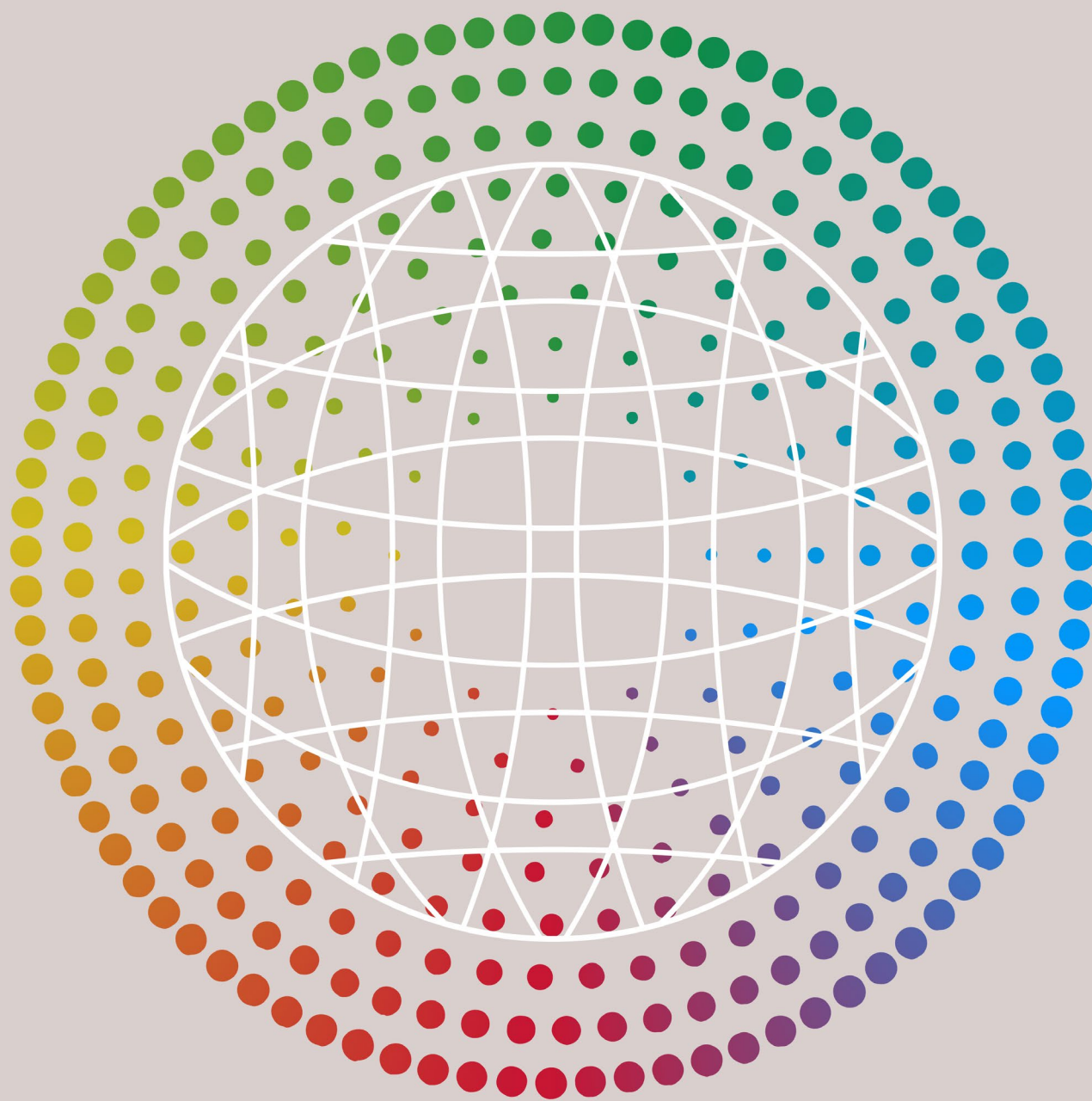


VISUAL EFFECTS



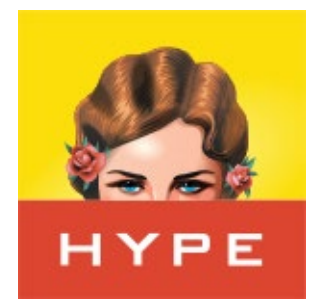
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2024

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Foreword



The book you are reading is long overdue. It shares publicly, perhaps for the first time, research towards answering a fundamental question: "How big is the Visual Effects Industry?" The information was collated not by a large organization but by a small group of individuals with the goal of being both thorough and objective.

This work is important for two very different reasons. First, we have never had a detailed understanding of how many of us there are in the Visual Effects industry – much less where we are located in the world. Second, as an industry that drives all forms of entertainment today, from movies and television to print and advertising, it makes the undeniable point that Visual Effects deserve a voice, a "seat at the table", and as much respect as any other profession in filmmaking.

How many times have you heard someone ask why there are so many names under Visual Effects in the credits of a movie? If only they understood what those names contributed to the entertainment that they just saw! The public (and even some of our colleagues in film and entertainment) imagine the work is easy, largely done by computers

or AI. They have no idea just how demanding it is to do what we do, or the effort and innovation that it takes to keep advancing the workflows, the imagery, the industry.

No other vertical of the entertainment industry has grown so large, so fast, and innovated so much -- all to keep pushing the envelope, feeding the insatiable appetite for our work at the box office, as well as our own satisfaction as creators and fans of that work. Just think of all the stories that could not have been told as effectively, emotionally, or seamlessly as they were without visual effects. In fact, think of all the stories that could not have been told at all!

And yet, how visual effects are created is still a mystery to most, as is the visual effects industry itself. To have a guide -- this very document -- lay out the breadth of the visual effects industry, accurately and succinctly, is incredibly valuable.

The industry is in constant flux, not least because many Visual Effects artists and technicians are itinerant film workers who travel the world for the work. Yet, this guide, while a snapshot in time, shines a light on what is real and documentable. To glance through it will enlighten and amaze you. To read it cover to cover will educate and empower you.

Without further ado, dive in!

Jeffrey A. Okun, VES

Introduction

This atlas is about people. To be specific, it's about the global population of people who work in the visual effects industry. There are approximately 100,000 of us worldwide.

100,000 is a big number and a small number. Big, in that it's too many people to know everyone personally, or understand trends in the VFX industry based only on anecdotes and impressions. Small, compared with industries like Video Games, or Film as a whole, which have specialized research firms that analyze data on industry trends and publish their findings in expensive reports.

In some ways, VFX is still tight-knit and relationship-driven. There's a feeling that insiders already know everybody and everything they need to know. This works against us as an industry. Looking at data allows us to gain insights that would not be practical to acquire otherwise. It allows us to see the forest for the trees. It also offers the beginnings of a shared understanding of the global VFX industry that spans job roles, companies, and countries.

The raw data used to make this atlas comes from public sources, including job titles, locations and company affiliations of over 55,000 VFX industry professionals. The data was cleaned, categorized, checked and presented by someone who has worked in the VFX industry for over 20 years. You can find more details of how the research was done on page 56.

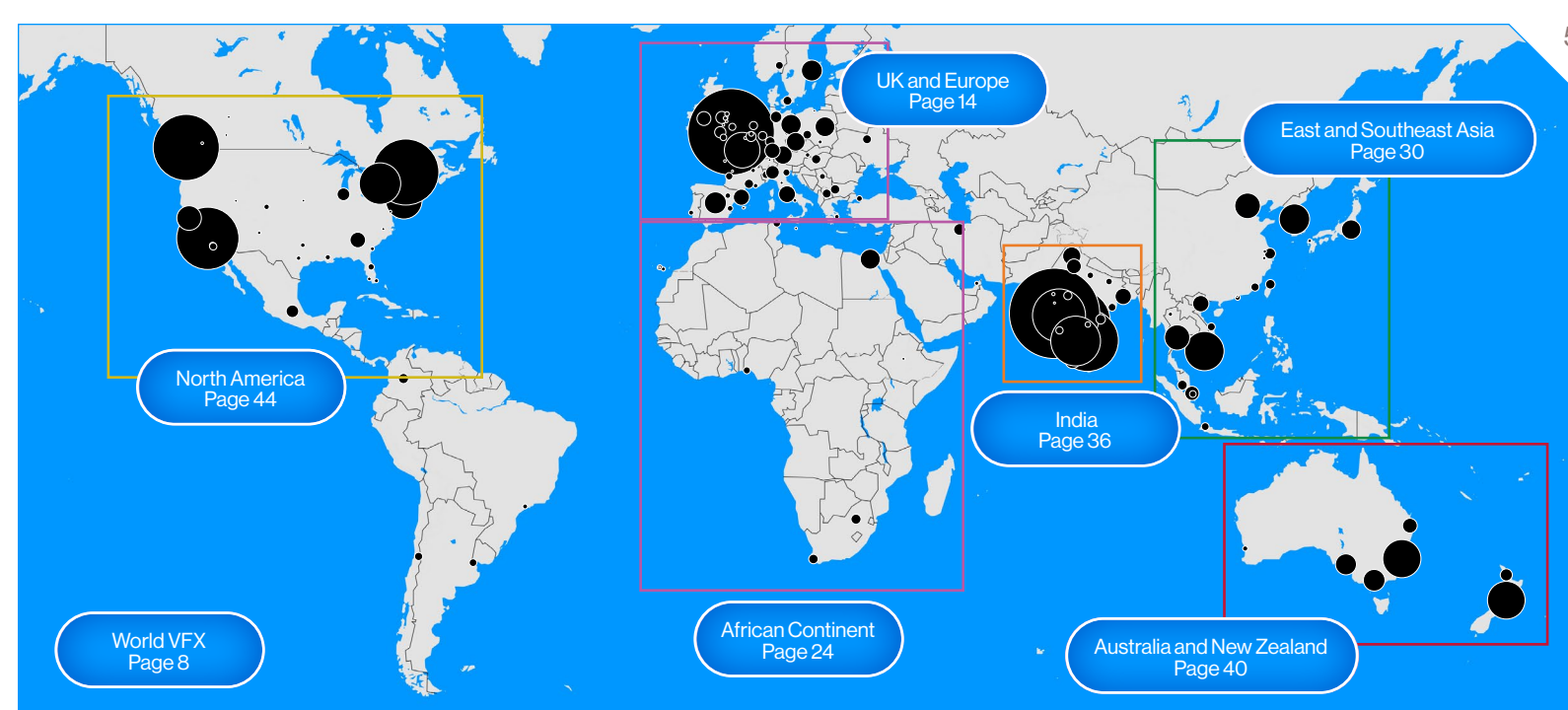
What was the motivation for doing all this? I felt there was a lack of basic information about the global VFX industry and wanted to take a proactive step towards filling that gap. I also think a better understanding of the industry will foster a sense of community among the people who do this work. It should empower more people to make more informed decisions about their careers, their companies, and how they pursue their passion for VFX.

There are other maps of VFX studios around the world. The focus on people is what makes this atlas different. Despite advances in technology, creating visual effects relies on bringing talented people together. Above all, I hope that the work that has gone into these pages shows love and respect for my colleagues in the industry.

Joseph Bell

Buttons like this one link to interactive versions of the maps on vfxatlas.com. You can zoom in to the maps and see additional details on the website.

[Explore this data online](#)



Contents

About the Data	6	East and Southeast Asia	30	VFX Disciplines	50
World VFX Hubs	8	Spotlight: Vietnam	32	Remote Work	54
Hubs Headcount	10	Spotlight: China	34	Ratio of Roles	60
World Data	12	East & SE Asia Data	35	VFX Companies	62
UK and EMEA	14	India	36	Est. Headcount	64
Spotlight: UK	17	Spotlight: India	37	Global VFX Studios	66
London	18	Mumbai	38	VFX & Animation Grps	68
Spotlight: Italy	19	India Data	39	The Future of VFX	70
Spotlight: France	22	Australia and New Zealand	40	How the Research was Done	72
African Continent	24	Spotlight: Aust & NZ	42	Companies in the Study	74
Spotlight: Egypt	26	Aust & NZ Data	43	Special Thanks	76
UK & EMEA Data	28	North America	44		
		US Cities	46		
		Canadian Cities	47		
		N. America Data	48		

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About the Data

1

This atlas was created using publicly available data on 55,000+ VFX professionals and 560 VFX companies, collected in June 2024. This edition does not cover animation and video game studios, or client-side VFX professionals working for movie studios and production companies.

4

The data does not tell us whether VFX professionals were actively employed in VFX at the time of the study. Instead, it shows where VFX professionals with specific skillsets were located, as well as the companies with which they were most recently associated.

2

Data tables for each region show the number of records found during the research. They do not capture every individual, company, or location. That said, the sample size is rather large -- sufficient to provide insights into the global industry. For further details of how the study was conducted, see page 56.

5

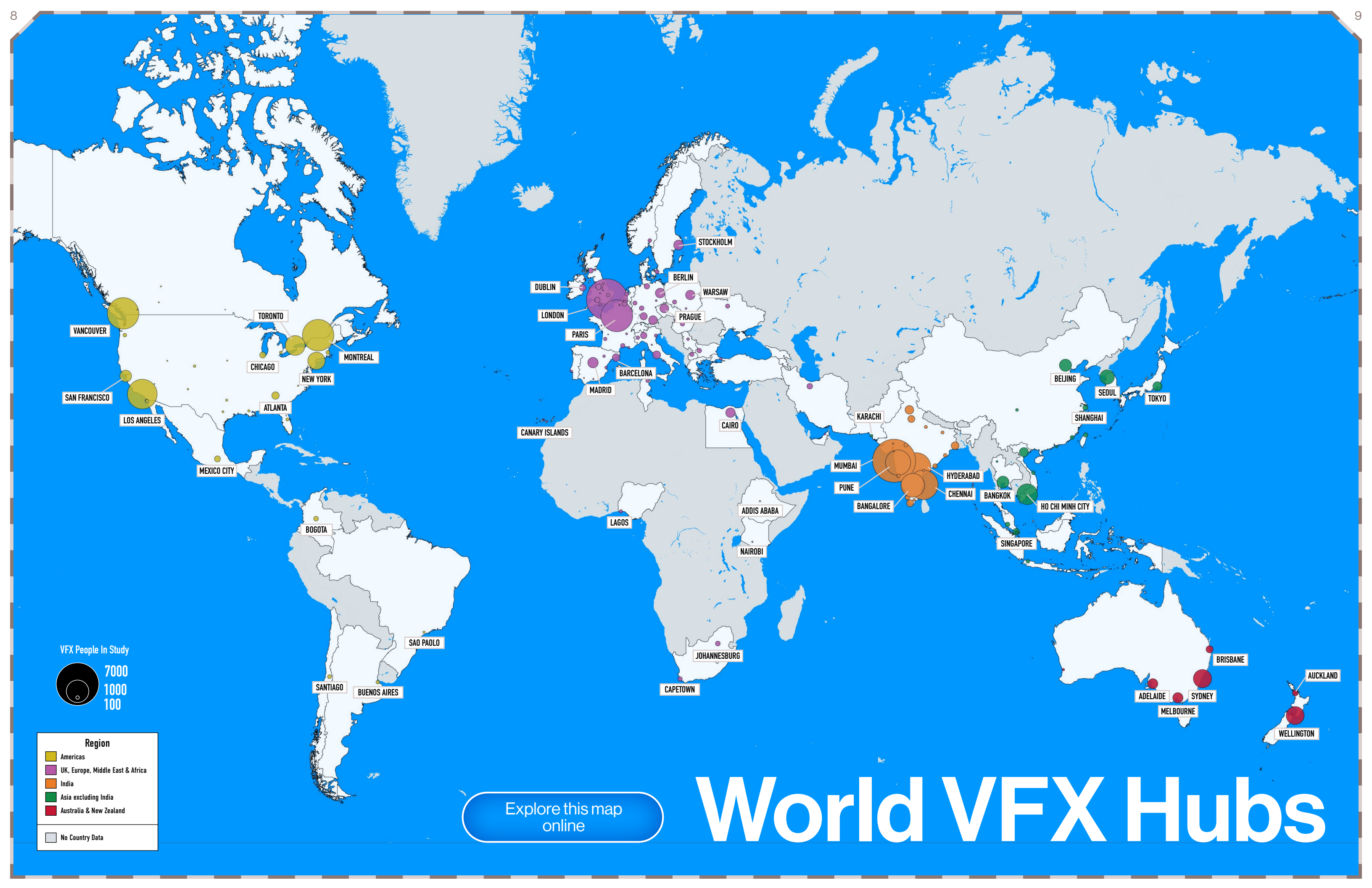
No companies were asked to review or validate the findings before publication. None of the companies mentioned in this atlas were contacted or otherwise participated in the study except for a small number of studios in Vietnam and Africa for which no online data was available.

3

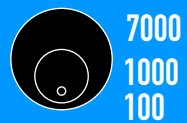
The data understates the breadth of people working in visual effects in countries where the English language is less commonly used. English language websites were the main source of data. As a result, the data skews towards people and companies that work on English language productions, at least some of the time.

6

This publication is intended to be as objective and factual as possible. Nothing in the editorial content is intended to promote, misrepresent, ignore, or denigrate any region, company, individual, or skillset. Please help improve future editions by sending corrections and suggestions to info@vfxatlas.com.



VFX People In Study



Region

- Americas
- UK, Europe, Middle East & Africa
- India
- Asia excluding India
- Australia & New Zealand
- No Country Data

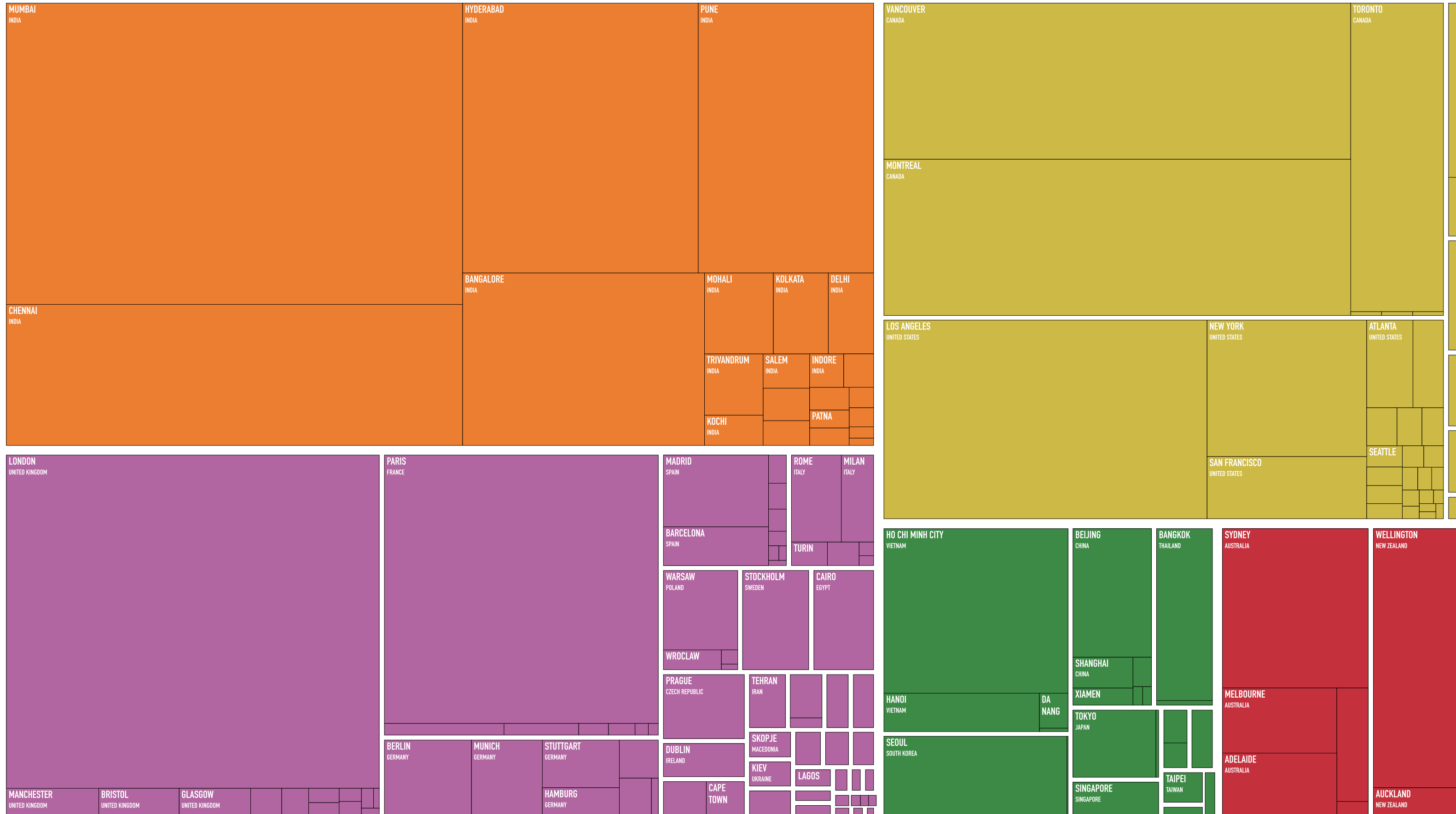
Explore this map online

World VFX Hubs

VFX Hubs (Headcount)

[Explore this data online](#)

This chart represents the number of VFX people in the study. **Countries where English is less commonly spoken tend to be underrepresented** in the atlas data. France and Vietnam have been adjusted to nearer their true size, using data from other sources.



World Data

The atlas groups VFX hubs into five regions based on geography.

Department	Americas	Australia NZ	E & SE Asia	India	UK & EMEA	Grand Total
Accounting	226	41	33	83	149	532
Admin	112	20	57	160	103	452
Analytics	21	5	2	38	14	80
Animation	928	257	209	839	753	2,986
Backgrounds			2	12		14
Business Development	218	25	31	98	185	557
CG / 3D Department	549	118	159	393	843	2,062
Client Relations	37	14	17	54	51	173
Color	135	9	14	48	124	330
Compositing / 2D	1,960	397	329	2,549	1,754	6,989
Creative / Art Direction	341	24	64	63	297	789
Creature TD / CFX	258	80	26	135	168	667
Data I/O	93	32	10	83	101	319
Department Management	387	112	73	286	336	1,194
Design	378	59	156	358	351	1,302
Editorial	377	58	52	208	455	1,150
Engineering / DevOps	397	113	68	156	287	1,021
Environment / DMP	389	60	51	349	269	1,118
Facilities	129	56	11	41	229	466
Flame Artist	129	10	17	31	76	263
FX / Simulation	561	147	116	330	478	1,632
Games	13		29	11	3	56
Groom	33	4	4	44	37	122
Human Resources	291	75	77	325	217	985
IT	452	127	57	354	358	1,348
Layout	215	104	42	191	108	660
Leadership	553	79	162	271	476	1,541
Learning & Development	31	15	7	47	29	129
Legal	16	7	1	2	10	36
Lighting TD	705	207	125	582	438	2,057
Marketing	107	31	50	91	110	389
Matchmove / Tracking	141	34	37	1,073	97	1,382
Media Systems	57	18	4	5	79	163
Model / Texture / Asset	621	231	182	851	438	2,323
Motion Capture	48	83	1	7	50	189
Pipeline	324	62	52	103	272	813
Previz / Postviz	189	12	9	20	109	339
Production Management	2,116	483	460	1,528	1,793	6,380
R&D	113	46	30	6	91	286
Realtime	96	16	22	77	112	323
Render Support	33	20	7	49	28	137
Resource Management	153	12	21	72	105	363
Rigging	144	24	29	138	116	451
Roto / Paint	146	85	34	4,606	147	5,018
Sound	35	15	6	28	142	226
Stereo	31	2		113	3	149
Story	20	1	8	12	11	52
VFX Artist	260	63	107	2,305	333	3,068
VFX Supervision	470	78	55	159	432	1,194
Virtual Production	103	6	15	6	71	201
No Data			1,786		2,709	4,495
Grand Total	15,141	3,577	4,916	19,390	15,947	58,971



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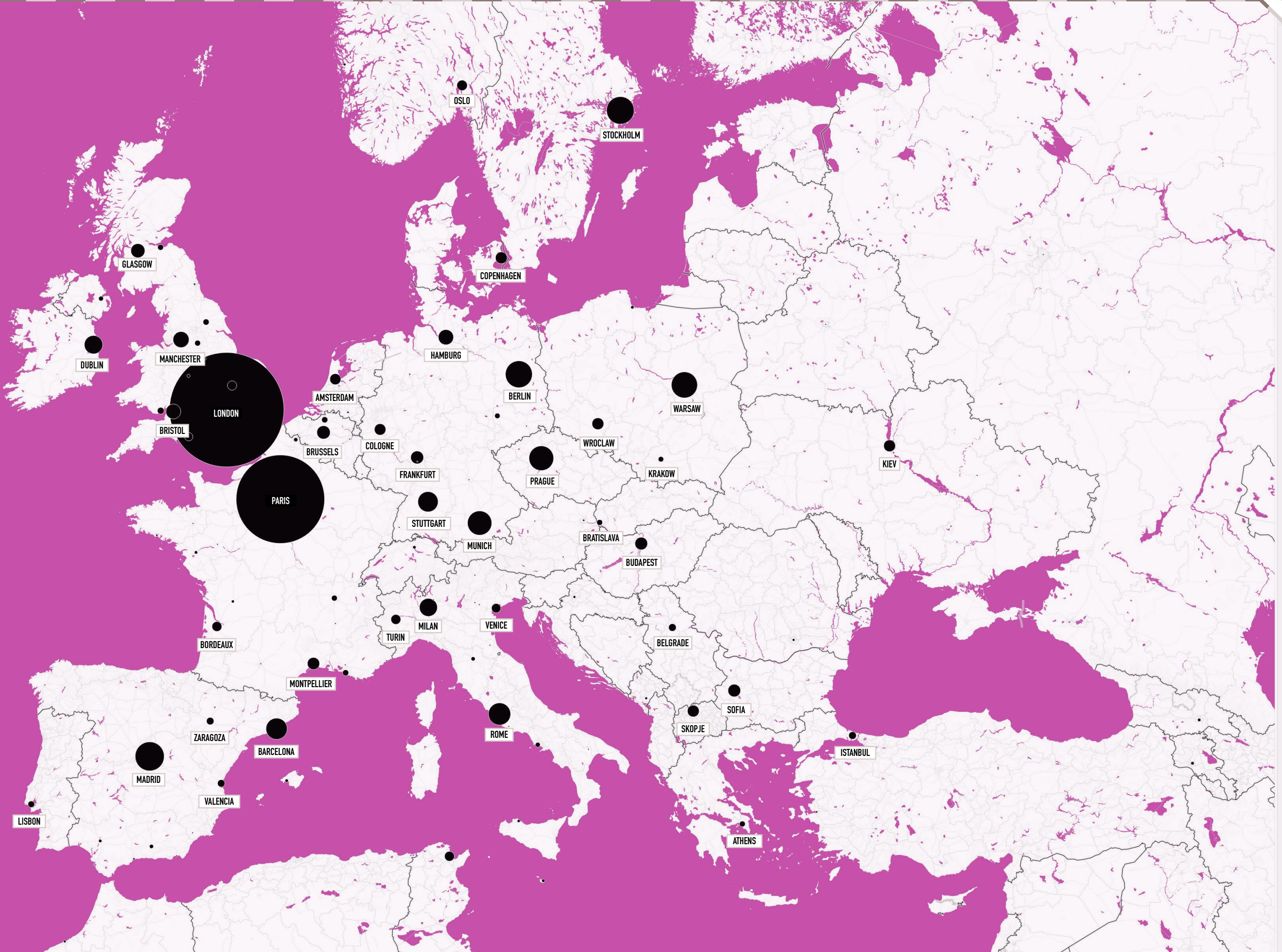
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VFX People In Study



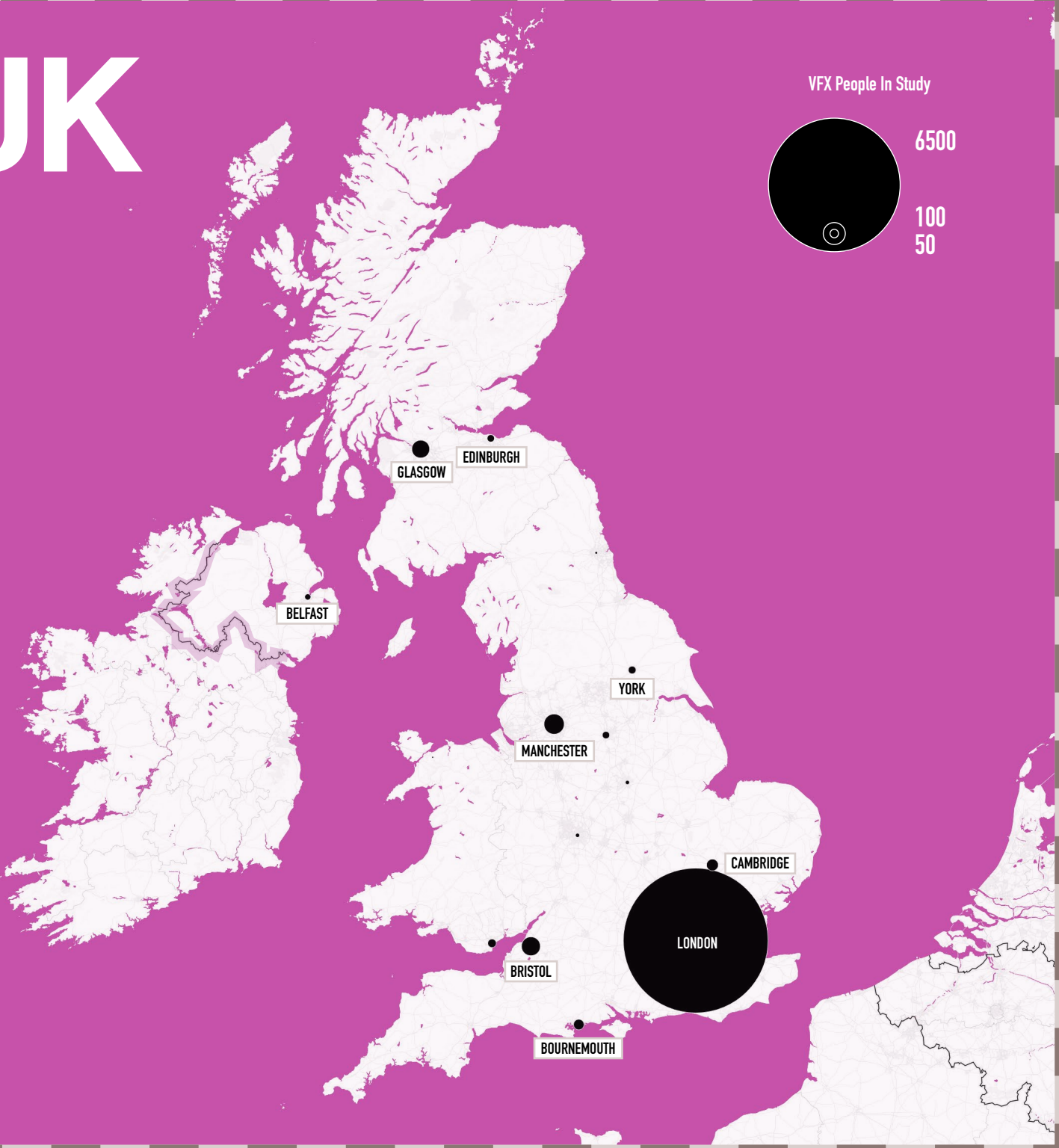
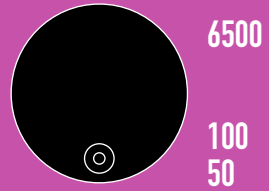
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UK and Europe



UK

VFX People In Study



Accounting	95	Environment / DMP	123	Motion Capture	22
Admin	45	Facilities	124	Pipeline	142
Analytics	10	Flame Artist	28	Previz / Postviz	86
Animation	419	FX / Simulation	196	Production Management	895
Business Development	101	Groom	22	R&D	45
CG / 3D Department	250	HR	102	Realtime	61
Client Relations	27	Human Resources	14	Render Support	13
Color	52	IT	165	Resource Management	75
Compositing / 2D	600	Layout	74	Rigging	40
Creative / Art Direction	144	Leadership	196	Roto / Paint	110
Creature TD / CFX	92	Learning & Development	19	Sound	35
Data I/O	58	Legal	5	Stereo	3
Department Management	209	Lighting TD	235	Story	1
Design	131	Marketing	48	VFX Artist	111
Editorial	256	Matchmove / Tracking	49	VFX Supervision	219
Engineering / DevOps	198	Media Systems	26	Virtual Production	50
		Model / Texture / Asset	228	Grand Total	6,249

Spotlight: United Kingdom



Neil Hatton
CEO, UK Screen Alliance

The data in the Visual Effects World Atlas chimes well with what we know about the size of the industry in the UK, from research using entirely different methods. Our tax credits for film and TV have to be periodically justified to the UK Government as giving value for money. This is done through the British Film Institute's Screen Business Report, which has chapters dedicated to VFX. The latest version, published in 2021 and based on 2019 data, estimated that the total population directly working in VFX for film, TV and commercials was 10,680. This was determined using surveys and company statutory accounts. Like the Visual Effects World Atlas methodology, it concentrates on vendor employees and misses the freelancers working on the client-side.

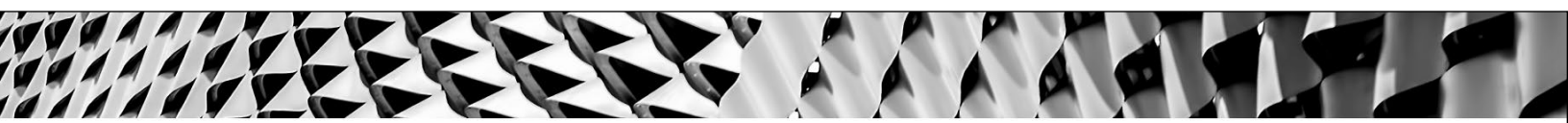
For the UK Screen Alliance's own campaign to expand the tax credit for VFX, we needed current figures, so we commissioned data gathering to cover from 2019 to 2022, using the same methodology as the Screen Business Report. This showed the headcount falling during the pandemic to 7,410, before rising to 9,160 in 2022.

The recent global slowdown in production has also affected the UK. Our surveys showed that the UK's VFX workforce was likely to shrink by up to 40% over 2023. This would put our estimate of the population into a similar range as that determined by the Visual Effects World Atlas.

9160
people worked in VFX in the UK according to a study from 2022

The work is now picking up in the UK, but slower than anyone could imagine at the outset of last year's strikes. There is light at the end of the tunnel, as in November 2023 an increase in the UK's VFX tax relief was announced, which could create an additional 2,000 jobs. Even though we have had a change in government since the announcement, there was cross-party support for the increase before the election, and hopes are still high for a significant boost to the UK's VFX sector in 2025.

London



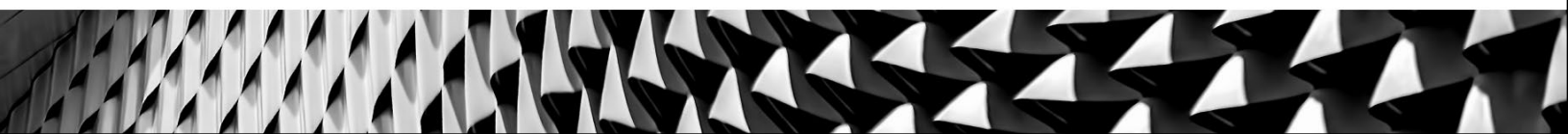
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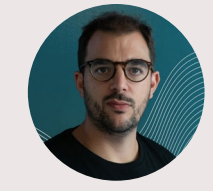


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Spotlight: Italy



Federico Gnoli
 Visual Effects Producer / Supervisor

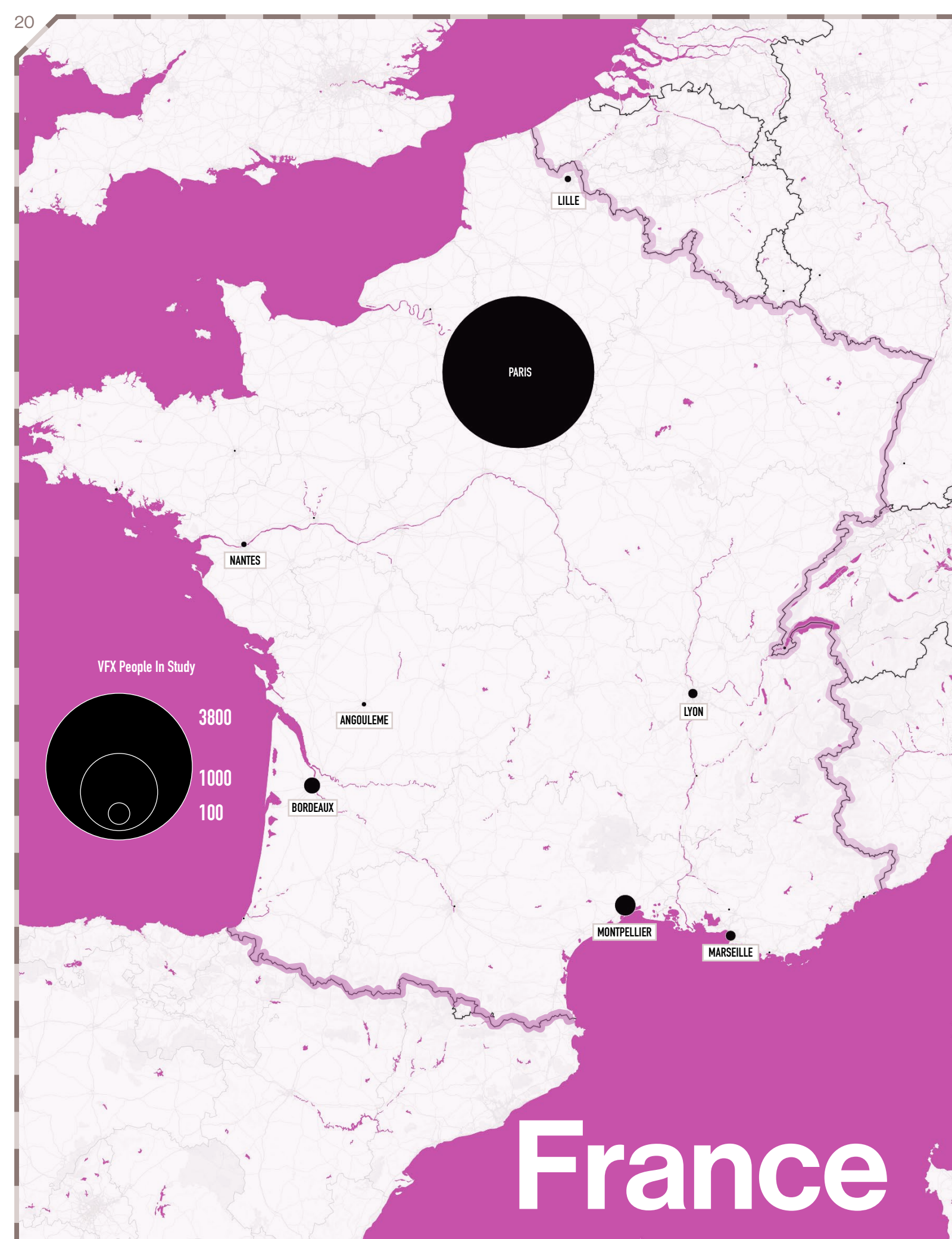
In recent years, Italy's visual effects sector has benefitted from substantial private and public investments, tax credits, and increased demand for content due to the proliferation of streaming platforms. The country has seen a surge in both domestic productions embracing visual effects as an essential tool for storytelling, and growing expertise with which to support international productions. TV series comprise the largest share of the Italian market at present, followed by films and advertising. Co-productions with American studios filming in Italy include *My Brilliant Friend* (HBO), *Ripley* (Netflix), and the upcoming *Citadel: Diana* (Amazon).

Domestic visual effects companies dominate the industry landscape in Italy, while a significant number of smaller firms contribute to the vibrancy of the culture and the work. Most VFX studios in Italy are in either Rome or Milan, and the major streaming platforms have bases in both cities. Historically, Rome has been the center for film production, while Milan specialized in advertising. Today, each city has a more integrated industry engaged in both film and advertising work. Additionally, newer studios are emerging in cities like Turin and Treviso.

Investment in the sector has created opportunities to attract talented expatriates back home, many having left Italy to work for larger visual effects studios abroad. This influx of experienced professionals has significantly expanded the local talent pool. Cinecittà, Italy's premier production studio, has also seen significant investment, including the construction of one of Europe's largest LED stages.

“ Investment has created opportunities to attract talented expatriates back home. ”

At the same time, uncertainty regarding the future of the country's tax credit system, and limited educational opportunities for emerging talent, are impacting both the visual effects industry and the wider film industry in Italy. The contraction of the global film industry over the past two years has reduced the number of international co-productions and investment in the sector generally. Continued support, recognition, and strategic investment will be crucial in maintaining momentum and ensuring Italy's place on the global stage of the visual effects industry.



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Spotlight: France



Yann Marchet
FranceVFX

France has a long tradition in filmmaking and is known for a combination of creativity, knowhow and innovation able to meet the needs of any type of production. Prominent French VFX studios regularly work on major international feature films and episodics, with recent projects including *The Rings of Power*, *The Walking Dead: Daryl Dixon*, *The Serpent Queen*, *Three Body Problem*, *House of the Dragon*, *Beetlejuice Beetlejuice*, *The Substance*, *John Wick 4*, *Napoleon* and *Indiana Jones 5*.

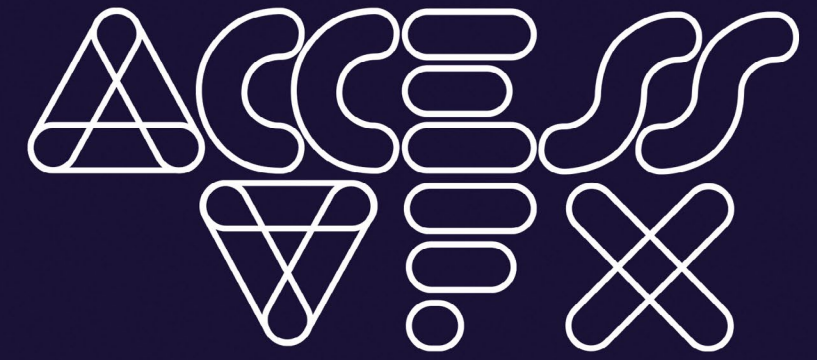
The French VFX market has seen rapid growth over the last few years thanks to the accessibility of talent, government incentives, and advanced technology. Our industry research found that the French VFX market has doubled its activity in just 3 years, mainly due to the high demand from international productions and streaming platforms. The latest evolution of France's tax rebate for international productions (TRIP) significantly increased incentives for productions with over €2 Million of eligible VFX spend, which has helped put the country on the map of the global visual effects industry.

Data from the French National Centre of Cinema (CNC Audiens) puts the headcount of VFX talent working in France today at over 4,000 people. Their research found that the industry is concentrated in Paris, where companies account for 95% of the country's total expenditure on VFX payroll. Several studios have locations in Montpellier also.

4000+

VFX workers reside in France.

Clients in France can count on a robust VFX ecosystem that includes overall (client-side) VFX Supervisors and Producers who organize the work between vendors. FranceVFX, the French visual effects vendors association, was founded in 2017. With over 25 members today, FranceVFX provides a point of contact for international producers. World-class French VFX and Animation schools prepare the talents of tomorrow to join the industry. Last but not least, PIDS Enghien, the VFX and CGI festival launched in 2015, gathers together international VFX professionals each year in Paris for conferences, keynotes and case studies, and offers a unique place to network and debate about the future of the industry.



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The African Continent



Dédy Bilamba
Co-Founder, AfroVFX

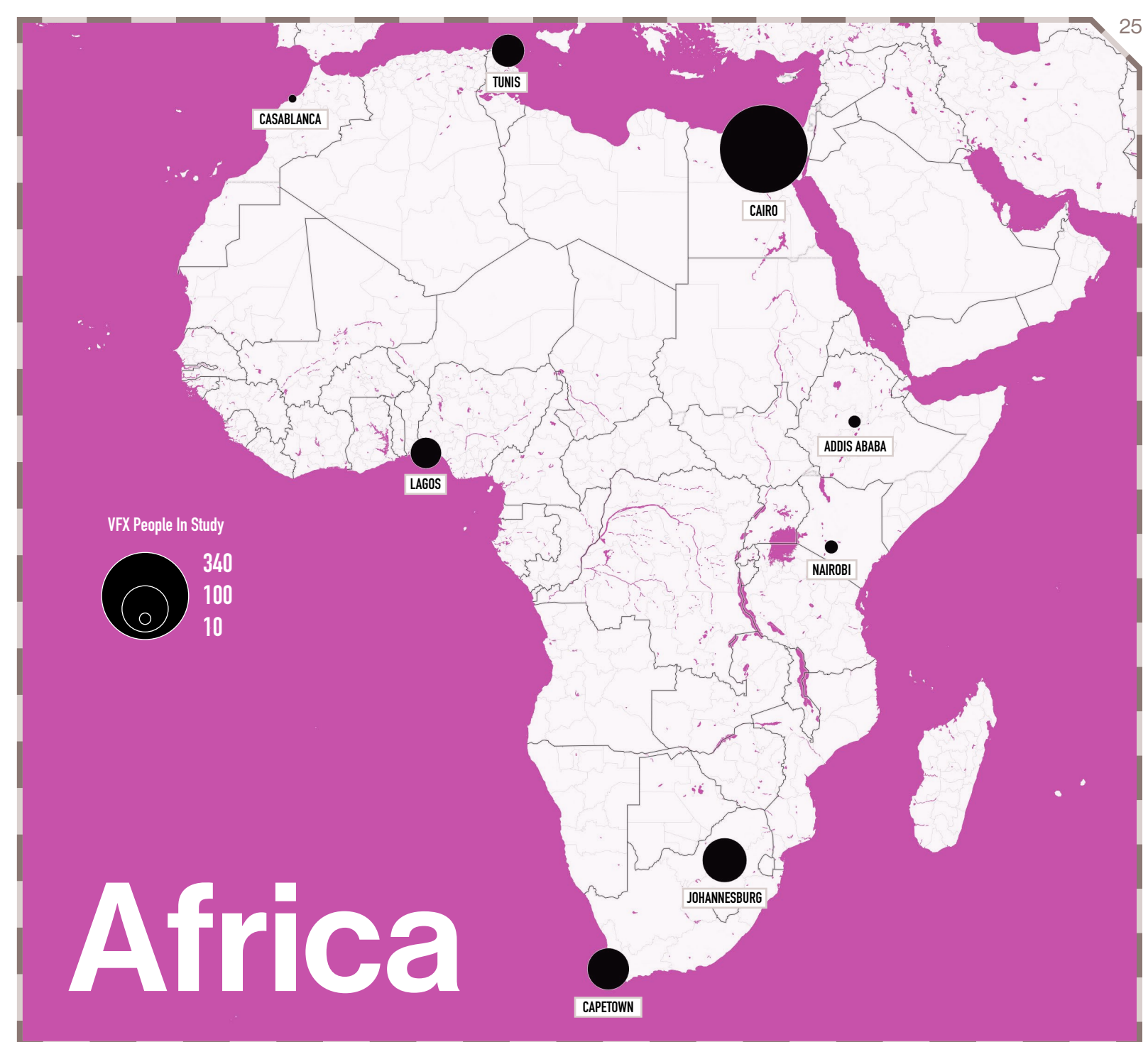
The African continent has a growing ecosystem for CGI, including VFX studios like Chocolate Tribe and Midnight VFX (South Africa), Ikweta Arts (Kenya), artist platforms CG Africa (Nigeria) and Unreal Engine Africa, events like VISAGE (Kenya), LISOLO (Côte d'Ivoire) and AVIJOZI (South Africa), and training programs NET-INFO (Tunisia) and AfroVFX. However, the African market for VFX remains underrepresented, and often misunderstood, in the global context.

Our activities with AfroVFX over the past three years have given us an opportunity to better understand the specificities of the African VFX market. Talent in Africa is primarily freelance, and Africa currently has many more 3D CGI artists than specialized VFX artists. Access to equipment is no longer as much of an issue, but high-speed data transfer remains challenging in some regions. In the past, training, tools and tutorials were more accessible to those in English-speaking countries, although this is starting to balance out.

A large majority of locally trained artists are self-taught, using open-source solutions like Blender. Demand for training is huge -- when we first offered the AfroVFX training program in Côte d'Ivoire in 2022, nearly 500 candidates applied for 20 available spots. Telecom/internet giant Orange supports the training of digital artists through their Orange Digital Centers, with locations across the continent. We also see a trend where skilled professionals with expertise acquired outside of Africa look to give back to the continent.

~500
candidates applied for 20 available spots in the first AfroVFX cohort.

Much of the revenue for VFX and 3D in Africa currently comes from television advertising. The African film and television industry is experiencing rapid growth due to significant investments, such as Canal Plus (France) investing in Multichoice (South Africa). Generally, though, a reluctance to fully utilize VFX in film and TV remains, even in major African markets such as Nollywood that are supported by key international players like Netflix and Amazon. This stands in contrast with countries in West and South Asia – India, for example – where VFX is a driving force in the film industry.



Why is this the case? Africa's VFX capability is still developing. Producers may have had poor experiences with freelance artists working without the benefits of a proven VFX pipeline. African creators often face a lot of setbacks in realizing their vision and creativity.

None of this reflects the enormous potential that this continent represents in terms of

talent, and stories that are sought after by major studios. Thanks to increasing awareness of the African market, information sharing and training efforts carried out by private stakeholders with the support from industry (Orange, Action VFX, Chaos Group, Autodesk, Foundry, and others), the African continent is increasingly ready to realize that potential.

Spotlight: Egypt



Mahmoud Ghali
Visual Effects Supervisor and Cofounder
Monkeys VFX

Egypt is an important market for film and advertising industries in Africa and the Middle East. Demand for high-quality VFX is increasing year-on-year across both the film and advertising sectors, fueled by rising investment in entertainment projects from the Middle East and Gulf countries, alongside growing demand from streaming platforms. Egypt is the region's largest producer of local drama, with Egyptian series and films widely viewed across the Middle East.

Cairo, the capital, is the production hub, with around 10 key VFX and Animation studios that shape the market. Studios in Cairo are predominantly Egyptian owned, having started as independent ventures. They range from mid-sized companies with 100+ employees to smaller boutiques with 20+ employees. The total VFX workforce in Cairo is likely somewhere in the region of 1,000 people. Some studios are more established than others, with approximately 300 artists working for studios in Cairo that lack international visibility, and a further 200 artists working remotely for international VFX studios.

Talent development is one major challenge faced by the VFX industry in Egypt. Most VFX artists in Egypt are self-taught through online courses and workshops, as formal education in the field is limited. The Information Technology Institute (ITI, affiliated with Egypt's Ministry of Communication and Information Technology) remains the primary structured VFX training institution in the country, graduating around 80 artists annually across various disciplines. Infrastructure, particularly high-speed internet connectivity, can be an obstacle too, especially in remote areas.

~1000
VFX professionals in Cairo, including those at studios without international visibility, and those working remotely.

General economic conditions in Egypt pose another challenge for VFX studios, with inflation projected to exceed 30% in 2024. Artists seem to move between studios more frequently these days, and some work part time jobs alongside full time jobs. Egyptian VFX studios need to find the right balance between projects for local clients and expanding their connection to regional and international clients, pursuing bigger projects and revenue in multiple currencies to succeed in the current economy.

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UK & EMEA Hub Data

United Kingdom, Europe, the Middle East, and Africa

Department	Barcelona	Berlin	Cairo	London	Madrid
2D Animation				1	1
Accounting	1	2	1	99	6
Admin		3	4	48	3
Analytics	1			9	1
Animation	13	9	11	401	21
Business Development		3		103	4
CG / 3D Department	18	37	29	246	34
Client Relations		1	3	31	1
Color		6	8	67	3
Compositing / 2D	50	67	84	581	84
Creative / Art Direction	1	2	6	146	9
Creature TD / CFX	9	1	2	91	8
Data I/O		1		57	1
Department Management	2	10		207	8
Design	2	5	10	117	14
Editorial	4	5	13	275	13
Engineering / DevOps	2	6		198	2
Environment / DMP	3	7	15	118	9
Facilities	2		3	173	5
Flame Artist	1	1		40	6
FX / Simulation	16	14	22	192	13
Groom			1	22	
Human Resources	3	10	2	116	5
IT	2	11	23	165	12
Layout	2	3	2	73	1
Leadership	7	14	9	217	8
Learning & Development	1			20	1
Legal			2	6	
Lighting TD	7	11	7	226	8
Marketing		2	5	43	3
Matchmove / Tracking	1		6	51	1
Media Systems	1	4		44	1
Model / Texture / Asset	13	7	12	227	15
Motion Capture				30	
Pipeline	2	13	2	140	4
Previz / Postviz				83	
Production Management	29	62	26	924	61
R&D			1	44	4
Realtime				49	2
Render Support		1		13	
Resource Management		2		80	2
Rigging	15	3	2	41	4
Roto / Paint				109	1
Sound		4		64	13
Stereo				3	
Story				3	
VFX Artist	3	9	21	106	5
VFX Supervision	7	13	6	220	12
Virtual Production	2	1		51	1
No Data					
Grand Total	220	350	338	6,370	410

Department	Munich	Paris	Prague	Stockholm	Warsaw
2D Animation					
Accounting		6		6	7
Admin		9	4	3	6
Analytics		1			
Animation	9	39	14	21	17
Business Development	5	12	4	9	10
CG / 3D Department	22	111	31	27	22
Client Relations				3	2
Color	10	3	4		
Compositing / 2D	44	156	54	40	19
Creative / Art Direction	5	25	2	14	11
Creature TD / CFX	1	24	2	3	4
Data I/O	1	15	8	1	4
Department Management	14	22	3	9	11
Design	6	65	5	6	9
Editorial	3	14	4	8	1
Engineering / DevOps	7	8	1	11	9
Environment / DMP	3	46	6	3	8
Facilities	1	12		2	4
Flame Artist		16	3		
FX / Simulation	16	36	20	10	10
Groom		3			3
Human Resources	9	7	8	12	15
IT	10	33	13	15	11
Layout			1	2	3
Leadership	10	36	2	20	14
Learning & Development					
Legal		1			
Lighting TD	10	23	5	18	8
Marketing	2	11	1	5	6
Matchmove / Tracking	1	10	4	2	
Media Systems	6	6	1	2	5
Model / Texture / Asset	6	23	7	6	13
Motion Capture		3		6	3
Pipeline	7	14	5	12	5
Previz / Postviz		5			3
Production Management	46	148	47	44	54
R&D		17	4	4	3
Realtime	3	2	9	2	6
Render Support	1	2			4
Resource Management	1	3		4	2
Rigging	3	12		8	1
Roto / Paint	1	15		2	1
Sound	7			5	2
Stereo					
Story					
VFX Artist	4	46	4	11	2
VFX Supervision	11	52	11	12	11
Virtual Production			8	1	1
No Data	1	2,708			
Grand Total	286	3,800	295	369	330

East and Southeast Asia

Many parts of East and Southeast Asia are underrepresented in the English language data sources used for the atlas. Vietnam has been adjusted to nearer its true number of VFX professionals, using data from other sources. Data for e.g. Beijing, Bangkok and Tokyo does not yet capture the full size of the VFX industry in those cities.

VFX People In Study



Spotlight: Vietnam



Ngân Phan
Research Lead, Vietnam

The VFX and Animation industry in Vietnam has experienced rapid growth over the past 10 years (2014 – 2024). A report by the VFX and Animation Vietnamese Association (VAVA) counts 48 studios in Vietnam focused on VFX, together employing over 3,500 people. Additionally, there are 54 studios producing 3D Animation in Vietnam, which employ a further 4,700 people.

Of the country's 102 VFX and Animation studios, 68 are in the South, where Ho Chi Minh City acts as a hub. Within HCMC, Binh Thanh District and District 7 have the highest concentration of studios, with around 25 studios in those areas alone. Hanoi is the hub in the North, with 24 studios in that region, and Da Nang City serves as a hub for Central Vietnam, with 10 studios located there.

Two thirds of the country's studios are Vietnamese-owned. The majority are smaller than foreign-owned studios, typically ranging from 10 to 50 employees. In contrast, several foreign-owned studios employ between 100 and 500 people. International video game content creation company Virtuos has the largest workforce, with the two Virtuos subsidiaries in Vietnam (Sparx and Glass Egg) employing around 950 people.

Both Vietnamese- and foreign-owned studios rely on international projects to thrive, as domestic film productions tend to have limited scope and budget. According to VAVA statistics, 30% of Vietnamese studios work with international clients from Asia (e.g. Korea, Thailand, Japan) and another 30% work with clients from Europe (e.g. France, Denmark). Vietnamese studios are somewhat less dependent on Hollywood than studios in other countries, although Hollywood clients like Netflix and Marvel do produce VFX in Vietnam.

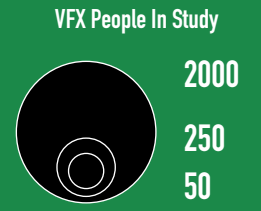
30%

of Vietnamese studios work with clients from Asia and another 30% work with clients from Europe

Competition for talent between Vietnamese-owned and foreign-owned studios is intense, and developing Vietnamese talent is critical to raising the country's international profile. Limited exposure to international projects, along with competition from international studios, poses significant challenges for the industry in Vietnam. The VFX and Animation Vietnamese Association is focused on creating stronger international ties for the industry, along with government relations and workforce training. Vietnam promises to be a dynamic and exciting place to do VFX and Animation work in coming years.



Vietnam



Spotlight: Mainland China



Wenhui (Cara) Du
VFX Producer / Supervisor

Our research into VFX and animation studios in China is just beginning. So far, we have looked at over a hundred studios in mainland China, mostly large (200 – 1,000 employees) and medium-sized (50 – 200 employees). Chinese film and television production companies tend to be in Beijing, and this is where the largest VFX studios are located. The market in Shanghai is more focused on commercials and seems to be experiencing faster growth right now. Hundreds of smaller VFX and animation studios, many with 10 – 20 employees, are scattered across China, often working on lower budget productions. While more research is needed to provide an accurate estimate, the combined VFX and animation workforce in China easily exceeds 10,000 people.

Today, animation is a more developed industry in China than visual effects, thanks in part to government incentives dating back to 2004, which were designed to encourage Chinese animation production as an alternative to imported animated shows for children. Incentives for visual effects began later, in 2012. With global videogame giants like Tencent Games and NetEase Games headquartered in China, the Chinese visual effects industry also competes with a larger gaming industry for talent.

The box office success and international distribution of *The Wandering Earth* (2019) gave China one of its first VFX-driven global blockbusters, boosting Chinese producers' confidence in spending on visual effects. VFX heavy TV shows such as *The Journey of Flower* (2015), often based on well-known Chinese fantasy novels, have gained popularity over the past decade. While fewer theatrical films have been produced in China since the COVID-19 pandemic, television production continues with increasingly large budgets and ambitious visual effects. International audiences' attraction to classical Chinese culture is one driver of jobs in the Chinese VFX industry.

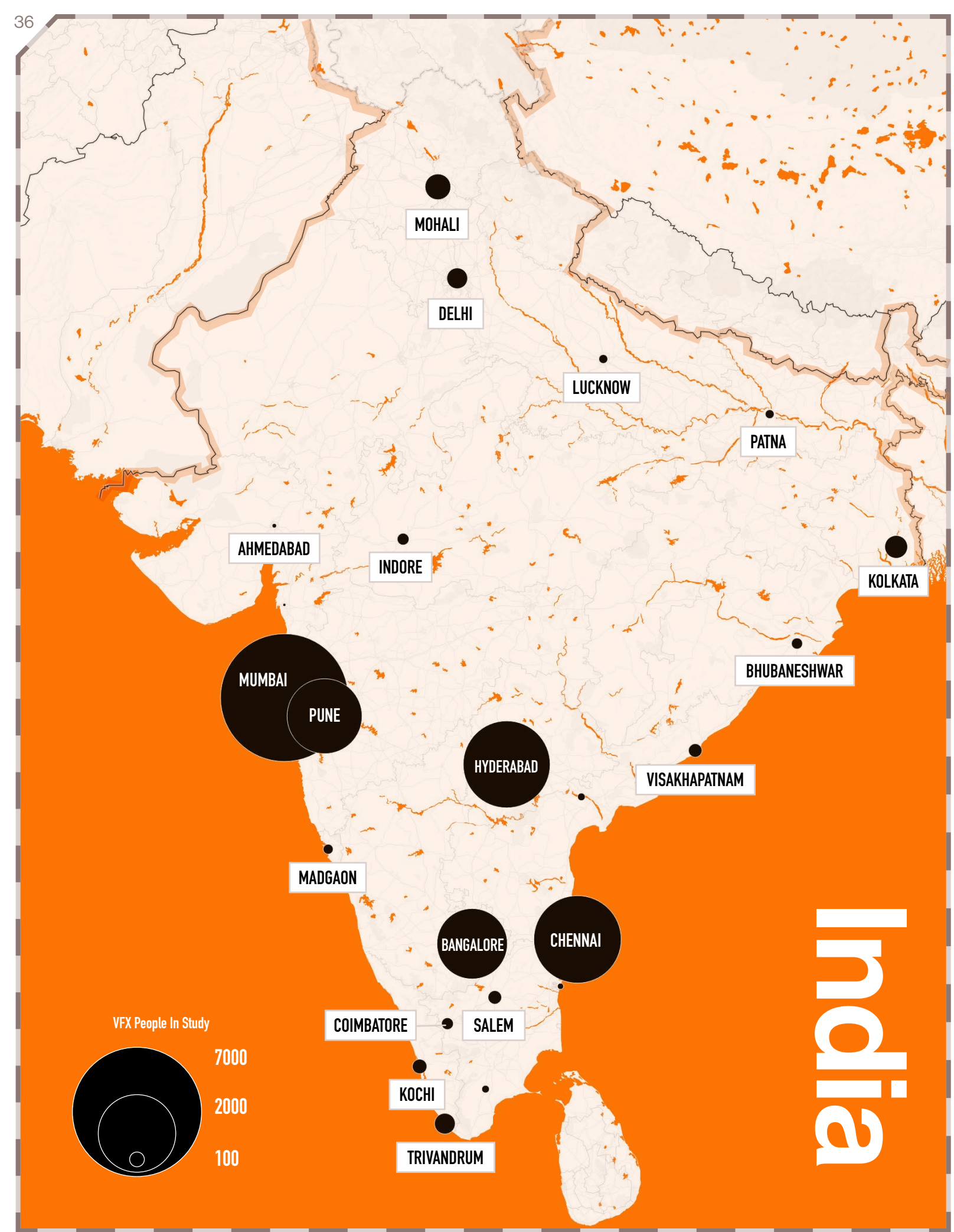
“ *The Wandering Earth* gave China one of its first VFX-driven global blockbusters ”

Limited exposure to the global VFX production market remains a challenge for many Chinese VFX studios. At the same time, those Chinese studios that do work on international projects have been impacted by the recent slowdown in Hollywood. In summary, China is going through its own version of the present challenges faced by the VFX industry in many countries. We hope to learn more as research for the Visual Effects World Atlas project continues into 2025.

East & SE Asia Hub Data

Including China, Japan, Korea and Vietnam

Department	Bangkok	Beijing	Ho Chi Minh City	Seoul	Tokyo
2D Animation	3			2	
Accounting	5	7	4	1	
Admin	15	7	4	2	7
Analytics	2				
Animation	54	45	13	45	9
Business Development	2	2	1	9	7
CG / 3D Department	32	11	12	31	19
Client Relations	5	2	4		
Color		2		2	4
Compositing / 2D	25	121	17	71	23
Creative / Art Direction	8	6	3	15	6
Creature TD / CFX	12	1	1	6	2
Data I/O		3	1	3	1
Department Management	9	5		28	15
Design	24	27	12	31	15
Editorial	1	7	4	5	8
Engineering / DevOps	39	1	5	13	4
Environment / DMP	4	17	2	11	8
Facilities	2	2	1	1	
Flame Artist	1		1	3	1
FX / Simulation	17	37	4	31	12
Games	21	1		1	
Groom	2			1	
Human Resources	12	16	17	3	6
IT	7	8	4	12	8
Layout	6	15		6	1
Leadership	17	19	20	34	34
Learning & Development		2			
Legal		1			
Lighting TD	23	27	2	39	1
Marketing	13	5	4	8	7
Matchmove / Tracking	11	4	1	16	1
Model / Texture / Asset	27	35	5	52	17
Motion Capture				1	
Pipeline	14	4	1	17	10
Previz / Postviz		5		3	1
Production Management	77	63	35	132	44
R&D	1	2	3	16	6
Realtime	4	3	1	7	1
Render Support	1	2		4	
Resource Management	5	3	1	7	2
Rigging	7	1		8	5
Roto / Paint	11	5		10	
Sound		1		1	
Story	2		1	2	1
VFX Artist	19	9	7	35	23
VFX Supervision	1	18	5	16	7
Virtual Production	1	3		8	
No Data		2	1,417	40	
Media Systems					3
Grand Total	542	557	1,613	789	319



Spotlight: India



Sneha Sharma
Research Lead, India

India is known internationally for its strong ecosystem in Animation, VFX, Gaming and Comics (AVGC). The AVGC sector is fragmented, with over 4,000 studios in total. Large global players such as DNEG, ReDefine, and MPC operate major facilities in India, alongside many small-to-midsize companies. Key hubs are Mumbai, Bengaluru, Pune, Hyderabad, and Chennai. The sector grew consistently during COVID-19 and last year's industry strikes in the US. Currently, there are estimated to be around 260,000 people working across the sector (not just VFX) in India.

International projects contribute nearly 70% of VFX revenue in India, and there has been an increase in the number of foreign co-productions and cross-collaborations. Western countries rely heavily on India for their animation and VFX postproduction needs. There has also been a notable increase in revenue from domestic productions, including more demand from domestic producers for work performed by the larger Indian firms.

Geographically, our research found that many studios are located in the western and southern parts of the country, especially Mumbai (36% of the total workforce in India

in our study), Chennai (16%), and Hyderabad (15%), followed by Pune and Bangalore each representing around 12%. Smaller towns are also seeing a surge in the opening of new studio locations, highlighting the sector's widespread expansion.

~70%
of VFX revenue in India comes from international projects.

Challenges for India's AVGC sector include the growing need for a highly skilled workforce, adequate production and financial incentives, formalized education/training programs, and developing state-of-the-art infrastructure. The Indian government is actively engaged in driving the development and promotion of the sector, recognizing Audiovisual Services as one of India's 12 Champion Service Sectors. The AVGC Promotion Task Force was formed in 2022 to guide policy and boost sector growth. Additionally, several states including Karnataka, Kerala and Telangana have introduced state-level incentives to further enhance their competitiveness. India's diverse talent pool and major cost advantage makes the country well-positioned to keep growing a global hub for AVGC content creation.

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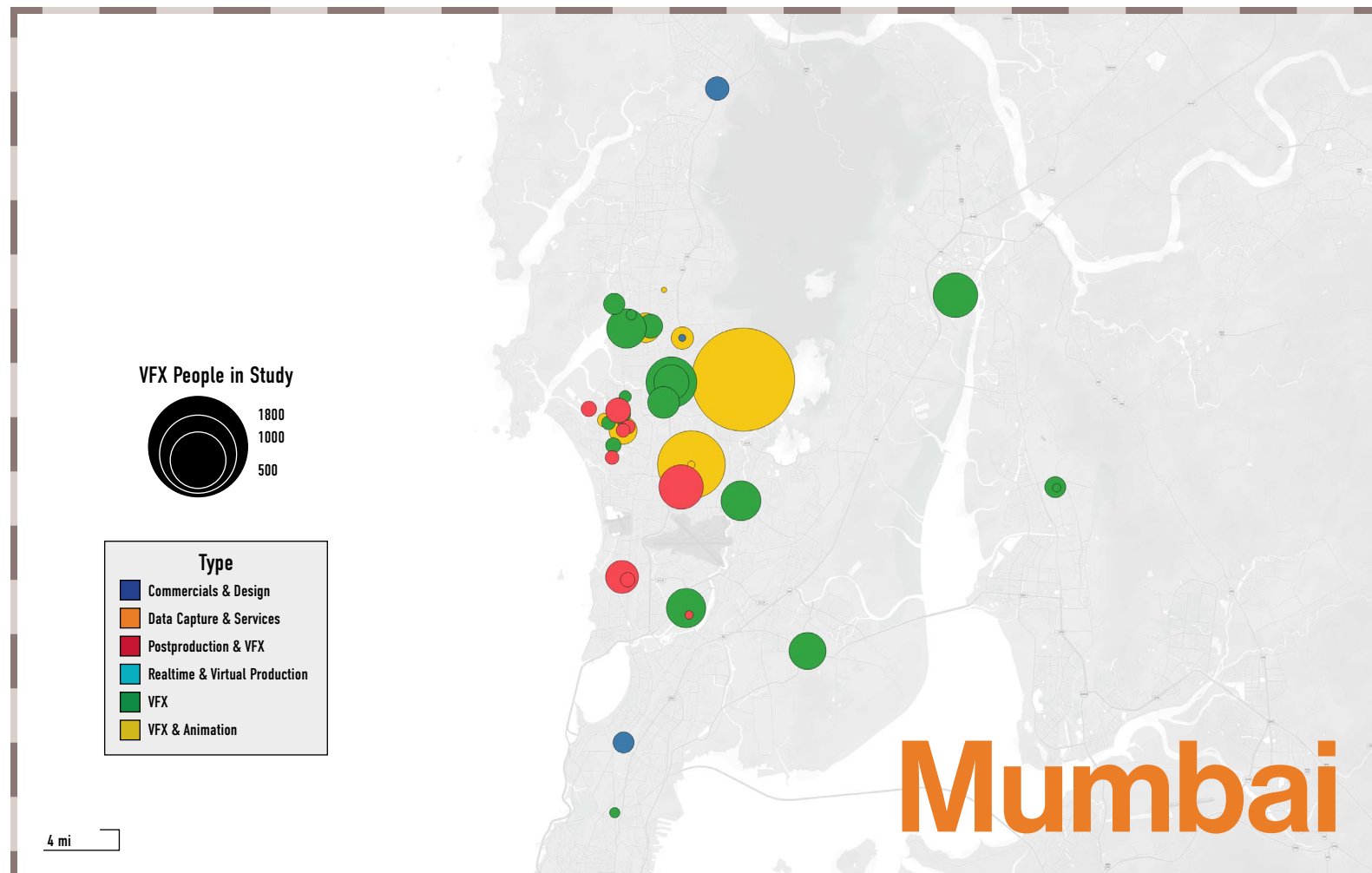
Los Angeles | Montreal | Pune | Tokyo

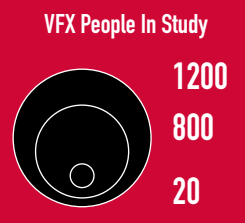
vfx@digikore.com www.digikorevfx.com

Offering Canadian and Indian Rebates

India Hub Data

Department	Bangalore	Chennai	Hyderabad	Mumbai	Pune
2D Animation	1		8	6	16
Accounting		15	10	49	8
Admin	3	29	24	68	24
Analytics	5	12	6	11	4
Animation	177	55	184	277	61
Business Development	3	21	13	33	15
CG / 3D Department	65	70	46	113	48
Client Relations	1	10	3	27	9
Color	1	7		35	5
Compositing / 2D	419	307	342	1,070	260
Creative / Art Direction	5	5	5	36	5
Creature TD / CFX	36	4	12	70	5
Data I/O	2	26	8	29	14
Department Management	36	39	31	143	28
Design	17	38	53	202	31
Editorial	4	46	22	114	13
Engineering / DevOps	25	49	17	41	17
Environment / DMP	87	27	22	183	12
Facilities	2	7	2	24	2
Flame Artist		2		29	
FX / Simulation	68	44	37	145	17
Games			2		8
Groom	23	1	4	14	1
Human Resources	12	73	40	123	50
IT	11	90	53	110	61
Layout	19	18	17	123	6
Leadership	10	48	28	114	39
Learning & Development	12	10	5	17	2
Legal				1	1
Lighting TD	115	59	62	296	19
Marketing	3	22	19	34	11
Matchmove / Tracking	25	272	123	444	156
Media Systems		1	1	3	
Model / Texture / Asset	250	70	78	346	48
Motion Capture	2		1	4	
Pipeline	11	22	12	41	13
Previz / Postviz		3	1	16	
Production Management	176	252	161	671	159
R&D	4	1	1		
Realtime	10	2	14	28	17
Render Support	3	8	8	22	7
Resource Management	10	11	8	33	8
Rigging	45	9	20	44	9
Roto / Paint	232	949	969	1,162	870
Sound		5		21	2
Stereo		19	2	25	31
Story		1	1	4	5
VFX Artist	167	479	718	468	260
VFX Supervision	12	17	24	72	17
Virtual Production	1			4	1
Grand Total	2,110	3,255	3,217	6,945	2,395





Australia

New Zealand

Spotlight: Aust & NZ



Marcus Wells
Talent & Recruitment Consultant at PXL Talent

Australia and New Zealand have long been regarded as dependable locations for complex and compelling VFX and post-production work. While there has been a softening in overall staffing numbers over the past eighteen months, we have seen a modest increase in the number of VFX studios looking to invest in the region. Companies offering remote and WFH opportunities have been able to tap into an experienced talent pool spread across several regional hubs. The Visual Effects World Atlas 2024 accurately reflects the diversity of roles found in these cities.

The global production slow-down during 2023 -- and subsequent sluggish restart of postproduction work -- created challenging employment conditions for many local artists, supervisors and production personnel, as they have in the industry worldwide. Despite this, large and mid-sized studios in the region have been able to maintain a steady slate of project awards, with a weak Australian dollar, continued support from various state-based tax incentives, and a federal Post, Digital and Visual Effects (PDV) offset helping to attract work from international clients. Excellence in effects simulation, environments and compositing remain highly desirable skillsets.

Tasks like roto and prep continue to move offshore, as shown in this atlas.

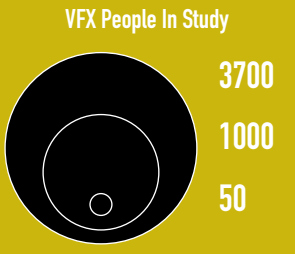
We have seen an increase in virtual production capability during this time, with new LED Volumes opening in Melbourne and Brisbane, and companies incorporating RealTime applications into their VFX workflows. Machine learning (ML) has also created new opportunities in tool development and pipeline optimisation.

“ VFX companies that have **robust support** for inbound candidates compete successfully for discerning global talent. ”

Steady investment in VFX education has kept up with industry demand, and immigration pathways (such as the Australian Entertainment Activities stream (408) Visa & New Zealand's Skilled Migrant Category Resident Visa) support initiatives that require rapid company growth. With relatively short visa approval times, VFX companies that have robust support for inbound candidates compete successfully for discerning global talent. Though our industry is hard to predict, the sentiment in the region is one of optimism, and a belief that opportunities may see steady, if cautious, growth from late 2024 onwards.

Aust & NZ Hub Data

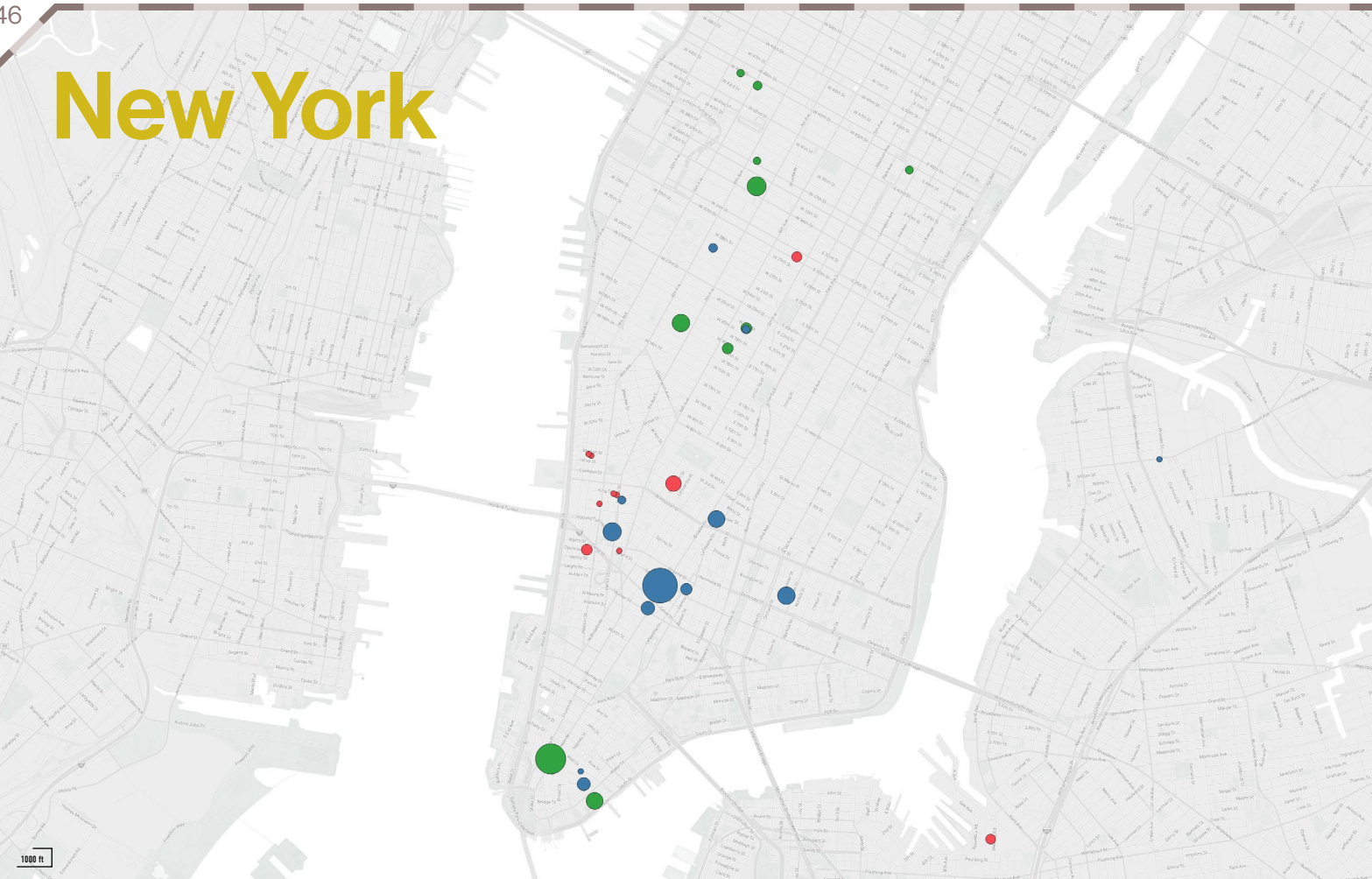
Department	Adelaide	Brisbane	Melbourne	Sydney	Wellington
Accounting	3	4	3	24	6
Admin	1		2	11	6
Analytics					5
Animation	19	9	35	92	99
Business Development	6	1	7	7	2
CG / 3D Department	7	10	10	59	17
Client Relations	1	2	1	3	4
Color	1	1		5	2
Compositing / 2D	51	26	62	133	103
Creative / Art Direction	1	4	3	10	3
Creature TD / CFX	8		6	30	32
Data I/O	3	6	2	7	7
Department Management	11	2	14	28	54
Design	5	2	11	12	23
Editorial	10	14	4	16	12
Engineering / DevOps	7	3	6	46	49
Environment / DMP	5	2	16	14	21
Facilities	5	6	7	14	22
Flame Artist		2	1	5	
FX / Simulation	24	4	16	42	61
Groom	1			1	2
Human Resources	6	4	9	39	14
IT	10	3	7	40	61
Layout	21	2	9	40	31
Leadership	10	15	6	29	14
Learning & Development	4		1	6	4
Legal				2	5
Lighting TD	20	6	32	76	65
Marketing	5	1	4	7	14
Matchmove / Tracking			10	5	19
Media Systems	1	6		7	4
Model / Texture / Asset	20	2	27	84	93
Motion Capture			7	4	65
Pipeline	7	2	8	32	11
Previz / Postviz				4	6
Production Management	49	34	52	182	139
R&D	9		3	13	20
Realtime	1	1		13	
Render Support	1		1	2	15
Resource Management	2		1	5	4
Rigging	7		4	12	1
Roto / Paint	18	1	6	21	37
Sound		7		5	3
Stereo				1	1
Story				1	
VFX Artist	7	4	1	30	16
VFX Supervision	9	3	6	23	33
Virtual Production		1			5
Grand Total	376	190	400	1,242	1,210



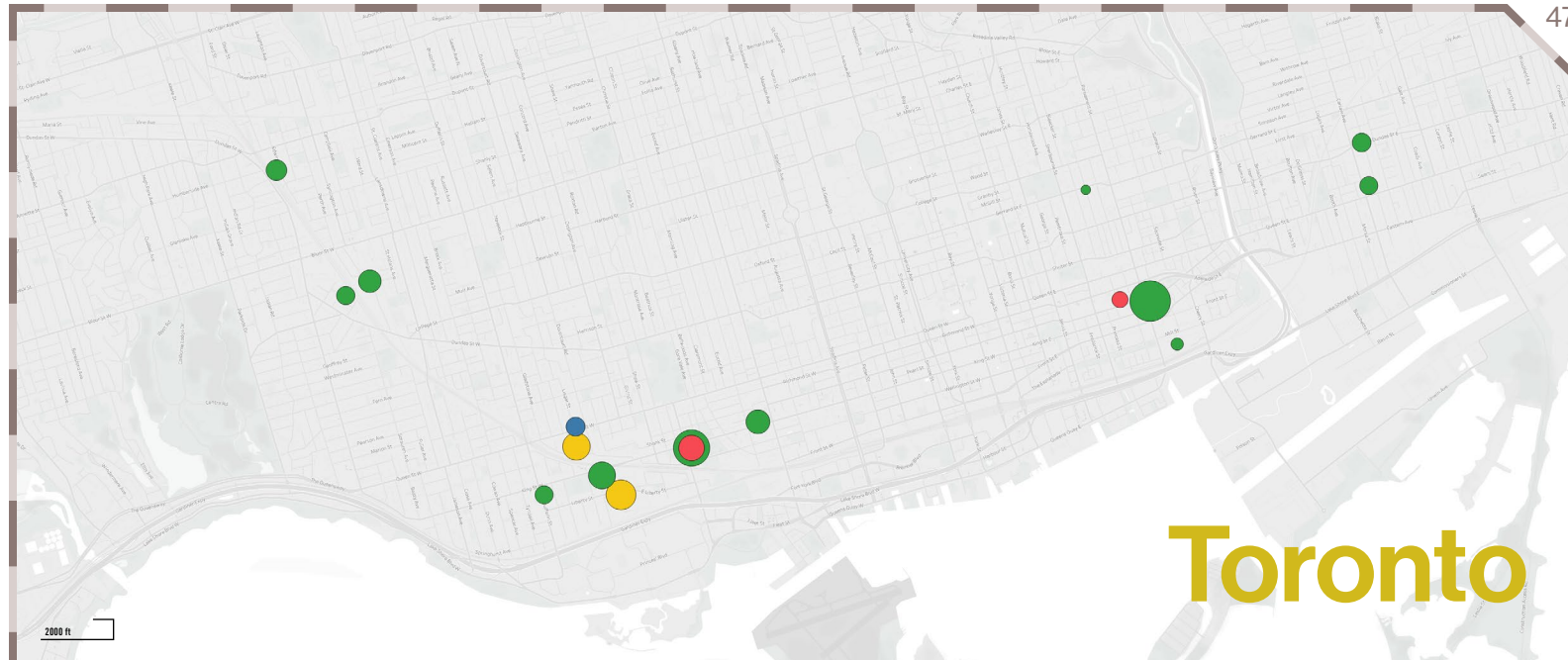
What about South America? Some South American cities are shown on the world map (page 8), and you can see Bogota on this page. Overall, though, we have very little data on South America currently. More research is needed to properly capture the VFX industry on that continent.

North America

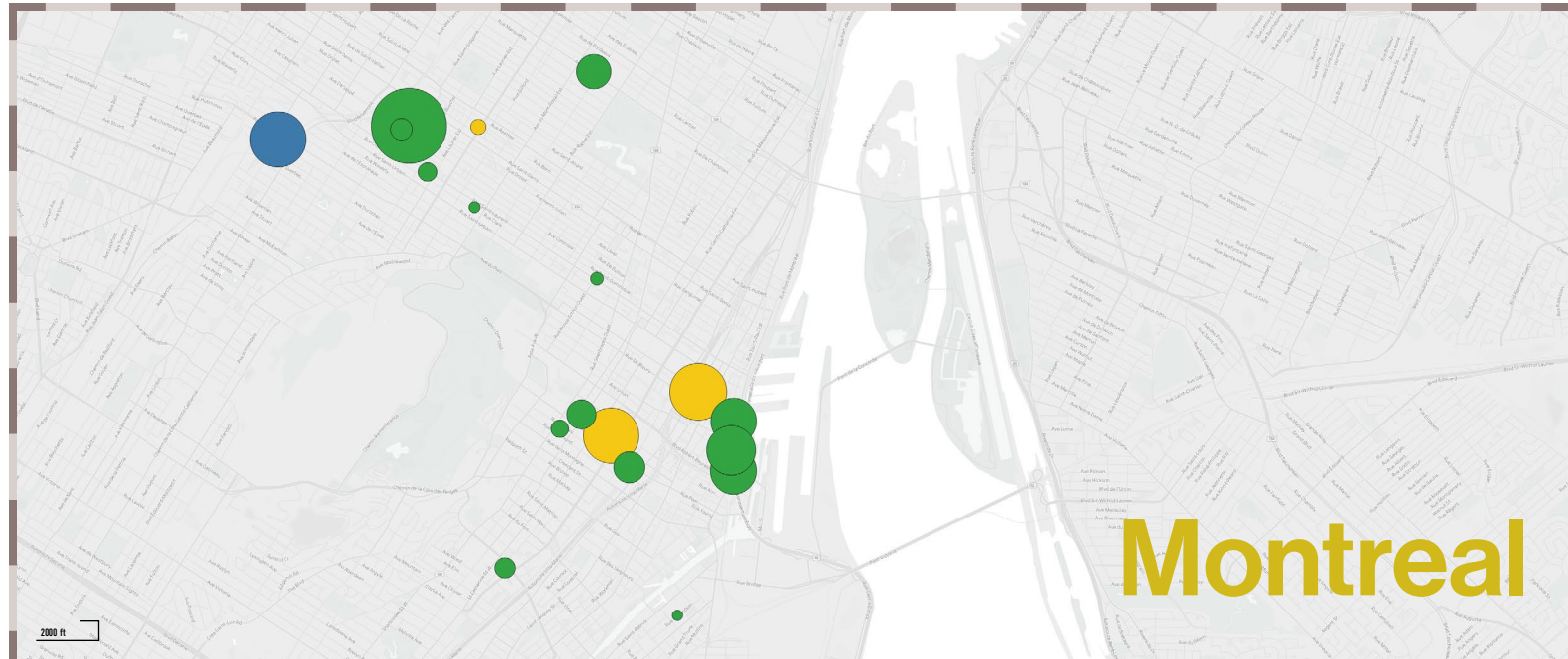
New York



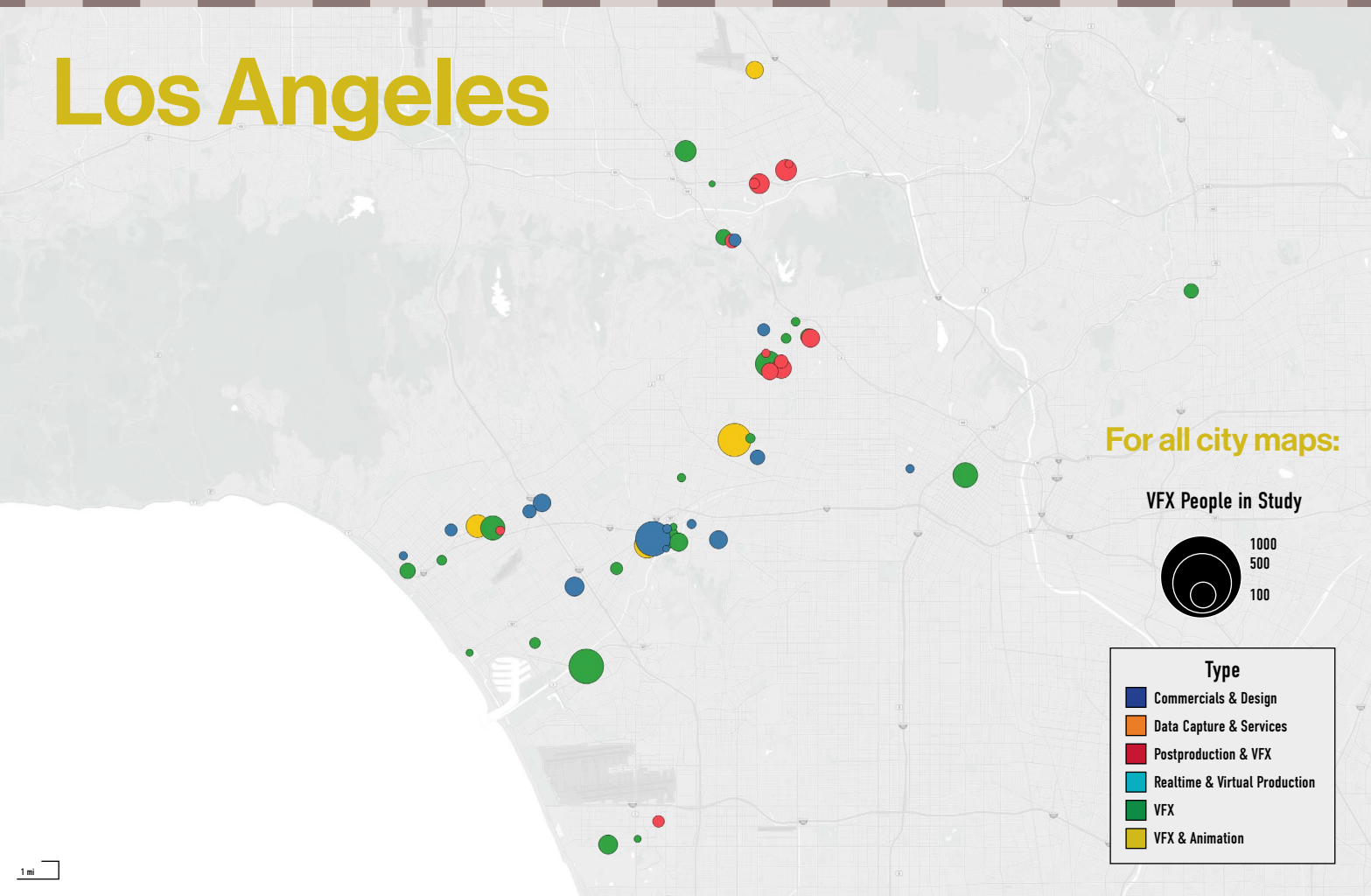
Toronto



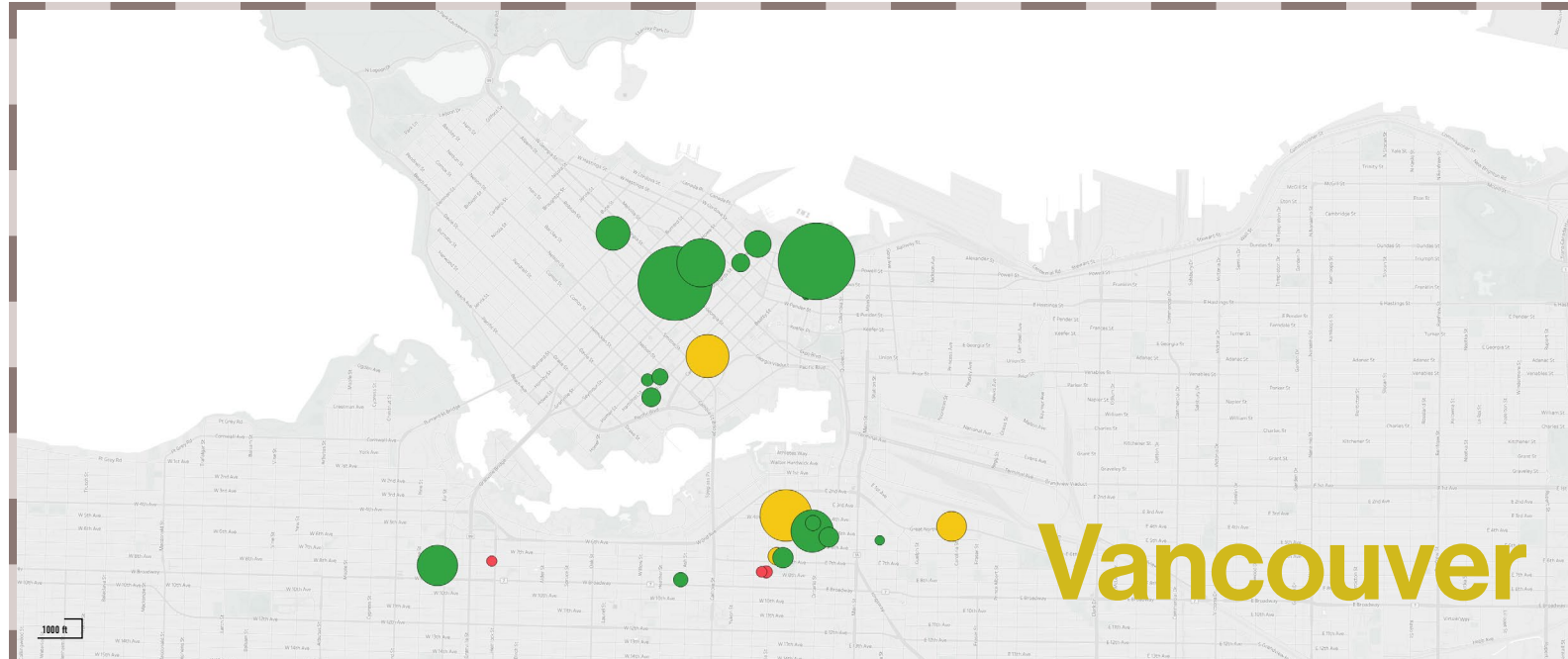
Montreal



Los Angeles



Vancouver



N. America Hub Data

Canada, USA, and Mexico

Department	Los Angeles	Montreal	New York	Toronto	Vancouver
2D Animation	3		1		
Accounting	58	51	15	24	55
Admin	39	24	10	10	14
Analytics	3	8	3	4	1
Animation	116	291	22	82	338
Business Development	87	22	44	23	17
CG / 3D Department	120	135	45	46	106
Client Relations	13	1	7	2	3
Color	68	3	31	10	10
Compositing / 2D	243	504	134	260	549
Creative / Art Direction	141	51	81	18	8
Creature TD / CFX	24	84	2	19	113
Data I/O	35	13	10	9	14
Department Management	65	124	26	42	97
Design	127	76	57	21	25
Editorial	128	62	39	41	51
Engineering / DevOps	89	54	28	42	136
Environment / DMP	24	178	9	37	115
Facilities	34	39	22	11	17
Flame Artist	67	8	26	10	4
FX / Simulation	71	187	27	53	193
Games		5		5	
Groom	3	14		4	12
Human Resources	51	90	9	25	85
IT	95	112	26	53	111
Layout	18	68		28	88
Leadership	240	49	73	49	46
Learning & Development	1	12	2	3	11
Legal	6	6	1	2	
Lighting TD	76	236	17	64	262
Marketing	30	23	16	12	5
Matchmove / Tracking	11	51	5	21	40
Media Systems	23	2	8	3	8
Model / Texture / Asset	82	180	13	50	245
Motion Capture	7	8		2	22
Pipeline	55	73	15	42	103
Previz / Postviz	138	11	2	2	16
Production Management	507	533	195	179	448
R&D	19	17	7	13	31
Realtime	30	15	4	11	21
Render Support	6	9	1	5	8
Resource Management	42	39	17	15	25
Rigging	16	49	1	18	50
Roto / Paint	9	64	1	10	47
Sound	10	2	4	3	
Stereo	5	2		19	1
Story	2	4	4	4	
VFX Artist	71	35	14	8	73
VFX Supervision	140	93	48	36	90
Virtual Production	56			13	12
Grand Total	3,304	3,717	1,122	1,463	3,726



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VFX Disciplines



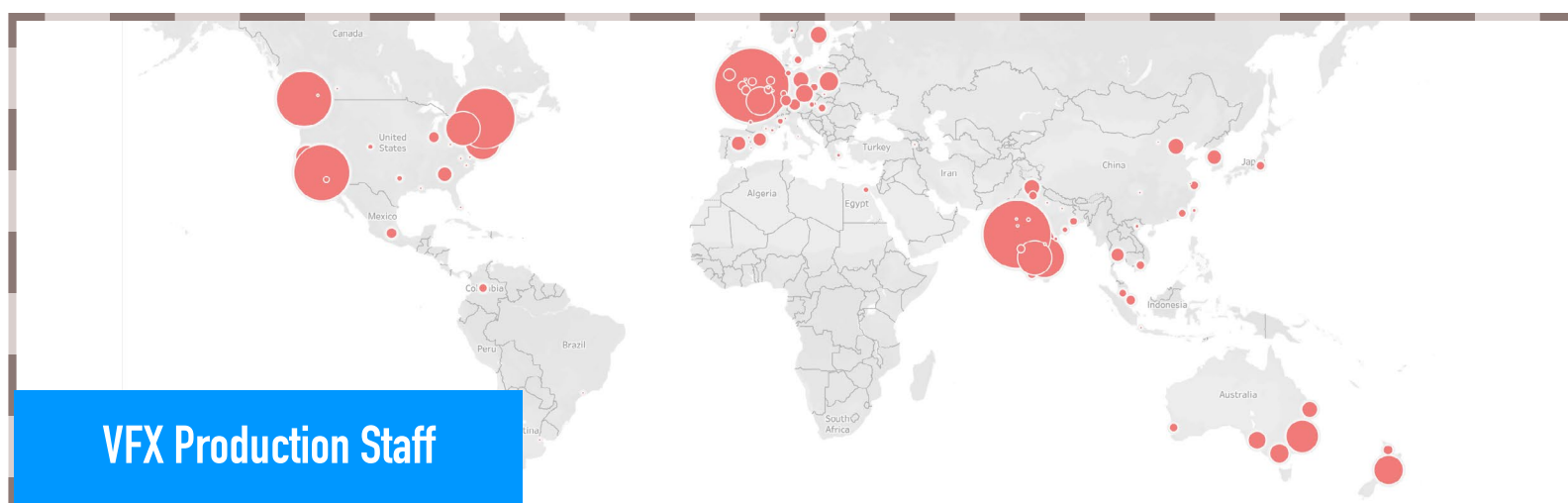
VFX Supervision

Example roles: VFX Supervisor, DFX Supervisor, Associate VFX Supervisor



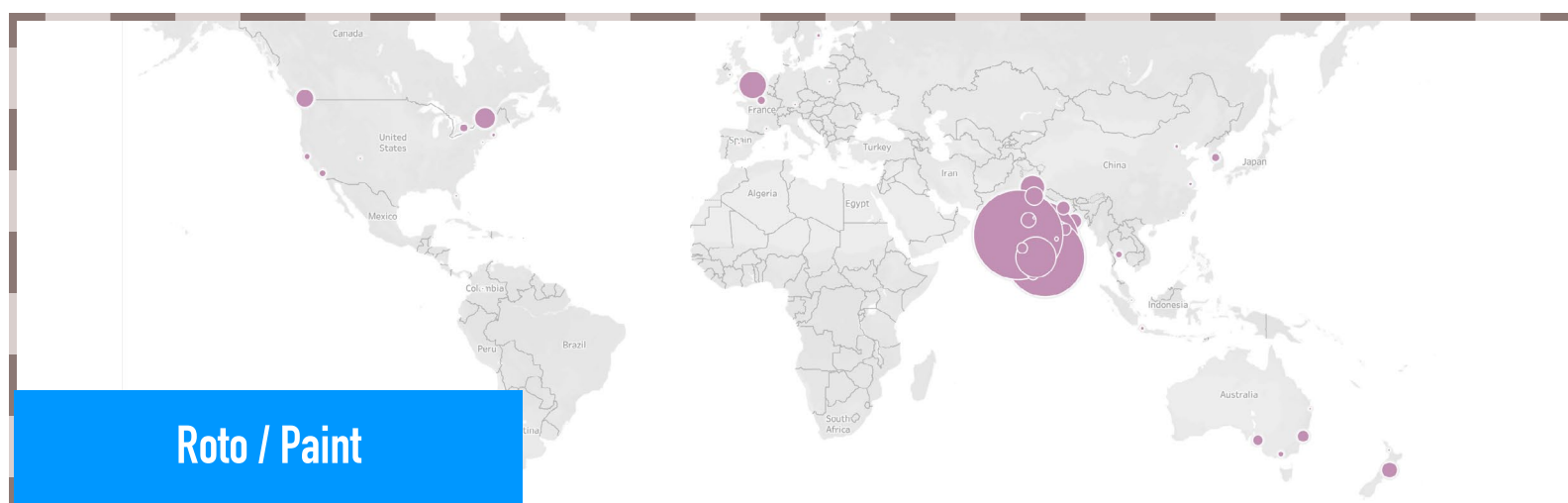
Animation

Example roles: 3D Animator, Character Animator, Animation Director, Technical Animator



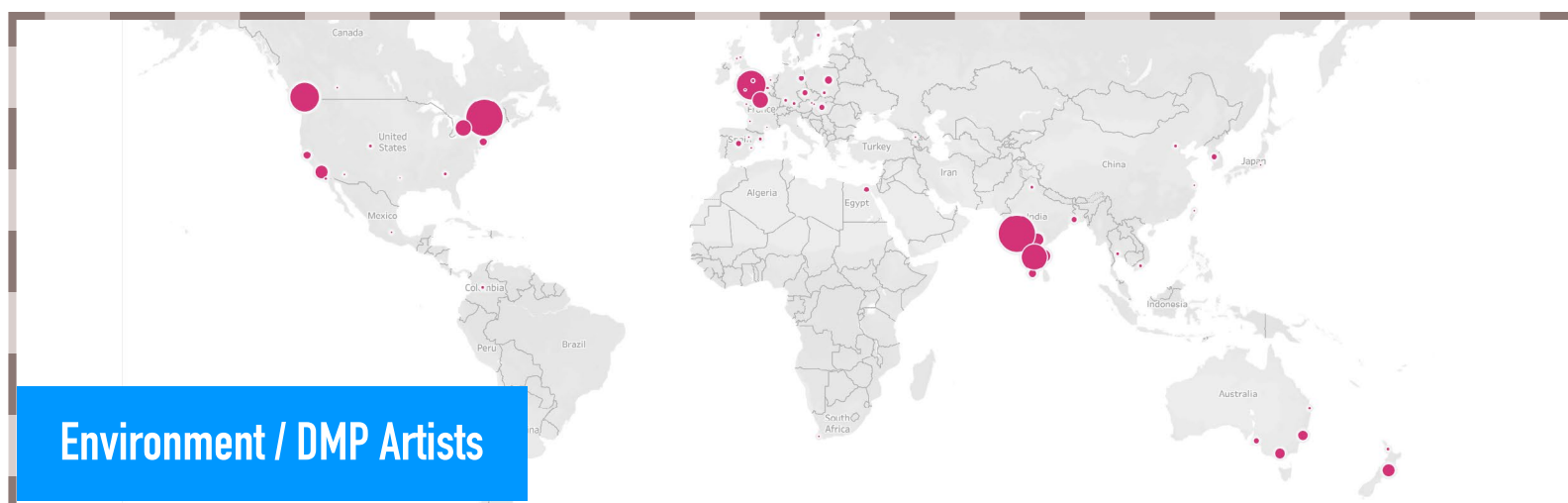
VFX Production Staff

Example roles: VFX Producer, VFX Production Manager, VFX Coordinator



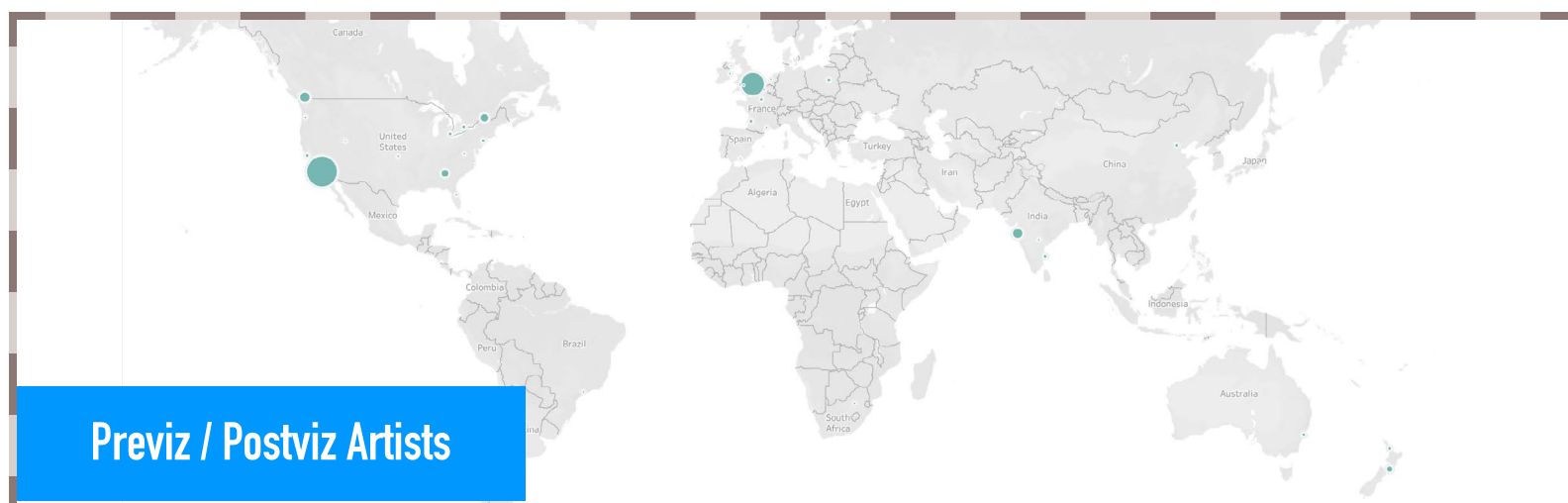
Roto / Paint

Example roles: Roto Artist, VFX Prep / Paint Artist, Roto / Paint Supervisor



Environment / DMP Artists

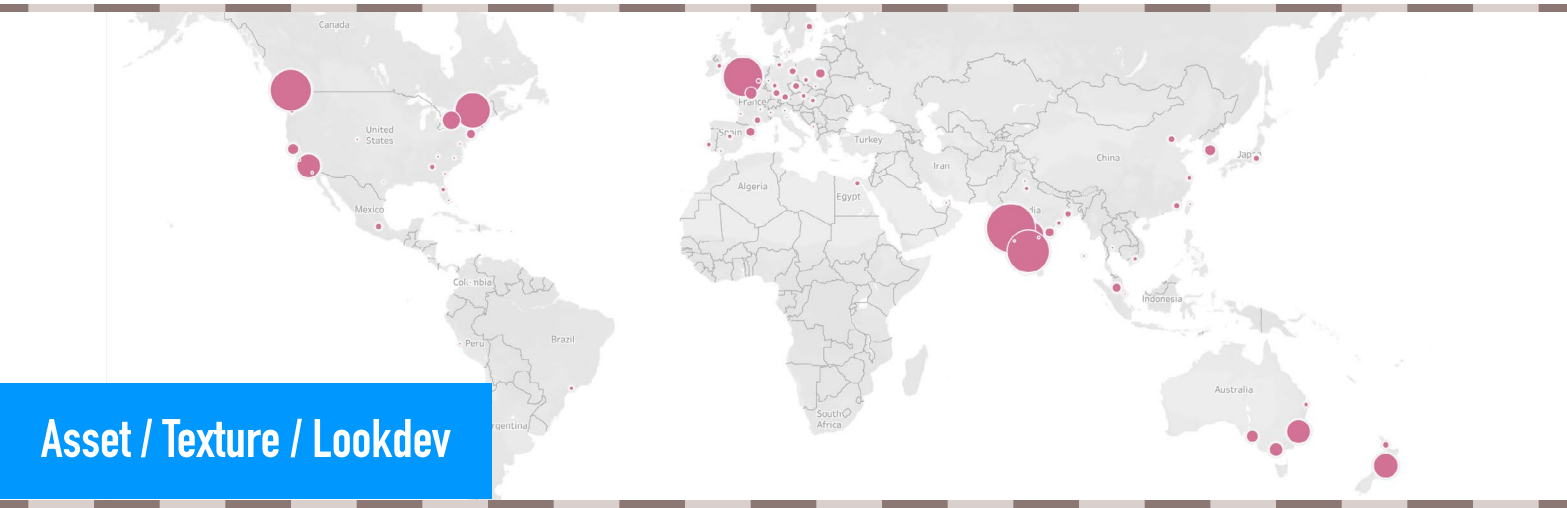
Example roles: Environment Artist, Digimatte Artist, Matte Painter



Previz / Postviz Artists

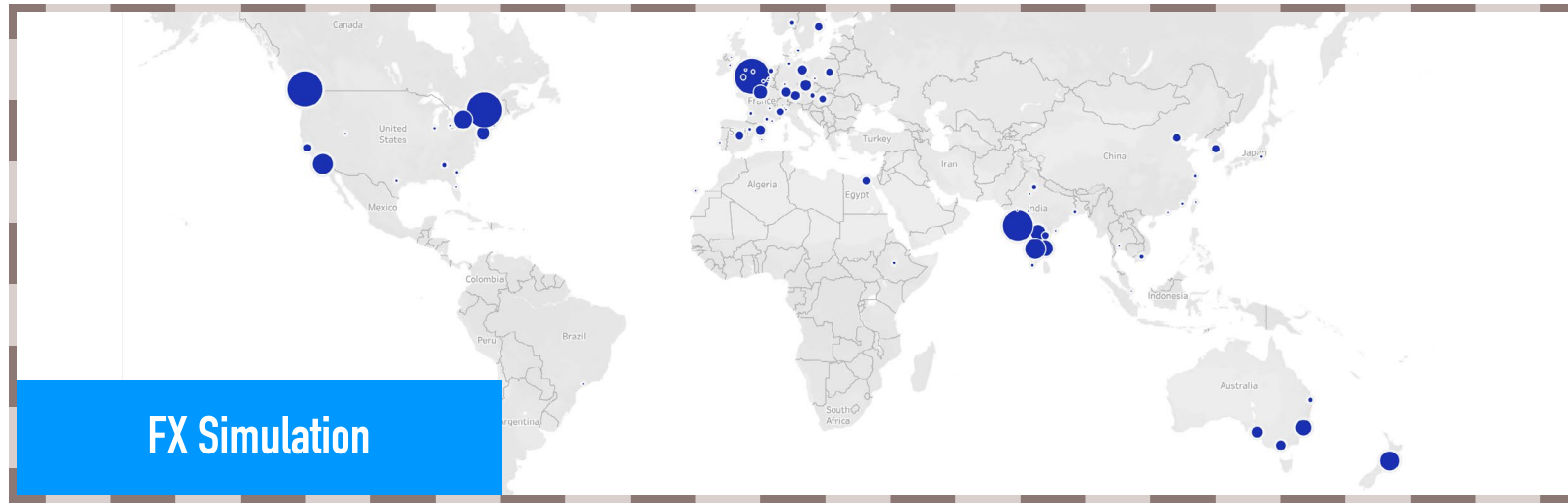
Example roles: Previs Artist, Previs Supervisor, Visualization Artist

VFX Disciplines



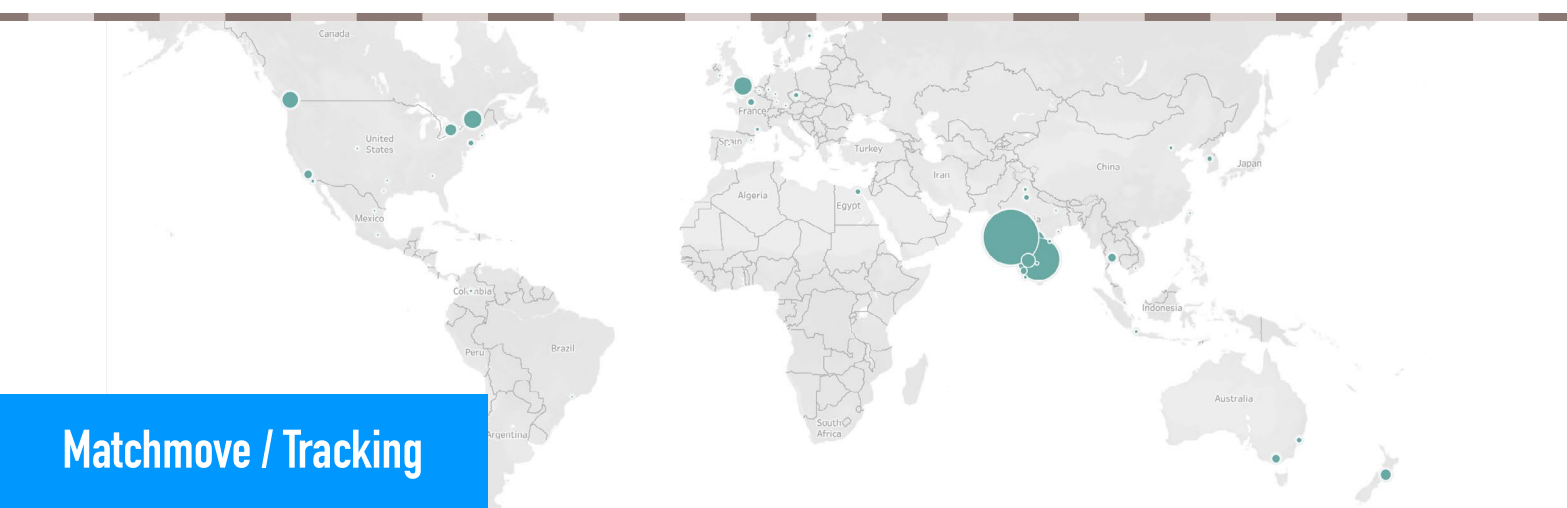
Asset / Texture / Lookdev

Example roles: Asset Artist, Texture Artist, Modeler, LookDev Artist, Character Modeler



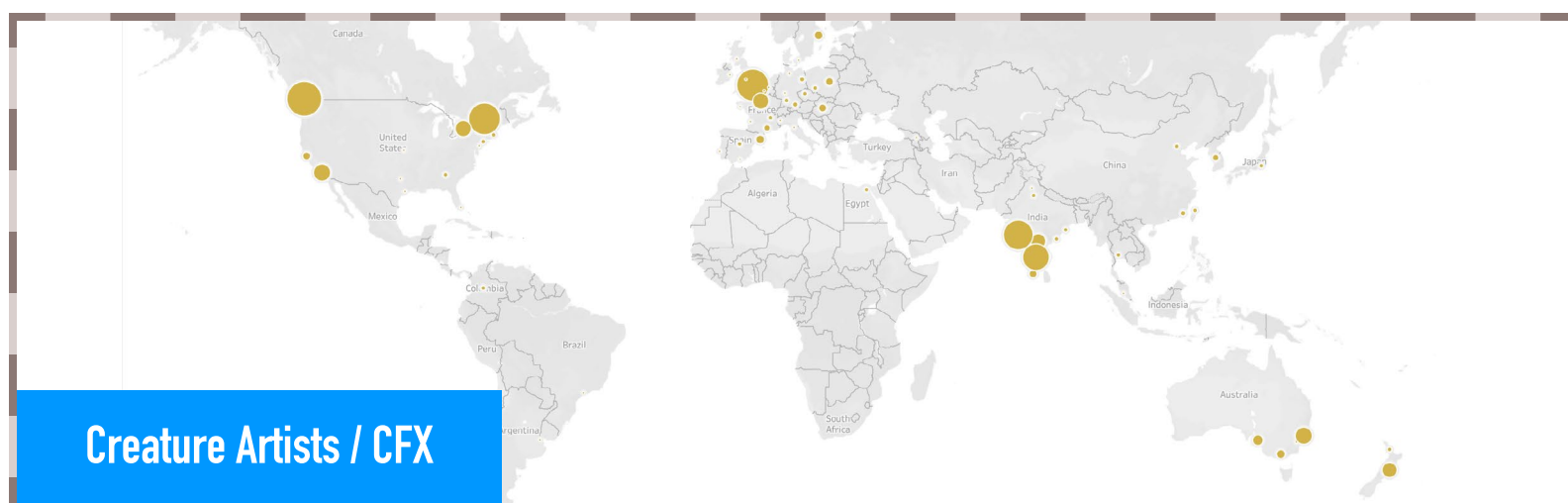
FX Simulation

Example roles: FX Technical Director, FX Supervisor, Crowd Artist



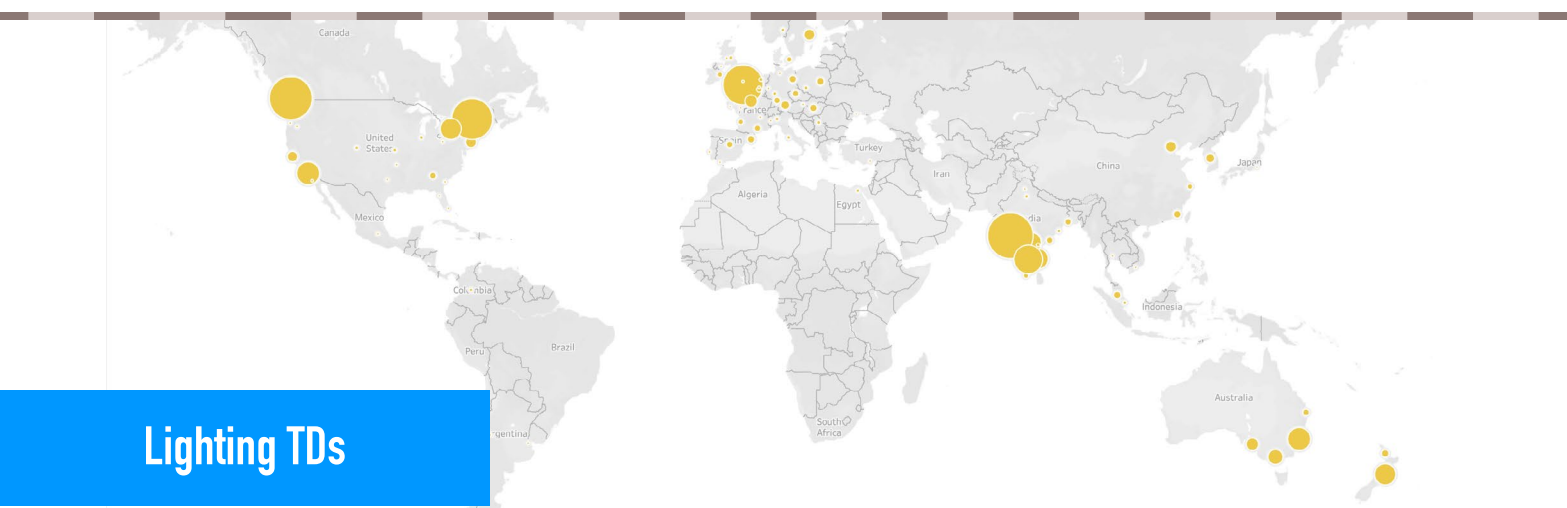
Matchmove / Tracking

Example roles: Body Tracking TD, Camera Tracking, Matchmove Artist, Rotomation



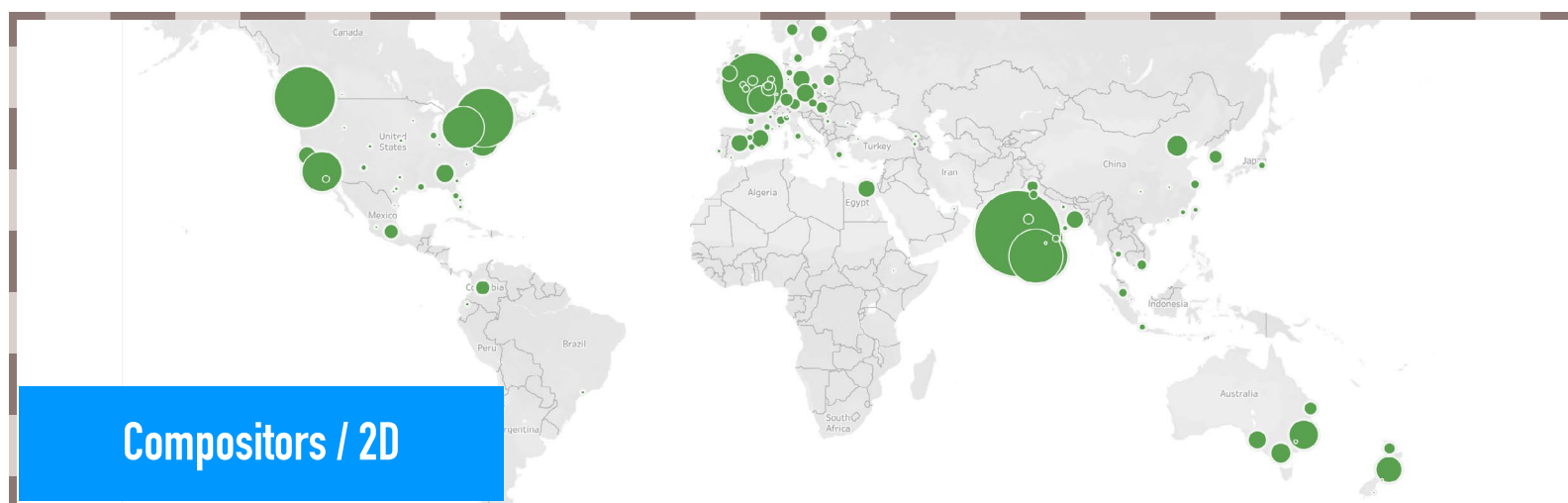
Creature Artists / CFX

Example roles: Creature Technical Director, Groom, Rigging, CFX Artist, Creature Supervisor



Lighting TDs

Example roles: Lighting Technical Director, Lighting Artist, Lighting Supervisor



Compositors / 2D

Example roles: Digital Compositor, Lead Compositor, 2D Supervisor, Compositing Supervisor

Remote Work

Over 3,100 visual effects professionals in the data work remotely (6.4%).



Among the regions covered by this atlas, the relatively small sample of workers from Asian countries other than India had the highest percentage of people working remotely, followed by EMEA.

Where Remote Workers are Based

Region	% Working Remotely
Asia (excluding India)	12.70%
EMEA	9.60%
Americas	8.20%
Australia & New Zealand	8.20%
India	2.50%

Top Skills for Remote Workers

In terms of the total number of remote workers, Compositing was by far the most common role, with 16.8% of all remote workers in this department. Production Management (8.3% of remote workers) and Animation (8.0% of remote workers) were the next most common in terms of the overall number of remote workers.

Departments with the highest percentage of remote workers tend to be roles that require (1) specialized technical skills, (2) design skills, or (3) working onsite with clients at their locations. These include:

Technical Skills	
Realtime	14.30%
R&D	14.30%
Engineering/DevOps	11.40%
FX Simulation	9.70%
Creature TD / CFX	9.60%
Pipeline	9.10%
Design Skills	
Design	11.70%
Directors, Creative Directors, Art Directors	11.50%
Working Onsite with Clients	
Motion Capture	11.40%
Business Development	10.90%
Previz/Postviz	10.80%

Intense competition with companies in other sectors for tech talent and design talent in large city hubs – for example, with tech companies and consumer products brands – is a likely driver of remote work for these skillsets. For roles that involve working onsite with clients, the ability to travel to client locations may be a key factor. At the other end of the range, the department with the lowest proportion of remote workers was Roto/Paint, with just 1.8% of roto/paint artists working remotely.

Where are Employers of Remote Workers?

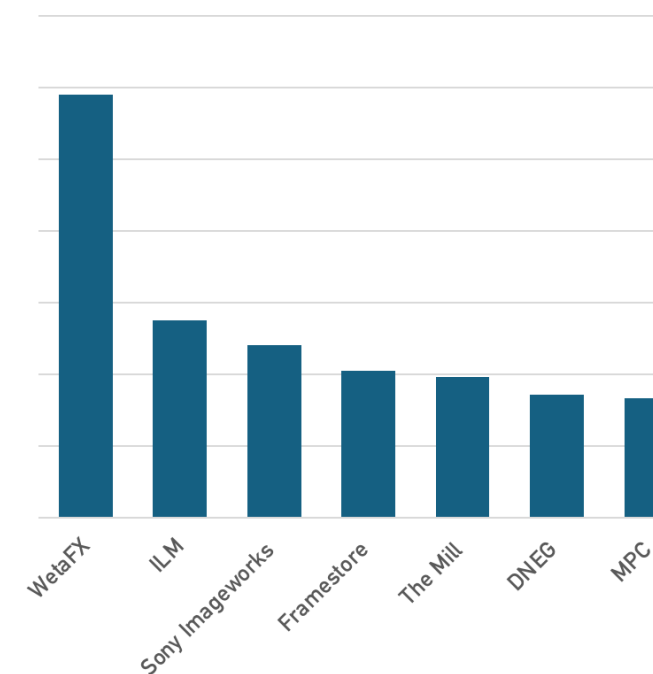
Location	% Remote Employees
Americas	
San Francisco	18.72%
Atlanta	18.39%
Los Angeles	15.84%
New York	9.50%
Toronto	6.57%
Montreal	4.71%
Vancouver	3.33%
Australia and New Zealand	
Melbourne	15.79%
Wellington	10.84%
Adelaide	10.83%
Sydney	7.99%
Brisbane	6.21%
EMEA	
Stuttgart	33.48%
Warsaw	19.17%
Barcelona	16.38%
Berlin	13.11%
Stockholm	9.71%
Prague	6.86%
London	5.94%
Paris	5.92%
India	
Chennai	3.11%
Hyderabad	2.39%
Mumbai	2.12%
Bangalore	2.09%
Pune	1.20%
East and Southeast Asia	
Beijing	8.52%
Seoul	3.95%
Bangkok	2.42%

Employers in locations where tax incentives are dependent on resident workers are less likely to hire remotely. Canadian hubs leveraging tax incentives – Vancouver, Montreal and Toronto – are 3 to 5 times less likely to hire remotely than California hubs where tax incentives have less of an impact, such as Los Angeles and San Francisco. The exception is Atlanta, which has a smaller local talent pool. Studios may tap into remote talent with specialized skills to unlock larger opportunities for local teams.

Top Companies for Remote Workers

A handful of smaller companies are 100% remote by design, including Theory Studios and NEXODUS Cooperative. Among mid-size firms, Ingenuity Studio, Platige Image and Jellyfish Pictures seem to have embraced remote workers. WetaFX stands out among VFX studios with 1,000 or more employees, boasting double the number of remote employees as the next nearest large firm. The geographic location of Weta's largest site in Wellington, New Zealand, no doubt contributes to this.

% of Employees who are Remote



Remote Work

Explore this map online

The remote work maps in the atlas show VFX professionals who are geographically remote from their employers. These maps **do not include people who work from home near their employers, or people who have hybrid work arrangements.**



Worker Location:

- East & Southeast Asia
- Australia & New Zealand
- Americas
- India
- UK & EMEA

Remote Work

Remote Work in the UK & EMEA

The study identified 1,040 remote workers in the UK and EMEA. Among the major hubs in the region, remote work is least common in the largest, London, where just 2.5% of people in the dataset worked remotely for VFX studios scattered all over the world.

As the data focuses on VFX studios working with international clients at least some of the time, numbers for cities with fewer studios of this kind skew towards remote workers. Data for Madrid, for example, shows 23.5% of VFX professionals working remotely, with Barcelona at 19.5%.

Remote Work in North America

Just 1.8% of VFX people in Vancouver work remotely, the lowest proportion among the major hubs in North America. Other North American hubs with a low incidence of remote work are Montreal (3.4%) and Los Angeles (4.5%).

As with continental Europe, cities with fewer local VFX studios show a higher percentage of professionals working remotely. 11.5% of VFX people in New York work remotely, and 20.8% in San Francisco. Four out of five of these remote workers in San Francisco work for studios in Los Angeles.



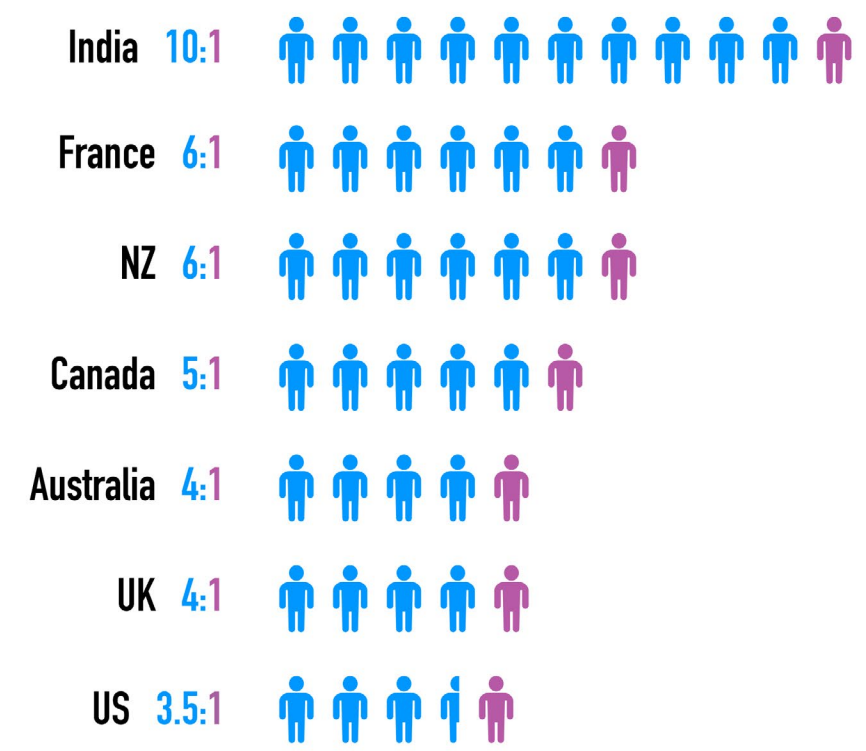
Set up, deploy, and scale a fully managed cloud render farm in minutes.

<https://aws.amazon.com/deadline-cloud/>

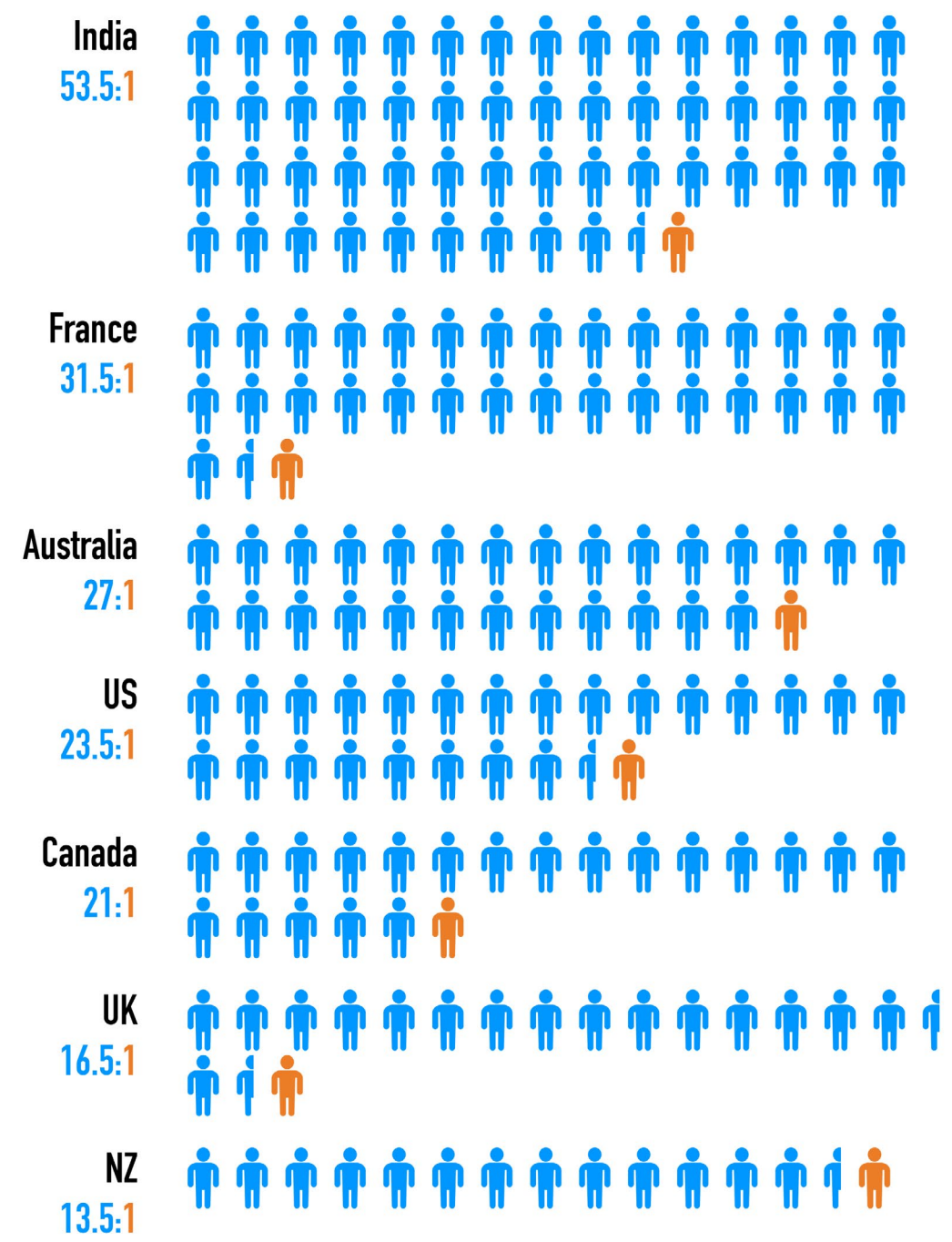


Ratio of Roles

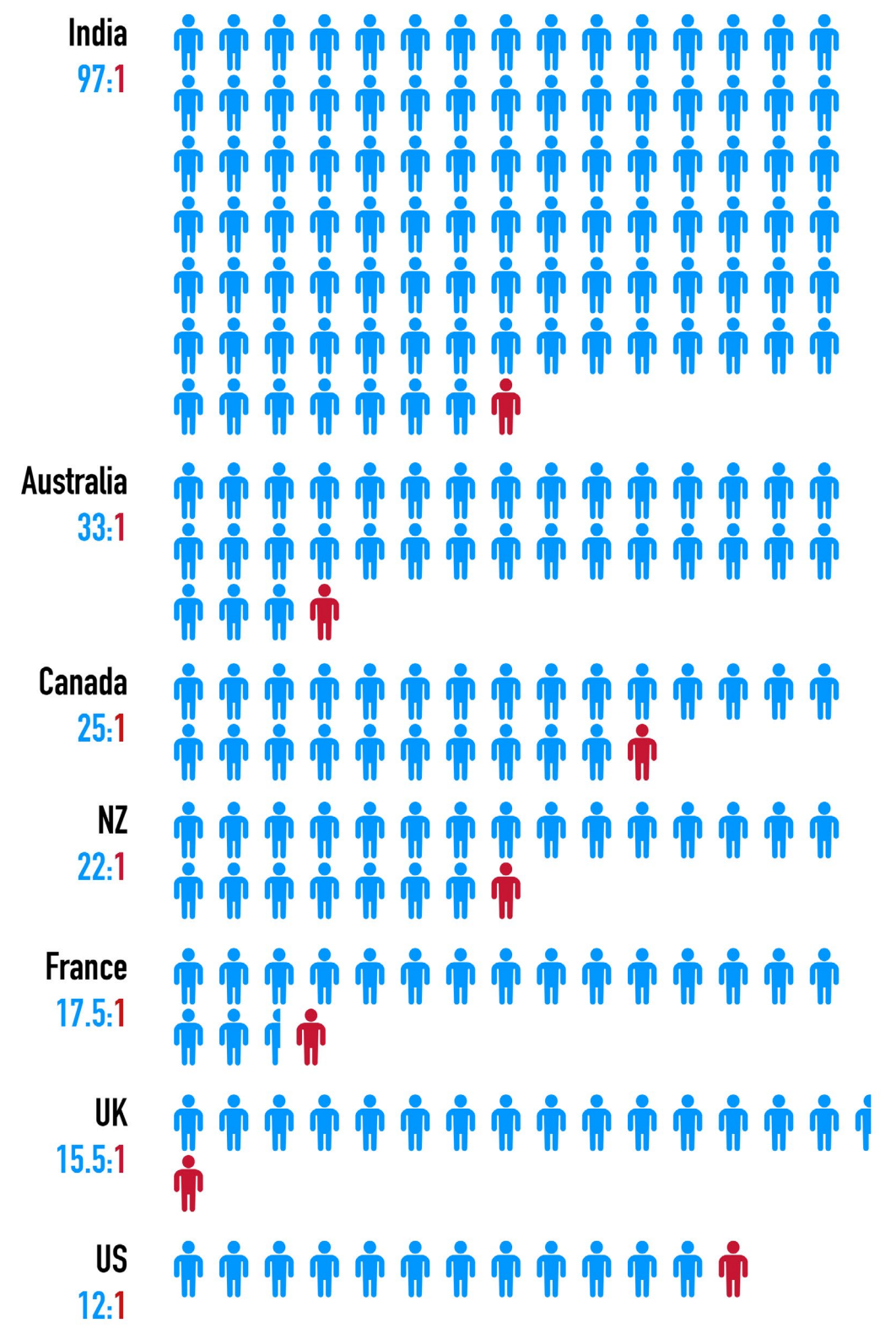
Artists : Production



Artists : Department Heads



Artists : VFX Supervisors



There is considerable variation between countries in the ratio of artist roles to Production, VFX Supervisor and Department Head roles. VFX studio sites that engage intensely with clients, perform more creatively and technically complex work, or oversee the work of artists located in another part of the world, are likely to have a higher proportion of Supervisor and Production roles. There may also be regional differences in the responsibilities associated with job titles. Team Lead roles are common in India, and may offset the smaller number of VFX Supervisors and Department Heads per artist in that country.

VFX Companies

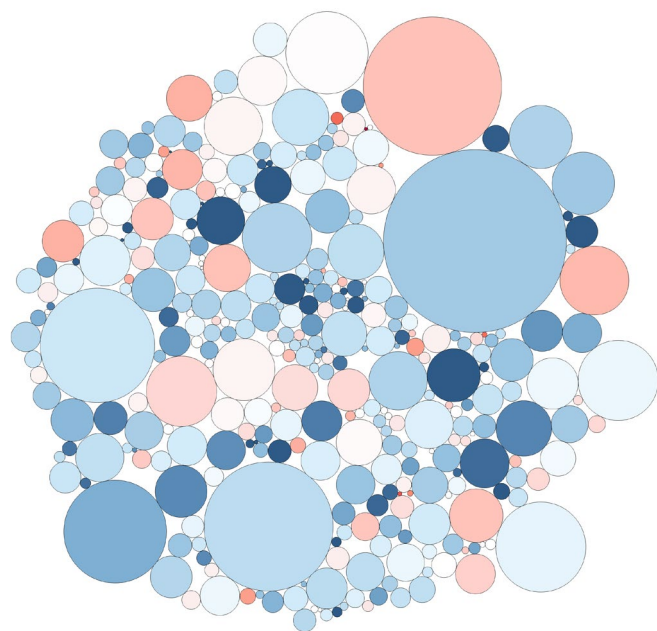
[Explore this data online](#)

Effects of the 2023 Slowdown

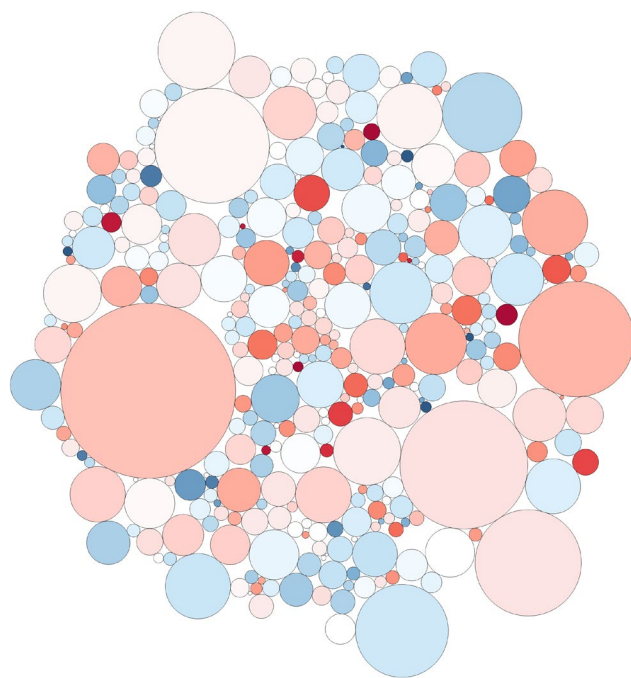
Demand for VFX reached an all time high in 2022. The following year saw a dramatic reduction in project commissioning by the major Hollywood studios, along with the WGA and SAG-AFTRA strikes, and a slowing of content spend in neighboring sectors like commercial production and video games. The bubble charts on these pages show the effects of this slowdown on the VFX industry. The size of each bubble represents the approximate size of a VFX studio. Color tells us whether the studio increased their headcount over the preceding six months (blue) or reduced their headcount over the preceding six months (red). The darker the color, the bigger the percentage change.

The January 2023 chart shows that most VFX studios of all sizes increased their headcount during the busy period in the second half of 2022. In contrast, the December 2023 chart shows the impact of the industry slowdown, with far fewer studios displaying growth in the preceding six months, and many reducing their headcount.

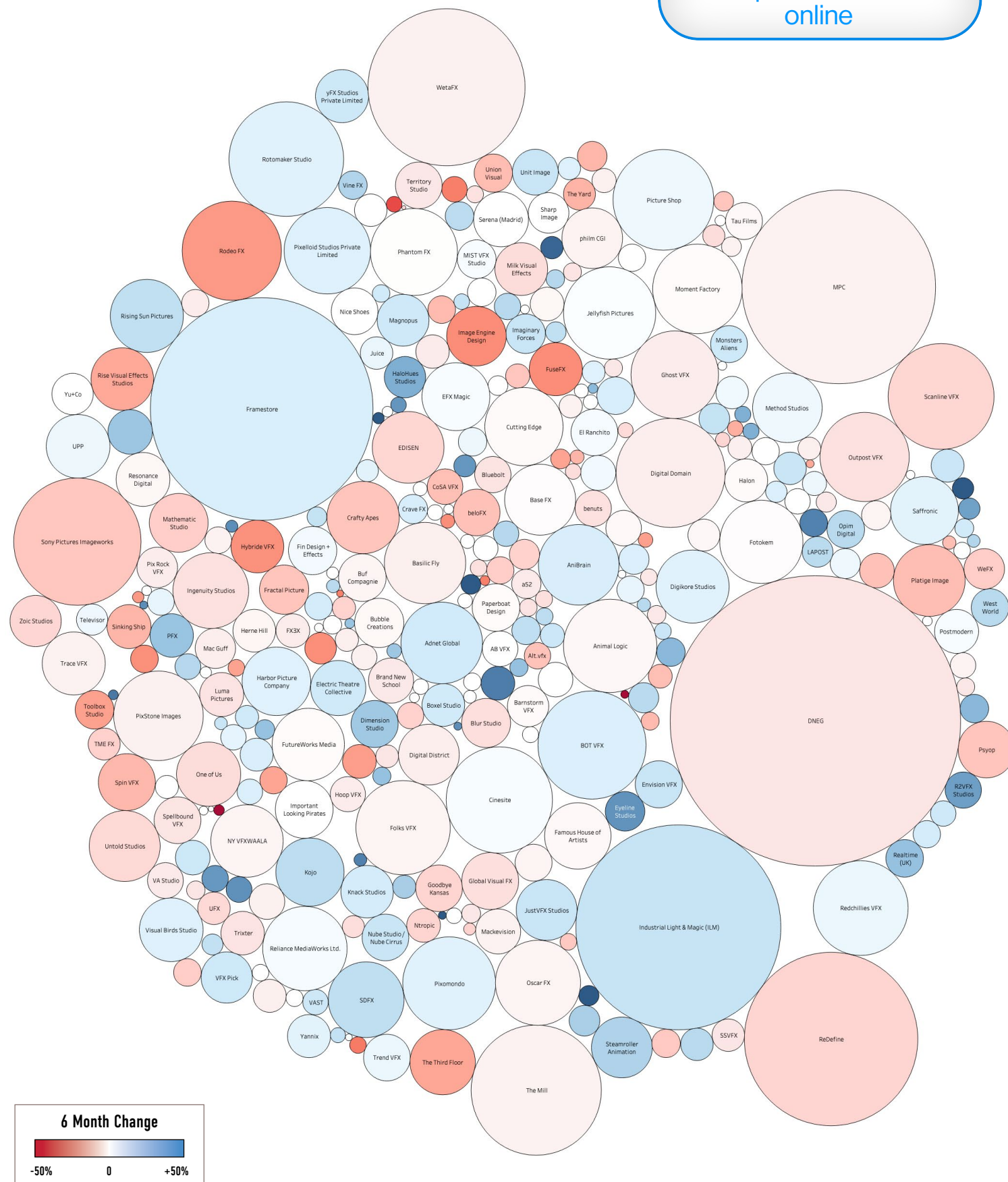
Recovery has been slow. The July 2024 chart shows little change in headcount for many companies during the first half of 2024. This means that companies who reduced their headcount during 2023 had not yet bounced back as of July 2024.



January 2023



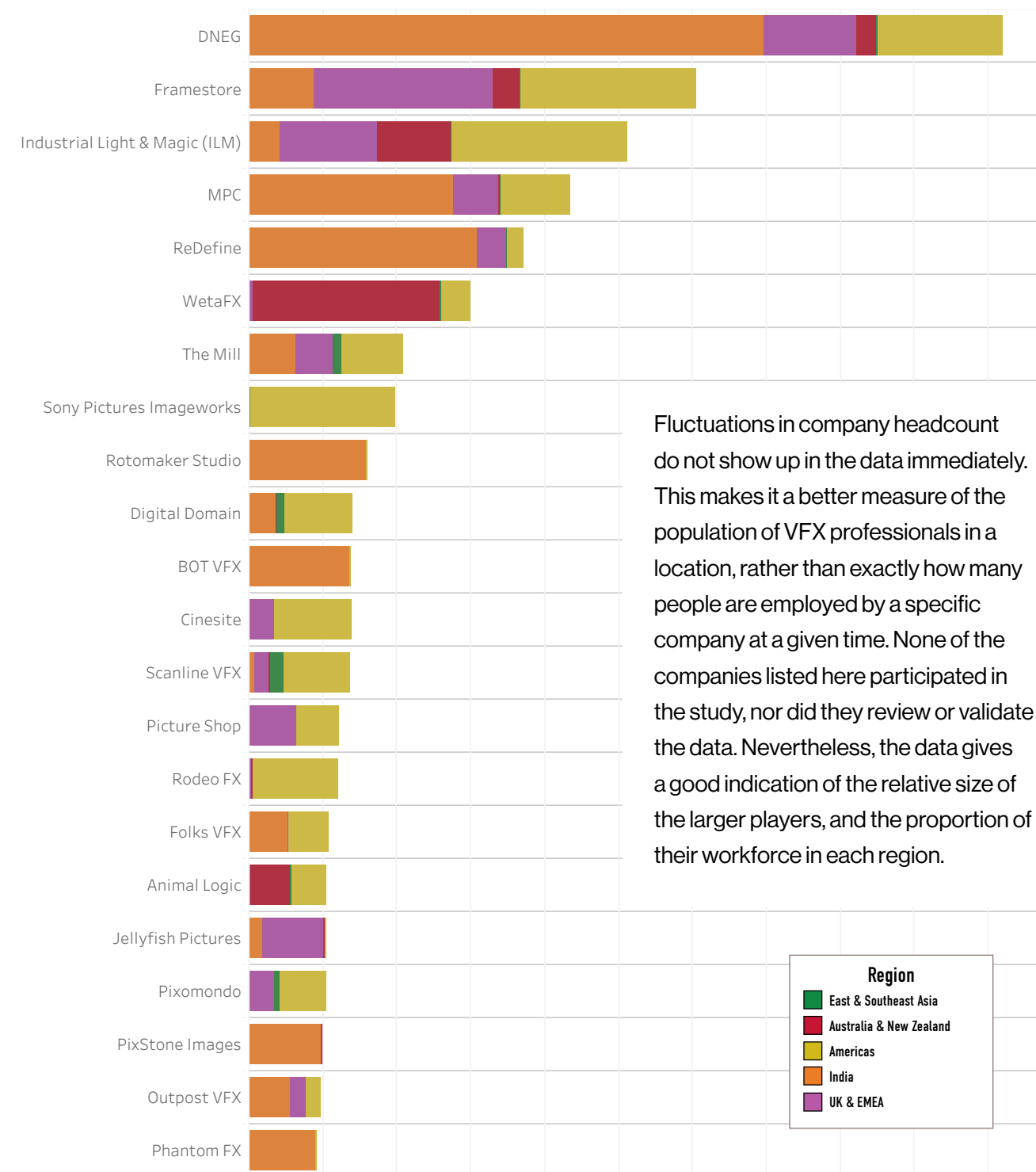
December 2023



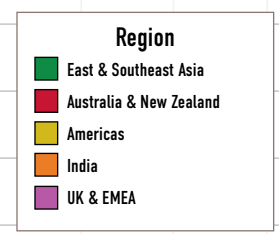
July 2024

Estimated Headcount

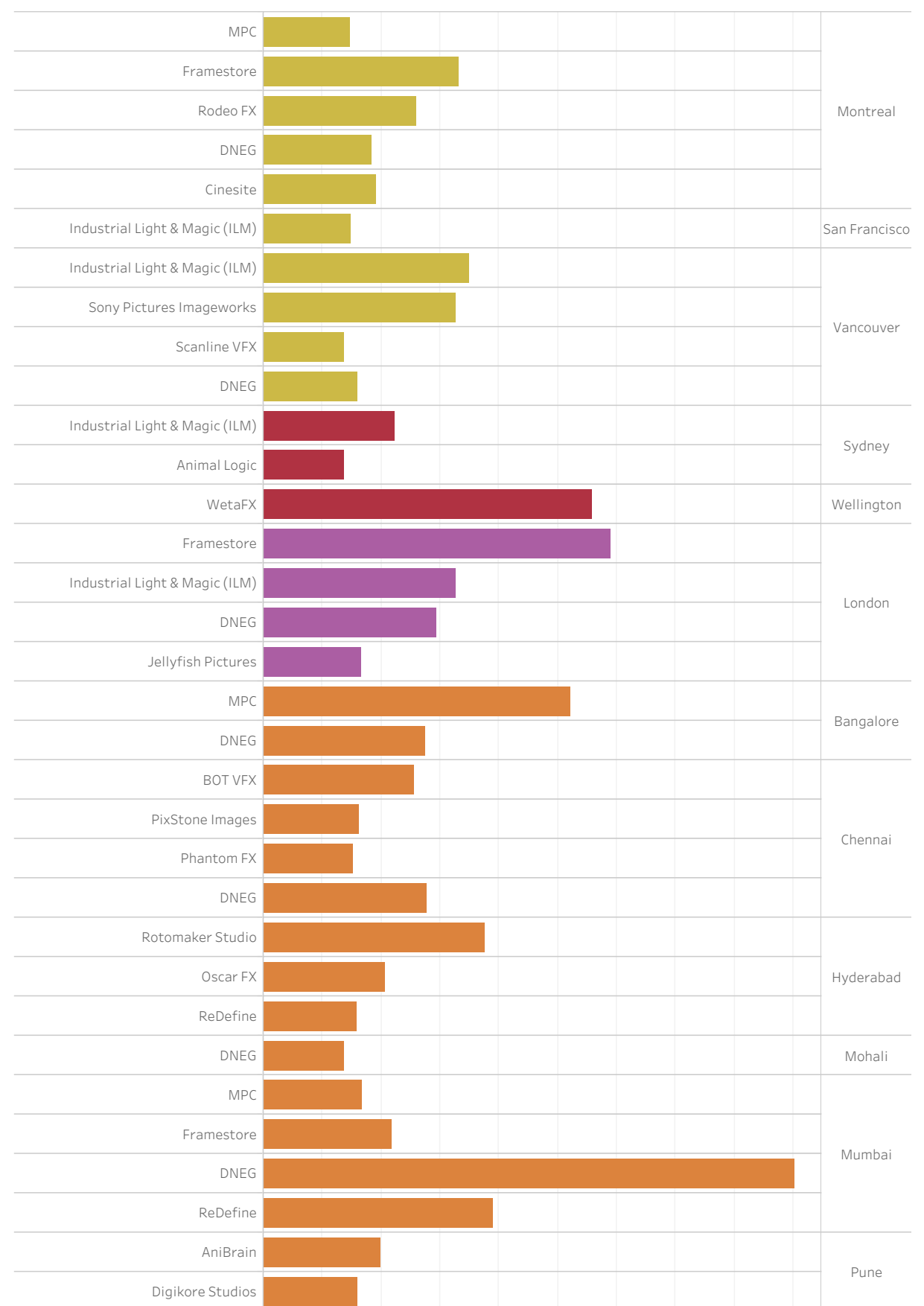
Largest Companies Worldwide



Fluctuations in company headcount do not show up in the data immediately. This makes it a better measure of the population of VFX professionals in a location, rather than exactly how many people are employed by a specific company at a given time. None of the companies listed here participated in the study, nor did they review or validate the data. Nevertheless, the data gives a good indication of the relative size of the larger players, and the proportion of their workforce in each region.



Largest Sites Worldwide



Global VFX Studios

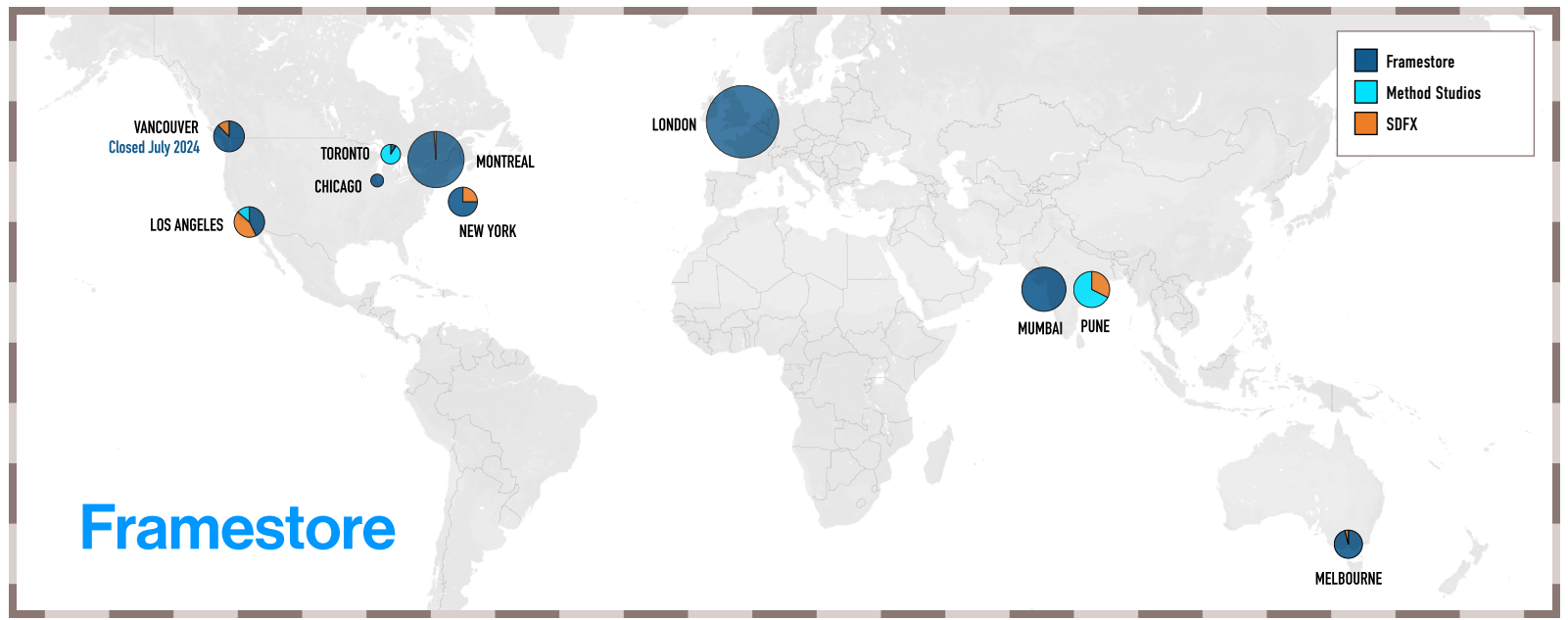


Tax incentives, availability of talent, and proximity to clients mean there is no single best place to do every VFX project. Several of the largest VFX providers have a global footprint that spans North America, the UK, Europe, India and Australia. **ILM**, owned by Disney, is the only example of a studio with

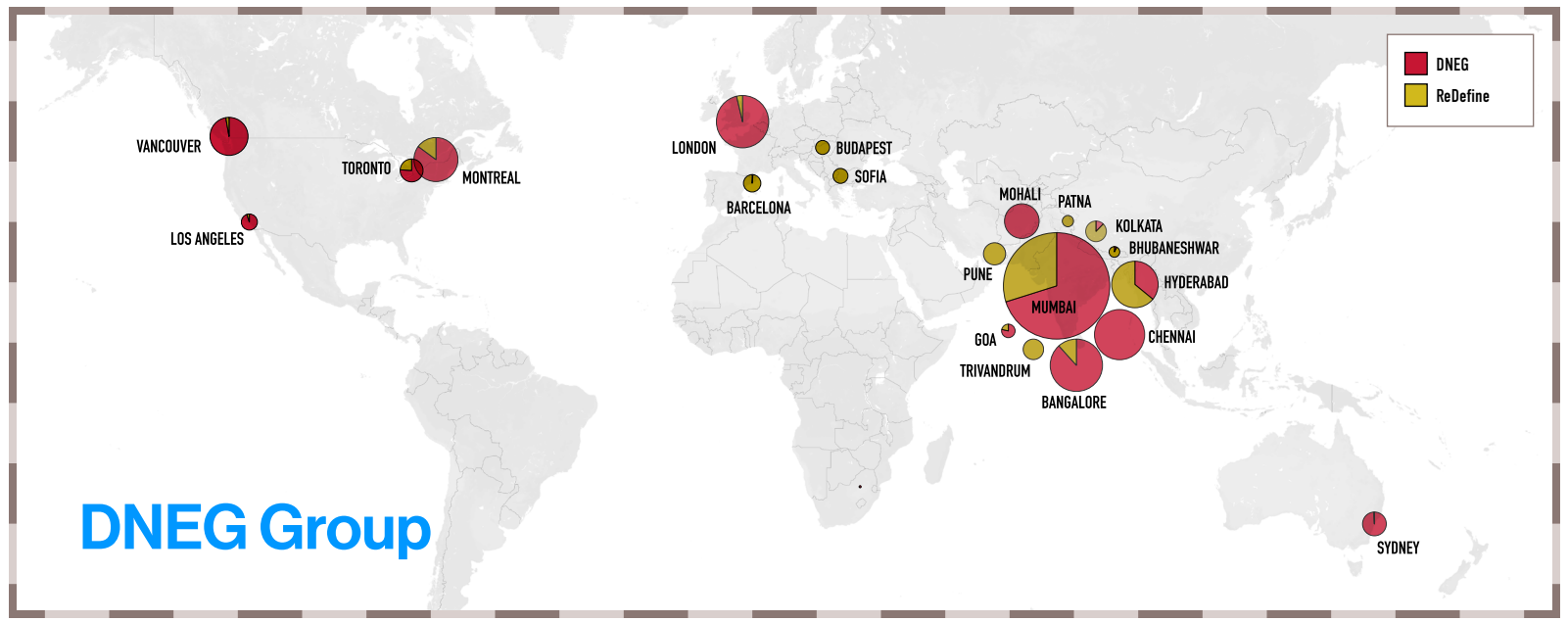
such a broad international presence that is not also part of a group of VFX companies. Historically headquartered in San Francisco, ILM operates major facilities in Vancouver, Mumbai, London and Sydney. **Framestore** – now a group that includes Method Studios and SDFX – has a particularly large facility in London.

In recent years, a handful of investment groups have built a global footprint by acquiring VFX studios in different parts of the world. **Pitch Black Group** (formerly Fuse Group) has a significant presence in four of the five regions covered by this atlas, with El Ranchito in Spain, Rising Sun Pictures in Australia, FOLKS VFX

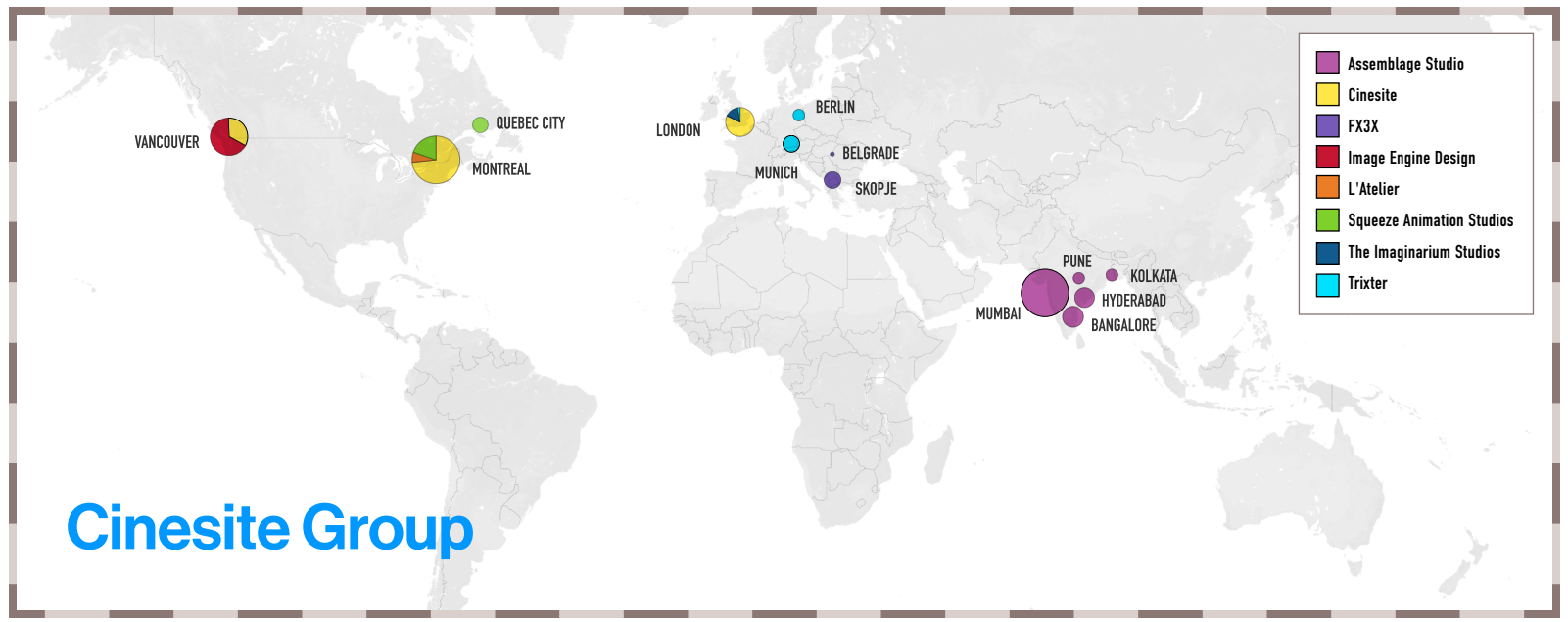
locations in Canada, India and Colombia, and FuseFX locations in the US and Canada. **Dream Machine** recently acquired Important Looking Pirates (ILP) and Cumulus VFX, significantly expanding their footprint, which previously included FIN VFX + Design (Australia and Asia), plus ZERO VFX and Mavericks VFX (North America).



VFX & Animation Groups



DNEG Group



Cinesite Group

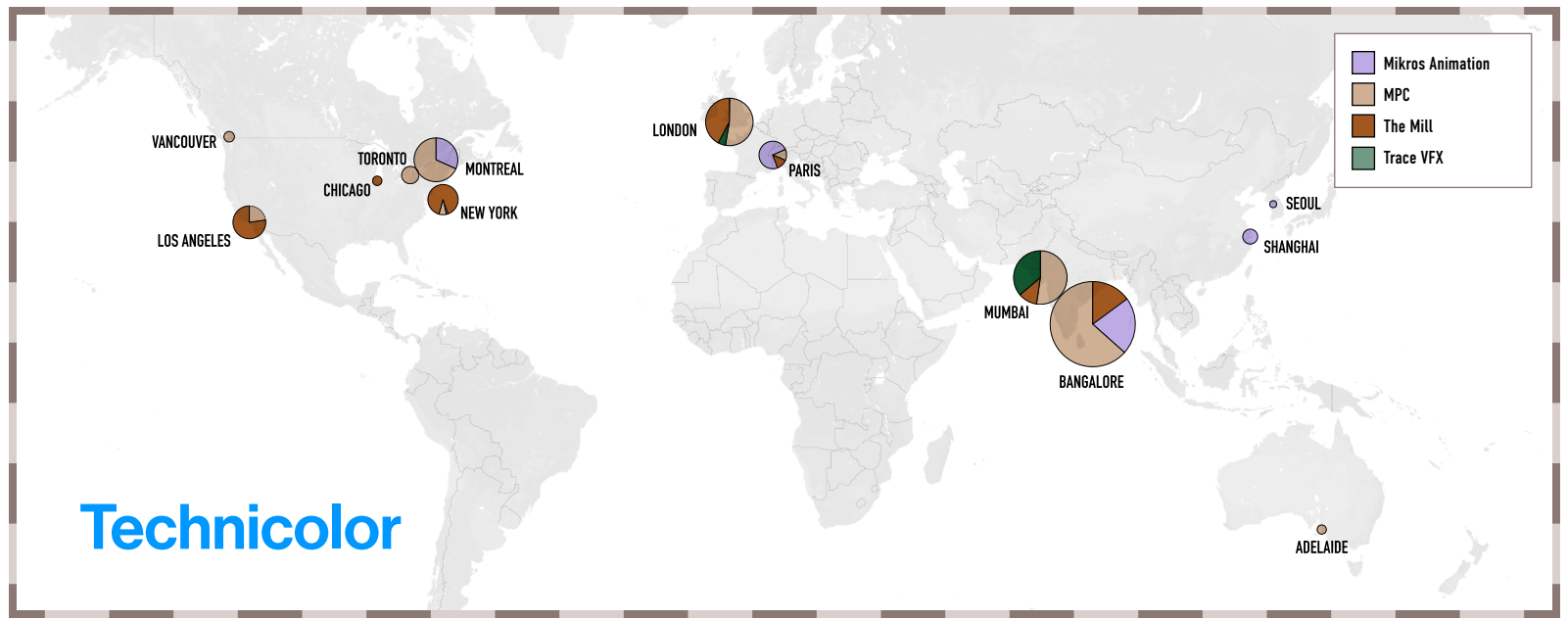
Animation studios are a key part of the global operations of VFX providers DNEG, Technicolor and Cinesite. These two pages are the only ones in the atlas that include companies working in animation who do not also work in VFX. **DNEG's** feature animation group sits under their DNEG brand, with ReDefine as their second VFX brand. Both

have a truly international footprint, with facilities in several Indian hubs, London, Montreal and Toronto. Redefine has additional locations in Europe, while DNEG has major studios in Vancouver and Sydney. DNEG is the largest employer in the VFX industry globally, and their Mumbai studio is likely the largest single VFX studio site in the world by headcount.

Technicolor owns animation studio Mikros Image alongside MPC, The Mill and Technicolor Games (the gaming division is not pictured on the maps).

Cinesite Group acquired L'Atelier Animation, Squeeze Animation Studios and Assemblage alongside their several VFX brands.

Finally, **Netflix** bought Animal Logic in 2022, adding feature animation as well as VFX capacity to their group, which also includes Scanline VFX and Eyeline Studios.



Technicolor



Netflix

The Future of VFX

If the maps in this atlas show just one thing, it's that visual effects has become a truly global industry – at least when it comes to the type of big budget Hollywood films and television shows that drive much of the spending on visual effects worldwide.

You need a large budget to employ a lot of people, and you need a large audience to justify a large budget. International clients with the biggest budgets for visual effects today -- streaming giants Netflix, Amazon and Apple, Hollywood studios like Disney and Warner Bros. -- are headquartered on the West Coast of the United States.

And yet 70% of the VFX professionals in this study live and work on different continents. The country with largest population of VFX professionals – India – is literally on the other side of the world to Hollywood. This may come as a surprise to some readers; for others, this is something they've known all along, perhaps without being sure of the numbers.

• • •

What explains this distribution of the global VFX workforce? Put simply, **visual effects work travels to where the level of quality required by the client can be delivered for the lowest cost.** We don't really need separate maps showing locations with biggest tax incentives and the lowest cost

for skilled visual effects labor – these maps of the global population of VFX professionals already show us where those places are.

More intensive interaction with clients has anchored certain types of visual effects work in Los Angeles and London -- previs and postvis, for example. Roles like VFX Supervisors and Production staff skew towards locations closer to end clients, from which they oversee and organize the work of artists located in other regions.

The maps also show us **there is no single best location for all projects and all kinds of visual effects work**, even if we just focus on Hollywood's output. Some countries offer bigger tax incentives for visual effects if filming also takes place there. Others set a cap on how much of a project's visual effects spend is eligible for rebates -- in which case clients may spend only enough in that region to reach the cap, and send the rest of the work elsewhere.

• • •

What does all this mean for VFX professionals planning their future in the industry, company leaders thinking about business strategy, policymakers looking to attract VFX work to their part of the world?

Firstly, **we need to pay close attention to changes in the tax incentives that attract visual effects work to regions where the cost of labor would otherwise make them less competitive.** Labor in Canada is far from being the lowest cost in the world.

Nevertheless, it is cost effective for Hollywood to send large volumes of visual effects work to Canada because of attractive incentives offered at both the federal level and by several Canadian provinces -- provided those incentives remain in place.

At the time of writing, we are seeing the impact of this play out dramatically in Quebec, where the government is introducing a new cap for how much of a project's visual effects spend qualifies for rebates. Recent changes in legislation in France and Australia have made rebates there more attractive to high budget international productions; the UK is working on the same. As things stand right now, we can expect this to result in less visual effects work going to Quebec, and more to France and Australia, in the near future.

• • •

The growth of the Canadian visual effects industry over the past 20 years also shows that **financial incentives can drive visual effects work to locations where the workforce needs to grow to meet demand.** Inexperienced workers become experienced workers over time. Experienced workers move to locations with plentiful work. Again, this is neither a surprise to many readers, nor a comment on whether it is a good thing or a bad thing – the maps simply show evidence that work travels and workers follow it.

The disruptive influence of AI and Machine Learning (ML) tools is likely to be felt first by companies and workers specializing in Rotoscoping, Matchmove, and Paint, tasks that rely on the type of complex pattern recognition capability at which AI/ML excels. These roles are heavily concentrated in India. The threat of disruption by AI/ML increases pressure on these

companies and workers to compete for more subjective, complex and creative work.

Last, but by no means least, **countries with stronger protections for VFX workers are likely to lose work to countries where workers have fewer protections.** Arguably, one of the best things we can do to make careers in VFX more sustainable worldwide is to advocate for colleagues in countries that have fewer protections. This will not prevent work from going to low cost geographies, but it could be a step towards a more balanced global industry with higher standards for Environmental, Social and Governance (ESG).

• • •

In 2023, employment in the Visual Effects industry was heavily impacted by a reduction in project commissioning by the major studios, as well as the WGA and SAG-AFTRA strikes in Hollywood. Many VFX people were unable to find work in their chosen profession for months. The effects of this slowdown are still very present in the second half of 2024.

On the bright side, **the challenges of the past few years have spurred several community-driven initiatives to strengthen the global VFX community.** ACCESS:VFX has been pursuing inclusion, diversity, awareness and opportunity in the industry since 2017. World VFX Day, and the VFX industry's response to the trend of downplaying the use of CGI in film marketing, were championed by Hayley Miller and Jonas Ussing. While they have gone on to receive widespread industry support, these initiatives show that each of us can play a role in making careers in VFX as inspiring as the work we produce.

How the Research was Done

This atlas is based on a study of 55,000+ visual effects professionals associated with 560 studios worldwide. The core data was gathered in June 2024.

SCOPE

The scope of this atlas is limited to vendor companies for whom the creation of visual effects is a significant part of their business. It does not include (1) companies working on computer animation or video game content that do not also work on visual effects, (2) educational and government institutions, or (3) client-side visual effects professionals at movie studios and production companies.

These limitations in scope are purely practical – to keep the size of the project manageable. Future editions will hopefully include more data on animation and gaming, as well as the client-side people who play such a critical role in the industry.

This atlas defines visual effects as the process of combining elements of motion picture imagery, sometimes with additional elements created with a computer. The intention is usually for the resulting imagery to appear seamless or “photoreal”.

COMPANY CATEGORIES

Companies were grouped into six categories for the study. The study looked at all employees at these companies, including those working in areas other than visual effects (e.g. feature animation, motion design, games, sound, color and business functions).

Commercials & Design	79 Companies
Live action VFX for commercials, creative and art direction, motion design	
Motion and Data Capture	3 Companies
Specialists in motion capture, scanning, and data capture	
Postproduction & VFX	63 Companies
Full range of postproduction services, including editorial, color, sound and visual effects	
Realtime & Virtual Production	13 Companies
Specialists in virtual production, AR/VR/XR and realtime 3D	
VFX	306 Companies
Specialists in photoreal VFX for live action film and TV productions	
VFX & Animation	96 Companies
Photoreal VFX for live action productions and fully 3D animated content	

SOURCES

The data used to create this atlas comes from public sources -- primarily online -- such as company websites and social media.

Companies mentioned in this atlas did not participate in the study, nor did they have an opportunity to review or validate the findings in this publication. Many would consider number of employees, as well as the size of departments and studio locations, proprietary information. Even if they would like to support a project such as this one in principle, concerns about business confidentiality would prevent most of them from sharing this information in practice.

A small number of public companies in the visual effects industry, along with trade commissions, government groups, and unions, provide valuable public data on specific regions. This is excellent for checking the broad validity of global data from other sources.

SAMPLE

As with any sample, the data is an imperfect representation of the larger population. That said, it is a very large sample, comprising around half of the population of visual effects professionals globally. The core dataset used for this atlas includes (1) job titles, (2) city in which the worker is located, and (3) company affiliation. This individual data was cross-referenced against (4) company locations and (5) types of projects produced by those companies.

DATA CLEANING

Location data and job titles were used to screen out irrelevant entries. Dormant social media profiles were removed. Ultimately, over 10,000 entries were screened out of the dataset to get to the 55,000+ entries used for the atlas. Job titles were used to categorize each entry into a department (corresponding to those commonly found at visual effects studios). Entries from suburbs of cities like Los Angeles, Vancouver and Mumbai were aggregated into a “hub” for each city.

LIMITATIONS

The data only “shows what it shows”. It says nothing explicit about e.g. economic drivers of the visual effects industry, the financial performance of visual effects companies, or the capabilities of companies and talent in different parts of the world.

The dramatic reduction in content commissioning by major Hollywood studios in 2023 left many visual effects professionals unemployed for an extended period. This data does not tell us whether people were working or not working at the time of the study (June 2024). Rather, it speaks to the global distribution of visual effects professionals and their skillsets.

We cannot assume that visual effects workers in all parts of the world use online services like social media as frequently, or in the same way. The study focused on English language websites, which are less commonly used in some countries than others. The data used by this atlas underestimates the number of visual effects professionals in countries where fewer workers maintain professional profiles on English language social media.

ADDITIONAL RESEARCH

Online research today cannot capture the scale of the domestic visual effects industry in certain countries. Some, Vietnam for example, have a significant number of visual effects workers. The practical limitations of producing this atlas are not intended in any way to dismiss or ignore visual effects workers in these countries.

In the case of Vietnam, a local researcher who speaks Vietnamese was hired to gather a list of visual effects companies, their locations, and estimates of headcount. Data for Vietnam was gathered in a fundamentally different way to other countries. The atlas would be missing a major emerging market for visual effects without including this data.

Companies in the Study

22 Dogs 257 Studio 2BIG Production 3D Maximal 3D Services India 4th Creative Party 5Elements Entertainment A52 Artifex Aaron Sims Creative Absolute AB VFX ACHT Adnet Global AfterZ VFX Studio AIOI Studios Ajax VFX Alchemy 24 Alien VFX Studio Alive VFX Alkemy X Alps Studios Alt.vfx Altered FX Alzahra Studio AniBrain Animal Logic AnimationsFabrik Animost Studio Antares Image Aria Animation Studio Ares Studio AronFX Arsenal FX Color Artisan Media Solutions ASOO VFX / Animation Assembly Atomic Arts Automatik VFX Autrechose BadClay Studio Bait Studio Barnstorm VFX Base FX Basilic Fly Bazeto Visual Effects beloFX benuts beEpic Gmbh BigHugFX Black Kite Studios Black Sail Pictures Blacksmith VFX Blackstone Studio VFX Blank Negatives Bleed VFX Blend Flux Studios Bliss Interactive Blockhead VFX Blue Blaze Studios Bluebolt BlueR Blur Studio Bonjour Boss VFX Studio BOT VFX Bottleship VFX Boxel Studio Brainstorm Digital Brand New School Brickyard VFX Bubble Creations Digital Studios Buf Compagnie Bunker NZ Bunker Visual Effects C2C VFX Studio Cantina Creative Capraplanet Capsule VFX Carbon Cause and FX Celluloid VFX Gmbh CGEVVFX CGS 3D Visual Effects Charuvi Design Labs Pvt. Ltd Chaya Pictures Co Ltd Checkpoint VFX Chicken Bone FX Studios Chocolate Tribe Chop Shop Post Chromatica Cinesite Cinetism Citystate Studio CONTROL Studio CoSA VFX Cosmic Vision Studio Cousin Bizarre Covert Crafty Apes Crave FX Creative Outpost Creative Splash Cumulus VFX Cutting Edge D-Facto Motion GmbH Dare Planet VFX & Animation Studio Dark Army Studio Dark Slope Dash Dot Creations Day for Nite Daydreamer DELI Creative Dexter VFX Digikore Studios Digital District Digital Domain Digital Frontier Digital Frontier FX Digital Magic Effect House Co Digital Storm Pictures DigitalFilm Tree Digiteyes Dimension Studio Dinamita Post Distillery VFX DNEG Do it Creative DRAWIZ Dsquare VFX Dupe VFX EDISEN Effetti Digitali Italiani (EDI) EFX Magic Egg Post Production and VFX Eisko El Ranchito Electric Theatre Collective Entropy Studio Envision VFX Envy Evil Eye Pictures Excuse My French VFX Eycline Studios Famous House of Artists Famulus Media FatBelly VFX Fatcat VFX Feather VFX Studio Fin Design + Effects Final Pixel Firebrand VFX Fix Studio VFX fixFX Floating Rock Studio Flow Effects FluidMask Folks VFX Fort York VFX Fotokem Fourth Dimension Visual Effects Fractal Picture Frame By Frame Frame Founder Frame X VFX Studio Framestore Freefolk Fullscreen FuseFX Future Associate FutureDeluxe FutureWorks Media FX3X GarageVFX Gelarograce Studio Ghost VFX Giantstep Glassworks VFX Global Visual FX Gneiss Stuff VFX Goodbye Kansas Graphic Monk Productions Gratiaverse Griot Groove Gulliver Studios Haika Studios HaloHues Studios Halon Entertainment Harbor Picture Company Hecate Studio Heckler Herne Hill Hocus Pocus Studio Hoop VFX Horseman FX Host VFX HotSpring House of Parliament Hybride VFX HypnoticVFX Identical Brains iGene IIW Studio Ikweta Arts Illusorium Studios Image Engine Design Imagica Entertainment Services Inc IMAGICA Lab, Inc Imaginary Forces Imaginarypower Inc Important Looking Pirates Industrial Light & Magic (ILM) Infinite Studios Ingenuity Studios inHouse VFX JAMM JAMVFX Jellyfish Pictures Juice JustVFX Studios Kaizen Studios Keep Me Posted Kevin VFX Khaki Inc. Knack Studios Koala FX Kojo La Planete Rouge Labyrinth Cinematic Solutions Lacus Post Lamppost VFX LAPOST Laposta VFX LAUNDRY LAVA Labs Le Canard à trois pattes Leons Digital Technologies Les Tontons Truqueurs Lexhag Leyenda Studios Lia Film Lights & Shadows Light Visual Effects Lighthouse Image Works Lighthouse Visual Effects Lights & Shadows Pte Ltd Lipsync Post Little Black Star VFX LOCUS VFX Studio Lola Visual Effects Lorem Studios Morocco Lore VFX LTHS Studio Luma Animation Luma Pictures Lumatic Animation & VFX GmbH Lux Aeterna VFX Luxa Studio Lzrd Tunisia M74 Post M83 Studio Mac Guff Mackevision Magic Dust VFX Magic Lume CG Magic Media VFX Magnopus Majestic VFX Makuta VFX Mammal Studios Mamuth Studio Marlen Studios MAS effects Masters of Reality Mathematic Studio Matte Entertainment Media Mavericks VFX MDK Digital Pictures Ltd Megalis VFX Mercury Visual Solutions Method & Madness MeshFX Meta VFX Creations Method Studios Midas VFX Midnight VFX (Athens) Midnight VFX (Capetown) Melies Miind Map Studios Milk Visual Effects Mindstein Studios Minimo VFX Mirada Studios MIST VFX Studio ModelFarm ModelingCafe Inc. Molecule VFX Moment Factory Monkeys Monsters Aliens Robots Zombies Moonraker VFX Mopart More VFX MPC Mr Wolf Muse VFX Myriad Studios Myth VFX N-DESIGN Inc Nebraska VFX NEWPOT Pictures Inc NEXODUS Cooperative Nice Shoes No. 8 Noise NOX VFX Ntropic Nube Studio / Nube Cirrus Nxgen Media NY VFXWAALA Oceanus Media Global OHUfx Ollin VFX OMNIBUS JAPAN INC One Life VFX One of Us Oner VFX Onesal Opim Digital Opsi Orange VFX Studios Orca Studios Original Force Oscar FX Outlanders VFX Outpost VFX Outside the Club Painting Practice Palantir Digital Paperboat Design Studios Pariah VFX Park Road Post Production Perception Periscope Post and Audio PFX Phantom FX PHAROS - The Post Group philm CGI Phosphene Picture Shop Pix Rock VFX Pixel D Post Pvt. Ltd. Pixel Frames VFX Studios Pixel Magic Pixelloid Studio Pvt Ltd Pixl Visual Effects Pixomondo PixStone Images Platform Post Production Platige Image Player Two Polycat Visual Effects Pty Ltd Postmodern Poston Digital Arts Powerhouse VFX Prep Point Studio Preymaker Primary Visual Effects Proof Inc Proxima Milano Psyop R2VFX Studios RADFX Media Services Rainstorm Film Rare Reverse Raynault VFX Realtime UK ReDefine Reepost Refuge VFX Resin Resonance Digital Rhinestonervfx Riddlemonk Studios Rise Visual Effects Studios Rising Sun Pictures Rocket Science VFX Rodeo FX rohtau ROSEN Visual FX Rotomaker Studio Rotor Studios RPM VFX Studios RSTFXstudio Rumble VFX Run-Hun,Sha SANCIO VFX Studios Sarofsky Scanline VFX SDFX Sehsucht Select VFX Studios Selected Works Serena Sharp Image Shepherd VFX Sinking Ship Entertainment Skyfall VFX Studio Slate VFX Smoke & Mirrors Soho VFX Sony Pictures Imageworks SPACE Film & VFX Space Office VFX Spade&Co. Spark VFX Studios Spectrum Films International Spellbound VFX Spellwork Spice Media Spin VFX Spring Production Squids VFX SSVFX Stage 23 STAMPEDE Stargate Studios Stiller Studios Storm Studios VFX Stormborn Studios Studio 51 Studio Blackbird Studio Ulu südlich-t SupernovaFX Studios SUZA VFX Synapse Studio T.A.M. Productions TAJ Media Tau Films Tau Pictures Televisor Temprimental VFX Tendril Studio Terminal FX Terminus Territory Studio The Embassy The Flying Colour Company The Imaginarium Studios The Last VFX The M.A.R.K.13™ - Group The Mill The Monk Studio The Refinery The Seed The Third Floor The White Rabbit Entertainment The Yard Theory Studios Time Based Arts Timeaxis VFX TME FX Tomogram Studio Toolbox Studio TPO VFX Trace VFX TREE Digital Studio Inc Trend VFX Trimaran VFX Trinix Studio Vietnam Trixter Twilight Post UFX Ultra Digital Studio Union Visual Effects Unit Image Unplug Infinity Untold Studios UPP VA Studio Vantage Pictures VAST Verve Digital Technologies Verve VFX Studio VFX Legion VFX Pick VHQ Media Vine FX Viridian FX Visual Birds Studio Visual Creatures Vitality Visual Effects VIVE Studios We Are Royale WeFX WetaFX What'zhat Agency Whiskytree White FX Studio Whitecat VFX Studio Wild Visual Effects Pvt Ltd Windmill Lane Wonderlab VFX Worldwide FX WOT Studios Wysiwyg Studios Wunderkint Wylie Co. VFX X3D Studio Xhabition XON Studios XTRIMSTUDIO XYZ Yafka Yannix yFX Studios Private Limited Yggdrazil Group Public Co Ltd Yu+Co Yuchi VFX Zealous Studios Zero Gravity VFX Zero VFX Zoic Studios 无限光子 诺华视创

Special Thanks

The Visual Effects World Atlas 2024, accompanying website, and many of the marketing materials were all designed by my wife **Catherine Bell**, who has invested innumerable hours into the VFX industry over the years. If you find creative notes from a client annoying, try taking them from your spouse.

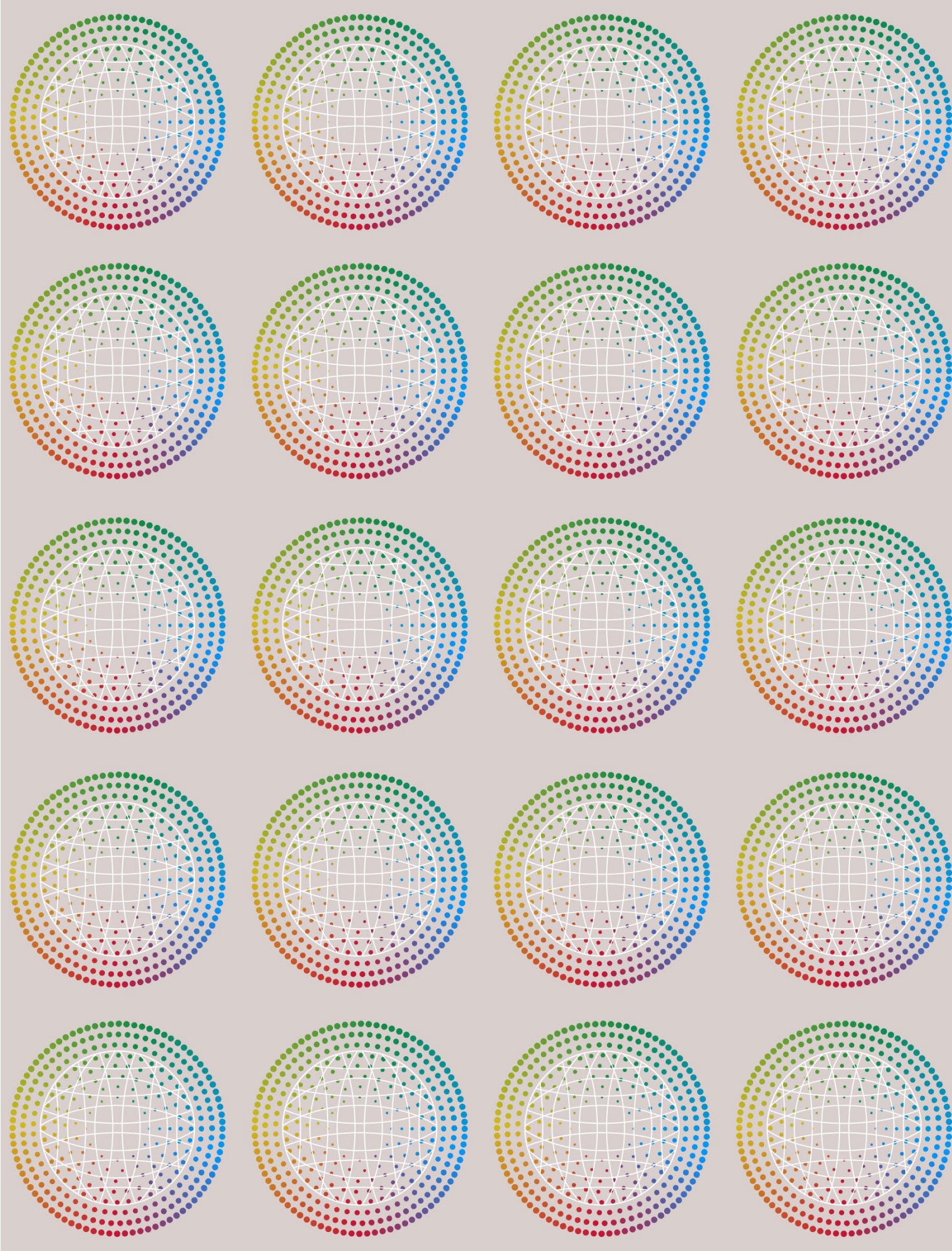
Coverage of India and Vietnam benefitted immensely from research in those countries by **Sneha Sharma** – who also worked on the global dataset for the atlas – and **Ngân Phan**. Research by **Wenhui (Cara) Du** allowed us to start putting VFX studios in China on the map. **Dédy Bllamba** and **Eric M'boua** of AfroVFX provided key insights for our coverage of the African continent. **Marcus Wells** was key to our coverage of Australia and New Zealand. **Neil Hatton** of the UK Screen Alliance contributed both an assessment of the UK coverage, and invaluable feedback on the project as a whole. Coverage of France benefitted greatly from the support of **Yann Marchet**. **Phil Pham** provided key contacts and data for East and Southeast Asia region, including his home base of Singapore. **Juck Somsaman**,

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The atlas was conceived from the start as a free resource for the global VFX community. Producing both a study and a publication of this quality was not free, however. Sponsorship helped us to cover part of those costs. Once again, thank you to **FranceVFX, AWS, Digikore Visual Effects, IMT Global, DAX** and **Hype** for supporting the project.

Last, but not least, the **global VFX community on LinkedIn** has been a constant source of encouragement, feedback and support throughout this project.



Where VFX Happens.

UK and EMEA

East and Southeast Asia

India

Australia and New Zealand

Americas

55,000+
Visual Effects
professionals.

560
Visual Effects
companies.

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- The world's largest VFX hubs and VFX studios
- Global distribution of VFX skillsets
- Emerging markets like Vietnam and Africa
- Remote work in the VFX industry



About the Author

Joseph Bell is a unique voice in visual effects, combining 20 years of hands-on experience at some of the most respected studios in the field – including Industrial Light & Magic, The Mill and FuseFX – with a global view of industry trends and business dynamics.

In addition to leadership roles at visual effects studios, Joseph provides specialized Management Consulting services to investors looking into the industry, and VFX studios engaged in strategic growth and M&A, through his consulting business **HDRI Consulting**.

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