

# Greater Manchester Animation Sector Report

2026

## About this survey

In 2025 Manchester Animation Festival funded principally by MediaCity Immersive Technologies Innovation Hub (with funding from InnovateUK's Innovation Accelerator pilot programme), with additional funding from BBC Children's & Education and MediaCity launched a landmark survey to capture a comprehensive, data-rich portrait of Greater Manchester's animation, VFX, motion graphics, games cinematic, and immersive media sectors.



**MANCHESTER  
ANIMATION  
FESTIVAL**



**MEDIACITY  
IMMERSIVE TECHNOLOGIES  
INNOVATION HUB**

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**CHILDREN'S  
& EDUCATION**

**MEDIA CITY**



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# INTRODUCTION

## WHAT DO WE MEAN BY ANIMATION?

In this report the term 'animation' or 'animation industry' are regularly used as a catch all phrase. It represents the animation, VFX, Game Cinematics, Motion Graphics and other associated industries as a collective unit. The terminology is also not limited to any particular outlet such as TV animation or audience such as children's.

Animation is to the eyes what music is to the ears. A sensory pleasure that connects with us effortlessly, able to inform, educate and entertain. It is often misunderstood as a single form, usually children's cartoons, yet while children's animation delivers extraordinary storytelling, the medium itself is far broader, stretching from the smallest haptic interaction on a device to emotionally powerful cinematic experiences that stay with us long after the screen fades to black.

From the moment we wake, animation surrounds us. The alarm on our phone, the movement of icons beneath tired fingers, the animated weather forecast, the bubbling dots of a message being typed, the hearts, gifs and stickers on social media. It follows us into our fitness routines, onto our watches, into our music players and podcasts. Mornings differ across households, with children watching television, teenagers gaming and parents scrolling the news, but the constant is animation. Our journeys and workplaces are saturated with it through travel displays, digital advertising, websites, emails, productivity tools and notifications. Even errands bring encounters with animated shop displays, self checkout screens and QR codes leading to motion content, all quietly shaping how we navigate the day.

We end our evenings with animation too, ordering food through apps that show each stage of the journey from kitchen to doorstep, and settling down to watch films where even live action is now inseparable from animation with the use of visual effects created frame by frame. One last scroll before sleep and we are ready to repeat the cycle tomorrow.

Animation is not only an artform or a form of entertainment, it is one of the most powerful communicators of our age. And every piece of it is made by someone. Within the pages of this report we explore how that creative effort takes shape here, through Greater Manchester's growing contribution to the animation sector.

Accompanying the results of the survey are interviews with animation practitioners based in Greater Manchester, giving you the opportunity to get to know some of the artists behind the data that the survey presents.

With the UK's animation industry valued at an estimated £1.7 billion (Animation UK), this initiative aims to quantify the North West's regional contribution, assess the evolving creative landscape shaped by global shifts and emerging technologies such as AI and immersive platforms, and gather critical data on turnover, employment, and creative output reinforcing Greater Manchester's position as a leading hub for creativity and applied innovation within the UK's dynamic creative economy.

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# MANCHESTER ANIMATION

## PAST, PRESENT AND FUTURE

Many of animation's brightest stars hail from Manchester and the surrounding region. *Danger Mouse*, *Bob the Builder*, *The Clangers*, *Daisy and Ollie*, the list goes on.

It's not just the animated kids tv stars of the small screen that get their start in the north-west, with Guillermo del Toro, Wes Anderson and Tim Burton taking advantage of the region and it's puppet making experts Mackinnon and Saunders to populate some of Hollywood's best animated works and short film makers celebrated by both BAFTA and Oscar recognition, Manchester really is a place where anything animated can be brought to life.

Animation studios in Greater Manchester work with some of the world's biggest brands to create explainers and advertisements that sell products. Interactively you'll find Games companies galore and VFX companies making use of emerging technologies and digital platforms.

Among the biggest hotspots for animation in the country, beneath London and alongside Bristol, Greater Manchester benefits from an established network of skilled craftspeople who have contributed to the world animation story for over half a century.

IMAGES LEFT TO RIGHT:

Chorlton and the Wheelies - Courtesy of Boat Rocker Studios

Danger Mouse - Courtesy of Boat Rocker Studios

The Wind in the Willows - Courtesy of Boat Rocker Studios

Count Duckula - Courtesy of Boat Rocker Studios

Bob the Builder - Mattel / Mattel Television

Raa-Raa the Noisy Lion - NBC UNIVERSAL

## GREATER MANCHESTER'S ANIMATION BEGINNINGS

In the early 1970's two young Granada TV employees from the graphics department decided to leave the company to create their own TV shows/programmes based on the cartoons that they loved watching growing up. Those young men were Brian Cosgrove and Mark Hall and, with the help of a father in laws shed and a lot of patience they built their company up to be world leaders in animation.

Cosgrove Hall became synonymous with classics like *Danger Mouse* and *Count Duckula*. Before closing in the early 2000s, it set milestones, including being the first UK studio to sell an animated show internationally, paving the way for British animation. Greater Manchester's animation legacy continued with Mackinnon and Saunders animating the Ivor Wood classic *Postman Pat* as well as creating puppets for Hollywood blockbusters like

*Frankenweenie*, directed by Tim Burton, *Fantastic Mr Fox* by Wes Anderson and Guillermo Del Toro's *Pinocchio*. Other Manchester studios included HOT Animation (*Pingu*, *Bob the Builder*), Chapman (*Raa Raa the Noisy Lion*, *Roary the Racing Car*), and Factory (*Strange Hill High*, *The Clangers*).

The modern picture of animation in the city includes many successes. Mackinnon & Saunders have teamed up with Tim Burton for both *Beetlejuice*, *Beetlejuice* and the animated sequences of Netflix series *Wednesday*. Stop Motion services also dominate the region with Animation Toolkit providing stop motion products to an international array of clients. Surfing Giant recently worked with Disney to develop and deliver the TV Series *Hey A.J.!* Studios such as Kilogramme, whilst operating on a smaller studio scale, deliver for huge clients, Flipbook Studio bolster the regions output with work for a wide range of clients as well as international short film co-production with the Oscar longlisted *Black Slide*.



IMAGE TOP: Deep Rooted - Copyright 3DR Studio 2025  
BOTTOM LEFT TO RIGHT:  
Guillermo Del Toro's Pinocchio - Netflix  
Daisy and Ollie - Hoopla Animation  
Mixmups - MixMups Entertainment Limited  
Black Slide - Courtesy of Flipbook Studio  
Ballad of the Pale Blue Dot - Copyright 3DR Studio 2025  
Hey A.J - Disney  
Two Black Boys in Paradise - Courtesy of One 6th



Motion Graphics plays a strong role in the regional animation economy, with Flow Creative, Mighty Giant, Bearded Fellows and DoodleDo among the studios delivering world class services. Krygon Studio produces VFX and animation on an international stage, producing work for the Las Vegas Sphere and as well as offering globally renown studio facilities Dock10 creates animation as part of their wider catalogue of cutting edge of motion capture and VFX. The city is also home to major video game companies such as Cloud Imperium and Epic Games.

Short films are still being made in the region with Duncan Rudd's CGI Films *Deep Rooted* and *The Ballad of the Pale Blue Dot*, scooping up prizes internationally, including at Blender Con 2025. 2026 saw *Two Black Boys in Paradise*, produced by Manchester based stop motion studio One 6th win a BAFTA after a hugely successful festival run, scooping over 20 international film festival awards including Best British Film at Manchester Animation Festival

2025. This marks the first time a Manchester production has won in this prestigious BAFTA award category.

Animation in Greater Manchester has come a long way from Brian and Mark working away in their shed but their incredible legacy and the legacy of those companies and creatives that have established the regions reputation as a global animation powerhouse continue to this day.

EDUCATION

Entry into the workforce through further and higher education is supported extensively in reater Manchester. Universities such as the University of Salford, Manchester Metropolitan University/SODA, the University of Greater Manchester (formerly University of Bolton) and Futureworks provide specialist degrees covering areas including 2D/3D animation, visual effects (VFX), illustration with animation, and immersive media. Colleges such as UCEN Manchester and The Manchester College provide animation training also.

ANIMATION IN THE UK

Within the UK animation it is estimated that over 800 companies contribute £1.3bn to the GVA<sup>1</sup>. and attracts over £350 million inward investment into the country.

Animation is the future. NESTA placed animation as the most promising digital skill for the future workforce in their 2018 survey *Which digital skills do you really need?* Which studied over 41 million job adverts. Its production demands a lot of skilled roles, from managerial, engineering, technical and creative.

Greater Manchester hosts an established network of animation, motion graphics, CGI and visual effects (VFX) companies, from one-person studios to huge employers it is clear that with the right investment Greater Manchester is in a position to lead the country for animation both culturally and economically.

<sup>1</sup> Mapping the presence of animation activity across the UK economy (BFI)



## SECTOR CONNECTIVITY - THE GREATER MANCHESTER ANIMATION INNOVATION TASKFORCE

The Greater Manchester Animation Innovation Taskforce (GMAIT) is a strategic, year-long R&D&I investigation into the growth and evolution of the region's animation sector. It forms a key part of the Innovate UK funded Media City Immersive Technologies Innovation Hub (MITIH) - one of Manchester's 10 Innovation Accelerator Pilot Programme's projects.

This taskforce represents the formal evolution of Animate North-West, a consortium established by the Manchester Animation Festival in 2021 to unify the sector. By absorbing this established network, GMAIT showcases a long-standing, joined-up commitment to the industry. By bringing together a broad cross-section of voices, the taskforce aims to identify specific ecosystem challenges and develop actionable solutions for the region's future success.

### **GMAIT core objectives are:**

- **Strengthening the Ecosystem:** Enhancing the partnership between MITIH, Manchester Animation Festival (MAF), Motion North and bringing together organisations and individuals from the wider animation ecosystem in Greater Manchester to form a unified advisory group.
- **Problem Identification:** Conducting deep-dive sessions to uncover technical, financial, and operational barriers within the industry.
- **Policy Influence:** Translating industry feedback into formal guidance for the Greater Manchester Combined Authority (GMCA) and national Government.

The heart of the taskforce consists of four major strategic forums designed to facilitate high-level dialogue:

1. **Opening Forum (June 2025):** Establishing the baseline requirements of the GM animation industry through panels, roundtables, and participant-led feedback.
2. **Data & Funding Forum (August 2025):** A dual-focus session regarding the health of the sector. Discussing the design and launch of a comprehensive survey to capture improved industry data and taking a deep dive into existing and emerging funding opportunities available within Greater Manchester.
3. **The "MAF" Forum (November 2025):** A high-profile session held alongside the Manchester Animation Festival, focussing on a rigorous analysis of the GMCA Creative Industries Sector Plan, with the objective of identifying specific requests for the Combined Authority.
4. **The "Animating Tomorrow" Forum (March 2026):** The concluding event to showcase outputs, summarise key findings, and explore the potential future of the Taskforce as an advisory committee.

### **STRATEGIC IMPACT & LEGACY**

In March 2026, the taskforce will publish a Comprehensive Activity Report. This document, backed by the new industry data gathered via the Greater Manchester Animation Survey and the formal policy requests from the Taskforce's proposal letter to GMCA will seek to provide authoritative evidence and guidance for local and national Government.





Manchester's biggest film festival and the UK's largest animation event.



## VISITOR ECONOMY - FESTIVALS AND EVENTS

### MANCHESTER ANIMATION FESTIVAL

Since 2015 Manchester Animation Festival has developed into Manchester's biggest film festival and the UK's largest animation event. 2025 admissions approximated 12,000 with around 1,300 delegates. The 2023 economic impact as assessed by Visit Britain was £1.4 million and has been growing since then. Internationally recognised, MAF is one of only 4 UK film festivals to be Academy Award® qualifying.

Animation is a term that encompasses many different elements of arts and culture from writing to sculpture to performance and technology. Its main focus is creativity. MAF celebrates all animation forms.

The main festival hosts UK Premieres and Previews of feature and short films, inviting filmmakers to share and discuss their work. Major studios including Netflix, Disney, Apple, Aardman, Cartoon Saloon, Blue Zoo, DreamWorks and Nickelodeon come to Manchester to present exclusives and behind-the-scenes insights. Artists come to demonstrate their processes, host panels where professionals debate industry and creativity, and run networking events to strengthen the animation community.

The Animation Nation Forum, part of MAF, is a commercial B2B conference fostering collaboration and industry growth, discussing international co-productions, financing, future audiences and the state of the animation nation. The forum connects businesses and freelancers with the resources and insights needed to thrive in the ever-evolving animation landscape, offering access to key decision-makers and thought leaders from commercials, broadcast &

streaming, online, expanded media and feature films.

Together, these two strands make MAF the UK's premiere destination for animation and a local event with international prestige.

Beyond the festival, MAF run year-round screenings and projects these have ranged from exhibitions, careers talks and workshops in schools across Manchester, and partnerships with community groups and charities to give away hundreds of tickets. MAF founded Animate North West, a consortium of regional companies to highlight animation's role in the economy and digital skills. Later, with the assistance of the Media City Immersive Technology Innovation Hub (MITIH) this organisation became GMAIT (Greater Manchester Animation Taskforce). With the support of MITIH MAF hosts an innovation conference, Animating Tomorrow, showcasing emerging technologies and new practices for companies in Greater Manchester.

MAF has conducted sector research nationally and regionally, contributing to Screenskills and BAFTA, cofounded the Alliance of British Animation Exhibitors, and they engage internationally through European Animation Festivals Meetings. MAF also works with the Young Animator of the Year national programme aimed at engaging young people aged 11–21 with animation and encouraging them to create work.

## VISITOR ECONOMY - FESTIVALS AND EVENTS

### MOTION NORTH

Established in 2009, Motion North was originally set up as a forum and meetup for the motion design and animation community. Since then, it has grown into a quarterly event featuring industry speakers from across the UK and beyond. Historically, the organisation has hosted four events per year, providing a space for professionals to be inspired, learn, and connect. From 2026, Motion North will move to a schedule of three events per year, which will allow for the introduction of a two-day festival of creativity at the end of February.

Motion North aims to help the industry develop creatively and professionally across the North and beyond. The expansion to a two-day event in 2026 is designed to push this mission further, specifically building stronger connections between education and industry. The event is actively promoted through universities to encourage students to attend not only for the talks but also for the opportunity to network with professionals. These efforts have already proven successful, with several students and early-career professionals securing employment as a direct result of these connections.

For the year 2026, attendance is expected to reach between 1,500 and 2,000 people, with a total reach several times that figure. The strategy includes a 1,000-capacity festival in February, followed by smaller 250-capacity events in June and October.

Motion North has a specific interest in the commercial side of motion design, animation, and visual FX. The programming prioritises commercials, brand films, and online advertising. While not exclusive to these areas, the audience and speakers typically represent smaller commercial studios alongside various schools and universities.

Motion North maintains strong relationships with European events and festivals that cater to similar audiences, such as “Playgrounds” in the Netherlands and “ODDFest” in Helsinki. Discussions with the founders of these organisations reveal that they benefit from a significant level of security through the backing of government and creative bodies. Such support allows them to develop both the events and their internal teams. Currently, Motion North operates with one full-time staff member, supported by freelancers during event periods.

Establishing a year-round resource would provide a tangible benefit to the industry in the form employment opportunities. More crucially, it would provide the infrastructure needed to enable deeper connections between industry and education throughout the year. Motion North seeks to become a true enabler, helping those in both higher and further education become employment ready.

The ethos of the event is to foster greater creativity, leading to increased output, higher income for companies, and more jobs. At present, the organisation operates on a short-term financial basis, relying on sponsors and ticket sales. While these income streams will remain, the organisation requires more stable foundations to establish itself as a global event. Growth is limited by a reliance on sponsors who commit only months before an event. In 2025, speaker Emanuele Colombo noted that Motion North “is well on its way to becoming one of the most important [events] in Europe.” The organisation is now focused on making that vision a reality.



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The Archive contains a mixture of 2D and 3D assets, since Cosgrove Hall Films produced both hand drawn animation and stop motion animation simultaneously.

## VISITOR ECONOMY - FESTIVALS AND EVENTS

### COSGROVE HALL FILMS ARCHIVE

The animation economy overlaps with the visitor economy also. Waterside in Sale has become the home of the Cosgrove Hall Films collection, the material that remained from the film studio that operated in Chorlton from the 1970s through to the early 2000s.

The Archive contains a mixture of 2D and 3D assets, since Cosgrove Hall Films produced both hand drawn animation and stop motion animation simultaneously. Their 2D store contains hundreds of plan, script, storyboard and editing material from an assortment of Cosgrove Hall Films series, including Engie Benjy, Bill and Ben and the Likeaballs. 2D also encompasses a smaller selection of hand drawn set designs and character designs on paper. The collection includes several hand painted transparent cels and model sheets from Danger Mouse, Count Duckula, Avenger Penguins, The BFG, Victor and Hugo and more.

Their 3D store contains an extensive array of stop motion models from Cosgrove Hall Films, including puppets from animated series, such as Wind and the Willows, Truckers, Engie Benjy, Fetch the Vet, Oakie Doke, Fetch the Vet, Noddy, Postman Pat, Cinderella and many more. Set props from Fool of the World and the Flying Ship and Wind and the Willows. Props from the set of Noddy and Engie Benjy. A number of model-making materials are also included, including armatures, original moulds, spare model parts. The 3D store also contains some costume, mainly

from Wind in the Willows and Truckers. In 2021 the collection acquired the sets from Postman Pat: Special Delivery Service, Entertainment Rights & Cosgrove Hall Films produced Postman Pat between 2003–2008.

The majority of the collection is made up of physical assets left over from Cosgrove Hall Films, but it also contains some material from other production companies with links to Cosgrove Hall Films. Such as, Stop Frame Productions (Sally & Jake, Grandma Bricks), Westley Wood's Compost Corner, Barry Purves's Rigoletto, Mackinnon & Saunders (Postman Pat), Entertainment Rights (Postman Pat), Woodlands Productions (Original Ivor Wood Postman Pat puppets).

In 2026 the UK's only permanent animation exhibition opened at the Sale Library and hosts items from the collection on permanent display. This archival project has been supported by National Lottery fund for Heritage, Arts Council England the Esmée Fairbairn Collections Fund in partnership with Creative Industries Trafford and Waterside Arts.

This permanent exhibition builds upon the success of previous animation exhibitions that have been hosted yearly at Waterside and which have seen high levels of public engagement.

# "WITHOUT HAVING STATISTICS BEHIND OUR PROJECTS, WE'LL GET IGNORED" MACKINNON & SAUNDERS CO-FOUNDER IAN MACKINNON ON THE URGENCY OF MAKING MANCHESTER'S VOICE HEARD

INTERVIEW WITH IAN MACKINNON, WORDS AND INTERVIEW BY SIMON BLAND

"Directors like Guillermo del Toro and Tim Burton come to us because they realise there's a talent pool in Manchester - so why wouldn't they use it?" reasons Ian MacKinnon, reflecting on just two of the big starry names that have visited the city for its game-changing animation services. "We need to encourage more of that. We need to ensure many different companies across the whole of Manchester are recognized for the various services they offer."

From their humble studio based in south Manchester, the Altrincham-based Mackinnon & Saunders has seen its work showcased and celebrated on a global stage. Co-founded by Ian and his fellow Cosgrove Hall colleague Peter Saunders, their groundbreaking expertise in the world of stop-motion has swiftly become world-renowned.

Burton relied on Mackinnon & Saunders' puppet making skills for his chilling 2005 animation *Corpse Bride*, using their bespoke puppet-tech to give his macabre characters elevated facial expressions. American auteur Wes Anderson followed suit, visiting Manchester to request similar services for his 2009 stop-motion adaptation of Roald Dahl's *Fantastic Mr. Fox*. In 2022, horror maestro Del Toro did the same for his long-awaited *Pinocchio* feature, all while the Mackinnon & Saunders team delivered beloved kids TV hits like *Mixmups* and *The Twirlywoos*.

Many of these big recognized names count themselves as return clients. Recently, the studio re-teamed with Burton to contribute puppetry work to his hugely successful sequel *Beetlejuice*, *Beetlejuice* and his equally-popular Netflix series

*Wednesday*. It's a continued collaboration that has paired Manchester with major Hollywood exports. However, according to Ian, they're just one part of a larger, thriving scene - one that needs urgent support.

**"THERE'S MANY HUNDREDS  
OF PEOPLE HERE DOING  
AMAZING WORK"**

"The Manchester region has a 50-60 year history of creating animations. A lot of heritage children's television, from stop-motion to drawn animation, has come from Manchester," says Ian, pointing to nostalgic faves like Cosgrove Hall's *Danger Mouse* and Factory's *The Clangers*. "We work on very high profile projects but there's many hundreds of people here doing amazing work in games, VFX, advertising and writing for animation. All of these companies need to make themselves known because without that information, the industry is invisible."

This need for visibility is paramount, especially now. The recent closure of Manchester stop-motion giant Factory compounded with the arrival of AI has sent ripples of uncertainty throughout the sector. "A lot of businesses are struggling at the moment," says Ian. "We've been really busy but many companies haven't. Animators are having to work in factories or supermarkets to survive. We've got such a hub of creativity in Manchester. We need to find a way of supporting it and making sure the right conditions are there for it to grow."

From digital storytelling, video games and VFX creations, to nurturing state-of-the-art Createch

skills, the city has become a focal point for innovation. According to Ian, it's this world-class legacy that needs to be protected. "Our team won visual effects awards in Hollywood for the innovative work they did on *Pinocchio* using 3D metal printing. We use digital technology every day as part of what we do and we've won awards internationally. We need to make sure that newer companies, producers, directors and animators have all the support they need."

To achieve this goal, Manchester Animation Festival has recently conducted a survey of the region's Animation Sector. By quantifying its raw value and highlighting the key areas that show potential and need support, policymakers can gain a better understanding of the region's value to the UK's creative economy and implement the framework needed for it to reach new heights.

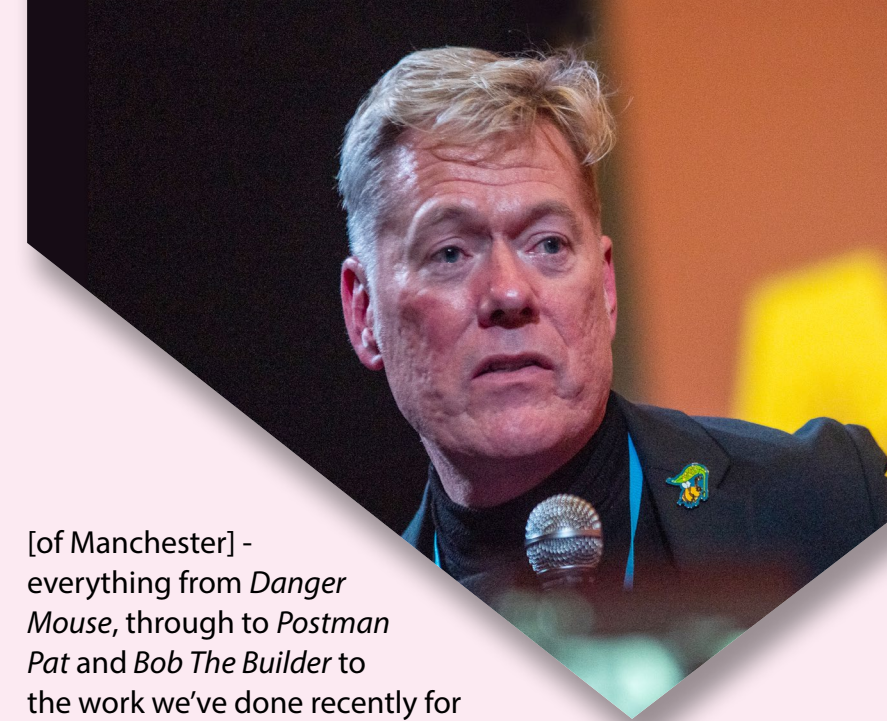
**"THERE'S A TALENT POOL HERE  
LIKE NO OTHER PLACE I KNOW"**

"Policymakers and local politicians talk about Bristol and London as being the hub of animation while Manchester discreetly carries on doing amazing work. Without having statistics behind these projects, we'll get ignored," reasons Ian. "If you look at the animations that have come out

[of Manchester] - everything from *Danger Mouse*, through to *Postman Pat* and *Bob The Builder* to the work we've done recently for *Beetlejuice*, *Beetlejuice* and *Wednesday* - there's so much more being done by the region - and it's all incredible work. There's a talent pool here like no other place I know."

By shining a light on the work the city is doing now, the framework and planning for a more sustainable future can be put in place. In a time full of uncertainties, it's one future-planning element that creatives can control. "VFX, gaming and Createch are all having their own challenges at the moment which is why pulling all of this information together is going to make it easier for people to see what the entire animation industry needs to give it the best conditions to grow," continues Ian. "We've had incredible successes but we need to keep building on that. It's a fragile time - but this will be the best way to support the animation sector."

IMAGES:  
*Corpse Bride* - Warner Bros. Entertainment Inc  
Guillermo Del Toro's *Pinocchio* - Netflix  
*Fantastic Mr. Fox* - Twentieth Century Fox Film Corporation



## PREVIOUS SECTOR MAPS AND SURVEYS OF NOTE

### MAPPING THE PRESENCE OF ANIMATION ACTIVITY ACROSS THE UK ECONOMY 2024, BFI

*Mapping the Presence of Animation Activity Across the UK Economy* (2024) confirms Greater Manchester as one of the UK's most significant centres for animation production. The report identified 35 'core' animation companies in the city-region, alongside a further 68 businesses operating across the wider animation value chain. This places Greater Manchester third nationally, behind only London (257 core companies and 753 wider value chain organisations) and the South East (32 core and 74 wider value chain companies). Greater Manchester ranks ahead of other recognised creative clusters, including the West of England, which—despite having a higher number of core animation companies (44)—supports a significantly smaller wider value chain (55)..

This distinction is critical. Greater Manchester's strength lies not only in the number of studios, but in the depth, resilience and interconnectedness of its animation ecosystem. The region supports a mature, end-to-end animation economy encompassing production, post-production, VFX, motion graphics, broadcast supply, games animation, immersive technologies and IP development. This breadth reflects decades of industrial evolution and positions Manchester as one of the UK's few animation clusters capable of sustaining large-scale, long-term production activity.

### GREATER MANCHESTER ANIMATION INDUSTRY SURVEY 2021 MAF/MIDAS

The establishment of Animate North-West in 2021, led by Manchester Animation Festival, marked the first coordinated, industry-led effort to formally connect Greater Manchester's animation companies, articulate their shared interests, and advocate collectively for the sector's strategic importance. Bringing together a consortium of animation businesses operating across production, post-production and related disciplines, Animate North-West created the industrial infrastructure necessary for meaningful engagement with regional policy and investment bodies.

Building on this, a foundational survey commissioned by MIDAS in 2022 provided the first robust evidence base for the animation sector in Greater Manchester. Twenty-six companies participated, contributing both qualitative insight through in-depth interviews and quantitative data through structured economic analysis. Together, this mixed-methods approach established not only the scale of the sector—valued at £50 million between 2017 and 2021—but also its industrial relationships, commissioning patterns, skills base and long-term growth potential.

This research was critical in moving animation from anecdotal recognition to evidence-led understanding. It mapped the interdependencies between studios, freelancers, broadcasters and global commissioners, demonstrating that animation in Greater Manchester operates as a connected industrial ecosystem rather than a loose collection of independent companies. As such, the 2022 MIDAS-commissioned survey should be recognised as the baseline dataset against which subsequent growth, risk and opportunity—including those identified in the GM Animation Survey 2025—can be measured.

Taken together, Animate North-West and the 2022 survey laid the groundwork for all subsequent analysis, advocacy and strategic planning. They represent the moment at which Greater Manchester's animation industry first became visible, measurable and legible to policy, and they continue to underpin the case for sustained recognition and targeted support.

### BFI STATISTICS

The British Film Institute (BFI) reports extensively on the UK Film industry, including animation productions that receive tax incentives as a result of passing their cultural test. These official statistics are released in accordance with the Statistics and Registration Services Act 2007.

It's important to note that not all productions receive this support, so the figures do not represent the total output of UK animation production. They do provide a comparative 'health check' of the industry.

Drawing from these reports between 2022 and 2024 a total of 214 animated television programmes received final certification under the cultural test with a total production budget of £417,700,000.

**2024 98 programmes  
£179 million production budget**

**2023 62 programmes  
£119.5 million production budget**

**2022 54 programmes  
£119.2 million production budget**

the Young Audiences Content Fund supported 160 projects and 61 new commissions, creating 287 hours of UK children's content with £44.1 million in funding

## MARKET CONTEXT AND ONGOING CHALLENGES

Over the period covered by this report, the animation market has undergone significant changes that challenge the region's animation companies.

The continued rise of global streamers and social media platforms has reshaped commissioning priorities, particularly in children's animation, with platforms such as YouTube transforming how younger audiences engage with content, shifting away from traditional broadcast models.

At the same time, reductions in BBC Children's budgets and commissioning, the end of commissioning of original children's content at Sky. In 2023 ITV announced the closure of their children's channel CITV, leading to direct job losses in Media City. Channel 4 has not made a new children's serial programme for many years. Channel 5 still shows children's programmes, but it makes fewer than BBC and mostly focuses on shows for preschool. These challenges, combined with the end of the Manchester-based BFI Young Audiences Content Fund pilot have collectively narrowed domestic funding routes for UK children's content which have historically been a core part of regional production pipelines.

Over three years, the Young Audiences Content Fund supported 160 projects and 61 new commissions, creating 287 hours of UK children's content with £44.1 million in funding, with more than 71% of the spending going to regions outside London and the South East, including the North West, and achieving a 11% commission

rate, well above the 5% industry average, bringing significant investment, jobs, and creative growth to the region. Whilst the fund catered for both animation and live action productions its loss has been felt sharply within the animation community.

Wider pressures include the impact of Brexit on talent mobility and access to co-production opportunities through markets such as Cartoon Movie and Cartoon Forum, disruption linked to US industry strikes (such as the 2023 writers strike), and growing uncertainty around the role of AI in production workflows have all added further instability to commissioning cycles and business planning.

Major Greater Manchester animation studio closures such as Brown Bag Films UK (prior to the survey period) and Factory (during the survey period) illustrate how rapidly changing market conditions can affect even established companies, underlining the importance of adaptability, diversified revenue streams, and supportive local ecosystems.

For companies in Greater Manchester, these shifts mean increased competition for fewer traditional commissions, greater reliance on international markets and digital platforms, and a pressing need to evolve business models in response to an increasingly fragmented and globalised animation landscape.

## METHODOLOGY

This study employed a mixed methods approach, combining quantitative survey data with qualitative insights gathered through interviews and one to one engagement. The objective was to develop an evidence-based profile of the scale and composition of the animation, motion graphic and game cinematic sector in Greater Manchester whilst gathering colloquial context from interviewees to paint a picture of the animation community in the region..

Designed as a sector-mapping exercise, The research focuses on the size and structure of the industry rather than its economic value. As such, the study does not assess Gross Value Added (GVA), exports, licensing activity, tax contributions, or the wider value chain. It's worth noting that such analysis is not simple or even possible from public records due to company SIC code classifications and the significant output from companies which operate across several sub-sectors.

This study provides a baseline understanding of who is operating in the region, how the workforce is structured, and where capacity exists.

## QUANTITATIVE DATA COLLECTION: SURVEY

An open, anonymised survey was distributed to organisations, freelancers, and researchers working across Greater Manchester and the wider North West and publicised through the media and partner social media channels. The survey aimed to gather consistent, comparable data to support a collective, data-driven overview of the regional animation sector.

A total of 220 survey responses were received.

Following data cleaning, responses were reviewed to remove:

- incomplete submissions,
- duplicate entries, and
- responses from outside the Greater Manchester Combined Authority (GMCA) area.

After this process, the final dataset comprised:

**31 COMPANIES, AND  
77 FREELANCERS OPERATING WITHIN GREATER MANCHESTER.**

Responses received from outside the GMCA boundary demonstrated the presence of a broader North West animation industry. While these responses were excluded from the core dataset to maintain geographic consistency, they present a clear need for expanded regional inclusion in future surveys.

Though 31 companies were reached with this survey it is possible that with a longer timeframe and greater resources for advertising and reaching potential companies that a larger data set could have been obtained. 31 should not be considered the final number of studios in the region.

Previous reports have counted up to 200 animation production, SFX, VFX, games, Digital and post production facilities within the region. Initial research for this survey suggested 78 companies operating in Greater Manchester. All were approached, with some unwilling to fill in the form, unresponsive or it was revealed that they fell outside the regional remit of this survey.





### INCLUSION OF FREELANCERS

Unlike previous surveys of this kind, this survey explicitly incorporated freelancers as a distinct and essential part of the workforce. Freelancers represent a significant proportion of the region's production capacity and provide critical skills across animation workflows.

Including freelancers enables the survey to function as a health check of the region's industrial output, capturing skills that are actively used within Greater Manchester but are also highly mobile.

This group is particularly sensitive to changes in incentives, infrastructure, and opportunities, and their inclusion provides important insight into workforce retention and resilience.

### ONE-TO-ONE SURVEY SUPPORT

To improve data quality and accessibility, one-to-one calls were offered to participants. These sessions guided respondents through the survey and allowed

clarification of questions where required. This approach helped reduce misinterpretation, supported completion, and ensured more accurate and consistent responses.

### QUALITATIVE DATA COLLECTION

Qualitative data was gathered through interviews conducted with key stakeholders across the region. These interviews were designed to contextualise the survey findings and provide a deeper understanding of the animation ecosystem, including sector dynamics, workforce conditions, and challenges.

The qualitative insights are presented as a thematic summary of the regional animation ecosystem and are presented throughout this report. Together with the survey results, they contribute to a more comprehensive, human picture of the sector than quantitative data alone could provide.

# The Results: Companies

**TOTAL  
EMPLOYEES  
1665**

**Number of  
PAYE Employees**  
This is the unique people  
employed over the  
course of 2025  
**380**

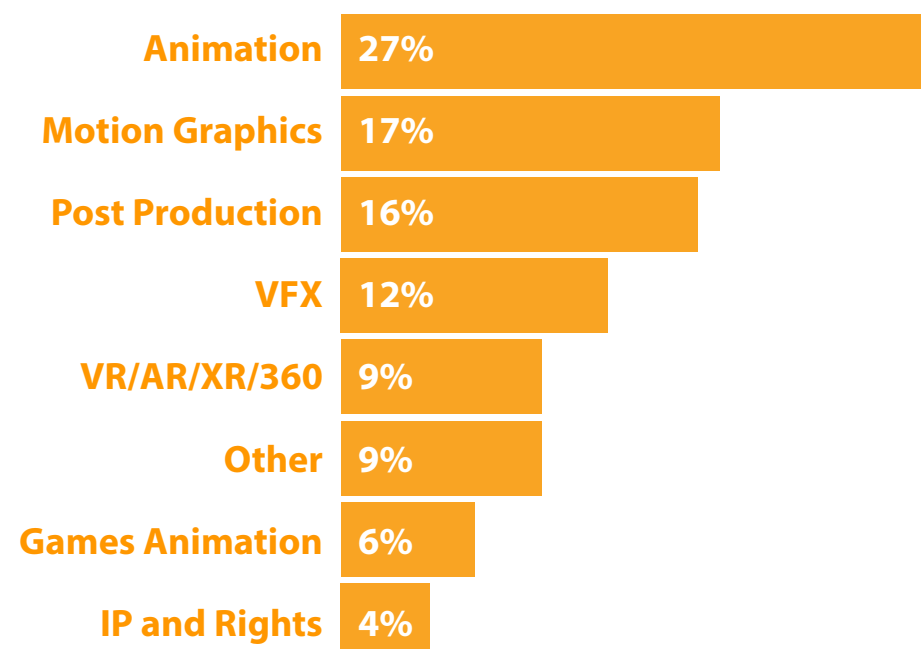
**Number of  
FREELANCE  
Employees**  
This is the unique people  
employed over the  
course of 2025  
**1285**

## THE WORKFORCE

Over  $\frac{3}{4}$  of the animation workforce in GMCA is freelance. Due to the nature of animation production this allows animation talent the flexibility to move from project to project and share their skills across the region, moving from project to project and company to company.

Freelancer data will be shared later in this report, but it is worth contextualising that though we have received 77 freelance responses in this survey, the number below may account for freelancers outside of traditional animation roles and could be more studio based. It is also worth noting that large organisations that produce hybrid work may attract freelancers from outside the region in non-animation roles.

## WHAT SERVICES & PROJECTS DO COMPANIES SPECIALISE IN



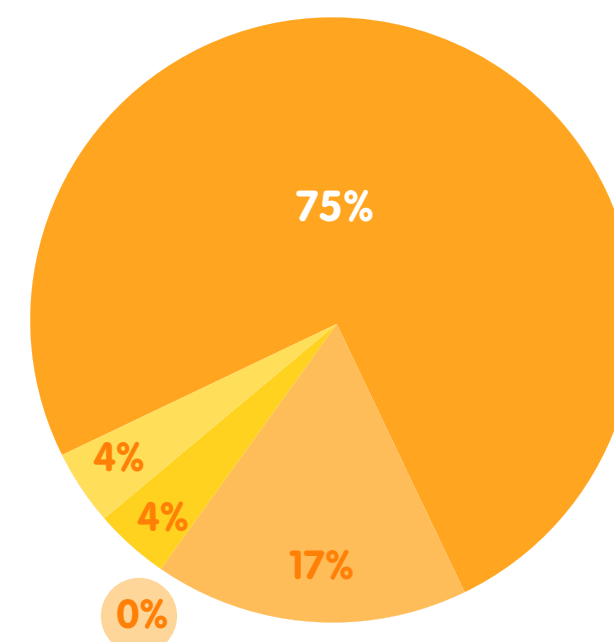
## WHAT IS CREATED?

Company specialisms in Greater Manchester reflect a mix of content creation and service-led work. While animation remains the largest area (27%), alongside motion graphics (17%) and post-production services (16%), VFX currently accounts for a smaller share of activity (12%). This points to a significant opportunity for growth. Unlike live-action film production—which often requires extensive on-location filming, road closures, and large-scale logistics—VFX and Createch work can be delivered largely from office-based environments. Expanding Greater Manchester's VFX capabilities could therefore strengthen the region's offer to the film and high-end TV sectors, positioning it as a flexible, scalable, and cost-effective hub for screen production and establishing the city-region as a beacon for supporting skilled jobs in VFX-led service or original IP content creation.

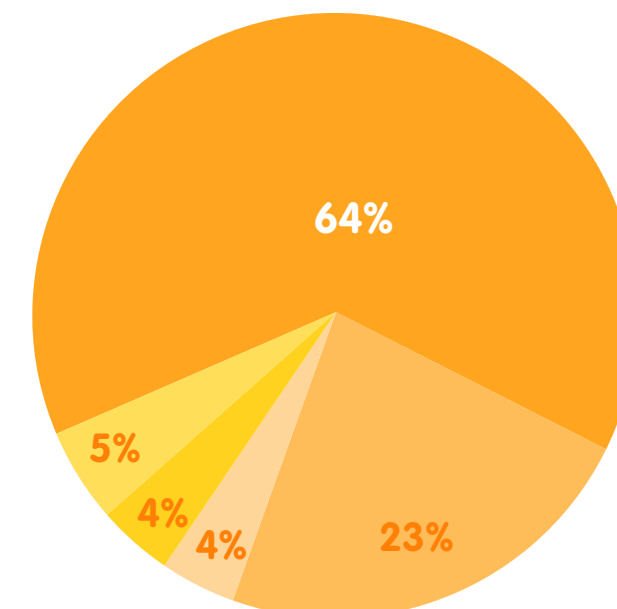
Other services include live action film and mixed media, websites, apps, Computer Generated (CG) still imagery, development, armature fabrication and hardware for motion capture.

28% of animation work produced in Greater Manchester is commissioned locally, demonstrating the region's current capacity to generate and sustain its own animation activity.

## EMPLOYEES PER COMPANY



## FREELANCERS PER COMPANY



Between 1 and 10  
Between 11 and 25  
Between 25 and 50  
Between 51 and 100  
100 plus

## PROJECTS

Animation is not just about kid's TV or character animation, as a communicator it can encompass many uses. As an art form the line between defining motion graphics and animation is a slim and not officially defined one, with companies identifying themselves as motion graphics companies without there being a general, agreed consensus of the difference between animation and motion graphics. Typically motion graphics is likely to utilise animation alongside graphic principles such as typography, illustration or other design principles. Animation might be more aligned to narrative driven, character work. Though both can be used for commercial purposes such as advertising. There are likely to be bigger differences between different individual motion graphics or animation projects than there are differences between the art forms of motion graphics and animation as a whole. Nonetheless, self identification has been applied by companies participating.

In the sphere of animation production, animation finds itself by far the most common output for companies in the region, followed by motion graphics and post production services.

Manchester's animation studios work for an exceptional range of clients, from the UK's dominant broadcasters, especially the BBC (by far the most frequently cited employer), Channel 4, ITV and Sky, to the world's most powerful global entertainment companies including Disney, Netflix, Sony, Apple, Warner Bros, Universal, Paramount Pictures, HBO, IMAX, Amazon Prime Video, EA, Microsoft, Lucasfilm and Lionsgate.

Their client base extends to leading creative institutions and prestige organisations such as the BFI, National Theatre, Royal Opera House, Aardman, Mackinnon & Saunders, the University of Manchester, and major international film director Peter Jackson, alongside premium children's and cultural platforms including CBBC, Nickelodeon, National Geographic, PBS, ZDF, Smithsonian Channel, History, Hulu, Sundance Now and Curiosity Stream.

Beyond film and television, Manchester studios deliver work for world-class brands and corporations such as Jaguar Land Rover, Adidas, FIFA, Hyundai, EDF, Sony PlayStation, JD Sports, Manchester United, Booking.com, Aldi, Britvic, Bupa, Pets at Home, Betfred, TalkTalk, Dreams Beds, and Qatar Airways, while also partnering with globally respected institutions including the NHS, UNICEF, British Red Cross, Environment Agency, ESA, Wildlife Trust Wales, World Mosquito Program, Save the Children, Shelter, Children in Need and leading educational and technology bodies such as Micro:bit Education, Raspberry Pi Foundation, Multiverse, STEM Learning, Epic Games, Ninja Theory, Dambuster Studios, Nant Studios, and Ninja Theory — confirming Manchester's position as one of the UK's most strategically important animation production hubs serving the very highest tier of international media, cultural and commercial clients.

## HOURS OF CONTENT CREATED

2022 2680

2023 2244

2024 2219

(based on 31 companies participating)

This demonstrates a steady downward trend of content being created in the region. In 2024 Factory closed its doors, contributing to the loss for the region's animation output.





INCOME

Overall annual turnovers for the combined animation industry in GM are as follows

|      |             |
|------|-------------|
| 2022 | £41,745,000 |
| 2023 | £42,449,000 |
| 2024 | £36,152,000 |

Please note that these above figures should not be compared to the BFI Statistics previously reported on. Whilst they could be used to roughly compare GM to a national picture, the BFI data will include GM productions and the data above is a wide animation sector picture that does not differentiate between animation productions that passed the cultural test and those that did not.

Subsequent reporting might shed light on Greater Manchester’s position in the UK when it comes to producing animated television programming.

LOCATION

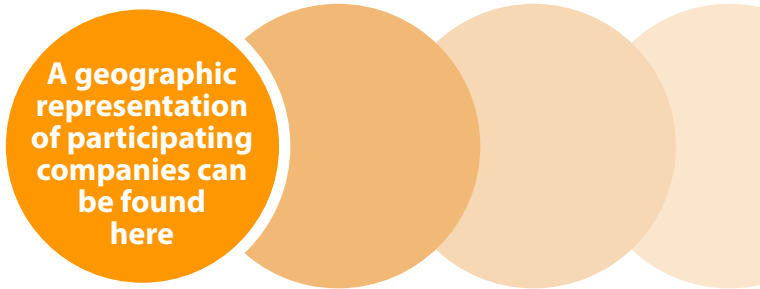
The survey shows a strong concentration of animation and creative businesses in **Manchester (52%), Salford (23%)** and **Trafford (16%)**, reflecting how the sector follows infrastructure, talent and market access. Manchester city centre remains the gravitational core of the ecosystem, while Salford’s MediaCity continues to anchor high-value production activity around major broadcasters and global media partners. **Trafford — particularly Altrincham and the wider South Manchester corridor — plays a critical strategic role**, shaped by historic and long running animation businesses and a highly attractive living environment for founder-led creative companies. Together these three areas form the engine of the region’s animation economy.

At the same time, the survey highlights locations where animation presence is currently limited, **Oldham**, despite strong transport links and ongoing regeneration attracted 3% of the responses. This imbalance points not to weakness but to opportunity: with targeted intervention, affordable space and the reintroduction of large anchor employers, such as the kind of impact previously delivered by studios like **Brown Bag Films UK from 2015-2020** very close to the region, areas such as Oldham could become the next wave of growth, extending the benefits and reigniting previously enjoyed Manchester’s animation boom across the wider city-region.

“WHERE ARE THEY BASED?”

COMPANY LOCATIONS

|            |     |
|------------|-----|
| Manchester | 52% |
| Salford    | 23% |
| Trafford   | 16% |
| Stockport  | 6%  |
| Oldham     | 3%  |



## REGIONAL INSIGHTS

Around a quarter of respondents specifically cited the Business Growth Hub (also referred to as Growth Hub or The Growth Company) as having benefitted their business, making it by far the most frequently mentioned organisation, with occasional mentions of Innovate UK, Made Smarter, the University of Salford, MITIH, Gametech, Spark, and BBC/ITV local commissioning (each one or two mentions). However, a significant proportion of respondents stated that they had not benefitted from any local funding, business development or commissioning organisations at all.

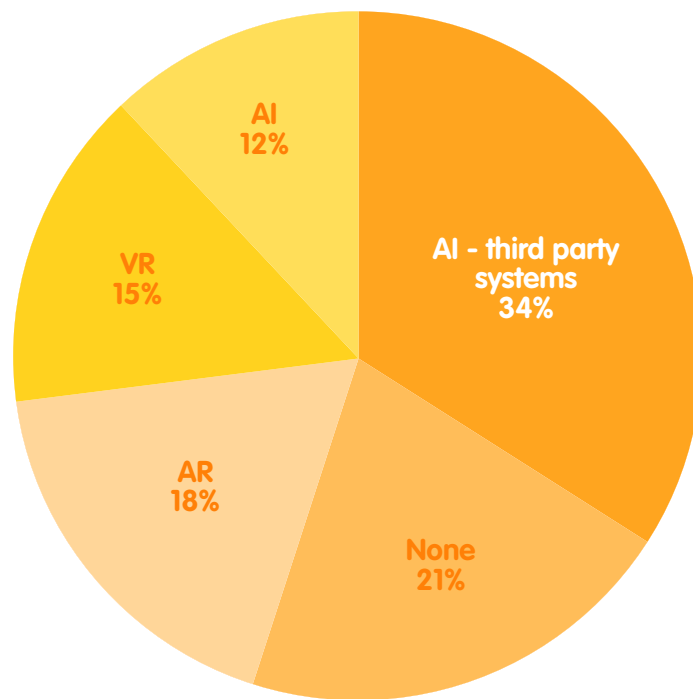
Just over half of respondents (around 55%) reported benefitting from **Manchester Animation Festival**, making it the most significant and frequently cited event, while **Motion North** was mentioned by roughly 30% as a source of networking or sector-related activity. Others referencing a wide spread of one-off or less frequently mentioned initiatives such as MediaCity events, MITIH and MIF. New connections are cited as the most popular benefit of these events.

**35% of respondents have benefitted from employing talent from Greater Manchester based schools or universities.**

35%

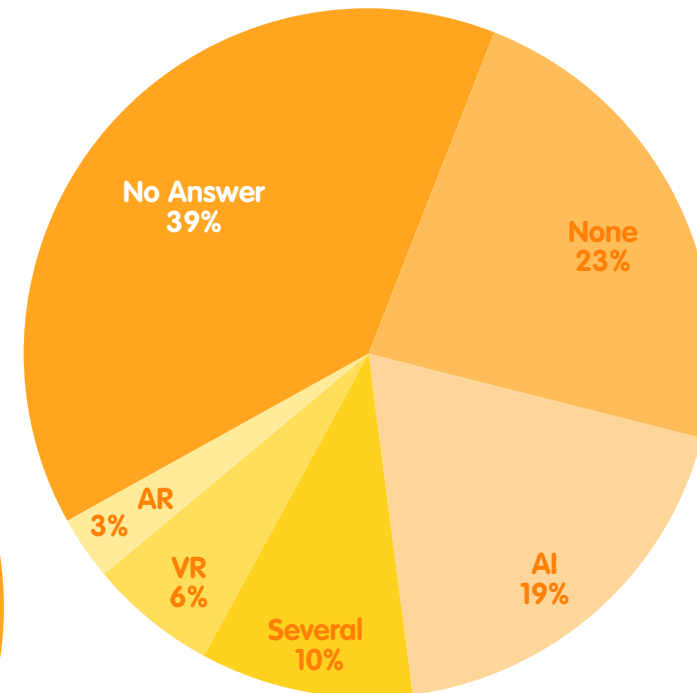
## CREATECH

**“Are you currently integrating CreaTech tools into your production pipeline, if at all?”**



CreaTech adoption across the sector is present but fragmented, with third-party AI tools leading uptake, while a significant proportion of companies are either not engaging at all or lack the resources to develop in-house solutions.

The continued presence of VR and AR indicates an ongoing interest in immersive technologies, even if adoption remains selective and project-specific.



**Have you received client demand or interest in the use of CreaTech tools in your services?**

CreaTech is embraced by clients as a cost cutting measure with one company reporting they were “... asking if we can use AI to cut budgets”. This has an obvious negative impact on the way companies operate.

Training and R&D funding were by far the most frequently requested forms of support, often mentioned together, with additional strong interest in policy / legal frameworks, particularly around ethical use, regulation, and upcoming AI legislation. Respondents also highlighted the importance of infrastructure and ecosystem support (such as labs access, talent pipelines, freelancer development, networking, and cash grants), alongside safeguarding human skills and jobs and developing more targeted AI tools for animation.

Only 22% of companies have a stance or employee guidance on using AI in projects. Whilst AI is still in the process of being adopted, there are many ethical questions surrounding its use in artistic commerce that go unanswered and vocal backlash from the creative community against companies that openly use AI to produce generative art. As such wider employee guidance and a better grasp of this fast moving area would be beneficial for the 78% of companies that do not have a stance or guidelines on AI.

45% of respondents engaged in technology-driven R&D, including software and tool development, new production workflows, AI applications, real-time and procedural content creation, and immersive technologies such as AR, VR, Unreal Engine, and virtual puppeteering. Significant work is also focused on product development, 3D printing and materials innovation, environmentally sustainable stop-motion practices, and integrating advanced animation techniques across pipelines.

58% of respondents indicated that over the next five years, they expect to continue investigating AI, alongside real-time animation, AI-driven tools for animation, automated systems, Unreal Engine, virtual puppeteering, procedural content creation, and immersive VR/AR technologies. Much of this R&D is described as project-led and adaptive, with a strong emphasis on ethical AI use that enhances pipelines without undermining human creativity.

**What kind of innovations do you think would be of benefit to the animation industry?**

Respondents believe the most valuable innovations would be those that improve production efficiency and lower barriers to entry, including faster rendering, advanced motion and performance capture, 3D printing for sustainable stop-motion, labour-saving AI for tasks like clean-up and rigging, standardised technical formats, subsidised software, and easier access to technical talent. Strong emphasis was also placed on protecting and developing the workforce, through legal and policy support, trade unions, education-to-employment pathways, training in schools, start-up funding, and broader recognition of the creative value of animation.

Are there any technologies or facilities that you need for your development/growth and/or R&D that you don't already have access to?

While many respondents said they technically have access to what they need, the biggest barriers identified were cost, space, and ease of access — particularly for studio space, advanced 3D printers, high-speed networking, VR/AR testing facilities, software development capacity, and specialist labs. There is also strong demand for better institutional support and connectivity, including access to AI companies, open-source development teams, funding and grants, improved routes to meet customers for R&D feedback, and clearer engagement with government around tax and policy.



## "IT MEANS A LOT TO US THAT PEOPLE ARE RESONATING WITH IT" ONE6TH CO-FOUNDERS ON THE RUNAWAY SUCCESS OF TWO BLACK BOYS IN PARADISE

INTERVIEW WITH BAZ SELLS AND BEN JACKSON, WORDS AND INTERVIEW BY SIMON BLAND

Debuting earlier this year, One6th's powerful short film *Two Black Boys in Paradise* has ridden a wave of festival buzz to become both Oscar qualifying and BAFTA winning. In addition to being a deserving way to celebrate a film with an important LGBTQ+ message, this national and international recognition is also helping in other ways. Most notably to re-cement Manchester's status as a hub of animation excellence - something that couldn't come at a more pivotal time.

"We started making *Two Black Boys in Paradise* in 2020 when Ben heard the poem at a live-event," recalls director Baz Sells. Together with his producer partner Ben Jackson, the pair founded One6th in 2018 as an indie studio with a particular (but not exclusive) focus on stop-motion. Penned by poet Dean Atta, their new short is a tale of love and self-acceptance with two black youths at its core. "We already wanted to make a film that featured these themes," adds Baz, "so we approached Dean and developed it with him for the next year or so."

After securing support from the BFI's Short Form Animation Fund, the duo were able to officially give their adaptation the green-light. What followed was a lengthy production process - one that relied heavily upon Manchester's wealth of talented animation professionals.

### "WE REALLY BENEFITTED FROM HAVING MACKINNON AND SAUNDERS SUPPORTING THE PROJECT"

"Manchester's got a healthy stop-motion scene and a lot of the people [who worked on the short] were local," reveals Baz. "We really benefitted from having MacKinnon and Saunders supporting

the project too," he adds, detailing the help they received from bigger neighbouring studios. In addition to being world-class leaders in their field, puppet makers MacKinnon and Saunders are also the go-to suppliers for big Hollywood names like Tim Burton and Wes Anderson. "A lot of their freelancers were working at MacKinnon's facilities on our puppets. It was really nice of them to help us out."

Despite only being a few months old, *Two Black Boys in Paradise* has already won a host of big awards. It's taken home top trophies at Encounters Film Festival, Hollywood Queer Short Film Festival and Portland Festival of Cinema, just to name a few. Not long afterwards, it became Oscar and BAFTA qualifying and in November it bagged Best British Short Film nomination at the 2025 British Independent Film Awards.

While accepting so much praise is a bit of a learning curve for its creators, this sudden surge of attention on both the story and Manchester's animation scene is certainly welcome, says Baz. "We worked really hard to make the best film possible for the sake of the subject matter. It really means a lot to us that people are resonating with it."

"The general consensus is that we could really do with more support..."

The timing of One6th's success is apt. In early 2024, Manchester stop-motion powerhouse Factory announced its shock closure after 24 celebrated years. The effect of this sudden change, combined with new uncertainties presented by AI, has sent ripples across a rightfully concerned industry.

"I'm seeing some unbelievably talented people consistently out of work," reveals Baz, reflecting

on the ground-level impact that removing a key player from Manchester's stop-motion ecosystem is having. "Obviously, our industry always peaks and falls depending on production but right now, due to various circumstances, I feel like we're going through longer periods of unemployment. It's a bit of a perfect storm of some past events, some political [elements], some stuff to do with AI... it's a strange time and people are trying to get a handle on it."

According to his co-founder, more help is needed to ensure the scene's survival. "We've seen a few people move out of the sector entirely just to get whatever job they can in order to pay the bills. It's not unique to now - but it does feel more prevalent," reasons Ben. "I think the general consensus is that we could really do with more support."

With a big industry player like Factory closing its doors, the need for smaller studios to level up and fill the void is key. However, that can only happen if the necessary support pillars are in place to help emerging teams take the leap. For a company that's already displaying award-winning promise, it feels like a natural next step for One6th.

### "WE NEED TO THINK ABOUT HOW TO GET PEOPLE TALKING ABOUT THE CITY"

"All we can hope for is that we continue to grow and that, in time, we might be able to fill some of the positions people are looking for," suggests Baz. "One thing this region would really benefit from is more development support that allows producers, directors and studios to develop Intellectual Property that they can carry forward in more of a long term way," he continues. "There's a history of IP that has originated in Manchester but equally

I think we need to develop new content, films and TV programmes that we can carry forward as a beacon for the future."

The duo believes that more recognition of the talent, opportunity and depth of storytelling on offer in Manchester can help secure its long-term sustainability. "Our film is doing well on the global festival circuit and picking up awards. I feel that should be celebrated," adds Ben. "It was made in Manchester but no one in local government really knows about it. We need to think about how to get people talking about the city."

With the proper support in place, Ben and Baz are convinced the city's animation scene is resilient enough to survive these uncertain times. Once it does, One6th could very well find itself at the forefront of a new ecosystem, picking up where the city's big names left off. "I hold hope that our industry will bounce back, particularly in Manchester," says Baz. "We've got so many talented people here, and even though there are concerns around AI, people are already wanting to see hand-crafted, human-made content. We hope that we'll soon be able to get some new stuff off the ground - and be able to bring some more local people in too."

IMAGE:  
*Two Black Boys in Paradise*  
Courtesy of One 6th

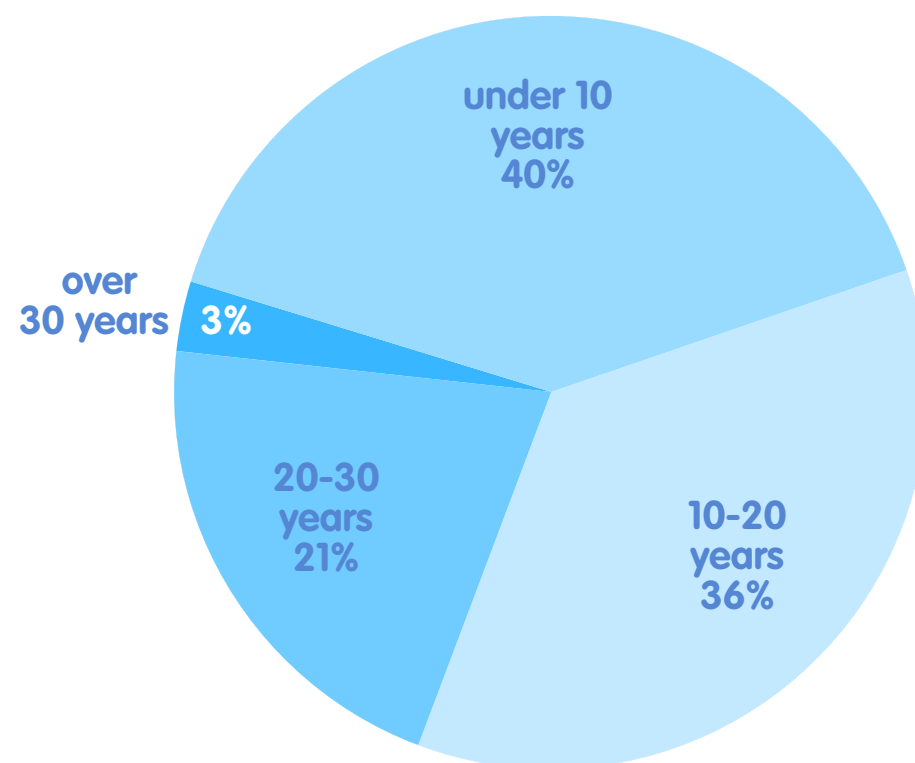


# The Results: Freelancers

Freelancers make up a significant proportion of the Greater Manchester animation workforce, accounting for an average of 54% of those employed by the regions studios and companies. As such, including freelance voices in the 2025 survey was essential in order to present an accurate and meaningful picture of the sector. This expanded approach acknowledges both the scale and importance of freelance labour within the local animation ecosystem. While many freelancers are based in Greater Manchester and benefit from its networks, studios, and creative community, they do not necessarily work solely within the region. Many undertake work for clients elsewhere in the UK and internationally, reflecting the global reach of the animation industry and the increasingly remote, project-based nature of freelance work.

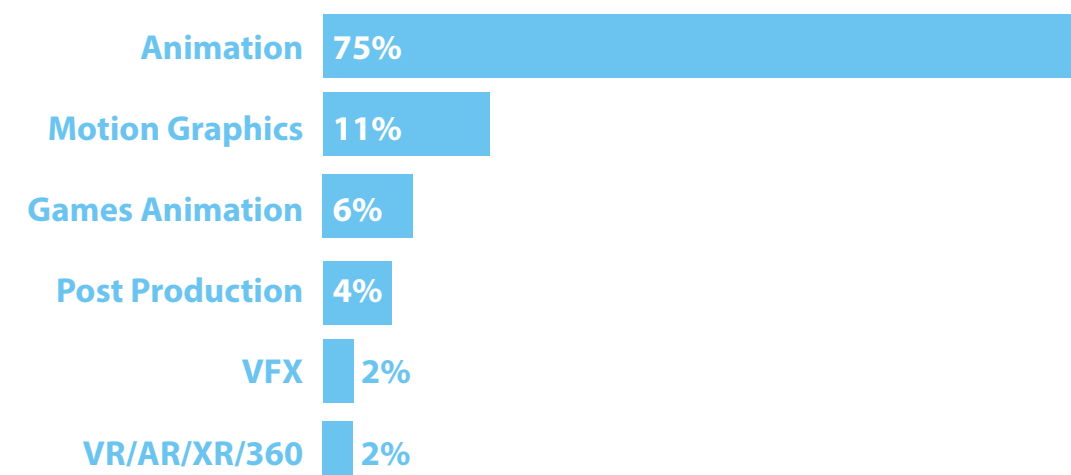
## THE WORKFORCE

The animation workforce is experienced with freelancers enjoying long careers in the sector, with thanks to a history of sustainable and continuous projects. The respondents averaged 12 years. 40% of the workforce have been working for under ten years, 36% between 10 and 20 years, 21% between 20 and 30 years and 3% over thirty years.



## WHAT IS CREATED?

Greater Manchester's animation freelancers span an exceptionally broad and highly skilled workforce, with animation roles forming the largest share: Animator roles account for roughly 30%, with more specialist roles such as 2D Animators (5%), Stop Motion Animators (5%), and smaller proportions in 3D/CGI, VFX and rigging-specific roles (15% combined), showing clear variation within the animator category itself. Beyond the role of animator, the sector is heavily supported by production, directing, design, editing, and stop-motion fabrication roles (model makers, puppet makers, riggers, set builders, prop makers), demonstrating that Greater Manchester's animation ecosystem is not only multidisciplinary across 2D, CGI/VFX and Stop Motion, but also unusually deep in specialist craft, technical, and leadership skills, underlining how advanced and production-ready the local talent base is.



# PROJECTS

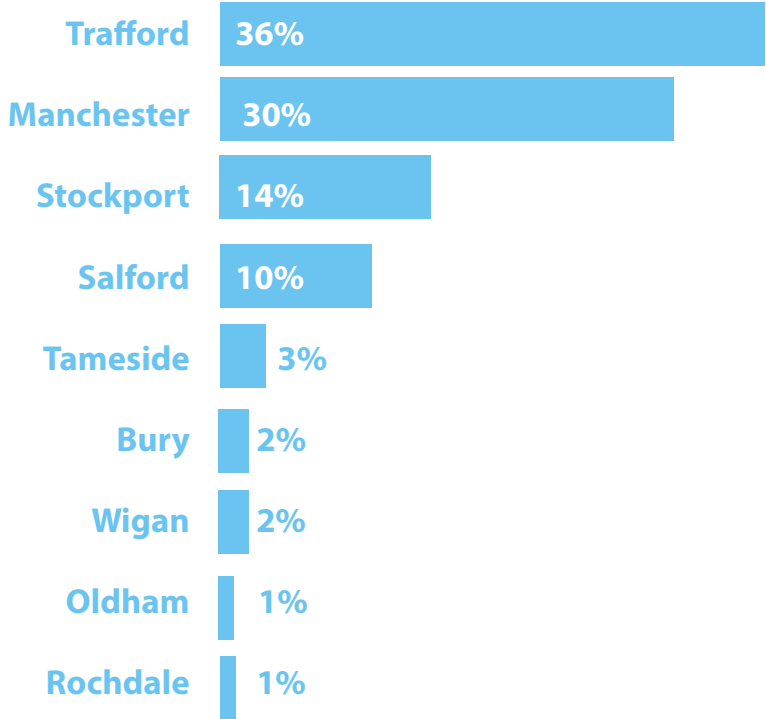
Greater Manchester’s animation ecosystem has historically been anchored by major studios such as Factory, Brown Bag Films (Manchester), and the legacy of Cosgrove Hall, all of which played a critical role in sustaining freelance careers, training talent, and attracting national and international commissions, but all have now closed. As a result, Mackinnon & Saunders remains the sole large-scale production studio holding the local free-lance ecosystem together.

The wider workforce increasingly depends on a distributed network of UK broadcasters and international commissioners, with key clients including BBC Studios, CBBC/CBeebies, Channel 5 Milkshake, ITV, Sky Kids, Aardman, Blue Zoo, alongside global platforms and studios such as Netflix, Disney, Nickelodeon, Universal Kids, Apple TV+, Warner Bros., Cartoon Network, Banijay, and Tencent. Much of this work is remote, London-led, or internationally commissioned, underscoring both the global reputation of Manchester’s animation talent and the growing precarity caused by the absence of multiple locally rooted production studios capable of consistently employing and nurturing freelancers in the region.

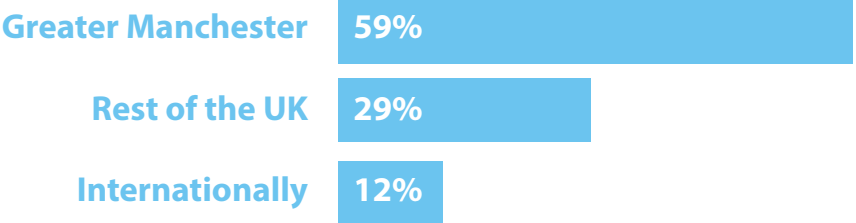


# LOCATION

The southern boroughs of the Combined Authority appear to be the largest areas for animation in the region with Trafford home to the biggest workforce. Transport links might factor into this as companies situated in the city centre and Altrincham can be accessed by the tram or road networks.



Greater Manchester Freelancers get their work, locally, national and internationally with this breakdown:



This demonstrates that although remote work and transport links can account for national or international work, there is still and overwhelmingly strong attachment to the area for freelancers.



IMAGE: Courtesy of One 6th

## “NOW’S THE TIME TO INVEST IN OUR FUTURE SO WE CAN COME BACK STRONGER” MANCHESTER’S ANIMATION SCENE RESPONDS TO SECTOR UNCERTAINTIES - AND OFFERS A PATH FORWARD

### INTERVIEW WITH MEMBERS OF THE GREATER MANCHESTER ANIMATION COMMUNITY, WORDS AND INTERVIEW BY SIMON BLAND

Manchester’s animation scene is in flux. For decades, it’s enjoyed a reputation as a world leader. After legacy companies like Cosgrove Hall and Factory chose the city as their primary base, new talent flooded the region. This, in turn, gave birth to a thriving ecosystem, one full of new studios, fresh opportunities and a steady crop of animators eager to make their mark on an industry they loved.

The arrival of stop-motion powerhouse Mackinnon & Saunders in the early 90s only solidified this identity. Hollywood soon took notice, with filmmakers Tim Burton, Guillermo del Toro and Wes Anderson realising that if they wanted the very best that this sector had to offer, they had to head to the UK - specifically up North. However, cut to 2026 and things feel noticeably different.

### “I’D SAY THERE’S BEEN A DOWNWARD TREND OVER THE LAST COUPLE OF YEARS,”

says freelance CG animator Duncan Rudd. Through his company 3DR Studios, Rudd balances work-for-hire jobs from ad agencies and broadcasters with passion projects. However, one struggles to exist without the other and he’s experienced first-hand the impact of commissioners tightening their purse strings in the wake of AI uncertainties. “Work is still out there but you have to work a little harder to find it. It’s a shrinking market at the moment,” he reasons. “People are managing to stay afloat but there’s definitely a little fear and frustration under the surface.”

It’s a feeling that’s shared by stop-motion art director Lorna Bailey. A fellow regional freelancer, her skills have been featured on box office hits like Burton’s 2024 sequel *Beetlejuice Beetlejuice*.

Like many in her line of work, she used to bounce between gigs at stop-motion giants Factory and Mackinnon and Saunders - but when the former suddenly folded two years ago, it left big shoes that have unfortunately yet to be filled.

“It’s been incredibly difficult for us all,” she says of her time spent living in the wake of Factory’s closure. “Many of my friends [who worked there] are still out of work.” Throw new tools into the mix and freelancers of all mediums have been dealt a tricky hand. “There’s been a massive panic due to AI,” adds Bailey. “We’ve seen a huge drop-off of work, mainly due to studios wanting to see what the emergence of AI would mean for the industry. Nobody wants to commission an expensive show to find out AI could’ve done it for half the price.”

To make matters worse, adequate support to help creatives survive this growing lull is lacking: “I’ve gotten by without much outside help. My wages dropped to about half of what they were and it was very difficult shuffling childcare with freelance life,” she admits. “If the government moved forward with a basic income for all, that would really help.”

The city’s animation scene is an ever-evolving beast. Whilst covering traditional animated shows for studios and B2B/B2C-related commissions for ad agencies, it’s increasingly touching upon the worlds of gaming, VR, augmented reality and Createch. Together, this growing world only adds to the value of the city’s creative proposition - but it too finds itself at risk.

### “WHAT I SEE HAPPENING IS AI REPLACING JUNIOR AND ENTRY LEVEL JOBS,”

explains Richard Wormwell, Head of Production and Innovation at Dock 10. Based in MediaCityUK, his team acts as a production facilitator, frequently assisting those working at Createch’s cutting edge. “What you’ll soon find is that the people who come in at an entry level will no longer have a route to market. They’re expected to come in at a higher level but don’t have the experience,” he says, detailing a hole that’s emerging in the city’s creative ecosystem. “That gap’s just going to get wider and wider. How do we attract new talent into the industry when you’re only recruiting from the top?”

Meanwhile, this same issue is exacerbated by a lack of studios big enough to hire the region's growing out-of-workforce. With Factory now a mere nostalgic memory, new companies are needed to rise up and absorb the talented freelancers who used to populate their workstations. Baz Sells and Ben Jackson of One6th Studio are well placed to fill this market gap. Their BAFTA-nominated short *Two Black Boys in Paradise* puts them in a prime position for growth - but finding the guidance needed to scale is easier said than done.

"One thing this region would really benefit from would be more development support to allow producers, directors or studios to develop new IP that they can carry forward in a more long-term way," suggests Jackson, detailing his vision for sustainable future growth. "The city has lots of new ideas but one of the struggles is that if you're not able to sustain the development funding or cash flow it yourself, it's really difficult to get it off the ground."

With so much at risk, many believe that a renewed focus on the wealth of talent available in Manchester could be the first step in convincing the powers-that-be that more support is needed. It's something the city is no stranger to; you only have to turn a corner in Manchester to see tributes to its musical legacy. Why doesn't its contribution to animation get the same love?

"People know the massive heritage of animated content [in Manchester] but there's gaming and all these other areas," says Bradley Harris, CEO of Manchester's Emmy-winning digital art house Krygon Studios. "We all know about it because we're working in it - but outside of that, I'm not sure it's that well known." He believes converging these disciplines in a kind of taskforce would be useful: "It's a bit segmented with games, animation, VR, immersive... having a board or organisation that brings these sectors together into one space would be great."

Thankfully, there is some light at the end of the tunnel. As Karl Doran, founder and creative director at Flow Creative tells us, this influx of sudden change has reminded some of his studio's clients of the richness of tangible, human-made work. "We're seeing an

increased interest in handmade stuff that feels less fake and more authentic. Things like frame-by-frame or hand-drawn animation that's textured and obviously made by a human hand. That's reassuring."

This seachange has also been seen in the freelance space. "We're now seeing what we do as the 'artisan choice,'" says Bailey of stop-motion's new and slightly-augmented future.

**"STOP-MOTION IS REALLY HARD TO REPLICATE AND PEOPLE SEEM TO REALLY LOVE ITS HANDMADE QUALITIES."**

CG animator Rudd agrees that hope remains, before offering a caveat to the region's combined animation scene: "The community is strong, it's just a question of whether the work will still be there on the other side [of this uncertainty]. There's a real danger that we abandon traditional practices and stop teaching them to graduates. They won't be there anymore if we're not careful," he warns. "We're still going to need curious people with stories they want to share."

As fellow freelance animator and director Geoff Walker points out, now is not the time to sit back and see how the dust settles. Instead, it's time to act - to support all corners of this much-loved sector or risk losing it - and its world-renowned reputation - forever. "People can only hang on for so long not working in their chosen field before they turn their back on it completely," he says candidly.

**"NOW'S THE TIME TO INVEST IN THE FUTURE SO WHEN THINGS DO PICK UP AGAIN, WE CAN COME BACK STRONGER."**



IMAGE: Courtesy of One 6th

A man is shown in profile, wearing a black VR headset with a blue band and a black motion capture suit with white markers. He is looking towards a large screen in the background that displays a blue and white abstract image. The scene is set in a professional studio environment.

## CREATECH

**Are you currently integrating CreaTech tools into your professional work?**

**JUST 13% OF FREELANCERS ARE INCORPORATING CREATECH IN THEIR FREELANCE WORK.** The majority of those in the 13% are employing third party AI tools as well as AR and VR.

83% of those asked declared no client interest in using CreaTech with 7% requesting AI, 2% VR and 1% AR. The remaining 7% cited other tools.

47% declared no noticeable impact, with 42% reporting a negative impact. 11% declared a positive impact.

Overall, freelancer engagement with CreaTech remains low, with figures suggesting that adoption is driven by individual experimentation rather than client demand. While AI dominates awareness and discussion, its perceived impact is more often negative than positive, reflecting ongoing anxiety around job security, rates, and the long-term sustainability of freelance work within the animation sector.

## THE FREELANCER IN MANCHESTER

When asked to list any local funding, business development or commissioning organisation(s) that have benefitted freelancers careers, around 30–35% of respondents reported benefiting from formal funding, bursaries or structured development support, with ScreenSkills emerging as the most significant contributor (mentioned by approximately 20% through bursaries and career programmes), followed by BFI schemes, GMCA Inspire funding, local council or Trafford-based initiatives, and Channel 4/BBC-linked programmes, each cited by a small but notable minority. However, the majority (approximately 70%) stated they had not directly benefitted from any local funding or business support, often because they work on commissioned projects where funding is handled by production companies, were unaware of opportunities, or felt unable to access available schemes, highlighting a clear gap between provision and freelancer reach.

### **Have you ever benefitted from local events, screenings or networking opportunities aimed at the sector?**

The data shows that Manchester Animation Festival (MAF) is the most impactful local event, with 65% of respondents explicitly mentioning MAF as a key source of networking, screenings, inspiration, or direct work opportunities, making it the dominant sector touchpoint. Motion North and other sector related informal networking events (Animates MCR, Freelancers & Friends @ DoodleDo, HOME cinema events, BAFTA/RTS NW sessions) at 30%, while a smaller minority (around 20%) reported little or no benefit—often due to time, cost, accessibility, anxiety, or

participation being primarily social rather than financially driven—highlighting both the strength of Manchester’s animation events ecosystem and ongoing barriers to access for some freelancers.

New connections (44%) were the top benefit of these events, with cultural enrichment following (33%). Sector support gathered 10% of the results tailed by recruitment at 5%. The remainder cited ‘confidence’, ‘motivation’ and ‘funding’ among the benefits of these events.

### **Are there any regional or national challenges that you regularly face as a freelancer that might benefit from intervention on a local or national government level?**

Respondents describe a severe and systemic set of challenges facing animation freelancers in Greater Manchester, many of which sit at the intersection of regional fragility and national policy failure. A dominant regional issue is the loss and closure of major Manchester-based studios—particularly in stop-motion—which has sharply reduced local job opportunities, forcing experienced practitioners to either leave the region, relocate repeatedly, or exit the industry entirely. This contraction has created intense competition for fewer roles and weakened the sustainability of an ecosystem that had taken decades to build. Many note that when such shocks occur, animation receives little targeted local or national attention, despite being a high-skill, high-value creative industry.

At a national level, a perceived overall slump (see: Market Context and Ongoing Challenges)

in the UK animation industry is repeatedly cited, driven by declining commissioning (especially children’s TV), over-reliance on overseas finance, Brexit-related loss of European funding, and other international challenges. Freelancers have been directly affected by these ongoing challenges and as a result report long periods of unemployment, stagnant or declining fees (often unchanged for 20 years), late payments, and lack of basic protections such as sick pay, pensions, or income support between contracts. Many highlight stark London-centric disparities, including higher rates, greater job density, and commissioning power concentrated in the capital, while Manchester-based freelancers face prohibitive travel costs and limited local opportunities.

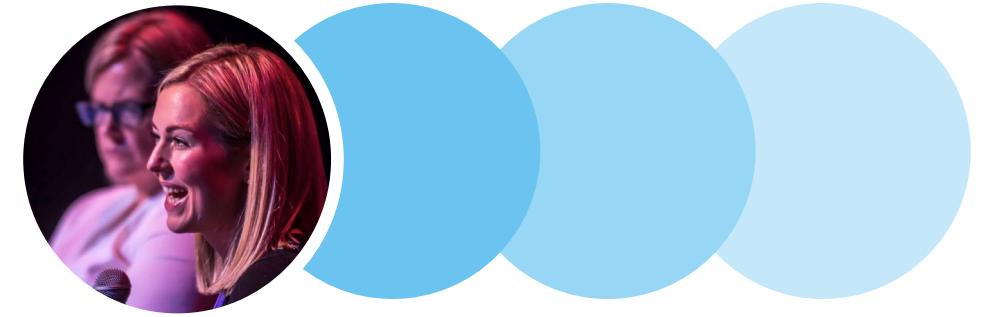
BBC Studios recently commissioned Rafi the Wishing Wizard based in south Manchester, complete with familiar landmarks and regional dialect. Though distinctly Mancunian the series was animated by London based Blue Zoo animation.

A further major theme is the weak pipeline between education and industry. While Greater Manchester has strong animation courses and enthusiastic students, respondents identify a lack of up-to-date industry pipeline training, limited communication between studios and educators, and insufficient funded professional development for lecturers and students. There is strong support for government-funded programmes that embed industry professionals into education, expand access to software and training, and engage schools and colleges earlier to build a future-ready workforce.

A strong, well-supported animation industry creates a mutually beneficial cycle where studios gain access to a skilled local talent pipeline and collaborative research opportunities, while universities enhance graduate employment outcomes, industry relevance, and partnerships that strengthen their courses and regional reputation.

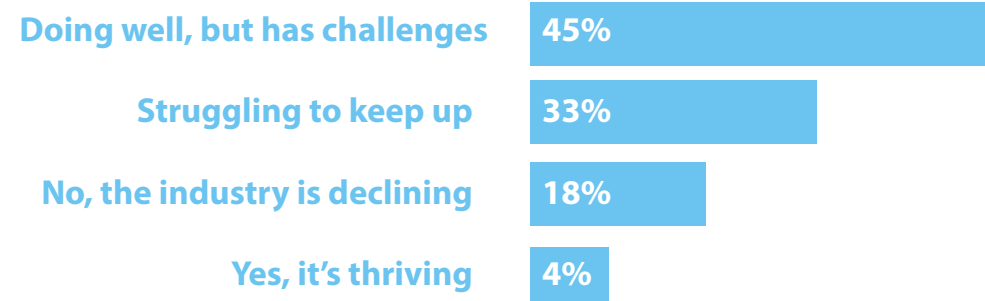
Respondents also point to structural barriers to innovation and sustainability, including limited R&D funding, insufficient support for independent and stop-motion production, lack of community workspaces, and rising living and studio costs across Greater Manchester. Concerns around AI—particularly unregulated scraping of artists’ work and its impact on jobs and pay—are increasingly prominent, alongside frustration with streaming platforms avoiding residuals and inequitable distribution of industry revenues.

Overall, the picture is of a highly skilled but increasingly precarious workforce, where talent loss seems to be accelerating due to underinvestment, instability, and geographic imbalance. Respondents consistently argue that targeted government intervention through funding, tax incentives, fair pay regulation, regional commissioning, education–industry bridges, and social protections for freelancers, could stabilise the sector, retain talent in Greater Manchester, and deliver long-term cultural and economic returns at both regional and national levels.



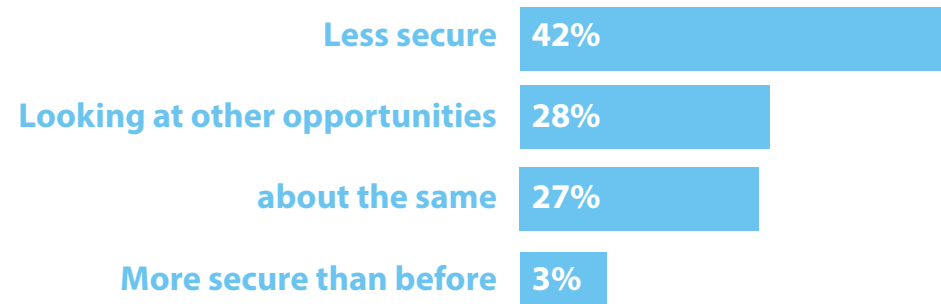
## IN THEIR OWN WORDS

**Do you believe Greater Manchester to be a strong hub for animation compared to other UK cities?**



While nearly half of respondents acknowledge that Greater Manchester is “doing well,” the overwhelming majority also highlight underlying challenges, suggesting the region’s reputation as an animation hub is seen as unstable rather than secure. The low percentage describing the area as thriving indicates concern about the sustainability of work, long-term investment, and the region’s ability to compete with other UK centres.

**How secure do you feel in your role in the animation industry right now?**



Feelings of insecurity appear to stem from ongoing uncertainty around consistent employment and career progression, with a significant proportion of freelancers actively seeking alternative opportunities. The small number reporting increased security suggests that current industry conditions are not supporting stable, long-term freelance careers, reinforcing perceptions of precarity even among those who have remained in the sector.

These findings suggest that Greater Manchester’s animation sector is widely seen as having strong foundations but lacking the stability needed to fully realise its potential. While freelancers recognise the region’s creative strength, uncertainty around long-term sustainability and career security is shaping more cautious perceptions of both the local industry and individual futures within. This moment presents timely opportunity for coordinated local leadership to reinforce existing talent, support sustainable work, and help translate recognised potential into lasting growth — ensuring Greater Manchester is not only a place where animation talent emerges, but where it can confidently remain and thrive.



Themes from Freelancer Testimonies  
What the Freelancers say.

Lack of Work & Funding  
**“STUDIOS ARE CLOSING. THERE’S NOT ENOUGH LOCAL FUNDING FOR NEW SHOWS.”**  
**“TALENT IS LOST BECAUSE PEOPLE CAN’T AFFORD TO STAY.”**

Decline of Stop-Motion  
**“A HISTORIC STOP-MOTION INDUSTRY HAS BEEN LEFT TO COLLAPSE.”**

Pay & Precarity  
**“FEES HAVEN’T CHANGED IN 20 YEARS.”**  
**“LATE PAYMENTS AND NO BENEFITS DRIVE PEOPLE OUT.”**

London Bias  
**“A TRAIN TO LONDON COSTS MORE THAN A FLIGHT TO EUROPE.”**

Education Gaps  
**“STUDENTS ARE EAGER BUT LACK EXPOSURE TO REAL PIPELINES.”**

# "THERE'S ALWAYS BEEN UPS AND DOWNS - BUT THIS DOWN HAS LASTED LONGER" ANIMATOR JO CHALKLEY ON THE THREATS FACING MANCHESTER'S ANIMATION SCENE - AND HOW TO TACKLE THEM

Interview with Jo Chalkley, words and interview by Simon Bland

Few have experienced the rollercoaster life of regional animation better than stop motion animator and director Jo Chalkley. A chance meeting with industry icon Barry Purves gave her a start in the early noughties and from there, Chalkley carved out a career at the city's own stop-motion powerhouse Cosgrove Hall. Stints working in Bristol for Aardman Animations followed, as she clocked up additional credits on shows like Shaun the Sheep and Creature Comforts USA.

Next, Hollywood called and Chalkley joined the animation department for Tim Burton's Oscar-nominated 2005 mega-hit Corpse Bride. Since then, she's lent her skills to a string of favourites ranging from The Clangers to 2025's viral hit The Tiny Chef Show. Long story short, her name is a regular feature on the end credits of your kids' favourite shows. However, according to Chalkley, all that could soon stop if those in the sector don't act fast.

"I think it was really good for me to get to know the London people, Bristol people and the Manchester people. I think that's why I've worked so much," says Chalkley, reflecting on her varied career so far. "I've had fairly solid work up until the last couple of years."

Chalkley isn't alone in seeing work that was once regular suddenly dry up, seemingly overnight. The shock closure of Factory in 2024 left a noticeable gap in the animation employment food chain. With fewer studios left to absorb Factory's now-available workforce and AI uncertainties leading commissioners to turn off their green lights, many have faced long waits between jobs.

"There's always been ups and downs, I just think this down has lasted a bit longer than we all thought it would," admits Chalkley, discussing the current situation facing regional creatives. "There's a lot of people out of work at the moment who haven't had steady work over the years - and there isn't necessarily anything on the horizon."

While Chalkley admits that there are still some jobs that animators can potentially jump on, she's quick to remind us that doing so isn't always as easy as it sounds. "There's work in Bristol and talk of work in Birmingham but it's quite hard when your life's already established somewhere," she reasons. "People have children and commitments and as much as they try to work away, they can't always do that."

As a result, many animators are trying to pivot or add to their skillsets in order to find work where they can. "People are trying to be more autonomous so they can create their own work and put things together but it's quite hard," says Chalkley, pointing to a lack of structured support. "We've worked under studios for a long time, so finding out where funding is and how to go through that process is difficult. I think we need a bit of mentoring or added information about where and how to get that stuff."

Having worked in so many different places, Chalkley has seen other cities benefit from schemes that she thinks could be replicated in Manchester. However, for real change to happen, she believes that creatives need to join forces to properly voice their opinions and have a say about their future

with the people who have the power to change it. "I know Birmingham has an intellectual property fund but I don't think there's anything like that in Manchester that I've heard of," she tells us. "It'd be great if there was more access to advice for funding your own IP. Having networking events with broadcasters or decision makers would be really helpful too. It's all about people getting to know you and having confidence in your work."

While we wait for these changes to happen, Manchester's animation scene runs the very real risk of losing a vital early part of its employment ecosystem. In fact, it's unclear whether a career like Chalkley's could even be replicated in today's uncertain landscape - and as a result, the city's reputation as a global leader in animation is being put at risk.

"I LEARNED MORE IN THREE MONTHS TRAINING WITH BARRY AT COSGROVE HALL THAN I DID IN MY THREE YEAR DEGREE," laughs Chalkley, highlighting the very real benefits of early-career, hands-on experience. "This downtime has been a bit longer than people expected but we're hoping it'll pick up again," she adds. "Manchester's animation industry has brought a lot to the city and I'm hoping that this survey will help shine a light on that."

TOP IMAGE:  
Courtesy of Jo Chalkley  
BOTTOM IMAGE: The Clangers -  
Coolabi Group with distribution  
by BBC / BBC Worldwide



# Next Steps and Recommended Actions

## SUMMARY OF FINDINGS

**While national and international market pressures, commissioning trends and technological change are undoubtedly impacting Greater Manchester's animation ecosystem, the evidence is unequivocal that there remains a substantial, internationally significant sector which, if formally acknowledged, strategically supported and actively nurtured by Greater Manchester Combined Authority, can continue to deliver major cultural, economic and reputational returns for the city region.**



## THE CASE FOR IMMEDIATE ACTION

Greater Manchester has an established, high-value animation industry with decades of accumulated skills, global relationships and cultural impact. The GM Animation Survey 2025 demonstrates a reasonably steady, but fluctuating turnover, high quality output and international reach, positioning the region as one of the UK's most strategically important animation and screen production hubs.

However, the survey reveals a clear and urgent warning: without targeted intervention, the sector, largely supported by a freelancer base will contract rapidly through the loss of this freelance talent, erosion of skills and declining confidence in the viability of animation as a sustainable career in the region. With 42% of the freelance workforce less secure about their role in industry and 28% actively seeking new opportunities outside of animation there is an urgent need to intervene. Once lost, this workforce and expertise will be extremely difficult and costly to rebuild.

Crucially, this risk is not inevitable. It is the result of structural under-funding rather than lack of performance or potential.

## RECOGNITION AS A STRATEGIC PRIORITY

Animation must be formally recognised as a core creative sector in its own right within Greater Manchester's economic and cultural strategies. The 2025 Greater Manchester Creative Industries Sector Plan referenced animation only three times largely as an addendum and not referenced as a specific sub-sector of industry, compared with 31 of film and 61 mentions of music, despite Mackinnon & Saunders being mentioned as a Key Creative Asset for Trafford and sustained engagement from the animation community during consultation and the provision of robust data and evidence from regional and national representatives.

Film and High-End Television are rightly strategic priorities for Greater Manchester, and regional screen agencies have been highly successful in attracting inward investment. However, national 2025 BFI figures reveal a structural imbalance: 91% of UK film spend (£2.5bn of £2.8bn) and 81% of HETV spend (£3.3bn of £4.0bn) came from inward investment. Domestic productions accounted for just 7% of film spend and 17% of HETV.

While inward investment delivers jobs and short-term economic activity, it largely positions regions as service providers. The IP, long-term value and global soft power typically sit elsewhere with no guarantee that productions will return to the area.

Animation offers a different model. It is inherently IP-driven, generating enduring brands and long-tail revenue. Greater Manchester has already

proven this through productions such as Dog Loves Books, Raa Raa The Noisy Lion, and Daisy & Ollie to name but a few. There exists a network of creatives who work between productions, incentivised to remain in the region to participate in its existing framework of studios and productions.

However, London retains the lion's share of work, even where animated shows are set in Manchester, using a Manchester cast and drawing on Manchester locations; these shows are produced far outside of Manchester. Because everything is drawn, viewers are none the wiser to this.

"I had to really hustle to get a script writing gig on an animated show set in Manchester – and all but one of the Writers' Rooms were in London." Freelancers wonder if London really should be telling Manchester's stories?

Strategic investment in animation would build Manchester-owned originals, retain value locally and strengthen the region's global creative identity.

The imbalance in the Greater Manchester Creative Industries Sector Plan sends a damaging signal to investors, commissioners, freelancers and companies alike. Animation cannot continue to be treated as an addendum to film or screen policy. It is a distinct, high-growth sector with its own production cycles, workforce realities, IP models and global markets. Acknowledging it as such presents a fantastic opportunity for growth.

## REQUIRED ACTIONS FOR GMCA

To stabilise, support and grow the animation sector, the following actions are recommended:

### 1. FORMAL SECTOR ACKNOWLEDGEMENT

- Explicitly recognise animation as a priority creative industry within GMCA and local authority economic, skills, creative, cultural and digital strategies, plans and reporting.
- Ensure animation is fully and visibly integrated into all relevant *screen, film* and *creative industries* policies, funding mechanisms and support programmes, with equal access and tailored criteria.

### 2. REPRESENTATION AND GOVERNANCE

- Guarantee representation for the animation community on the proposed GMCA **Creative Leadership Council**.
- Guarantee representation on the GMCA Freelancer Task Force, reflecting the reality that companies in the region rely on an average of 54% of their employees on freelance contracts
- Develop the Greater Manchester Animation Industry Task Force (GMAIT) into a formally recognised advisory sub-committee feeding directly into both the Creative Leadership Council and Freelancer Task Force.

### 3. SCREEN OFFICE AND SCREEN FUND COMMITMENTS

- Make a formal commitment that any new **Screen Office** or **Screen Fund** actively engages with and supports animation, rather than defaulting to live-action film and television.
- Include provision for:
  - Early-stage development and seeding of new animation IP
  - Support for IP ownership to be retained within the region
  - Targeted promotion of Greater Manchester's successful animation output to national and international commissioners at national and international marketplaces.

### 4. WORKFORCE STABILITY AND SKILLS RETENTION

- Use the survey data as an evidence base to address freelancer insecurity, skills retention and career sustainability within animation.
- Ensure animation freelancers are explicitly included in any regional responses to workforce instability, automation and AI disruption.

### 5. STRATEGIC SUPPORT FOR SPECIFIC ANIMATION CULTURAL AND INDUSTRY EVENTS SUCH AS MANCHESTER ANIMATION FESTIVAL AND MOTION NORTH.

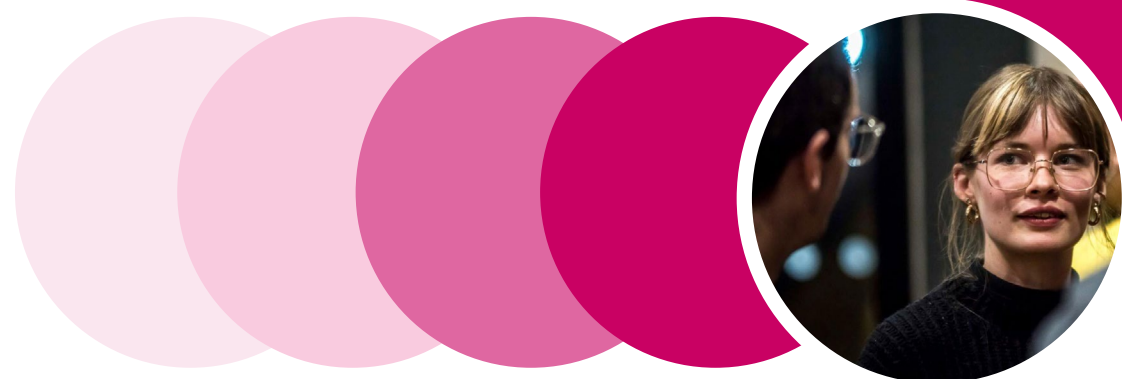
- Formalise support for Manchester Animation Festival as a flagship international showcase and Motion North both as convening platforms for the region's animation industry.
- Position these events as a cornerstone of Greater Manchester's international cultural film and industry offer, with the ambition to compete with major European animation festivals and markets.

## THE OPPORTUNITY COST OF INACTION

Greater Manchester's animation sector is not an emerging opportunity, it is an established asset. Failure to act now will result in the steady loss of talent, businesses and global standing, undermining decades of growth and investment. Conversely, strategic care, recognition and modest targeted intervention will generate significant returns for the city: economically, culturally and reputationally.

There is clear precedent for this. In 2012, coordinated national advocacy around the future of the UK animation industry—driven by industry voices and supported politically—resulted in tangible government policy change, renewed confidence, and a surge of public goodwill. That intervention did not merely “save” an industry; it unlocked growth, attracted inward investment, and positioned UK animation as a globally competitive success story. Crucially, it demonstrated that when government listens and acts decisively, the animation sector responds with resilience, innovation, and economic return.

The evidence is clear. The sector has spoken. It is ready to work with GMCA and other stakeholders to ensure all parties respond with decisive action.



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