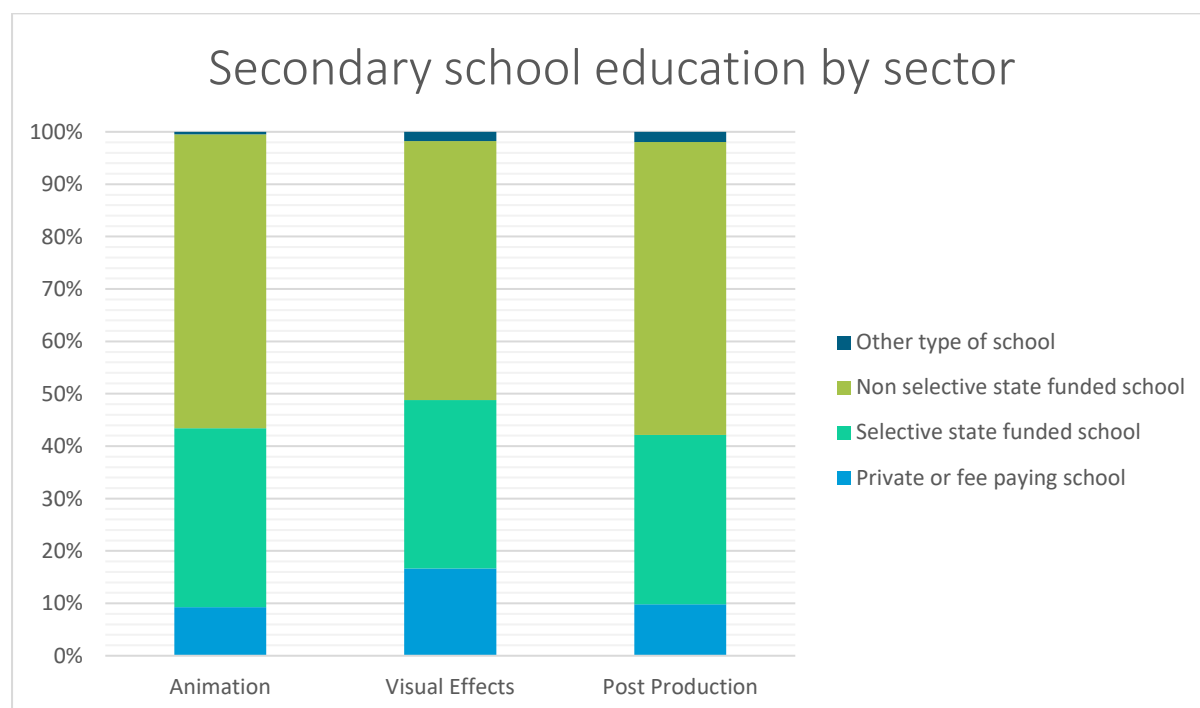
The workforce holds a noticeably higher level of educational qualification than their parents. Within animation and visual effects, for half of all workers, neither parent was a graduate. This ratio is 66% in post-production.



Independent fee-paying schools educate 6.5% of school children in the UK at present.²⁶ This percentage has been static at around 6% to 7% for the last 40 years.²⁷

All three of the sectors we analysed exceed the UK percentage for private education. The largest privately educated group were in VFX (17%) exceeding the national average by some margin. VFX is also the sector with the least proportion of non-selective secondary education. 9% of people working in animation or post-production went to a private school.

It is fair to assume that workers in these sectors have come from the more economically advantaged areas of society.



The proportion of people in senior management who attended a private school is even higher at 22%. Only the administration departments have proportions of privately educated people in line with the UK average.

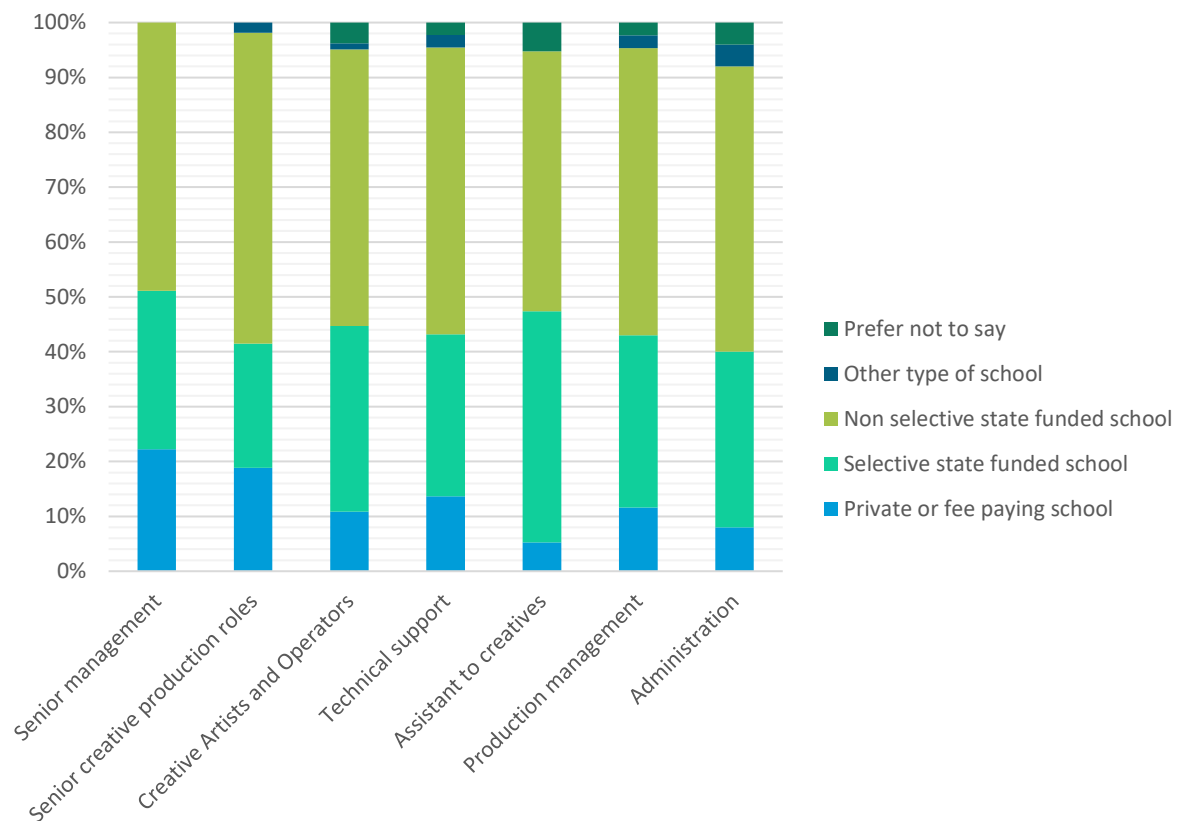
The proportion of privately educated people increases in older age groups. The over 55's are most likely to have been privately educated (30%). In the 25-34 age group private education is at its lowest proportion (8%) and is almost in line with the national average. However, the proportion of under 24-year-olds who were educated in selective state-funded schools (38%) is the highest of all the age groups.

At least 50% of people in all age groups attended non-selective state schools apart from the over 55s, but when this age group were of school age, grammar schools were plentiful in all areas of the country, before their decline in numbers during the 1980s and the growth of comprehensive schools.

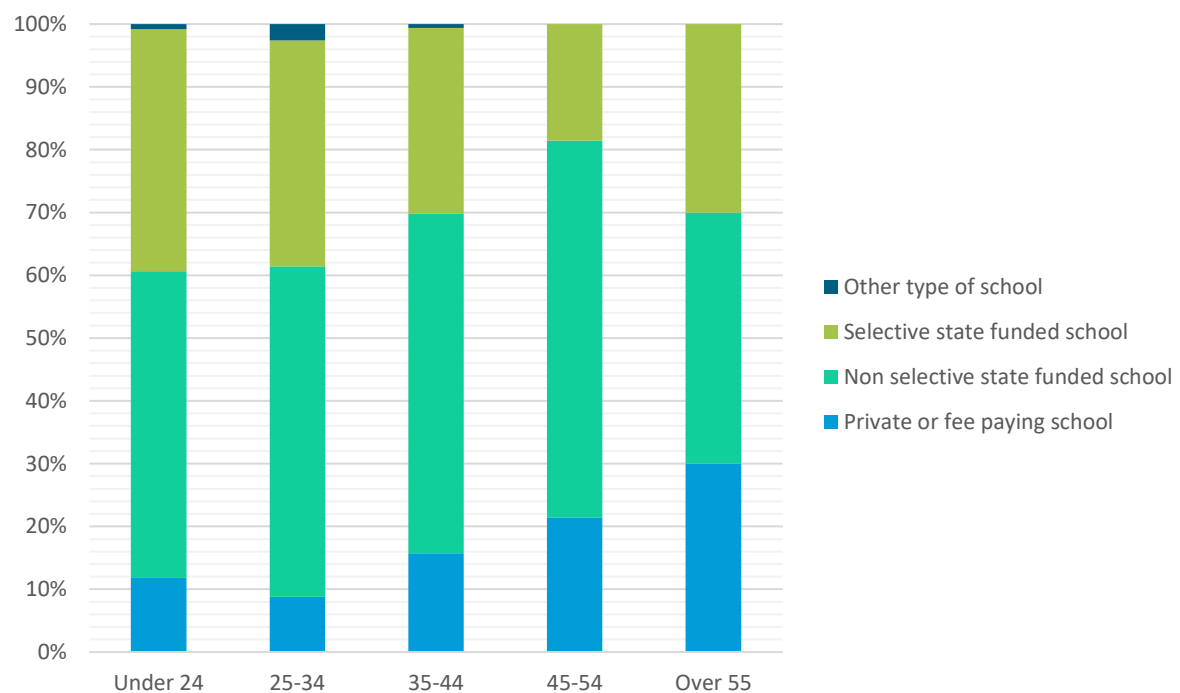
²⁶ Independent Schools Council research <https://www.isc.co.uk/research/>

²⁷ Private schooling in the UK - Luke Sibeta, Institute for Fiscal Studies <https://www.ifs.org.uk/bns/bn106.pdf>

Secondary school education by department



Secondary school education by age group



The importance of providing educational opportunity and careers advice to socio-economically challenged and BAME groups can be seen from the following quotes from parents whose children attended the Access:VFX Animation Summer School in 2019. This was a free to attend event for parents and schoolchildren held in London over 3 days. It included introductory classes from industry volunteers and was funded by employers and industry sponsors using no public funds.

"What you guys [Access:VFX] are doing is truly amazing. Working class children are almost never exposed to days like these or told they could work in an industry like this. Events like yours helps open up the door for less privileged children. Often there are a lot of working-class children who are not great at the academic side of school BUT they are highly creative, good problem solvers and good with hands-on skills. All great skills for animation, sadly they just don't get given the chance to apply it due to their background. Usually they believe it is out of reach, having never seen anyone in their family go to university or have a creative job and not being able to afford the equipment. So well done guys for tackling those barriers."

Parent of schoolchild who attended the Access:VFX Animation Summer School

"When I told my son about it [the Summer School], his first reaction was there's not going to be anybody who looks like me there. It's only going to be white people.... My son automatically thought that he didn't suit the industry purely because of skin colour.... When he came to the programme, I couldn't believe how talented he was, having never used Blender before. He flew through the steps, I told him he has talent, and this is a good way to learn transferable skills. I'm encouraging him to learn these programmes as not many 13-year olds can say they met Oscar winning animators during the summer. As a parent I'm glad we attended and it was a learning curve for both of us. I would like to thank the organiser for creating this insightful event."

Parent of 13-year-old BAME boy who attended the Access:VFX Animation Summer School



Access:VFX Animation Summer School 2019

"I think reaching out to colleges or kids in secondary school would be great, as I didn't learn about how to get into this industry until quite late. In my experience at school we were often pushed away from any form of art that wasn't fine art, and I think lots of kids would be happy to learn that this is a possible career path for them. "

Mid-level creative artist working in Animation

"Help children learn about these types of roles that exist. Most people don't know what a Compositor/rigger/ match-mover etc. are."

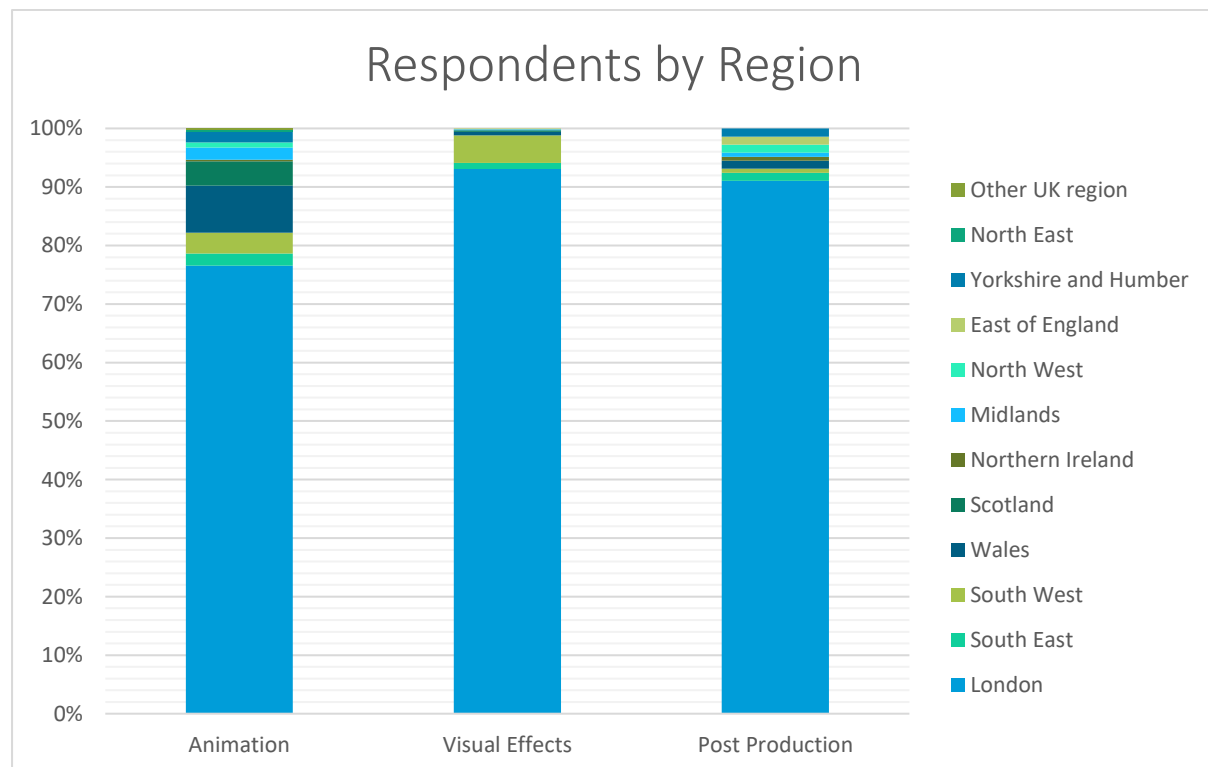
Senior creative artist in VFX



Access:VFX UK Careers Tour 2018 – Schools outreach event in Edinburgh.

Where you work compared to where you grew up

93% of the VFX respondents work in London. Post-production is also centred in London, but animation is much more regionally diverse. We noted that 5% of the VFX respondents work in the South West. Rather than this reflecting the South West as a major VFX hub, it is more likely to have been exceptional engagement in the survey by one or two companies.



The lure of London is clearly strong. Of the total number of VFX, animation and post-production jobs in the UK, 89% are in London or the South East. Yet when we asked our respondents to identify the region in which they grew up, 48% of those that hail from the UK, came from outside of London and the South East.

The need to move to the capital to enter VFX and post-production is often cited as a barrier to inclusion. Independent living for young new entrants in London is extremely expensive and usually requires parental support.

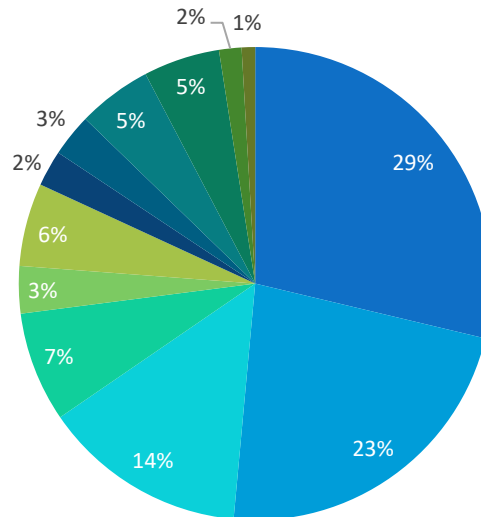
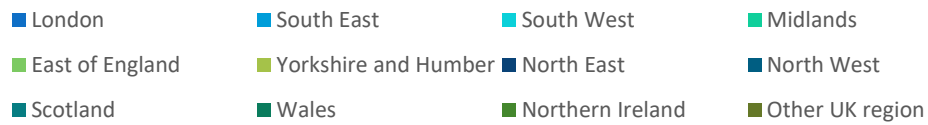
“Large named studios outside of London would allow those whom may be disadvantaged or come from low income families and can't afford the move, to become more interested in the industry. Especially when considering the loan payments for university that need to be paid back.”

Tech support worker in a regional Animation studio

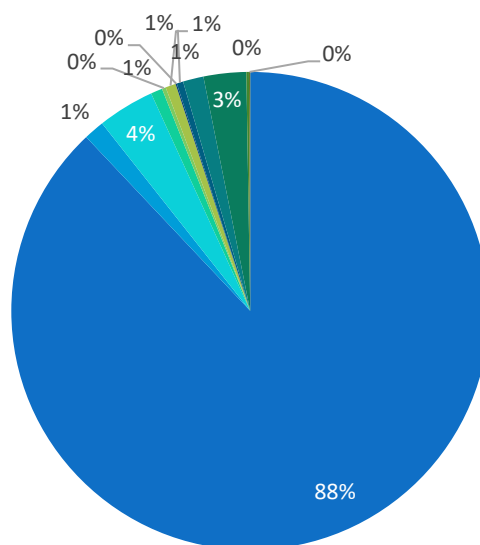
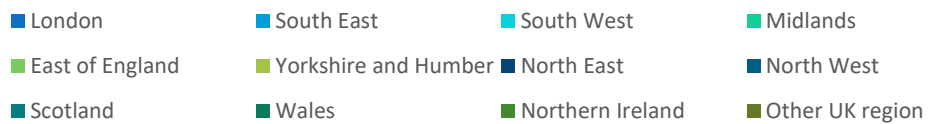
“Support more production and post-production in the nations and regions. The London-centric nature of our industry and the associated cost of living is stifling the development and growth of talent in and from other regions.”

Senior creative worker in regional post-production

Region you came from

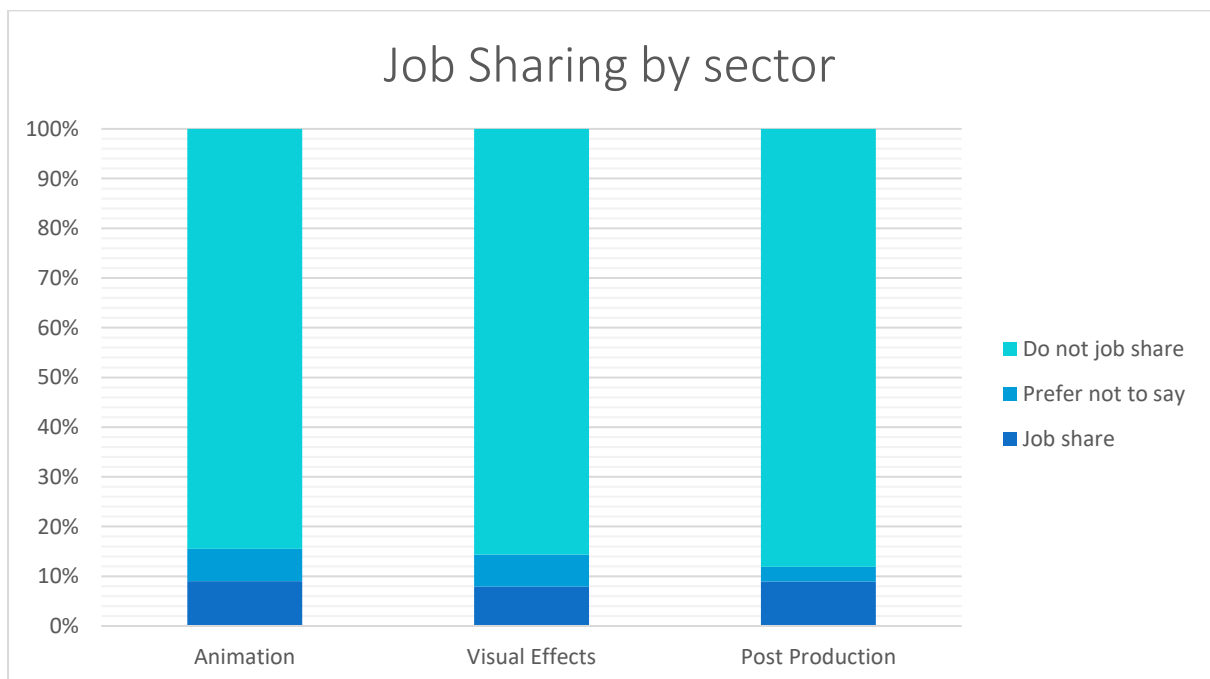
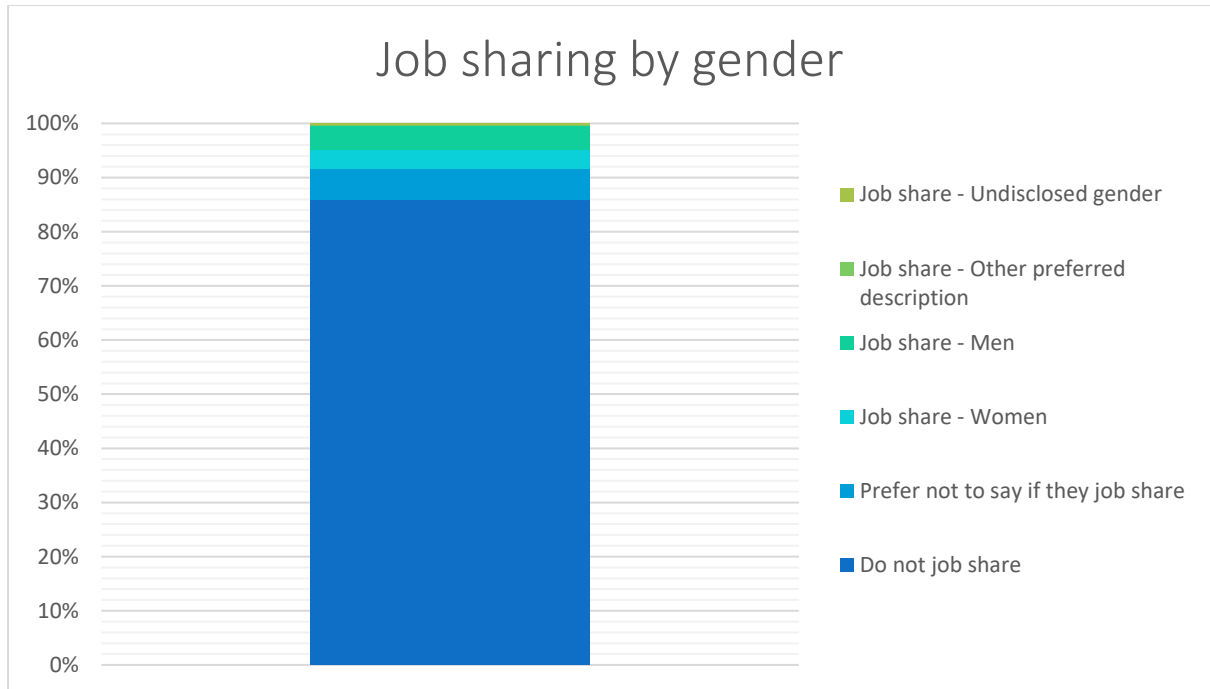


Region you work in

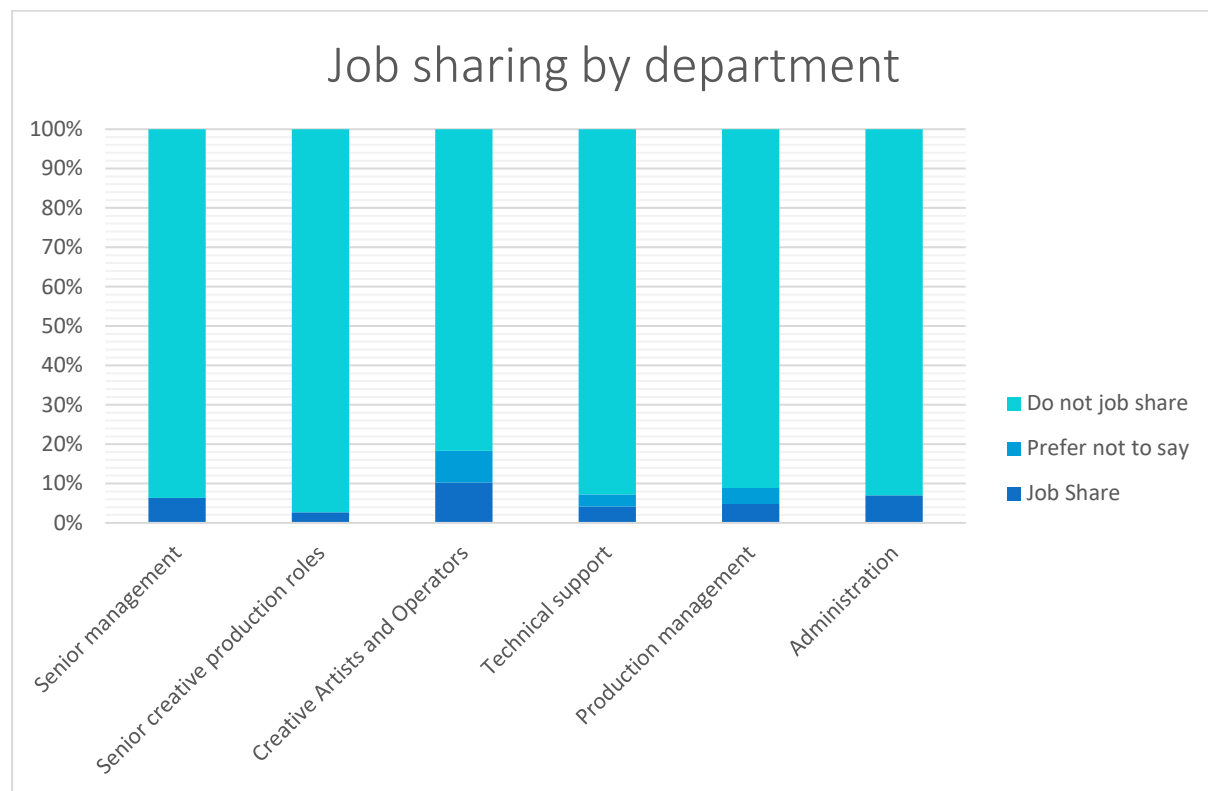


Job Sharing

8.5% of people in our survey say they job-share with a further 5.5% preferring not to say. Of those who do job share, more than half are men. The proportion of job sharing is similar in the three sectors analysed with only the percentage of those preferring not to say have any appreciable variance.



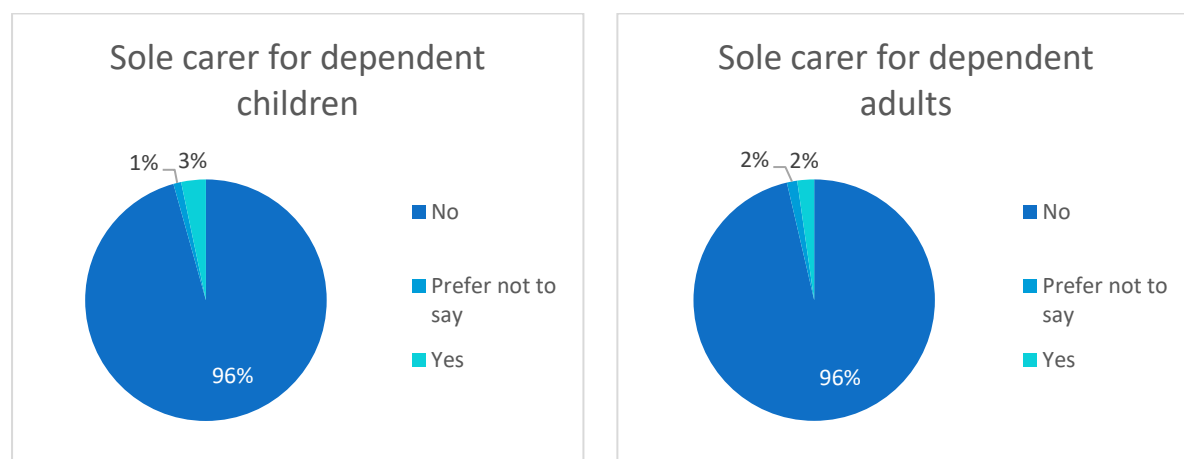
Job sharing was most common amongst Creative Artists and Operators (10%) and least common in Senior Creative Production roles (2%).



Caring Responsibilities

Caring responsibilities for dependent children or elderly relatives can make a severe impact on social mobility and on the potential for promotion. We found that 3% of the workforce were the sole carer for dependent children and 2% were the sole carer for dependent adults. 0.5% of our sample declared as having sole caring responsibilities for both dependent children and dependent adults.

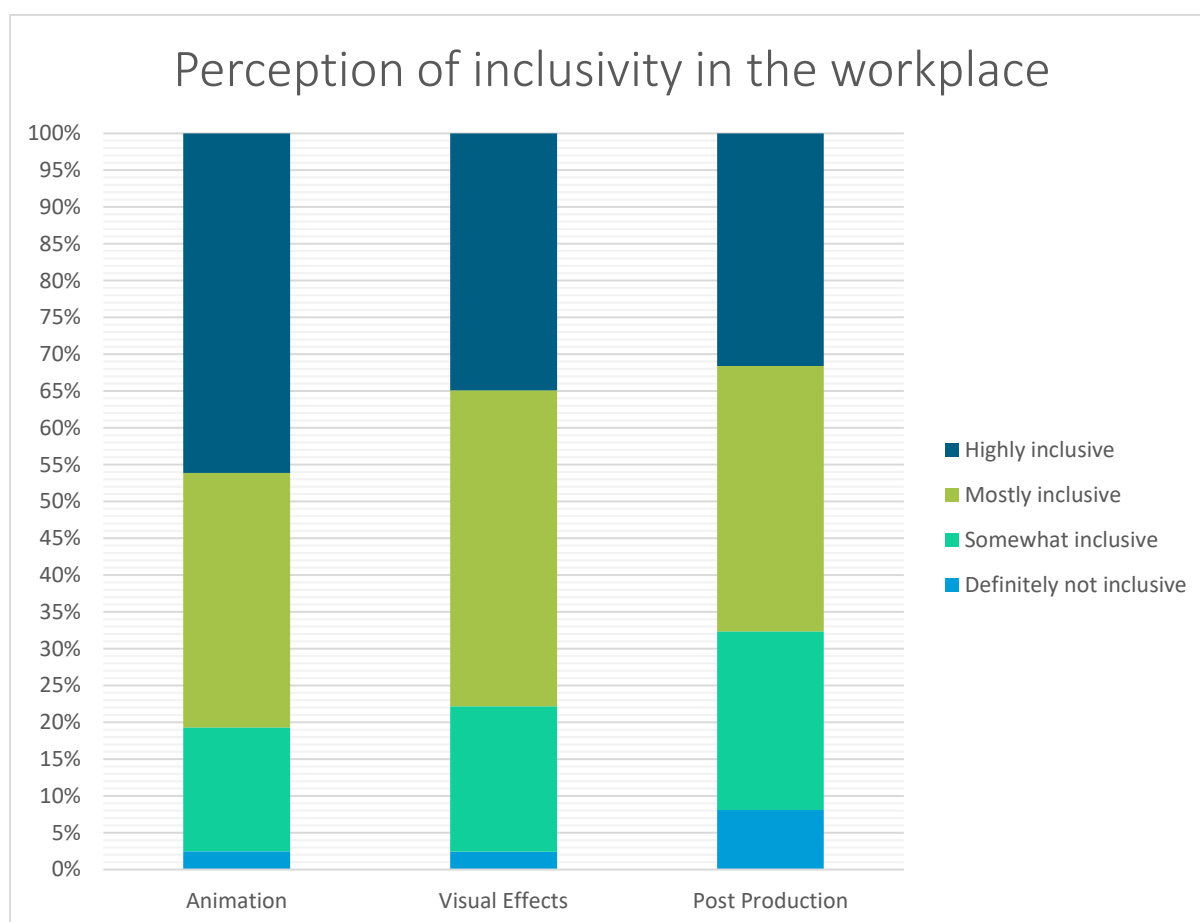
The sole carers for the elderly were just as likely to be male as female. However, most sole carers for dependent children were women. 5% of the female workforce in our sample identified as sole carers for dependent children.



Perception of Inclusion

Regardless of what the statistics reveal about measures of inclusion, the acid-test is, “does it feel right?”, to those people experiencing it in the workplace. We asked respondents to tell us if they felt their workplace was an inclusive environment.

In a sign that many employers are taking the right steps towards creating a welcoming environment for a diverse workforce, 81% of respondents from animation classed their workplace as “Highly Inclusive” or “Mostly Inclusive”. This was echoed in VFX (78%) but there was less perception of inclusion in post-production (67%) which also registered the highest proportion of people who considered their workplace as “Definitely Not Inclusive” (8%).



We analysed the dataset further to see if the perception of inclusion varies within various groups, depending on gender, ethnicity and disability.

We weighted the responses with “Highly Inclusive” receiving 100, “Mostly inclusive” as 67, “Somewhat Inclusive” scored 33 and “Not at all inclusive” getting zero. The responses were then averaged to give an overall weighted score.

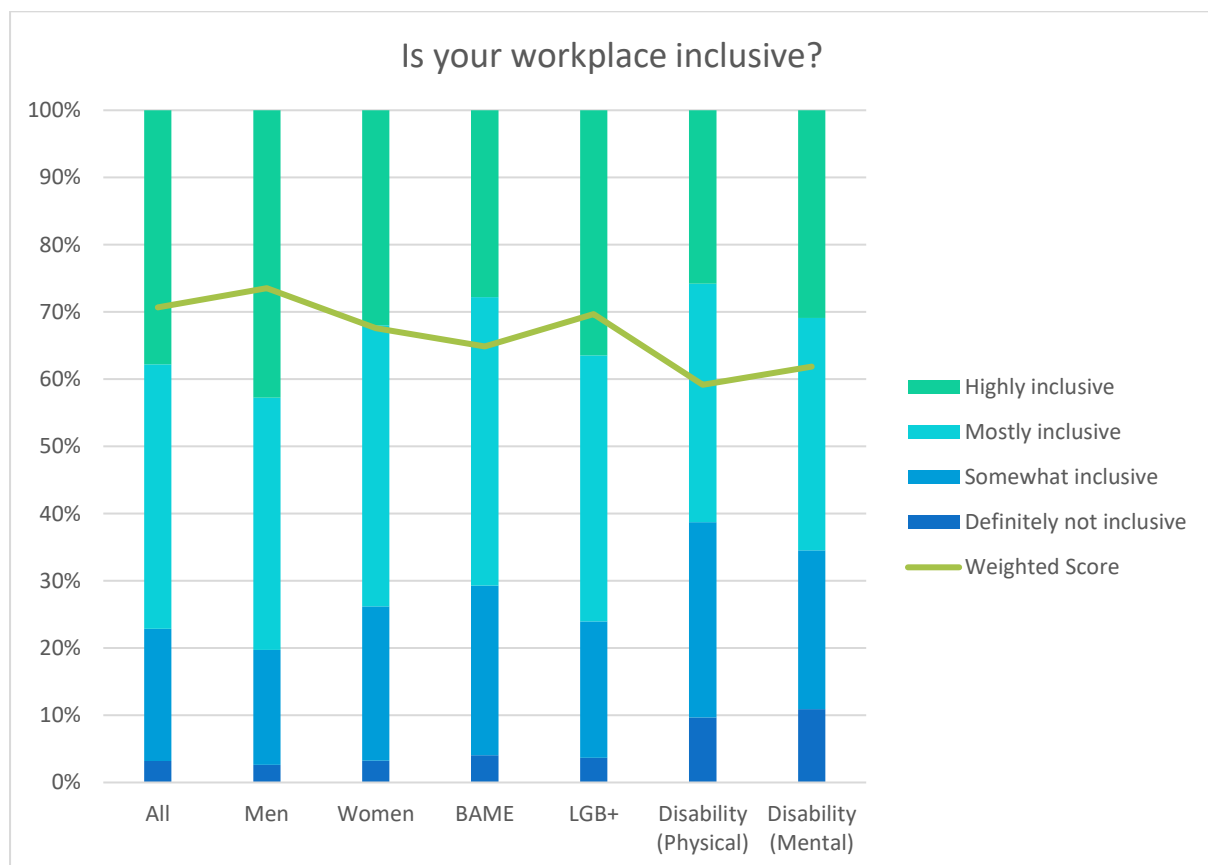
The overall weighted score of 71 represented an average response of just above “Mostly inclusive”.

Perhaps not surprisingly, the men rated the workplace more inclusive than the women. (Men 74, Women 68).

The LBG+ group rated workplace inclusivity as approximately the same as the overall population (score of 70).

There was a fall in the perception of inclusivity amongst the BAME group to a score of 65 which is just below an average response of “Mostly Inclusive”. Fewer people in this group rated their workplace as “Highly Inclusive”.

The percentage of people saying their perception of the workplace was “Definitely not inclusive” remained almost constant at around 3%, except for the Disability groupings where this percentage rose to around 10%. The weighted scores for both mental and physical disability groups fell to 59 and 62 respectively. However, in both these groups at least 62% of respondents still felt that their workplace was either “Highly Inclusive” or “Mostly Inclusive”



“Amazing diversity, makes anyone of any culture feel welcome, probably one of the most diverse environments I have worked in which is lovely.”

Woman of mixed ethnicity working in junior artist role in VFX

"There is an undeniable white male dominance in my company, but I put 'highly inclusive' because I don't believe anyone has ever been turned away based on gender or ethnicity. If someone has the talent, they are welcome here because the talent is rare."

BAME animation worker

"We have an extremely balanced department with a variety of genders, sexualities and nationalities. Competency is the determining factor on suitability within the department."

Male post-production worker

"My company displays a desire to employ people of all different backgrounds. However, as a working class born woman of an ethnic minority, I do find myself to be surrounded by people of a different background most of the time."

Woman of mixed ethnicity working in production management in VFX

"I find the VFX industry, especially in London, quite inclusive. I would agree that a lot of the work force is white, but we come from all over the world, have lots of different backgrounds and come from different social environments. Different genders, different sexual orientations, different ethnicities. So, in that regard I believe we are inclusive. Inclusion isn't just a tick box, where you can say that you've hired this-many-females, or this-many-black-people this year. It's more about creating an environment where everybody is welcome and feels integrated to a team. And above all still make sure you are hiring the best talent that's out there regardless of her/his gender, background, sexuality, ethnicity."

Mixed ethnicity male senior VFX creative

"I understand diversity and inclusion are different things. I feel we are inclusive of the employees we have although there is only a 20% female workforce in our department. Having been involved in the hiring process there isn't too much we can do when the university courses these potential employees are coming from seem to reflect a similar lack of diversity."

Female supervisor in VFX

"I think our company definitely tries to be inclusive and we are making great strides to get there. That said it is a very long game and requires work from schools and upwards to ensure people are aware of the roles available and how to get there."

White female working in administrative role in VFX

"While the balance to male and female is pretty much perfect, there aren't many people of colour at the studio; in particular at the mid-senior level. I personally think this impacts representation in the content we create."

Black woman working as a junior creative artist in animation

Opinions on Initiatives to improve Diversity and Inclusion

We asked our respondents their opinions of the likely effectiveness of initiatives that are either proposed or already delivering. Respondents were asked to score a range of initiatives as “Waste of time”(score=0), “Might have an impact” (score=25), “Worth doing but not a priority”(score=50), “Likely to have a positive impact”(score=75), or “Essential”(score=100). The scores were then averaged for each initiative. We also gave the opportunity to make comments about the initiatives.

Table 4 -Inclusion initiatives scorecard

Initiative	Weighted score
Schools outreach in disadvantaged areas	71.4
Schools outreach in general	70.6
Mentoring of potential new entrants	75.4
Mentoring in the workplace	77.8
Availability of job sharing	53.2
Flexible working hours	77.1
Access to childcare	78.6
Unconscious bias training	65.9
Availability of mental health first aid in the workplace	75.7
Support networks for minority communities in the workplace	64.9
Return to work programmes following parental leave	72.0
More entry routes for non-graduates (e.g. apprenticeships)	74.4
More job opportunities outside of London	75.8
Positive action to encourage promotion for women and minority groups	75.3

Most initiatives received scores which represented a response of “Likely to have a positive impact”. It is perhaps unsurprising that fewer people think “*Unconscious bias training*” is important. Therein lies the problem and the justification for including it on our list. It also may not be entirely surprising to see “*Support networks for minority communities in the workplace*” and “*Availability of job sharing*” receiving lower scores, as many will consider these unimportant if not directly applicable to their personal circumstances.

However, it is curious that job sharing is rated poorly, when access to childcare and return to work programmes are highly ranked; Job sharing would seem to go hand-in-hand with these initiatives.

“A way to give women the confidence in having a child and not worrying about fighting to get another contract for a job against people with more time/less commitments etc”

25-34-year-old woman working as a creative artist

“Currently lots of roles are Fixed Term Contract, meaning that we receive no benefits such as Maternity Leave, which then make it difficult to not only choose to have a family and maintain a career, ... as it seems once you leave and are replaced, it’s difficult to get back into the loop”

25-34-year-old woman working in production management in animation

"It would be great to see the ability to work remotely become more commonplace. A lot of the time it isn't strictly necessary for you to be in the studio all the time (though it is nice) and it would make it much easier for people who live further away or who have other obligations such as childcare or healthcare, to get a better work/life balance."

25-34-year-old woman working as a senior creative in animation

"Cut commute times by allowing people to work from home. This will enable parents to spend more time with their kids during the week."

Male tech support supervisor working in VFX in London

We received several comments about "flexible hours" along the lines of working from home reducing commuting time and costs and giving a better work/life balance. Whilst this may be possible for certain types of work, it raises concerns about security when dealing with commercially sensitive pre-release content. "More jobs out of London" was also referenced by respondents as being more inclusive, rather than facing high living costs in the capital.

It is pleasing to see that schools outreach programmes and mentoring both for new entrants and within the workplace, all receive high levels of support, as these are now underway as major initiatives by Access:VFX.

"I believe catching people at high school age so they're aware of the opportunities of the industry is essential and especially letting women and ethnic minorities know that there are people like them already working there."

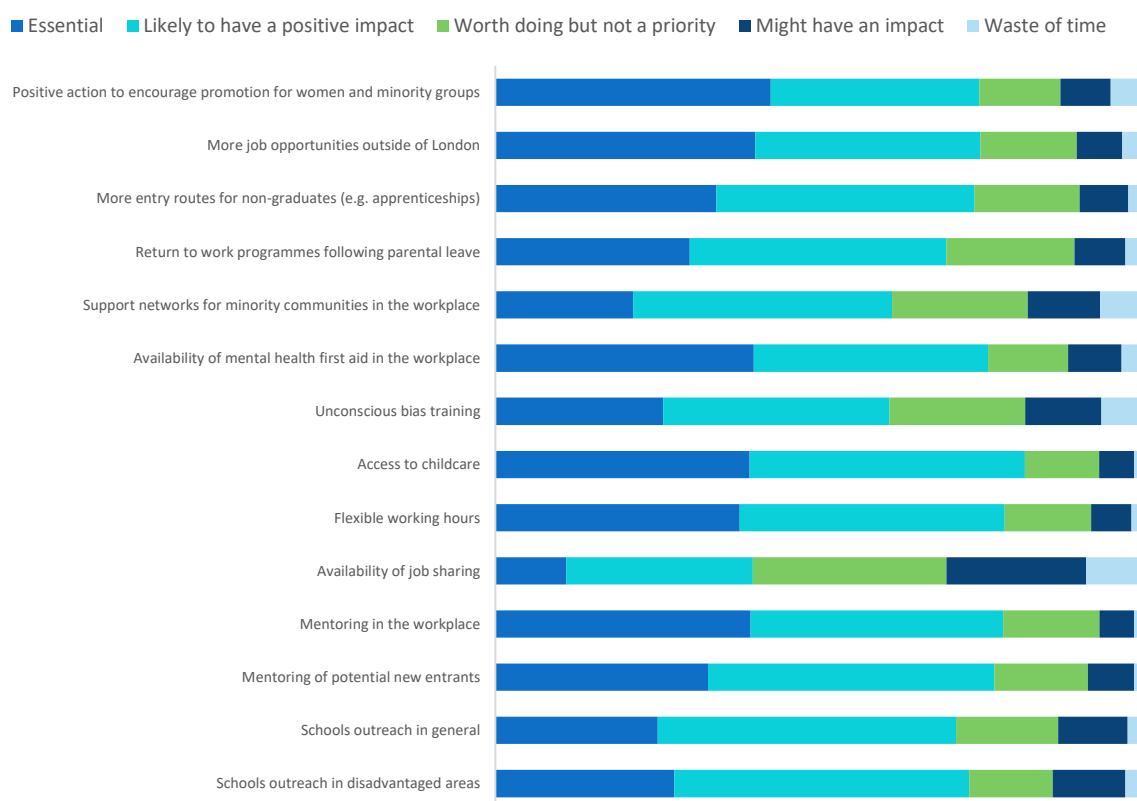
White female tech support worker in VFX

"Role models in the media: interviews/articles/videos about people in the industry whose background is closer to those we are trying to include could help to inspire young people or people currently outside the industry that it is possible and not impenetrable"

Male tech support worker in VFX

The growing importance of mental well-being in the workplace also scores highly; this issue was promoted in the very first Access:VFX Inclusion Week events in 2017 and several of our member companies have introduced mental health awareness programmes and have appointed trained mental health first-aiders.

Reaction to initiatives to boost inclusion



The most contentious of all the potential initiatives was “Positive action to encourage promotion of women and minority groups”. It had the highest number of respondents rating it as Essential, but also attracted the most comments disagreeing with it. There was occasional confusion among respondents between “positive action” and “positive discrimination”. Positive discrimination is of course illegal, but positive action could take many forms such as ensuring that women and BAME candidates are included on shortlists for interview, or the redrafting job descriptions to be explicit about the required social skills as well as the technical skills for the role, thereby making the hiring process more balanced for both genders.

Positive action could also mean coaching for women to overcome the so-called Gender Confidence Gap. Various research reports have suggested that women feel less confident in applying for promotion²⁸, and have more reason than men to lack confidence in the workplace²⁹.

²⁸ “This lack of confidence is evident in women’s more cautious approach to applying for jobs or promotions: 20% of men will apply for a role despite only partially meeting its job description, compared to 14% of women. Climbing the career ladder is notoriously competitive, and women’s hesitation in applying for more challenging roles inevitably puts them at a disadvantage.” - Ambition and Gender at Work - Institute of Leadership & Management UK – 2011 - <https://www.institutelm.com/resourceLibrary/ambition-and-gender-at-work.html>

²⁹ ‘Women In The Workplace Report’, McKinsey & Company 2018 <https://womenintheworkplace.com/>

However other research contends that women are confident; they just face more of a backlash³⁰ and are viewed differently for their confidence³¹, and therefore curb their actions to conform³². This effect may also be intersectional, and we should also therefore consider action on confidence inequality stemming from racial differences in combination with gender.

Regardless of the reasons for confidence inequality, schemes such as the “Helen North Achieve Programme”³³ run by Animated Women UK with funding from industry via the Animation Skills Fund, play a positive and vital role in coaching and mentoring women to be ready for advancement to more senior roles. Rise³⁴, a group for women in Broadcast, also offers mentoring.

Proposals to link screen sector tax credits to diversity criteria could also fall into the category of positive action, although UK Screen Alliance advises against this approach, as it could disincentivise the inward investment, on which our industry depends, leading to less opportunity for inclusion rather than more. We must make all the current and proposed inclusion and diversity programmes succeed with or without any carrot or stick incentives linked to the tax credits, so it seems unnecessary to be exposed to business risk by linking social policy to economic policy in this way.

We were not specific in our survey on the nature of any potential positive action to improve inclusion in promotion, but we received many comments from men, women, junior and senior workers, and persons of colour, who made the point quite forcefully that promotion and recruitment should be on the basis of skill and talent alone and should not be to fulfil quotas.

“Giving artificial advantages to certain groups undermines the hard work of those who are not in those groups. Applicants should be judged solely on the standard and quality of their work.”

Senior animation employee

“In my experience getting a job is 100% about the quality of one’s showreel/work/portfolio. Having been in a hiring role before, my experience was that employers don’t care about the name on the CV, race or place of birth. Everything should be focused on helping disadvantaged people excel and create great work.”

Male senior creative artist working in VFX

³⁰ Women who project self-confidence are often seen as less likable and are penalised if they “do not temper their agency with niceness”... Women are expected to be both confident and “prosocial”, demonstrating care and concern for others, while men can promote themselves without showing care for others and not be perceived negatively. - Prescriptive Gender Stereotypes and Backlash Toward Agentic Women, Laurie A. Rudman, Rutgers University 2001

³¹ Appearing self-confident and getting credit for it: Why it may be easier for men than women to gain influence at work, Laura Guillén Margarita Mayo Natalia Karellaia,

³² Women’s Bragging Rights: Overcoming Modesty Norms to Facilitate Women’s Self Promotion, Author: Jessi Smith & Meghan Huntoon

³³ <http://www.animatedwomenuk.com/animated-women-achieve-programme/>

³⁴ <https://risewib.com/>

"Promote people for their skills...Quotas are stupid, unproductive and kind of unfair in every sense... For internal promoting, using a quota for having x amount of minority can leave behind capable people. As an immigrant in this country, I would think that is unfair for other people if they promote me to have someone a little bit browner than most people."

Junior VFX Artist

"This industry should encourage people who are interested in and good enough to work in it... Gender or how much melanin you have in your skin is irrelevant. As a girl, I would feel angry if women were given any kind of unfair step-up to work in industry and it would diminish my own achievements"

White female senior creative artist in VFX

"The key is outreach and making people aware of the possibilities in VFX and animation... I don't agree with a blanket approach to 'encouraging promoting women and minority groups'. It's a good idea ONLY if a company is clearly overlooking their talent but aside from that I think that leads to people being promoted because of social pressure rather than because of talent... I DO completely agree with making sure all women and minorities are aware of the paths open to them if they have the talent and desire to follow them... We should improve our abilities to identify and support people who have the talent and the desire."

35-44-year-old BAME animation worker

We agree that we need to employ the best workforce possible and that talent and potential should be the main consideration when recruiting or promoting people. However, some of the comments we received show that there is still a strong message to be communicated about the nature of inclusion policies. Inclusion is not about pushing minority groups to the head of the queue for reasons of political correctness regardless of their level of talent. It is about ensuring these groups have the received all possible opportunities to develop and to be able to challenge for, and win these jobs in their own right, because they are just as talented as everyone else.

Appendix A: Inclusion initiatives already delivering progress

Across the screen sector, there are many initiatives under way to improve inclusion and diversity. Here we highlight those that have been initiated by our industry or that have direct relevance to VFX, animation and post-production.

Access:VFX



In 2017, the UK's largest VFX houses supported by the UK Screen Alliance came together to create Access:VFX, from a concept that originated at commercials VFX house, The Mill.

It was aimed at promoting...

- Inclusion and Respectfulness in the Workplace
- Inclusion and Opportunity for all in recruitment
- Diversity of Thought – a key essence of Creativity

The main creative jobs in VFX, animation and post-production require a special mix of arts and STEM skills, with high computer literacy and some coding ability. The most common applicant, and therefore typical recruit, is white, male and middle-class. We need to tackle the roots of poor inclusion much further upstream than the point of recruitment, to encourage a broader spectrum of applicants. We are missing vital pools of latent talent in minority & disadvantaged communities that don't develop because of a lack of opportunity.

Independent living in London is real struggle for first-jobbers that can't rely on parental support, but there are young people already living in the capital, just a few tube stops from the heart of our industry. They don't realise that there's a world-beating cluster of VFX companies in Central London that work on Hollywood features and they could be part of that too. Access:VFX started by connecting to these local communities with an inclusive careers fair to highlight opportunities and pathways to jobs in our industry.



In just 3 years, Access:VFX has gone from strength to strength. It now has an extensive programme of schools' outreach, which always ensures that it includes economically disadvantaged communities in the nations and region, as well as in London. In 2018, it ran 19 careers events in 13 cities in October alone reaching 3,000 young people. In November 2019, Access:VFX will attend WorldSkills Live at the NEC for the third year running and for the first time Access:VFX will be attending New

Scientist Live and RTS Futures in the Midlands. A further series of Access:VFX' s own regional events are planned throughout the autumn of 2019.



In August 2019, Access:VFX, in conjunction with Escape Studios, ran events over 3 days in central London. This Animation Summer Schools was attended by a diverse range of school students between the ages of 11 and 16. They received tuition from award-winning animators. Parents were also welcome to see how their children could find a rewarding career in this sector.

Access:VFX has a successful and growing mentoring scheme that covers new entrants to the industry as well developing existing employees. It has over 120 mentor/mentee pairs, of which 43% of the mentees are BAME and 43%

are female. The scheme mentor can emerging new talent from as young as 13.

Access:VFX releases a podcast every two weeks highlighting inclusion issues and initiatives.

Within the workplace, Access:VFX has promoted initiatives such as Unconscious Bias training. in conjunction with Escape Studios, Access:VFX will be promoting Mental Health Workshops during Autumn 2019,



In June 2019, to coincide with Pride, it launched its QVFX initiative; a series of events and a support network for LGBTQ+ workers in VFX and animation. This has been well received by the LGBT+ community in the workforce and already has a programme of events planned.

Access:VFX also runs regular industry connect events with minority community groups (e.g.

disabled or black filmmaker groups) and creates specific events around International Women's Day, National Inclusion Week and National Apprenticeship Week.

Access:VFX's activities and its schools outreach programme are funded by employers and industry sponsors and uses virtually no public money.

We are sure that the profile of Access:VFX and its work within VFX and animation is one of the key reasons why there is such an increased perception of the workplace being an inclusive environment.

Its success has led to the model being adopted internationally in the VFX and animation communities with Access:VFX chapters opening in Montreal, Chicago, New York and Los Angeles, spreading the good practice that started in the UK.



AWUK exists to positively support, represent, celebrate and encourage women in the animation and VFX industries in the UK. They aim to change the gender landscape by building a vibrant network that facilitates mentoring, knowledge exchange and education resulting in women in animation and VFX fulfilling their potential. www.animatedwomenuk.com

The Helen North Achieve Programme

The 'Helen North Achieve Programme', first run in 2017, focuses on supporting women in the VFX and animation industries to achieve their potential. Funded by the ScreenSkills Animation Skills Fund with contributions from UK animation productions and with additional support from Escape Studios, The Helen North Achieve Programme is open to women at all stages of their career looking to address the real challenges and barriers they face on a day-to-day basis. It aims to provide strategic career management and is run by acknowledged career development experts.

This unique and very successful programme now has 72 women alumni at various stages of their careers in VFX and Animation.

About Helen North

Helen was Career Development Director on the AWUK Board. She spent her early career at Skillset pioneering training programmes across the Creative industries. Her determination to drive for gender equality led her to AWUK. She became one of the original board members in 2014 and her voice was always a vital, caring and direct contribution to any discussion. Helen was the architect and driving force behind our Achieve Programme, which focuses on career development for women in VFX and Animation, and we are incredibly proud to continue the great work she started in her name.

Rise: Women in Broadcast



Rise is an advocacy group to support women working in the broadcast technology sector. Its goal is to ensure that there is a gender balanced workforce across the specific areas of: engineering, technical operations, sales, marketing and business.

Over the last two years it has delivered award-winning mentoring programmes, a series of events, seminars and conferences and more recently, launched its inaugural Rise Awards, which will be held at Europe's largest media and entertainment show, IBC, in September 2019. In addition to this, Rise is working on 'Rise Up' its education strand working with schools across the UK to encourage a new pipeline of talent into the sector. This is currently in a pilot phase, with workshops continuing to be rolled out over the coming year.

Equal Access Network



Established in January 2018, with support from the Mayor of London, Film London's Equal Access Network (EAN) has one mission- to help people get in, stay in and return to the Film and TV industries.

The EAN particularly targets those from under-represented communities and works as a unique connecting service between training providers and industry, ensuring people have access to the latest jobs and opportunities. It runs various activities including monthly masterclasses with top industry speakers, bespoke internship schemes (e.g. a two-day work placement with Two Brothers Pictures) and offers bespoke CV and career advice. To date, the EAN has helped some of its members secure jobs in companies such as Netflix, Green Door Pictures, HBO, Playground, Sky and UKTV, to name just a few.

Return to Work Scheme

Ten parents and carers successfully completed paid placements within the post-production and VFX sector at companies including BlueBolt and Molinare this year, as part of a Return to Work Scheme in association with Film London. The scheme was funded by the HETV Skills Fund administered by ScreenSkills. This followed an earlier Return to Work Scheme which saw six parents complete paid returnships in the TV industry.

After completing a paid placement, many of the returners have now been offered extended placements or full-time positions, contributing toward wider skills and diversity within the specialised sector.

Apprenticeships



Apprenticeships have the potential to offer a new and more inclusive route into our industry without the need to go to university and incur student debt. Employers in VFX have been engaged with this programme since 2014. We anticipate a significant increase in the number of apprenticeships starts in VFX, animation and post-production once new standards come on-stream during 2020 and 2021, offering pathways to jobs for emerging talent from a diverse range of applicants.

In many areas in the screen industries, where short-term freelancing is the most common mode of engagement, there are real barriers to the deployment of apprenticeships due to the need to be employed for 12 months with a single employer. However, the different pattern of long-term contracts or permanent employment in VFX, animation and post-production allows apprenticeships to work as intended.

We welcome the announcement, made in early July by Jeremy Wright, then Sec. of State at DCMS, of funding for a pilot scheme for an Apprentice Training Agency which will side-step the 12-month rule issue. This should open up apprenticeship opportunities in other parts of the screen industries such as production and on-set crew roles, which are specifically targeted at minority and socio-economic disadvantaged groups.

The VFX industry was an early adopter of apprenticeship standards, creating 2 new ones for Junior 2D Compositors and Assistant Technical Directors. These have been delivering since 2016. The fourth cohort of VFX apprentices is scheduled for September 2019 and is expected to be the most diverse yet with 50/50 gender parity and 33% BAME. There have been some spectacular successes on these programmes with almost all apprentices progressing to good jobs and receiving credits on multiple AAA internationally acclaimed movies.

An employer Trailblazer group was formed by UK Screen Alliance to develop an apprenticeship for Post-Production Technical Operators. This has been approved for delivery by the Institute for Apprenticeships and Technical Education (IfATE) and expect the first cohort to start in January 2021.

Further standards are already in the pipeline with the IfATE for Junior Animators, Storyboard Artists, Production Coordinators and Production Managers.

As part of the Creative Sector Deal, DCMS have provided funds to develop more apprenticeships in the creative industries. Employer Trailblazer groups have now been formed and proposals for new standards will be submitted to IfATE during August and September 2019. These include 3 new VFX standards, and standards in post-production for engineering and audio operators. Employer groups will work with IfATE to create the standards and assessment plans over the next 12 months with the aim of starting delivery by 2021.

UK Screen Alliance has created an innovative apprenticeship levy transfer programme to encourage smaller employees in VFX, animation and post-production to take on apprentices. The ALT scheme is

a match-making service which introduces small employers willing to employ apprentices, to large employers with excess levy contributions that would otherwise expire and revert to the Treasury. It makes use of the apprenticeship levy transfer rules to allow 100% funding for training, which is better than the government's offer for 95% co-funding. Within the ALT scheme there is currently over £150,000 of levy awaiting transfer to small employers. Our aim is to increase the overall talent pool and even though a large company may be funding a competitor's apprentice, they can see the benefit it gives to the whole industry. It also shares the onus of training more fairly. In any case, it is easy to be benevolent when you are going to lose the money anyway.

NextGen Skills Academy



A key part of the skills pipeline for our industry is the NextGen Skills Academy, a network of FE colleges teaching an industry approved curriculum leading to a level 3 diploma in games, animation and visual effects.

The VFX, Animation and Games industries worked together in 2014 to create the NextGen Skills Academy. Approved colleges receive a package of support from industry such as live-briefs, tutor boot-camps, guest lecturers, portfolio reviews, visits to the workplace for students and industry attended graduation shows.

The NextGen course gives students a flying start for university education but also feeds directly into our apprenticeship programmes. Around half of the successful applicants for apprenticeships have come from NextGen courses, which provides a foundation for this inclusive route into our industry avoiding the need for student debt and giving a good wage whilst you learnt.

The network is expanding to 14 colleges across England in 2019, which will produce around 300 students per year for the 2-year course.

Appendix B: UK Screen Alliance survey questions 2019

The following questions were distributed via SurveyMonkey.

Introduction

The screen-based industries have grown at a phenomenal rate in recent years and are experiencing skills shortages in most areas. Yet at the same time, the diversity of these industries does not fully reflect the population of the UK. It will be vital to open more opportunities to minority communities in order that we fill these skills gaps and develop the latent talent that lies within those groups.

To do this we need to survey VFX, post-production and animation workers to fully understand the composition of our workforce. We can then target initiatives in the right place and in the right way to boost inclusion effectively. We also seek your opinions on how best to do this.

Please be candid with your responses. Some of the questions are of a very personal nature, so please be assured that this survey is entirely anonymous and there is no way of identifying the respondents. We will only be publishing aggregate data and we will respect your privacy at all times.

We also take this opportunity to assess the impact of the ending of free movement as the UK leaves the EU and the progress of our EU workers towards achieving settled status in the UK.

1. Are you currently either employed by a company or working on a project in a self-employed or freelance capacity in the VFX, animation or post-production sector in the UK?
 - Yes
 - No
2. Which part of the industry do you work in?
 - Animation
 - Visual Effects
 - Post-production
 - Other
 - Prefer not to say
3. In which UK region is your job normally based?

• London	• North West
• South East	• North East
• South West	• Wales
• East of England	• Scotland
• Midlands	• Northern Ireland
• Yorkshire & Humber	• Another UK region
	• Prefer not to say

4. What is your age group?

- Under 18
- 18 – 24
- 25 – 34
- 35 – 44
- 45 – 54
- 55 – 64
- 65+
- Prefer not to say

5. What is your ethnic background?

- | | |
|---|-------------------------------|
| • White | • Asian – Indian |
| • White and Black Caribbean mixed ethnicity | • Asian – Pakistani |
| • White and Asian mixed ethnicity | • Asian - Bangladeshi |
| • White and Black African mixed ethnicity | • Asian – Chinese |
| • Another mixed ethnicity | • Any other Asian background |
| • Black Caribbean | • Arab |
| • Black African | • Any other ethnic background |
| • Any other Black background | • Prefer not to say |

6. Which gender do you identify as?

[Note: Cisgender is a term for people whose gender identity matches the sex that they were assigned at birth]

- Male (cisgender)
- Female (cisgender)
- Transgender male
- Transgender female
- Non-binary
- Other preferred description
- Prefer not to say

7. What is your sexual orientation?

- Heterosexual/straight
- Homosexual/Gay/Lesbian
- Bisexual
- Pansexual
- Asexual
- Other preferred description
- Prefer not to say

8. Do you have a physical or mental disability? Select any options below to describe yourself or select Able Bodied if you have no disabilities.

- Hearing impairment
- Visual impairment
- Mobility impairment
- Reduced physical capacity
- Disfigurement
- Epilepsy
- Autism spectrum
- OCD - Obsessive Compulsive Disorder
- Dyslexia
- Dyspraxia
- ADHD
- Other neurological condition
- Able bodied/no disability
- Prefer not to say

9. Are you the sole carer for dependent children?

- Yes
- No
- Prefer Not to Say

10. Are you the sole carer for dependent adults? (e.g. infirm or elderly relatives)

- Yes
- No
- Prefer Not to Say

11. If you grew up in the UK, which region do you consider yourself native to?

- London
- South East
- South West
- East of England
- Midlands
- Yorkshire & Humber
- North West
- North East
- Wales
- Scotland
- Northern Ireland
- Another UK region
- Prefer not to say

12. If you were educated in the UK, what kind of secondary school did you attend?

- Selective state funded school
- Non-selective state funded school
- Private or fee-paying school
- Other
- Not educated in the UK
- Prefer not to say

13. Are you a university graduate? (i.e. BSc, BA or international equivalent)

- Yes
- No
- Prefer Not to Say

14. Do you have a post graduate degree? (e.g. MSc, MA, MBA or equivalent)
- Yes
 - No
 - Prefer Not to Say
15. Did either of your parents or guardians attend a university?
- Yes
 - No
 - Prefer Not to Say
16. Which category most accurately describes your job role?
- Creative (e.g. Animator/VFX Artist/Compositor/TD/Graphic Artist/Editor/Colourist/Dubbing Mixer etc)
 - Assistant to creative (e.g. Edit assistant/MCR/Media Manager/Audio Assistant)
 - Technical Support (R&D/ IT systems support/Engineering)
 - Production or bookings management/coordination
 - Senior creative production roles
 - Administration/HR/Finance/Recruitment/PR/Sales
 - Senior management
 - Customer services/runner/reception
 - Any other roles not specified above
 - Prefer not to say
17. What level of seniority is your role?
- Junior
 - Mid
 - Senior/Lead
 - Supervisor/Department Head
 - Other
 - Not applicable
 - Prefer not to say
18. Do you job share?
- Yes
 - No
 - Prefer Not to Say
19. Do you consider your workplace to be an inclusive environment?
- Definitely not inclusive
 - Somewhat inclusive
 - Mostly inclusive
 - Highly inclusive

Comments were also sought for this question

20. Please prioritise these potential initiatives to boost inclusion

{Waste of time/Might have an impact/Worth doing but not a priority/Likely to have a positive impact/Essential}

- | | |
|--|--|
| • Schools outreach in disadvantaged areas | • More entry routes for non-graduates (e.g. apprenticeships) |
| • Schools outreach in general | • More job opportunities outside of London |
| • Mentoring of potential new entrants | • Availability of job sharing |
| • Mentoring in the workplace | • Access to childcare |
| • Flexible working hours | • Availability of mental health first aid in the workplace |
| • Unconscious bias training | • Return to work programmes following parental leave |
| • Support networks for minority communities in the workplace | • Positive action to encourage promotion for women and minority groups |

21. Any other suggestions to boost inclusion in our industry?

22. What is your citizenship status?

- UK citizen or Dual citizenship with the UK and another country
- Irish citizen
- EU or EEA citizen (excluding UK and Ireland)
- Citizen from a non-EEA country (i.e. the rest of the world)
- Prefer not to say

[The following question was not relevant to the Inclusion Survey but was part of different a different research project which will be reported separately. The question was only shown to EU or EEA citizens]

23. If you are an EU or EEA citizen have you applied for UK settled or pre-settled status?

- I have been granted settled status
- I have been granted pre-settled status
- I have applied but are waiting to hear the decision
- I have applied but the application was refused
- I have not applied yet
- I do not intend to apply
- Prefer not to say

Appendix C: VFX, animation and post-production in profile

Visual Effects



Guardians of the Galaxy 2: Marvel – VFX by Framestore

Visual Effects, or VFX for short, is the digital manipulation of images to enhance, augment or entirely replace elements of live-action shots in films, TV programmes or commercials. In some cases, entire shots, backgrounds and characters may be computer generated. VFX has become intrinsic in most feature films and many TV dramas

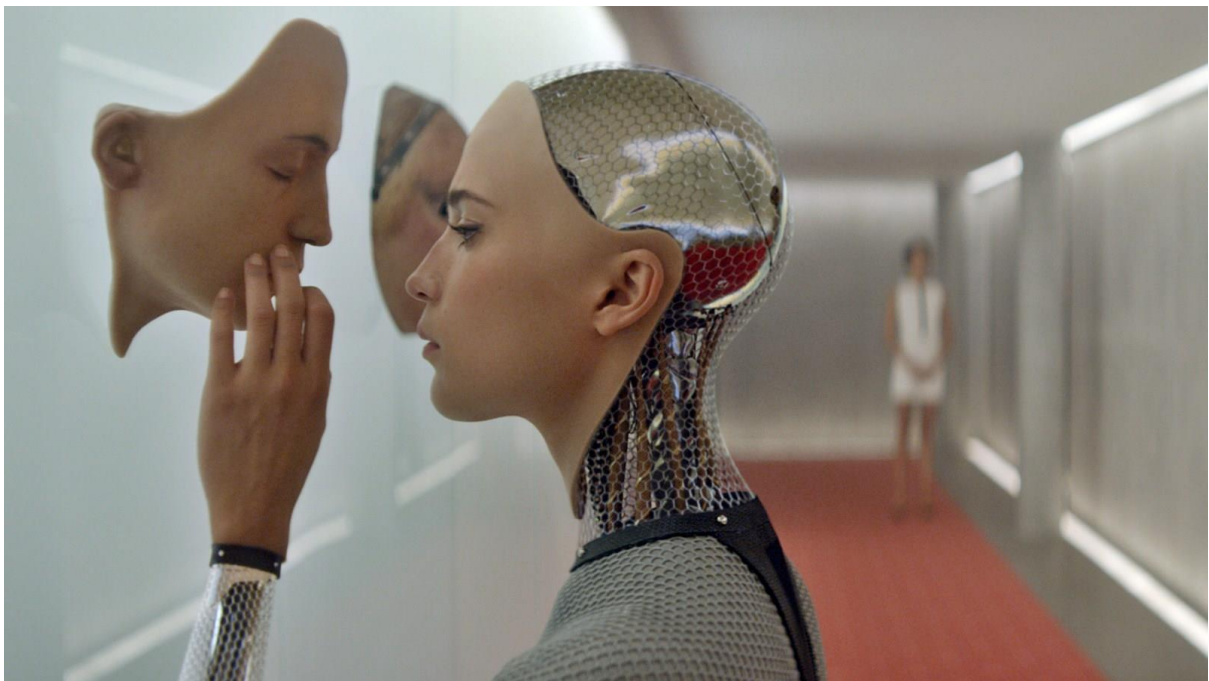
VFX is still a relatively young industry, which has gone through a period of significant growth in volume demand and which is characterised by a constant re-invention of the technology and workflows necessary to create increasingly complex effects. The Harry Potter franchise provided a springboard by which the UK's VFX sector transformed itself from a cottage industry to what is widely acknowledged as a world-leading centre for visual effects production. London houses six of the world's largest visual effects companies.

UK headquartered companies have won the VFX Oscar on numerous occasions, for *Gravity*, *Interstellar*, *The Golden Compass*, *Inception*, *Ex Machina* and *The Jungle Book*. In the VFX category of the Oscars in 2015, five out of six nominees and the eventual joint winners, *Double Negative* and *Milk VFX*, were British companies.



Gravity: VFX by Framestore

Whether it is visualising epic super-hero struggles in *Guardians of the Galaxy*; designing magical creatures for *Fantastic Beasts*; building vast alien landscapes for *The Martian* or re-creating convincing period drama environments for *Florence Foster Jenkins*, *The Crown* or *Suffragette*, the UK's talented VFX workforce has a proven track record of delivering winning results, not just with the awards judges but also with global audiences. *Framestore*, *Double Negative*, *MPC* and *Cinesite* have long-standing reputations but the demand for VFX for High-End TV series has led to the growth of a new breed of highly agile boutique VFX houses such as *Bluebolt*, *Union*, *One of Us* and *Milk*.



Ex Machina – Oscar winning VFX from Double Negative and Milk Visual Effects

In 2014, Industrial Light and Magic who were created the VFX for Star Wars, were encouraged by the UK's film tax relief and other incentives to create 200 jobs in a new studio in London.

The UK VFX industry competes fiercely and successfully with rival production centres around the world – USA, Canada, Australia, New Zealand, India, South East Asia and the rest of Europe – to secure high volumes of inward investment work (predominantly from the USA) which helps to underpin domestic production as well as delivering significant economic and cultural benefit.

The UK Government supports the VFX sector, and the wider film and television industry, to build on its world-leading status through a combination of production tax incentives and R&D tax reliefs.

In 2014, the thresholds for the UK's highly flexible Film and High-End TV (HETV) tax credits were lowered allowing inward investment productions to qualify solely based on VFX or other post-production performed in the Britain. This change along with the introduction of the HETV tax relief helped the UK's VFX sector grow by an estimated 23% in 2015.



The Crown – Netflix: VFX by One of Us

The economic value of VFX

In 2018, the British Film Institute analysed VFX as a sector in its own right in its Screen Business Report -Appendix 3. UK Screen Alliance was part of the steering group for this report which was based 2016 data.

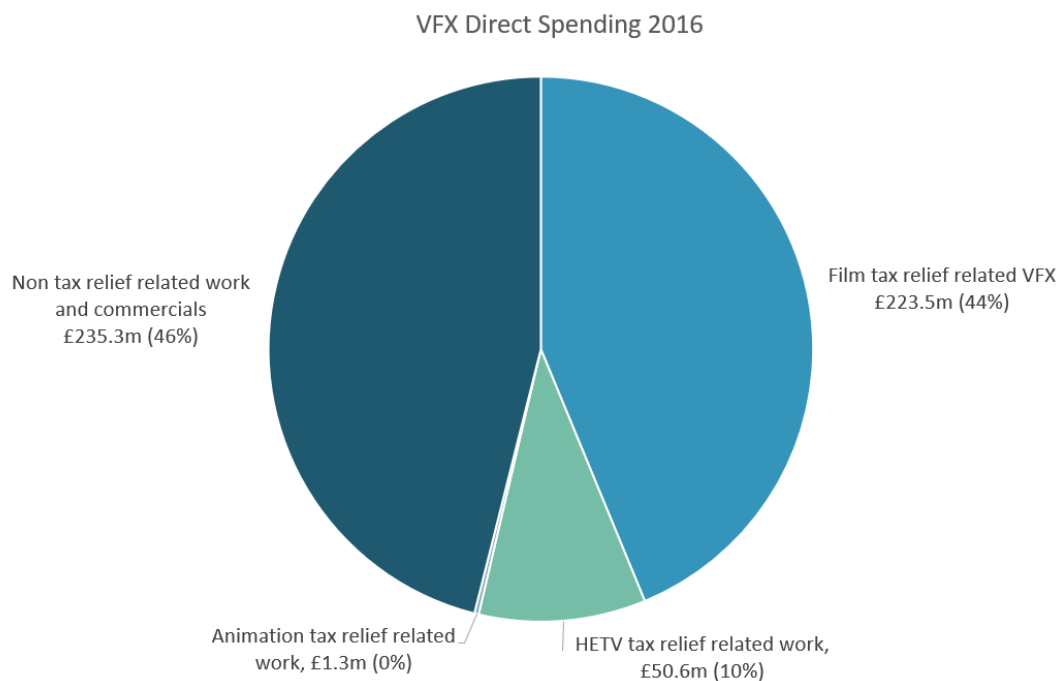
The BFI's remit does not extend to commercials so the report cannot truly reflect the whole of the VFX sector, although the figures do contain the best evidence of the size of VFX in the film and TV drama sectors.

The total spending on VFX for film tax relief related work was £223.5m and the HETV tax relief related work was £50.6m. We anticipate that when the HETV figures for subsequent years are calculated, there will be a marked increase because of activity by Netflix and other SVOD clients. There was a small amount of VFX for animation tax relief related work at £1.3m.

VFX for commercials and other non-tax relief related work was estimated at £235.3m (i.e. more than the spend on film VFX).

The total direct spending in VFX was £510.7m

13% of the claims for film tax relief relate to VFX work and 5.6% of the HETV tax credit is also VFX work.



The VFX workforce was 8,140 full time equivalent employees with total labour compensation of £372.3m. The direct economic impact (GVA) was calculated as £426.9m. The productivity of VFX workers was £81,257 of GVA per head which is £19k more than the UK average.

This direct VFX spend creates indirect impact in the supply chain and induced impact through employees spending wages. Furthermore, it cascades through the screen sector value chain in film and TV distribution creating additional value. Film & TV content creates spillover value into other sectors such as merchandise and tourism. VFX plays its part in creating that value and so £165m of spillover can also be attributed to VFX.

The total impact reported by the BFI using 2016 data showed that VFX created £1.043 billion of GVA for the UK economy and supported 17,940 jobs.

However, this will still be an underestimate as the BFI remit did not extend to analysing the spillover value created from VFX for advertising . The whole point of a commercial is to create value in other sectors (e.g. to increase sales of goods and services and to add to brand value)

As yet we have no way of estimating this commercials spillover value, but we will be liaising with other bodies in the advertising industry to see if any suitable evidence already exists or can be obtained.

Animation

Offering expertise in a wide range of specialisms, the UK animation industry is original, eclectic and celebrated for storytelling, character development, design and ironic sense of humour and ability to deliver mass global appeal.

The animation industry in the UK produces animated content for television, feature films, commercials, websites, games and virtual & mixed and augmented reality.

The UK is home to distinct and highly successful centres of animation production excellence throughout the country, including Belfast, Bristol, Cardiff, Dundee, Edinburgh, London and Manchester.

The UK's TV animation industry has a long track record of creative and commercial success. Iconic programmes such as *Wallace & Gromit*, *Tree Fu Tom*, *Noddy*, *Peppa Pig*, *Thomas and Friends*, *Shaun the Sheep*, and *Horrid Henry* were devised, developed and animated in the UK, are exported around the world and have become highly lucrative global franchises. *Peppa Pig* has audiences in some 180 countries. Other award-winning animated content includes *Denis & Gnasher Unleashed*, *The Clangers*, *The Amazing World of Gumball*, *Revolting Rhymes*, *Gruffalo*, *Digby Dragon*, *Hey Duggee* and *Stick Man*.

Animation in the UK has a strong track record in character development and storytelling. It also leverages the UK's global leadership in the artistic and technical aspects of the visual product.

The UK is globally renowned for its expertise in children's storytelling and design animation. Award-winning examples include cut-out multimedia animation series *Charlie and Lola* (Tiger Aspect Productions) and *Peppa Pig* (Astley Baker Davies), *Shaun the Sheep* and gaming app *Ludus* (Cube Interactive/Boom Kids).



The Gruffalo: Magic Light Pictures

The UK has an international reputation and is particularly highly-regarded for its expertise in short film animation, such as Aardman Animations' Oscar-winning *Wallace & Gromit* series, Half-hour specials such as *Snowman* and *We are Going on a Bear Hunt* and *Gruffalo*, and stop-motion animation, as showcased in *Fantastic Mr Fox* and stop motion feature-length animated films showcased in *Fantastic Mr Frankenweenie*, Raymond Briggs *Ethel and Ernest* (story of his parents) and *Early Man* (Aardman Animations) with UK animation skills contributing to box office successes such *Paddington*, *Jungle Book* and *The Lion King*.

The UK is a world leader in producing computer-generated animation for computer and video games and home to some of the world's leading providers of computer-generated visual effects for TV, commercials and feature films.

The UK leads the world in innovative new ways of telling stories and creating new worlds, as illustrated by the globally successful *Moshi Monsters*, as well as pioneering new work in virtual reality. The UK is also a big growth market for animation used at events, concerts, theatre productions and theme parks.

The UK is highly successful at making animated series based on best-selling books. Examples include Magic Light Pictures, which has created animated programmes based on *The Gruffalo*; Lupus Films, producer of the sequel to *The Snowman*; and Walker Books, which is working with many partners to make successful animated series from their children's titles. *Peter Rabbit and Friends*, based on the books by Beatrix Potter, has been sold across the globe.

The UK is home to a number of animation festivals and events. Examples include the annual London International Animation Festival, one of the largest of its kind in the world, which showcases some 250 films selected from more than 2,300 submissions from over 30 countries. In 2015 a new animation festival – MAF – launched in Manchester, while other events include the Encounters Short Film and Animation Festival in Bristol and the Children's Media Conference in Sheffield.

Digital animation is a key part of the Creative Industries Strategy, which is channelling huge amounts of funding into developing innovation, platforms and technologies to support the creative sector.

The economic value of animation

The latest research shows that production expenditure, supported by the Animation Tax Relief, reached an estimated £97.1 million in 2016.³⁵

This is an increase of 27% since its introduction in 2013 contributing £354.8 million in GVA, and for every £1 of tax relief this gives a return on investment to the UK economy of £4.44 [#]

In addition to award winning content, the UK animation industry is highly successful in terms of the ancillary licensed products that it generates, such as children's DVDs, books, toys and clothing.

Taking into account the ancillary licensed products that it generates, such as children's DVDs, books, toys and clothing and the licensed merchandise sales market for the UK animation sector and other spillover calculations and impacts, the overall value of the animation sector is calculated at £911.9 million.

³⁵ BFI Screen Business Report 2018

Post-production



Audio post-production at Gorilla

Post-production includes every stage in the filmmaking process after the capture of images in a studio or on location up to the point when the edited project is finished and delivered ready for exhibition or transmission. This includes editing, colour grading, picture and audio finishing, creating deliverables and international versioning, as well as adding Visual Effects (VFX). The VFX sector is so large, with a prestigious profile, that it is often thought of as a sector in its own right. Unfortunately, as a result, the remainder of post-production is often not properly recognised by many sector reports or is submerged or ignored when combined with VFX in official statistics or reports.

The VFX sector had a major evaluation of its financial value included in the BFI's Screen Business report in 2018 (based on 2016 data), but the remainder of the post-production sector was not analysed separately. A portion of post business value for film or high-end drama was included in the report, albeit combined into the full value of film and HETV production.

The last comprehensive analysis of the whole post-production and facilities sector was conducted by Olsberg SPI for UK Screen in 2010; a time before the HETV tax credit and the growth of SVOD networks. The survey provided important data to underpin campaigns for additions to the screen sector tax credits and proper recognition of our sector within government policy. We urgently need to update that data, but it is unlikely that we will be able to finance such a comprehensive study at this time and will have cut-our-cloth from the available resources. Before the end of 2019, UK Screen Alliance wants to instigate a study of the of post-production economy which will report separately on the value of the rest of post in addition to VFX.

Official government data gathered by the Office of National Statistics (ONS) recognises post-production as a distinct industrial classification (SIC 59.120) but this covers the whole of post including VFX and there are no subdivisions. However, these are the National Statistics that the government accept and rely on, so it is important to make sure that they are as accurate as possible.

In 2016, UK Screen checked the records at Companies House to see how many post-production businesses were incorrectly classified and discovered over £322m of turnover that was not being recognised as post-production. We wrote to many of those businesses asking them to re-classify into SIC 59.120 and many did, resulting in over £50m of turnover being moved to the correct classification which boosted the officially reported value of our sector in National Statistics. There is still over £250m of turnover incorrectly accounted for so we ask post-production business to check the appropriateness of their SIC code when notifying their next Confirmation Statement to Companies House.

SIC 59.120 Motion picture, video and television programme post-production activities:

Number of Enterprises: 2,965 (includes all businesses from large enterprises to sole traders) up 32.4% since 2013 – this includes VFX businesses as part of post-production

Total Turnover: £1,800.6 million up 25.5% since 2013

Number of employees 12,000

155 companies turnover more than £1 million per year. This is just over 5% of the companies in the sector, yet they account for over 81% of the turnover.

Source: ONS Inter-Departmental Business Register (March 2017) or ONS Annual Business Survey 2017

