Economic and Skills Analysis of the Audiovisual Sector in the Republic of Ireland

Commissioned by Fís Éireann/Screen Ireland **January 2025**

alma economics

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Glossary

Abbreviation/Term	Definition
AI	Artificial Intelligence
AR	Augmented Reality
ATL	Above-the-line
BAFTA	British Academy Film Awards
BCFE	Ballyfermot College of Further Education
BFI	The British Film Institute
BTL	Below-the-line
CMAI	Creative Media Academy Ireland
CPI	Commercial Producers Ireland
CRO	Companies Registration Office
TCAGSM	Tourism, Culture, Arts, Gaeltacht, Sport and Media (department)
DCU	Dublin City University
Digital production and development	This segment includes the following subsectors: VFX, post-production, digital games and VR/AR.
DOP	Director of photography
EDI	Equality, diversity, and inclusion
FTE	Full-time equivalent
GVA	Gross value added
HETV	High-end television
HOD	Head of department
IADT	Institute of Arts, Design and Technology
IFI	Irish Film Institute
IP	Intellectual property
NAPF	Nationwide Additional Production Fund
NTA	National Talent Academy
NZFC	New Zealand Film Commission

POV	Point of View (scheme)
QA	Quality Assurance
RTÉ	Raidió Teilifís Éireann
S481	Section 481
TG4	Teilifís na Gaeilge
TUS	Technological University of Shannon
TUD	Technological University of Dublin
UKGF	UK Games Fund
VOD	Video on Demand
VFX	Visual effects
VR	Virtual Reality
WRAP	Western Region Audiovisual Producers

Executive summary

Background and scope of this review

This report evaluates the economic impact and skills landscape of Ireland's audiovisual sector from 2021 to 2023. Commissioned by Fís Éireann/Screen Ireland, the national agency supporting Ireland's film, television, animation, documentary, and digital game industries, this report aims to inform strategy creation for Ireland's audiovisual sector. The scope of this report includes:

- **Economic impact assessment:** Providing estimates of the sector's current size and economic contribution, including estimates of full-time equivalent (FTE) employment, gross value added (GVA), and labour compensation across live action production, animation, digital production and development (including VFX, post-production, digital games and VR/AR), distribution and publishing, and transmission and exhibition.
- **Skills review:** Reviewing skills requirements within the audiovisual sector to identify gaps and opportunities for workforce development, with a particular focus on nationwide development, equality, diversity, and inclusion (EDI), environmental sustainability, and the integration of new technologies and generations.

This comprehensive analysis will support Screen Ireland's mission to foster innovative storytelling, invest in talent, reach global audiences, develop the industry sustainably, and maintain organisational excellence.

Research approach

The research approach for this comprehensive assessment of Ireland's audiovisual sector involved several stages, integrating desk-based research, economic modelling, and extensive primary research to gather insights from key stakeholders throughout the audiovisual sector. This work included:

Phase 1: Desk-Based Review and Initial Scoping

- Conducted a comprehensive desk review of relevant documents and past research.
- Held scoping interviews with representatives from Screen Ireland to build foundational insights for the primary research phase.

Phase 2: Primary Research

- Conducted online interviews with 66 stakeholders from various parts of the sector.
- Organised regional workshop and focus groups to gather diverse perspectives.
- Administered two surveys, gathering responses from:
    - 269 companies within the sector.
    - 290 professionals working in audiovisual roles.

Phase 3: Data Analysis and Economic Modelling

- Performed statistical and thematic analyses of the collected data.
- Developed an economic model to estimate direct, indirect, and induced impacts, utilising data from 2021 to 2023.
- Analysed contributions at both the subsector and regional levels to provide a nuanced understanding of the audiovisual industry’s economic impact.

The economic impact of Ireland's audiovisual sector

Estimates of economic impact have been derived for key audiovisual subsectors

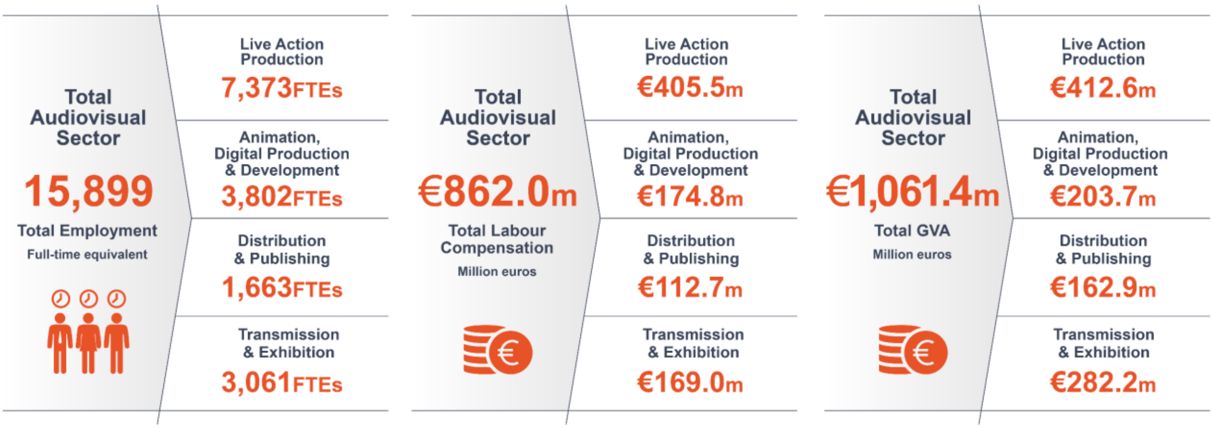
This research has combined available data with best practice economic modelling techniques to estimate the economic impact of the audiovisual sector for the years 2021 to 2023, providing estimates of employment levels and economic output generated from key subsectors. This work aligns with an economic impact assessment by Olsberg SPI and Nordicity in 2017, although it is not directly comparable due to differences in the methodological approach and changes in the scope of audiovisual subsectors covered.[1,2]

The audiovisual sector is a key contributor to employment and economic impact in Ireland

The audiovisual sector is a key contributor to employment and economic impact in Ireland. The analysis highlights the contribution of the audiovisual sector to the Irish economy, distinguishing between direct impacts (arising directly from sectoral activities) and total impacts (which include indirect and induced effects). Between 2021 and 2023, the sector supported 10,450 FTEs directly and 15,899 FTEs in total, highlighting its significant role across the economy. The audiovisual sector generated €594.8 million in direct labour compensation and €862.0 million in total labour compensation, contributing €522.6 million in direct GVA and €1,061.4 million in total GVA annually.

Live action production emerged as the largest contributor, supporting 4,716 FTEs directly and 7,373 FTEs in total, while generating €280.0 million in direct labour compensation and €405.5 million in total labour compensation. It contributed €159.0 million in direct GVA and €412.6 million in total GVA annually. This segment benefited significantly from the Section 481 tax incentive, with 65% of live action production spend (including animation) being eligible for this scheme.

Figure 1. Average total economic impact of the audiovisual sector, ø 2021-2023



Source: Alma Economics infographic. See individual report sections for detailed information on data sources.

[1] Economic Analysis of the Audiovisual Sector in the Republic of Ireland (Olsberg SPI & Nordicity, 2017). See: https://www.screenireland.ie/images/uploads/general/Olsberg_Report.pdf

[2] Key differences compared to the previous work included the exclusive focus on the audiovisual sector (excluding radio) and the provision of separate estimates for the television (scripted and unscripted), documentaries, animation, and film subsectors, along with the incorporation of VR/AR as an emerging area.

The audiovisual sector contributes to a range of positive economic and cultural spillovers

The Irish audiovisual sector makes a vast cultural contribution, extending far beyond direct economic benefits or ancillary spillovers. While this work focuses primarily on the sector's economic and skills assessment, it is important to acknowledge its significant role in promoting Irish language, identity, and values through storytelling on screen. Moreover, the depiction of Irish settings, talent, and culture on screen has notably enhanced the country's appeal as a tourist destination in recent years, exemplified by the surge in visitors to filming locations such as the West Irish Isles of Achill Island and Inishmore, showcased in the film *Banshees of Inisherin*. The audiovisual sectors are also a strong generator of cultural value, promoting the Irish language, identity, and values through the telling of stories on screen.

There is evidence that economic impact is not evenly distributed across Ireland's regions

The study also assessed regional impacts and broader effects of Ireland's audiovisual sector. While Dublin and Wicklow remained the main production hubs, initiatives like Screen Ireland's Nationwide Additional Production Fund (NAPF), the phased out regional uplift of Section 481 and the WRAP Fund, which supports productions in the Western Region, have spurred contributions from other areas. These efforts encouraged productions to explore locations beyond traditional centres, fostering economic growth throughout Ireland, though out of the Section 481 supported productions, only 18% (average 2021-2023) were eligible for the regional uplift. As the regional uplift's impact gradually declined before it phased out in 2024, Screen Ireland boosted NAPF funding to €3.9 million in 2024, supporting 18 new regional productions, a 50% increase in funding from 2023. Notably, the distribution and publishing segments showed greater regional dispersion, while digital production also exhibited some geographical spread, with 23% of employees located outside the main hubs.

The current state of skills in Ireland's audiovisual sector

The skills analysis of Ireland's audiovisual sector revealed a multifaceted landscape characterised by strengths, and opportunity areas for growth.

Ireland's audiovisual sector has a well-qualified, rapidly growing workforce, underpinned by effective training initiatives

Presently, Ireland's audiovisual landscape is characterised by a sizeable sector workforce that is well qualified to satisfy the crew requirements of various production types and sizes. The strengths of the sector workforce extend to key technical, below-the-line (BTL) roles on live action production, alongside above-the-line (ATL) talent. There is also a rapidly growing crew base in digital production – particularly in animation, visual effects (VFX), and increasingly in digital games.

Ireland's audiovisual sector workforce is supported by various national and regional initiatives for training and skills development. Efforts by Screen Ireland and the Screen Ireland funded National Talent and Crew Academies (NTAs) are particularly well regarded by sector stakeholders, who believe that the training offered by such programmes is relevant to their work and has been effective in bridging skills gaps and building an industry-ready workforce. Nevertheless, research revealed some gaps and limitations in the sector workforce.

The demand for talent: shortages in senior roles across production departments

Currently, departments facing skills shortages and demand in live action production, were in the production management, development and post-production departments. Importantly, in terms of seniority levels, skills gaps were found in key head of department (HOD) roles across departments, indicating shortages at senior levels. Critical skill gaps were identified in specialised roles, such as production accounting and editing, as well as a strong need for creative talent, particularly writers and directors experienced in Irish language production. The demand for technical roles was coupled with a need for multi-skilled professionals who can navigate various production types, highlighting the importance of versatility in the workforce.

There is increasing demand for a combination of technical and general skills

Stakeholders also identified key skills development areas that they felt were important to address learning priorities. These areas included business management, accounting, marketing and promotion, among other more technical areas. The integration of data analytics and artificial intelligence (AI) into content creation further underscored the necessity for ongoing professional development to keep pace with technological advancements. Soft skills such as communication, teamwork, and adaptability were identified as crucial competencies necessary for success in an industry characterised by project-based work and rapid change. Increasingly, stakeholders noted the need for increased skills development opportunities in the regions, outside sector hubs of Dublin and Wicklow.

More progress can be made in promoting EDI within the workforce in the audiovisual sector

The research showed the importance of promoting EDI within the sector. Despite some progress in improving gender parity in the sector, the research showed a need for EDI measures to address people from across all protected characteristics and socio-economic backgrounds equitably (detailed further in the skills analysis of the report). A diverse workforce was seen as essential for enriching storytelling and ensuring that a broad range of voices is represented in creative outputs.

Building careers through targeted training initiatives

The research showed the need for targeted training initiatives to address identified skill gaps and foster a culture of continuous learning and professional growth. The need for such interventions was particularly underscored for regional areas, falling outside the sector hubs of Dublin and Wicklow. Collaboration between educational institutions, industry bodies, and policymakers was highlighted as essential to aligning training programs with the sector's evolving needs, alongside targeted bridging programmes to address critical gaps and shortages. By addressing both immediate skill requirements, building sustainable career pathways, and improving sector retention, the findings emphasised that the audiovisual sector could establish a more resilient workforce capable of competing successfully on a global scale.

Towards a sustainable workforce: supporting careers through targeted retention initiatives

The analysis revealed a pressing need to create supportive environments to sustain careers and improve retention within the audiovisual production sector. Crucially, the research indicated a need for work continuity, in the sector hubs and in regions outside these hubs, to help workers remain in the sector. The key skills gaps identified in HOD roles also indicate a need for healthier pipelines of work so crew may be able to progress to senior roles and so that the Irish audiovisual sector may be able to retain its workforce.

Introduction

Project background

Fís Éireann/Screen Ireland is the national agency dedicated to supporting and nurturing the film, television drama, animation, documentary, and digital game industries in Ireland. As a vital creative partner, Screen Ireland invests in talent, fosters creativity, and promotes enterprise across these sectors. The agency provides comprehensive funding support throughout all stages of production, from development to distribution and skills development. This ensures that filmmakers receive the necessary backing to bring their artistic, cultural, and commercial stories to the screen. Driven by a passion for original storytelling, Screen Ireland aims to engage audiences both domestically and internationally.

Operating under the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media (TCAGSM), Screen Ireland has significantly contributed to the growth of Ireland's audiovisual sector. The country's tax incentives, such as Section 481, have attracted international productions and bolstered local talent and infrastructure. Screen Ireland plays a crucial role in financing Irish films, documentaries, animation and TV shows at international festivals and markets, enhancing the global profile of Irish creative works. The agency collaborates with educational institutions and industry bodies to develop training programs that equip emerging talent with the necessary skills to thrive in the industry, ensuring the continued success of Ireland's vibrant audiovisual landscape.

The agency's previous corporate strategy, titled *Building for a Creative Future*, outlines Screen Ireland's mission, vision, and core values.[3] This strategy reflects the agency's commitment to fostering a thriving audiovisual sector in Ireland and is based on the following five objectives:

- **Innovative and Creative Storytelling:** Develop a global reputation for excellence in innovative and creative storytelling across all genres and formats.
- **Talent and Skills Investment:** Invest in the talent and skills necessary for the industry's future success, with a focus on capacity development that prioritises EDI.
- **Global Audience Reach:** Create opportunities for global audiences to enjoy culturally rich Irish screen stories through strategic partnerships.
- **Industry Development:** Champion national and sustainable industry development by supporting Irish companies, maintaining a competitive fiscal environment, and expanding the workforce.
- **Organisational Excellence:** Ensure Screen Ireland is well-resourced, agile, and sustainable to effectively support the ambitious vision for the creative screen industry.

Aim of this report

Alma Economics was commissioned by Screen Ireland to conduct a comprehensive assessment of the audiovisual sector in the Republic of Ireland. The aim of this report is to assess the economic impact and skills landscape of the audiovisual sector:

[3] Building for a Creative Future 2024 (Fís Éireann / Screen Ireland, 2024). See: https://www.screenireland.ie/images/uploads/general/Building_for_a_Creative_Future_2024.pdf

1. **Economic Impact Assessment**: This section evaluated and mapped the scale and economic contribution of the audiovisual sector in Ireland, calculating GVA, FTE employment, and labour compensation across 15 subsectors within four segments: 1) live action production, 2) animation, digital production and development, 3) distribution and publishing, and 4) transmission and exhibition. The analysis not only showcased the economic impact of these segments but also delved into regional contributions beyond Dublin and Wicklow. Furthermore, it assessed other impacts of the sector, including its role in driving tourism and enhancing cultural value in Ireland. By triangulating data from diverse sources, this analysis aimed to provide comprehensive economic insights that will inform future strategies and investments in the nation's audiovisual industry.
2. **Skills Analysis**: This section analysed the current skills landscape within the audiovisual sector, identifying existing educational provisions and conducting a comprehensive skills gap analysis. Understanding the skills and development needs of the Irish audiovisual sector is essential for fostering growth and innovation, making this analysis a vital update since Screen Ireland's last comprehensive assessment in 2020. Using a mixed-methods approach that includes individual and business-level surveys, stakeholder interviews, and desk-based research, the analysis focused on critical areas such as promoting EDI, environmental sustainability, and the integration of new technologies. By mapping current training provisions and identifying skills gaps, this report aimed to highlight opportunities for career development and retention, ultimately ensuring the industry is equipped with a diverse and skilled workforce capable of meeting future demands.

Research approach

The research approach for this comprehensive assessment of Ireland's audiovisual sector consisted of several stages, combining desk-based research and economic modelling with extensive primary research to gather insights from key stakeholders across the audiovisual ecosystem.

Phase 1: Scoping and Data Collection

A comprehensive desk-based review of relevant documents, previous research and data was conducted as part of the initial scoping research. This included an examination of reports and data from Screen Ireland, TCAGSM department, and various industry associations. Financial statements, previous economic impact assessments, and other pertinent sources were also reviewed. Scoping interviews were held with individuals from Screen Ireland, including both core staff and a group interview with members of the skills team, to enhance understanding before commencing primary research.

Phase 2: Primary Research

Building on the scoping phase, a range of primary research activities were undertaken to capture insights into the economic activities and impacts of the audiovisual sector:

- **Stakeholder interviews:** A total of 66 stakeholders were engaged through online interviews, including representatives from companies operating in the audiovisual sector, industry trade bodies, audiovisual sector guilds, sector experts, skills organisations, film festivals, studios, distributors, broadcasters, the TCAGSM department and regulators.

- **Workshops and Focus Groups:**
  - A workshop was held in Galway with 13 stakeholders.
  - A horizon scan workshop in Dublin brought together 17 sector stakeholders and members from Screen Ireland.
  - A focus group conducted in Dublin with Screen Producers Ireland included 10 participants.
- **Industry Surveys**: Two comprehensive surveys were designed and distributed with the help of Screen Ireland and industry associations:
  - A business-level survey that focused on gathering economic impact data and insights on skills received 269 responses from companies across the audiovisual sector.
  - An individual-level survey focused on skills that gathered 290 responses from professionals working in the industry.

Phase 3: Economic modelling and analysis

Following the primary research, a detailed analysis of the collected data was performed:

- **Data Analysis and Triangulation:** Statistical analysis of quantitative survey results, as well as thematic analysis of interview transcripts and open-ended survey questions were conducted. Information from various sources, including surveys, interviews, and existing research, was cross-referenced to ensure accuracy and reliability in findings.
- **Economic Modelling:** An economic model was developed to estimate the direct, indirect, and induced economic impacts across the sector. This model incorporated data from multiple years (2021-2023) to mitigate the impact of year-to-year fluctuations caused by large-scale productions or external factors like the COVID-19 pandemic or the writers' and actors' strikes. The economic impact analysis was conducted not only for the entire sector but also included detailed subsector and regional analyses to provide a more nuanced understanding of the audiovisual industry's contributions.

This comprehensive approach aimed to provide valuable insights into the current landscape of Ireland's audiovisual sector while highlighting its broader economic impacts. All findings and insights are detailed in subsequent sections of this report.

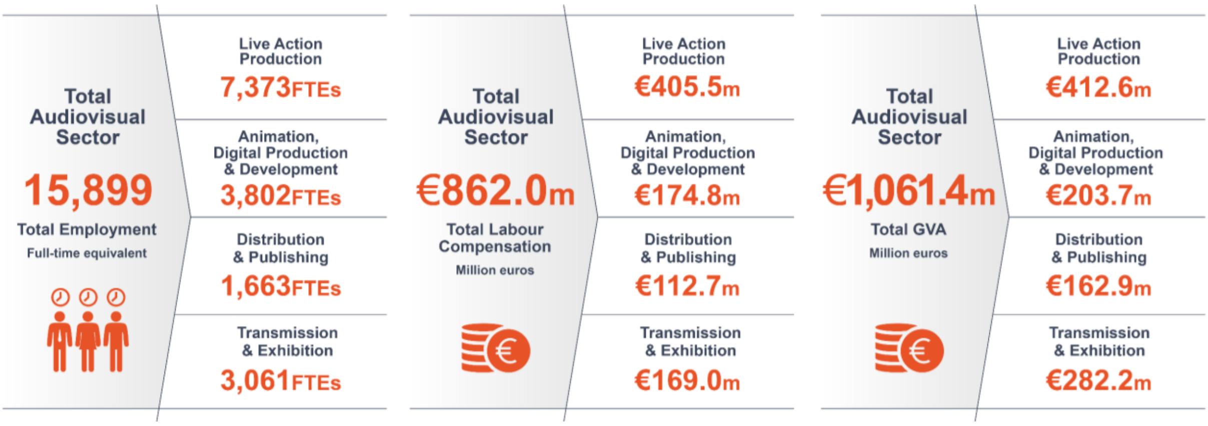
Economic impact assessment

Summary of findings

The economic impact assessment of Ireland's audiovisual sector for the years 2021 to 2023 provides a comprehensive overview of its scale and significance. The analysis focused on key metrics such as FTE employment, GVA, and labour compensation, capturing the sector's direct, indirect, and induced contributions to the Irish economy.

The Irish audiovisual sector has grown significantly, reflecting global trends, and shown resilience despite disruptions like the COVID-19 pandemic, inflation, and the 2023 writers' and actors' strike. The sector's expansion has been influenced by volatility, but post-pandemic recovery and fiscal incentives have driven growth. Key drivers include changing consumer behaviours, technological advancements, rising global competition, and legislative developments. These factors are reshaping the industry, making adaptability and resilience vital for continued growth.

Figure 2. Average total economic impact of the audiovisual sector, ø 2021-2023



Source: Alma Economics infographic. See individual report sections for detailed information on data sources.

The **total economic impact** of the audiovisual sector, averaging data from 2021 to 2023, demonstrates the broader contributions of the industry to the Irish economy. This includes not only the direct effects of activities within the sector but also the **indirect and induced effects**, such as supply chain impacts and the wider spending of wages. This total impact reflects the cumulative economic footprint of the sector, going beyond direct contributions to include the ripple effects throughout the economy. The sector **supported approximately 15,899 FTEs**, generated around **€862 million** in labour compensation, and achieved a total **GVA of €1.061 billion**, underlining its pivotal role in Ireland's economic landscape.

Key findings on **total impacts** across the four main segments of the value chain include:

- **Live Action Production**: This segment contributed to **7,373 FTEs, €405.5 million** in labour compensation, and **€412.6 million** in total GVA.
- **Animation, Digital Production and Development**: Encompassing animation, VFX, post-production, digital games, and VR/AR, this segment accounted for **3,802 FTEs**, generated approximately **€174.8 million** in labour compensation, and produced a total GVA of around **€203.7 million**.
- **Distribution and Publishing**: This segment employed **1,663 FTEs**, contributed roughly **€112.7 million** in labour compensation, and achieved a total GVA of about **€162.9 million**.

- **Transmission and Exhibition**: Covering TV broadcasting, cinema exhibition, and VOD, this segment supported **3,061 FTEs**, generated approximately **€169.0 million** in labour compensation, and resulted in a total GVA of **€282.2 million**.

The direct economic impact of the audiovisual sector, averaging data from 2021 to 2023, highlights the portion of the sector's contribution that can be attributed to direct effects, as distinct from total economic impacts. The sector **directly supported 10,450 FTEs**, generated **€594.8 million** in direct labour compensation, and contributed **€522.6 million** in direct GVA. These figures focus solely on the immediate, first-round effects of economic activity within the audiovisual sector, without including indirect or induced impacts.

Key findings on direct effects across the four main segments of the value chain include:

- **Live Action Production**: Direct effects in this segment accounted for **4,716 FTEs, €280.0 million** in labour compensation, and **€159.0 million** in direct GVA.
- **Animation, Digital Production and Development:** This segment, encompassing animation, VFX, post-production, digital games, and VR/AR, supported **3,026 FTEs**, generated **€140.9 million** in labour compensation, and contributed **€129.4 million** in direct GVA.
- **Distribution and Publishing**: Direct effects here include **1,201 FTEs, €82.1 million** in labour compensation, and **€105.2 million** in direct GVA.
- **Transmission and Exhibition**: This segment, covering TV broadcasting, cinema exhibition, and video on demand (VOD), accounted for **1,507 FTEs, €91.8 million** in labour compensation, and **€128.9 million** in direct GVA.

The Irish audiovisual sector, traditionally concentrated in Dublin and Wicklow, has seen efforts to spread economic benefits across the country through initiatives like Screen Ireland's NAPF, the WRAP Fund, and the Section 481 regional uplift (2019-2023). The regional uplift, which provided extra tax relief for productions in designated areas, generated 1,141 FTEs, €59.9 million in labour compensation, and €55.1 million in GVA on average 2021 to 2023, though its impact declined as the relief phased out. In 2023, the NAPF supported 18 productions with €2.6 million in funding, six of which were also eligible for the regional uplift. With the regional uplift phased out in 2024, Screen Ireland increased funding for regional productions through the NAPF, awarding €3.9 million to 18 new projects, a 50% increase from 2023. The WRAP Fund, focused on the West of Ireland, has invested €2.69 million across 32 projects since 2018. This has generated a regional spending impact of €12 for every €1 invested.

Irish film and television play a strong role in promoting Irish culture and boosting tourism. Productions like *Banshees of Inisherin* and *Normal People* have increased visitor numbers to filming locations, while films like *Kneecap* and *An Cailín Ciúin (The Quiet Girl)* raise interest in Irish language and heritage. Research confirms that screen content inspires international travel to Ireland, highlighting the sector's importance in sharing Irish landscapes, culture, and identity globally.

Ireland's audiovisual sector in a transforming global economy

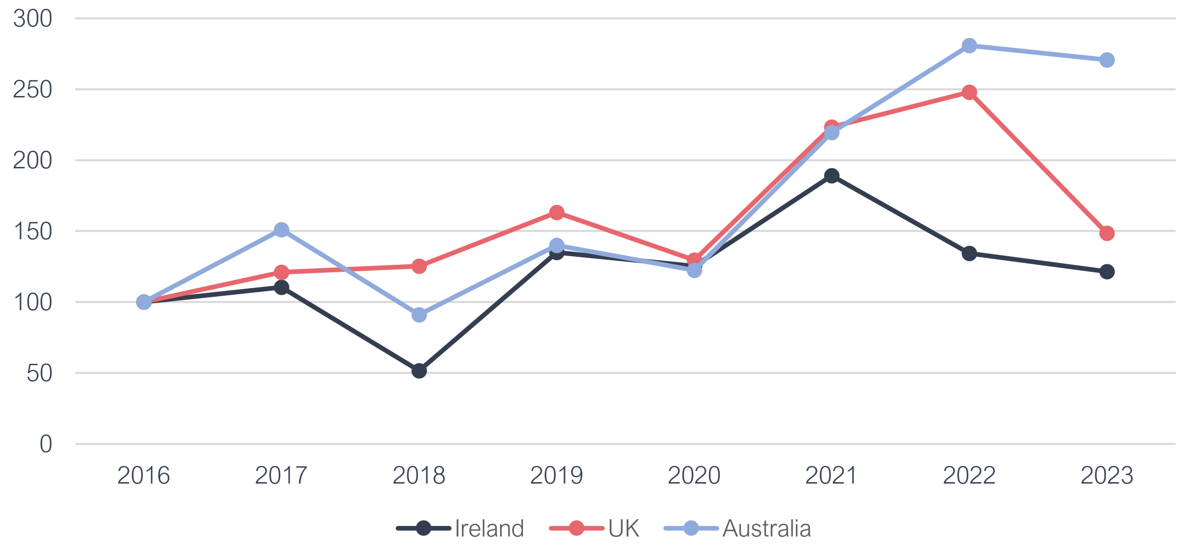
Sector growth amidst global shocks and volatility

The Irish audiovisual industry has experienced significant growth over recent years, reflecting broader global trends. Total production spend for feature film, scripted TV, creative documentaries and animation in Ireland increased from €265 million in 2016 to €322 million in 2023, marking a 22% growth. This trajectory peaked at €501 million in 2021, driven by a post-pandemic surge in production activity. These figures are based on production spend for projects funded by Screen Ireland and those availing of Section 481, with budgets exceeding €2 million.[4,5] It is important to note that these figures differ from those presented in the economic impact analysis in terms of scope and source. However, these are the only available data for the longer timeframe and are comparable to audiovisual data from other countries.

Globally, similar growth patterns can be observed. For instance, UK production spend rose from £2,487 million in 2016 to £4,232 million in 2023 – a 49% increase – with a peak exceeding £7 billion in 2022.[6] Likewise, in Australia, production expenditure grew from AUD 866 million in 2016 to AUD 2,344 million in 2023, nearing its all-time high, reached in 2022 with AUD 2,432 million.[7] However, the recently reported 2024 figures report a 29% fall in expenditure compared to 2023. This decline is primarily attributed to reduced high-budget production activity in international TV and Australian theatrical features, marking the end of a three-year high driven by COVID-safe conditions, high-budget features, and streaming platform investments.[8]

Despite notable growth in recent years, the expansion of the audiovisual industry has not been linear, both in Ireland and globally. The sector is particularly sensitive to global and industry-specific disruptions, as well as inherent volatility, especially in smaller markets. The chart below illustrates the indexed annual local spend on film and high-end television (HETV) productions in Ireland, the UK, and Australia, with 2016 as the base year (index = 100).

Figure 3. Indexed annual production spend across Ireland, UK and Australia (2016 = 100)



Source: Alma Economics elaboration on data from Screen Ireland, the British Film Institute (BFI), and Screen Australia.

4 FÍS ÉIREANN/SCREEN IRELAND STATISTICS 2022 (Screen Ireland, 2022). See: https://www.screenireland.ie/images/uploads/general/Statistics_2022_17.5.24.pdf

5 2023 in Numbers: Steady Production Levels Despite Global Disruption, New Talent, Sustainability and More (Screen Ireland, 2024). See: https://www.screenireland.ie/news/screen-ireland-releases-2023-production-figures-showing-steady-levels-despite-global-disruption

6 Film and high-end television programme production in the UK (BFI, 2023). See: https://www.bfi.org.uk/industry-data-insights/official-statistics-release-calendar

7 Screen Australia Drama Reports (Screen Australia, 2023). See: https://www.screenaustralia.gov.au/fact-finders/reports-and-key-issues/reports-and-discussion-papers

8 Screen Australia Drama Reports (Screen Australia, 2024). See: https://www.screenaustralia.gov.au/fact-finders/reports-and-key-issues/reports-and-discussion-papers

The graph reveals several commonalities among the three markets, reflecting global trends:

- **Overall growth:** Each country shows an upward trajectory in production spend over the period, albeit at different rates.
- **Pandemic-induced decline:** A pronounced drop in 2020 due to COVID-19 disruptions, followed by a substantial rebound in 2021 as production resumed globally.
- **Recent decline:** A dip in 2023, significantly linked to industry-wide disruptions such as the writers' and actors' strike, which affected production timelines and investment decisions.

However, the graph also reveals fluctuations that cannot be entirely explained by macroeconomic or global industry shocks. In smaller markets like Ireland, the production spend can vary significantly year-to-year due to the scheduling and scale of major productions. A single large production, such as a high-budget film or a season of a major TV series, can significantly impact annual figures, amplifying fluctuations compared to larger markets like the UK.

A rapidly evolving sector landscape

In addition to global disruption and volatility, the audiovisual industry is undergoing drastic transformations driven by shifting consumer behaviours, technological evolution, intensifying global competition, and legislative changes, among other drivers. These factors are reshaping the industry and will continue to do so in the years ahead. Key drivers of change include:

- **Changing consumer behaviours and preferences:** Global shifts in how audiences consume audiovisual content are redefining industry norms. Traditional consumption formats such as cinema and linear television are facing increasing competition from digital alternatives like VOD platforms. These changes, driven by technological advancements and evolving viewer preferences, have led to fundamental transformations in the models of distribution and exhibition. Theatrical windows have become significantly shorter, and new models like direct-to-streaming releases are becoming more prevalent.

- **Intensifying global competition:** The race to attract film and HETV productions has reached unprecedented levels globally. Countries are competing to establish themselves as leading production hubs by offering production-friendly policies, cutting-edge infrastructure, and skilled talent pools. Fiscal incentives, such as tax rebates and credits, are a critical part of this competition, with over 100 production incentives currently active worldwide.[9] Moreover, productions are increasingly flexible and mobile, especially those reliant on studio-based environments, further intensifying competition among jurisdictions for high-profile projects.

- **Legislative drivers of change:** Legislative frameworks are playing a transformative role in the audiovisual industry. For example, the EU Audio-Visual Media Services Directive[10] requires VOD platforms to ensure a portion of their content is European or domestic and enables member states to enforce a share of VOD revenue investment into European or domestic production. Such policies present a significant opportunity for countries to leverage the success of VOD platforms to strengthen and expand their domestic production sectors.

- **Technological advancements and AI:** Technological advancements, particularly in AI, are delivering significant changes across all stages of the audiovisual value chain. AI-driven tools are revolutionising digital production processes, streamlining operations, enhancing content strategies through data analysis and audience insights, and contributing to increased accessibility

[9] The Global Incentives Index (Olsberg-SPI, 2024). See: https://www.o-spi.com/projects/blog-global-incentives-index

[10] EU Audiovisual Media Service Directive (European Union, 2018). See: https://eur-lex.europa.eu/eli/dir/2018/1808/oj

to audiovisual content. While AI offers immense opportunities, its transformative potential underscores the need for clear regulatory frameworks to ensure its fair and sustainable use.

These key trends, alongside other ongoing changes, highlight the need for an audiovisual industry that is both adaptable and resilient. As consumer preferences, technologies, and regulatory frameworks evolve, the industry must continue to innovate and embrace change to remain competitive and sustainable in a dynamic global landscape.

Navigating uncertainty: macroeconomic factors shaping Ireland's audiovisual sector (2021-2023)

The period of analysis (2021-2023) was also marked by a series of significant macroeconomic events that had a significant impact on Ireland's audiovisual sector, contributing to fluctuations in production spend and employment patterns. Key macroeconomic factors influencing the sector during this period include:

- **COVID-19 pandemic:** The COVID-19 pandemic remained a central disruptor into 2021, as the sector struggled to recover from the impact of cinema closures, production halts, and travel restrictions. International productions were delayed, and local productions faced logistical challenges. These disruptions significantly affected both the supply and demand sides of the audiovisual industry, with production schedules being thrown off track, leading to postponed projects and higher operational costs. Simultaneously, shifting consumer behaviour saw a sharp increase in demand for streaming platforms, accelerating the growth of VOD consumption and altering the economic dynamics of transmission and exhibition segments.
- **Inflation:** In the wake of the pandemic, global inflation surged, creating substantial cost pressures across many industries, including audiovisual production. This period saw the cost of materials, labour, and services increase, impacting production budgets and profitability. The audiovisual sector, with its complex supply chain, was particularly vulnerable to rising costs, which affected everything from set construction and special effects to talent fees and post-production services. The resulting financial strain led to delays and cutbacks, affecting the timing and scale of both local and international projects being produced in Ireland.
- **US writers' and actors' strike and global ripple effects:** The 2023 writers' and actors' strike in the United States had a far-reaching global impact, disrupting production schedules and affecting market confidence, including in Ireland. While the strike primarily impacted US-based productions, it led to delays in key scripted TV projects and a reduction in global content output. International co-productions and broadcast schedules were postponed, and the wider uncertainty in the entertainment industry prompted more cautious investments, impacting both US and Irish productions that depended on US distribution and financing. However, Ireland was able to keep production moving by focusing on domestic projects, ensuring continued activity within the sector.

Contextualising the numbers

Our analysis demonstrates that Ireland's audiovisual sector contributes significantly to national economic outputs, showcasing remarkable resilience and adaptability in a rapidly evolving global landscape. The economic figures presented here must be understood within this broader context of macro-dynamics and global industry trends, shaped by external shocks, shifting consumer behaviours, technological advancements, and strategic policy interventions.

This broader perspective provides a foundation for interpreting the subsequent data, which reflects both the challenges encountered and the opportunities embraced by Ireland's audiovisual industry during this period of transformation.

Scope of the economic impact assessment

The aim of the economic impact analysis of Ireland's audiovisual sector was to comprehensively assess and map the sector's scale and economic significance. Focusing on key metrics such as FTE employment, GVA, and labour compensation, the analysis captured the sector's direct, indirect, and induced contributions to the Irish economy over recent years (2021–2023). This study examined economic activity across the audiovisual sector, including nationwide contributions beyond the traditional production hubs of Dublin and Wicklow. In addition, the wider social and cultural contributions of the audiovisual sector, including its role in enriching Irish identity, supporting heritage, and driving tourism were analysed.

The last comprehensive economic assessment of Ireland's audiovisual sector was conducted by Olsberg SPI and Nordicity and was published in 2017.[11] This report provided an in-depth examination of the sector's economic impact, focusing on production activity, employment, and its overall contributions to the Irish economy.

There are a number of key differences to previous reports regarding scope:

- The 2017 report not only assessed the impact of the audiovisual sector but also the radio sector. This report focused solely on the audiovisual sector.
- The economic impact assessment by Olsberg did not present separate estimates of impact for documentaries, scripted television, unscripted television and film. The figures presented in this report will give a first estimate of the economic impact of the different live action production segments.
- The scope of this analysis included virtual reality (VR) and augmented reality (AR) as an emerging subsector within the audiovisual industry, reflecting Ireland's growing immersive economy. With increased investment in content creation and innovation, VR and AR technology is creating new opportunities for storytelling and audience engagement across the sector and beyond.

Table 1 outlines the scope of the economic impact analysis across four key areas of the audiovisual sector*: 1) live action production, 2) animation, digital production and development, 3) distribution and publishing, and 4) transmission and exhibition*. Each area includes specific segments, such as film, scripted and unscripted television, animation, digital games, and cinema exhibition, capturing the breadth of activities contributing to the sector's economic impact.

Table 1. Scope of economic impact analysis

Live Action Production	Animation, Digital Production and Development	Distribution and Publishing	Transmission and Exhibition
• Film • Scripted television • Unscripted television • Other television • Creative documentary (Section 481) • Commercial	• Animation • VFX and post-production • Digital games • VR and AR	• Distribution (Film, TV, Animation, Documentary) • Publishing and QA – Digital games	• Cinema exhibition • Television broadcasting • VOD

[11] Economic Analysis of the Audiovisual Sector in the Republic of Ireland (Olsberg SPI & Nordicity, 2017). See: https://www.screenireland.ie/images/uploads/general/Olsberg_Report.pdf

Methodology and limitations

This economic impact assessment primarily aligned with Olsberg's methodology and their outlined approach for updating the economic contribution analysis, utilising inflation-adjusted impact ratios to ensure accuracy. To verify the reliability of these ratios, the underlying assumptions were tested, confirming their suitability for use without concern. Data for updating the analysis was gathered by triangulating information from various sources, including desk-based research, stakeholder engagements (as detailed in Annex B), an industry-wide business survey, and data obtained from the TCAGSM department, Screen Ireland, broadcasters, industry associations, and Companies Registration Office (CRO) filings. A comprehensive overview of the methodology is provided in Annex A for further reference.

Important economic impact terms

Direct Effects: Direct effects refer to the immediate economic impacts resulting from activities within the audiovisual sector, such as employment, wages for production crews, and revenue generated from productions. This includes expenditures on production-related goods and services directly associated with activities in the audiovisual sector.

Indirect Effects: These are the secondary economic impacts that occur when the activities of the audiovisual sector create additional business opportunities for suppliers and service providers. Examples include increased demand for equipment rental companies, catering services, and post-production facilities, all of which benefit from the primary sector's operations.

Induced Effects: Induced effects arise from the additional spending by employees whose incomes are generated within the audiovisual sector. This spending encompasses personal expenses on housing, food, and other necessities, leading to further economic activity in the wider economy as these employees support local businesses and services.

Full-Time Equivalents (FTEs): A measure of employment that standardises the workload, where one FTE equals the hours worked by a full-time employee, allowing for consistent comparisons across sectors.

Labour Compensation: The total remuneration provided to employees, encompassing not only wages and salaries but also additional benefits like social insurance contributions, pensions, bonuses, and other forms of compensation.

Gross Value Added (GVA): The economic value added by a sector, calculated by subtracting the cost of intermediate goods from total output, reflecting its contribution to the economy.

This study recognises several limitations that offer important context for the findings. The availability of data, particularly outside of Section 481, was limited and dispersed, which presents opportunities for further research. Also, Section 481 data is based on the certification date by the TCAGSM department. Actual tax relief claims to Revenue may differ from predicted 'Eligible Expenditure' in TCAGSM department data. Figures reflect the calendar year of certification; claims to revenue might appear in a different year (e.g., certified in December 2022 but claimed in January 2023).

As discussed in the previous section, the years covered in the analysis (2021-2023) were quite disruptive due to external factors such as the COVID-19 pandemic, writers' and actors' strikes, and inflation, which have contributed to significant fluctuations in spending. As a result, the figures presented were point-in-time estimates that should be interpreted with this context in mind.

To mitigate the effects of these fluctuations, average economic impact data from the three years spanning 2021 to 2023 were presented to offer a clearer and more stable representation of the audiovisual sector's contributions. By focusing on averages, the analysis aimed to minimise the influence of fluctuations caused by a limited number of large-scale productions, which could distort year-to-year figures. This approach allowed for capturing a more comprehensive view of the industry's performance, reflecting ongoing trends and underlying economic stability.

Care should also be taken when making comparisons to the Olsberg report from 2017, as differences in scope, methodology and data sources can influence the results. Despite these challenges, this study aimed to provide valuable insights into the current landscape of the audiovisual sector and its broader impacts.

Audiovisual sector overall

This section presents an overview of the direct and total economic impact of the audiovisual sector in Ireland for the years 2021 to 2023. Subsequent sections will offer detailed breakdowns of these impacts for each specific subsector.

The direct economic impact of the audiovisual sector between 2021 and 2023 emphasises its critical role in employment, labour compensation, and GVA. The sector supported **10,450 FTEs** through its direct activities, providing **€594.8 million** in labour compensation and generating a GVA of **€522.6 million**.

Table 2. Average direct economic impact of audiovisual sector, Ø 2021-2023

	Live Action Production	Animation, Digital Production and Development	Distribution or Publishing	Transmission or Exhibition	Total Audiovisual Sector
Direct Employment (FTEs)	4,716	3,026	1,201	1,507	**10,450**
Direct Labour compensation (€m)	280.0	140.9	82.1	91.8	**594.8**
Direct GVA (€m)	159.0	129.4	105.2	128.9	**522.6**

Source: Alma Economics table. See individual report sections for detailed information on data sources.

Going beyond its direct economic impact, the audiovisual sector’s total contribution from 2021 to 2023 highlights its broader role in the Irish economy. This includes not only the sector's direct activities but also indirect effects, such as supply chain interactions, and induced effects, like the wider spending of wages. The overall impact captures the sector's full economic footprint, reflecting its influence beyond immediate outputs and its broader ripple effects throughout the economy. The audiovisual sector supported a total of **15,899 FTEs** across its various components, highlighting its role as a significant employer in the Irish economy. The sector generated approximately **€862.0 million in labour compensation**, demonstrating its contribution to local wages and economic activity. The **total GVA** for the audiovisual industry reached **€1,061.4 million**, reflecting the comprehensive value generated by the sector through production, distribution, and exhibition activities. These figures underline the audiovisual sector's importance as a key driver of economic growth, fostering job creation and supporting related industries throughout Ireland.

Table 3. Average total economic impact of audiovisual sector, Ø 2021-2023

	Live Action Production	Animation, Digital Production and Development	Distribution or Publishing	Transmission or Exhibition	Total Audiovisual Sector
Total Employment (FTEs)	7,373	3,802	1,663	3,061	**15,899**
Total Labour compensation (€m)	405.5	174.8	112.7	169.0	**862.0**
Total GVA (€m)	412.6	203.7	162.9	282.2	**1,061.4**

Source: Alma Economics table. See individual report sections for detailed information on data sources.

In terms of total economic impact of the four segments, the **live action production** segment stood out significantly, supporting 7,373 FTEs and contributing approximately €405.5 million in labour compensation, resulting in a GVA of around €412.6 million. This reflected its vital role in the Irish economy, particularly in film and television production.

Animation, digital production and development, which encompasses animation, VFX and post-production, digital games development and VR and AR, accounted for 3,802 FTEs and generated about €174.8 million in labour compensation. Its total GVA was approximately €203.7 million, highlighting the growing significance of digital content in attracting talent and investment.

The **distribution and publishing** segment employed 1,663 FTEs and contributed roughly €112.7 million in labour compensation, with a total GVA of around €162.9 million. This subsector was essential for the distribution of audiovisual content, facilitating access for audiences across various platforms.

Finally, the **transmission and exhibition** segment, which includes broadcasting and cinemas, supported 3,061 FTEs and generated about €169.0 million in labour compensation, leading to a total GVA of €282.2 million. This area underscored the critical role of broadcasters and cinemas in engaging viewers and promoting both local and international productions.

Live action production

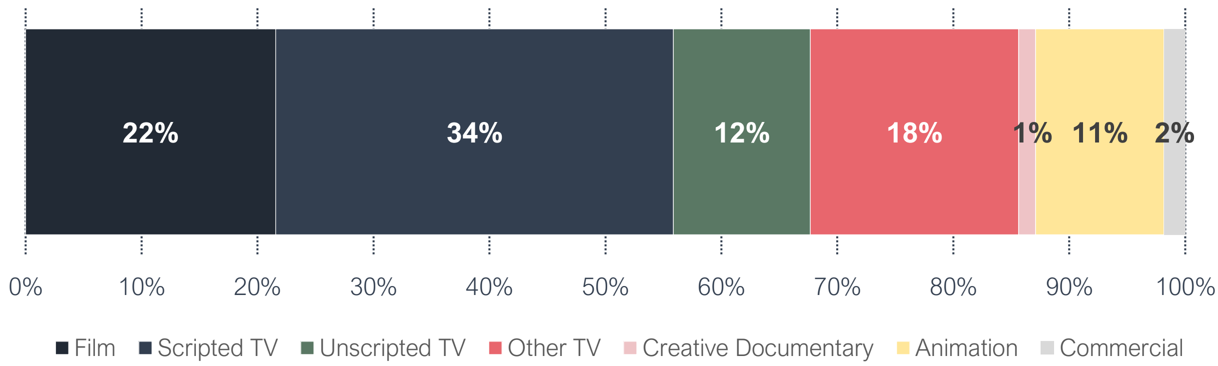
Ireland's live action production segment has seen significant growth in recent years, becoming an attractive destination for both domestic and international filmmakers. The country offers a diverse range of stunning locations, a talented workforce, and a supportive environment for various genres, including feature films, scripted television, unscripted shows, creative documentaries, and commercials. This variety has allowed Ireland to host numerous projects that cater to different audiences and storytelling styles.

At the heart of this growth is the Section 481 tax incentive, which offers productions up to 32% of eligible Irish expenditure as a tax credit. This incentive has been instrumental in attracting major international projects while also nurturing the domestic industry. The sector received an additional boost with the regional film development uplift, which provided extra support for productions in areas designated as eligible to receive enhanced rates of state aid, although this uplift has been phased out. In autumn 2024, the Irish government announced significant updates to Section 481, which include raising the tax credit for lower to mid-range feature film productions to 40% and introducing a new 20% tax credit for unscripted productions, aimed at enhancing the attractiveness of Ireland as a location for both domestic and international filmmaking. These are currently subject to approval by the European Union.

In addition to Section 481, live action productions were also supported through Screen Ireland and the Irish broadcasters (mainly RTÉ (Raidió Teilifís Éireann), TG4 , Coimisiún na Meán's Sound and Vision fund and Virgin Media Television). Screen Ireland serves as the national agency for the Irish film and television industry, investing in talent and providing funding across various stages of production. Irish broadcasters play a crucial role in commissioning diverse content and collaborating with independent producers. These broadcasters are subject to regulations overseen by Coimisiún na Meán, Ireland's media regulator, which encourages the production and broadcasting of Irish content. Together, these organisations contributed significantly to the growth and sustainability of Ireland's live action production landscape, ensuring that both local stories and international projects thrive across the country.

Overall, spend for productions was €654.2 million a year, on average between 2021-2023. Figure 4 shows the 2021-2023 average genre split between production spend in Ireland. Scripted television was the largest contributor, with an average production spend of €223.9 million a year in 2021-2023. This was followed up by film (€142.4 million) and other television (€116.5 million), which includes activity by commercial broadcasters and spend on news, sports and current affairs. Please note that while these numbers include spend on VFX and post-production, this share was removed for the economic impact analysis, as the subsector's economic impact was captured in its own section.

Figure 4. Distribution of total production spend (independent and in-house) for productions

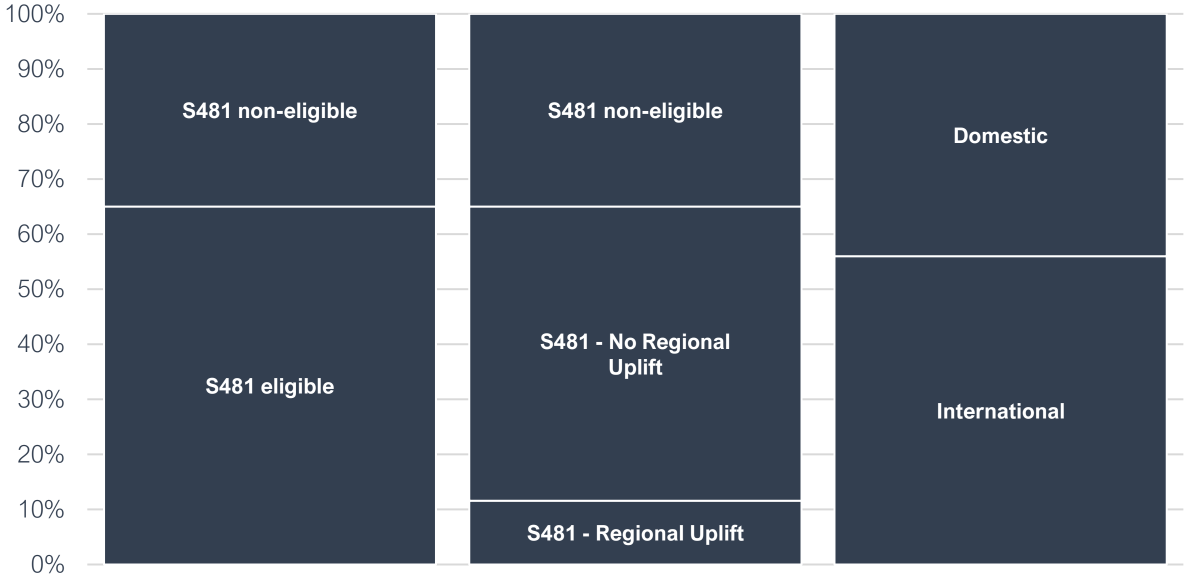


Source: Alma Economics figure. See individual report sections for detailed information on data sources.

Figure 5 shows how the average 2021-2023 spend for productions was distributed among different elements:

- About two-thirds (65%) of production spend was supported by the Section 481 tax relief. Examples of productions not eligible for Section 481 include unscripted television, commercial productions for advertising and in-house productions of broadcasters, e.g. news, current affairs, sports and weather.
- Out of the Section 481 eligible productions, 18% received a regional uplift (12% of overall productions). Please note that detailed information on regional distribution of productions outside of Section 481 did not exist.
- International productions were responsible for 56% of the production spend in the country, with them making up 87% of Section 481 eligible productions.

Figure 5. Distribution of total production spend in Ireland (independent and in-house)



Source: Alma Economics figure. See individual report sections for detailed information on data sources.

Film

In examining Ireland's film subsector, the impact of feature films supported by Section 481 and Screen Ireland was significant. The Section 481 tax relief offers up to 32% in tax credits for eligible expenditures, making Ireland an attractive location for high-profile international productions and bolstering domestic filmmaking. In 2024, it has been announced that the maximum tax relief will go up to 40%, subject to approval by the European Union. Screen Ireland funding and Section 481 were also essential for funding Irish-language productions and have significantly contributed to the resurgence of Irish-language filmmaking. Projects like *Arracht* and *An Cailín Ciúin (The Quiet Girl)* have gained substantial acclaim both domestically and internationally, showcasing the growing interest in Irish-language cinema.

Over the 2021-2023 period, the film industry provided a significant economic boost, generating nearly 2,000 FTEs each year, with 1,317 of these FTEs created directly.[12] Average yearly GVA reached about €95.2 million, with €33.8 million contributed directly. The industry's workforce spans numerous roles, from cast and crew to skilled technical positions, highlighting the broad skill set needed in film production. Labour compensation averaged at €103.5 million annually across direct, indirect, and induced impacts, showing the industry's role as a major employer. Although the FTE count provides a standardised measure, the actual number of individuals involved at any time is higher due to the short-term, project-based nature of many roles.

[12] Please note that estimated expenditures related to VFX and post-production were excluded. These specific expenditures were analysed separately in the evaluation of the economic contributions of that subsector.

Table 4. Average economic impact of film, Ø 2021-2023

	Direct	Indirect	Induced	Total
Employment (FTEs)	1,317	487	155	**1,959**
Labour compensation (€m)	73.3	21.6	8.6	**103.5**
GVA (€m)	33.8	42.0	19.3	**95.2**

Source: Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, Screen Ireland, see Annex A for methodology on impact ratios.

Comparing the total economic impact of film production across 2021 and 2023 highlights the fluctuations due to large-scale productions in some years. In 2021, the subsector supported 2,625 FTEs, with labour compensation reaching €133.7 million and GVA amounting to €122.9 million. However, this impact declined in 2022 and 2023, with employment dropping to 1,737 FTEs and 1,515 FTEs, respectively. Labour compensation and GVA also decreased significantly during these years, attributed to a reduction in large-scale productions and fewer new projects taking advantage of Section 481 tax relief, as well as the 2023 writers' and actors' strike. Notable films such as The *Banshees of Inisherin, Disenchanted* and *The Last Duel* were key drivers of the robust figures in 2021, illustrating how fluctuations in production activity directly influence the industry's economic contributions.

Table 5. Total economic impact of film, 2021-2023

	2021	2022	2023
Employment (FTEs)	2,625	1,737	1,515
Labour compensation (€m)	133.7	92.9	83.9
GVA (€m)	122.9	85.4	77.1

Source: Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, Screen Ireland, see Annex A for methodology on impact ratios.

Scripted television

Scripted television, particularly TV drama, encompasses a wide range of narrative-driven series designed for episodic storytelling. In Ireland, this subsector benefits from support by Screen Ireland, the broadcasters and the Section 481 tax incentive, which encourages high-quality drama by offering significant financial incentives for eligible projects. Additionally, some broadcaster productions that may not qualify for Section 481 also contributed to the landscape. The 2021-2023 yearly average production spend (including VFX and post-production) for scripted TV was €223.9 million. The large majority of productions were supported by Section 481 and 80% of the spend came from international productions.

Success stories from scripted television supported by Section 481 include *Vikings: Valhalla, Normal People,* and *Kin*. *Vikings: Valhalla* continued the legacy of the original Vikings series, becoming a global hit for Netflix with its compelling historical drama. *Normal People* received critical acclaim for its sensitive portrayal of young love, resonating deeply with audiences and earning numerous awards. *Kin* has made its mark as a gripping crime drama centred on family dynamics and organised crime in Dublin, attracting strong viewership and praise. These productions exemplify the effectiveness of the Section 481 incentive in promoting high-quality Irish television on both domestic and international platforms.

From 2021 to 2023, the scripted television subsector in Ireland had a notable economic impact, supporting an average of 3,090 total FTEs annually.[13] This included 2,078 direct FTE, reflecting the significant employment opportunities generated by the industry. Additionally, the subsector contributed approximately €163.8 million in labour compensation and generated around €150.6 million in GVA. These figures illustrate the substantial role of scripted television in driving economic growth and supporting local communities across Ireland.

Table 6. Average economic impact of scripted television, Ø 2021-2023

	Direct	Indirect	Induced	Total
Employment (FTEs)	2,078	768	244	**3,090**
Labour compensation (€m)	116.0	34.2	13.6	**163.8**
GVA (€m)	53.5	66.5	30.6	**150.6**

Source: Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, Broadcasters, see Annex A for methodology on impact ratios.

The total economic impact of scripted television in Ireland from 2021 to 2023 showed a notable decline in key metrics. Employment, measured in FTEs, decreased from 3,487 in 2021 to 2,431 in 2023. Labour compensation followed a similar trend, dropping from €177.6 million in 2021 to €134.6 million in 2023. GVA also saw a decline, falling from €163.3 million in 2021 to €123.8 million in 2023. This reduction in economic impact reflected the fluctuations in production levels within the scripted television subsector during this period, with both 2021 and 2022 recording large-scale productions.

Table 7. Total economic impact of scripted television, 2021-2023

	2021	2022	2023
Employment (FTEs)	3,487	3,353	2,431
Labour compensation (€m)	177.6	179.3	134.6
GVA (€m)	163.3	164.9	123.8

Source: Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, Broadcasters, see Annex A for methodology on impact ratios.

Unscripted television

Unscripted television includes a variety of formats, such as observational documentaries, docuseries, factual entertainment, lifestyle shows, quizzes, contests, game shows, studio and panel shows, and reality shows.[14] A significant development in this subsector is the announcement of a new Section 481 tax relief for unscripted productions in autumn of 2024, offering a 20% tax credit, making Ireland one of the first countries to provide such support. This new tax relief is currently subject to approval by the European Union. This initiative aims to stimulate investment in unscripted content, positioning Ireland as a prime location for diverse television production. Data on production spending is primarily sourced from broadcaster in-house productions and commissions, but limitations exist, as some genres may

[13] As above, expenditures related to VFX and post-production have been removed from production spend and are presented in their own section.

[14] Budget 2025: Lights, camera, tax break (RTÉ, 2024). See: https://www.rte.ie/news/analysis-and-comment/2024/1005/1473650-production-tax/

not align perfectly with the categories used and for commercial broadcasters like Virgin Media Television, no genre split is publicly available. As a result, the presented numbers are most likely an underestimation, with some unscripted television captured in the next category, other television.

The average yearly production spend (including VFX and post-production) between 2021-2023 was €76.5 million, all consisting of domestic productions. This includes both independent as well as in-house productions by broadcasters. Notable examples of unscripted Irish television included *The Big Deal*, *Living with Lucy* and *Ireland's Fittest Family.* The average yearly economic impact of unscripted television in Ireland from 2021 to 2023 showed a substantial contribution, supporting approximately 1,076 FTEs annually, with total labour compensation averaging €57.3 million and GVA around €52.7 million.[15] Direct employment contributed 723 FTEs, while indirect and induced employment added 352 FTEs.

Table 8. Average economic impact of unscripted television, Ø 2021-2023

	Direct	Indirect	Induced	Total
Employment (FTEs)	723	267	85	**1,076**
Labour compensation (€m)	40.6	12.0	4.8	**57.3**
GVA (€m)	18.7	23.3	10.7	**52.7**

Source: Broadcasters, see Annex A for methodology on impact ratios.

The total economic impact of unscripted television in Ireland from 2021 to 2023 has shown notable stability, with employment consistently around 1,078 to 1,083 FTEs over the three years. Labour compensation increased from €54.9 million in 2021 to €60.0 million in 2023, while GVA rose from €50.5 million to €55.2 million during the same period. This stability can be attributed to the nature of unscripted television, which is less susceptible to fluctuations caused by large international scripted productions and had not previously been eligible for Section 481 tax relief.

Table 9. Total economic impact of unscripted television, 2021-2023

	2021	2022	2023
Employment (FTEs)	1,078	1,067	1,083
Labour compensation (€m)	54.9	57.0	60.0
GVA (€m)	50.5	52.5	55.2

Source: Broadcasters, see Annex A for methodology on impact ratios.

Other television

This category includes two main components: 1) all productions (in-house and commissions that were not eligible for Section 481) from commercial broadcasters, such as Virgin Media Television, for which a genre split is not available, and 2) sports, news, and current affairs programming from all broadcasters, including RTÉ and TG4. As a result, this category may contain content that belongs to any of the other live action production categories. The average production spend (including VFX and post-production) per year between 2021-2023 was €116.5 million.

[15] As above, expenditures related to VFX and post-production have been removed from production spend and are presented in their own section.

The economic impact of the ‘other television’ subsector in Ireland, averaged over 2021 to 2023, demonstrated a robust contribution to the economy, supporting a total of 976 FTEs.[16] Directly, the subsector employed 412 FTEs, with an associated labour compensation of €39.5 million. The total labour compensation across direct, indirect, and induced effects amounted to €66.3 million. The GVA for this subsector averaged €96.8 million, reflecting its significant role within the broader television landscape.

Table 10. Average economic impact of other television, Ø 2021-2023

	Direct	Indirect	Induced	Total
Employment (FTEs)	412	448	116	**976**
Labour compensation (€m)	39.5	20.5	6.2	**66.3**
GVA (€m)	44.9	38.0	13.9	**96.8**

Source: Broadcasters, see Annex A for methodology on impact ratios.

The economic impact of this subsector has shown steady growth from 2021 to 2023, with employment increasing from 951 FTEs in 2021 to 1,018 FTEs in 2023. Labour compensation also rose from €61.7 million to €71.9 million, while GVA increased from €90.1 million to €105.0 million. This subsector's stability can be attributed to its focus on news, weather, sports, and current affairs, which tend to maintain consistent demand and do not experience the same fluctuations as larger production-based TV subsectors.

Table 11. Total economic impact of other television, 2021-2023

	2021	2022	2023
Employment (FTEs)	951	958	1,018
Labour compensation (€m)	61.7	65.3	71.9
GVA (€m)	90.1	95.4	105.0

Source: Broadcasters, see Annex A for methodology on impact ratios.

Creative documentary (Section 481)

This category only captures documentaries that are eligible for Section 481, creative documentaries as defined by Section 481, while factual documentaries fall under unscripted television. For a production to qualify as a creative documentary for Section 481 tax relief, it must exhibit original themes and a distinctive artistic style, usually demonstrated by a script or treatment that reflects a personal perspective. It should also possess a timeless quality, retaining viewer interest beyond current events, and involve significant preparation and postproduction, with a focus on original filming rather than simple reporting. Production spend (including VFX and post-production) on creative documentaries was on average €9.4 million per year between 2021-2023. Domestic productions made up the majority (67%) of creative documentary productions.

Noteworthy creative documentaries include *The 8th*, and *Songs for While I Am Away. The 8th* was an impactful Irish documentary that examined the grassroots campaign to repeal Ireland's constitutional

[16] As above, expenditures related to VFX and post-production have been removed from production spend and are presented in their own section.

abortion ban, revealing how activists transformed the country's social landscape and secured reproductive rights through the landmark 2018 referendum. *Songs for While I Am Away* delved into the life and legacy of the renowned Irish musician and lead singer of the rock band Thin Lizzy, Phil Lynott, showcasing his contributions to music and his impact on Irish culture.

The economic impact of creative documentaries in Ireland, averaged over 2021 to 2023 and supported by Section 481, revealed a modest but significant contribution to the economy.[17] The subsector supported 84 direct FTEs, resulting in a total of 125 FTEs when including indirect and induced effects. In terms of labour compensation, it generated approximately €4.7 million directly and a total of €6.7 million across all categories. The GVA amounted to around €2.2 million directly and €6.1 million in total, indicating a vital yet niche role of creative documentaries within the broader creative industry landscape.

Table 12. Average economic impact of creative documentary (Section 481), Ø 2021-2023

	Direct	Indirect	Induced	Total
Employment (FTEs)	84	31	10	**125**
Labour compensation (€m)	4.7	1.4	0.6	**6.7**
GVA (€m)	2.2	2.7	1.2	**6.1**

Source: Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, see Annex A for methodology on impact ratios.

The total economic impact of creative documentaries supported by Section 481 in Ireland showed fluctuations from 2021 to 2023. In 2021, the subsector supported 115 FTEs and generated a labour compensation of €5.8 million, with a GVA of €5.4 million. This slightly decreased in 2022, with 112 FTEs and labour compensation of €6.0 million, while GVA remained stable at €5.5 million. However, in 2023, the subsector saw a resurgence, supporting 147 FTEs, with labour compensation rising to €8.2 million and GVA increasing to €7.5 million. Notable documentaries during this period include *The 8th, Doireann*, *Nothing Compares* and *Mrs Robinson*, which exemplified the impact and significance of this subsector within the broader creative industry.

Table 13. Total economic impact of creative documentary (Section 481), 2021-2023

	2021	2022	2023
Employment (FTEs)	115	112	147
Labour compensation (€m)	5.8	6.0	8.2
GVA (€m)	5.4	5.5	7.5

Source: Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, see Annex A for methodology on impact ratios.

[17] As above, expenditures related to VFX and post-production have been removed from production spend and are presented in their own section.

Commercial

Commercial productions in Ireland include a range of content created for promotional or advertising purposes, supporting both local and international brands. The mapping of the subsector centred on members of the Commercial Producers Ireland (CPI) association, a voluntary organisation of independent Irish commercial production and post-production companies. They consisted of 21 members, but VFX and post-production companies were excluded from the mapping, as their economic impact is captured in their own section. Given the complex landscape and varied types of commercial content, estimates of production activity in this area may be understated, as not all commercial projects are fully captured among the CPI members. These productions, however, played a critical role in the Irish media economy by contributing to branding and advertising industries. Average yearly production spend between 2021-2023 was estimated at €11.9 million.

In 2023, commercial production directly generated 102 FTEs, with an additional 32 FTEs arising indirectly and 13 FTEs induced, resulting in a total of 147 FTEs. The total labour compensation for this subsector amounted to €7.9 million. GVA also demonstrated a positive impact, totalling €11.1 million, with direct GVA contributing €5.9 million. While data is only available for a single year for this subsector, fluctuations are less of a concern within the commercial production subsector.

Table 14. Economic impact of commercial production, 2023

	Direct	Indirect	Induced	Total
Employment (FTEs)	102	32	13	**147**
Labour compensation (€m)	5.9	1.4	0.7	**7.9**
GVA (€m)	5.9	3.8	1.5	**11.1**

Source: Business-level survey, CPI, CRO filings, desk-based research, see Annex A for methodology on impact ratios.

Animation, digital production and development

This segment includes a diverse range of subsectors such as animation, VFX, post-production, digital games, and VR and AR. Unlike live action production, which primarily involves filming real-life performances, digital production leverages technology and computer-generated imagery to create dynamic content.

Animation

Ireland's reputation as a world-class animation hub is championed by Animation Ireland, the national trade association supporting the subsector's growth across the island of Ireland and funded by Screen Ireland. Currently, they list 44 animation studios among their members. However, they represent studios from both the Republic of Ireland and Northern Ireland, with about 36 out of 44 being based in the Republic of Ireland. Some of the bigger names in the animation subsector include Dublin-based Boulder Media and Brown Bag Films, as well as Cartoon Saloon and Lighthouse Studios in Kilkenny.

Screen Ireland is the largest funder of animation in Ireland. In addition, Irish animation productions are eligible for the Section 481 tax credit, a vital incentive that helps maintain Ireland's competitiveness by offering substantial relief on qualifying expenditures for animations. Over the past few years, the tax credit has facilitated significant investments in both international and domestic animated productions in Ireland, with notable titles including *Transformers*, *Wolfwalkers*, and *Rick and Morty*, highlighting the country's creative talent and economic contributions to the industry.

However, some smaller productions, like animation shorts, will not be eligible for Section 481. The broadcaster data was not detailed enough to separate them out, and hence, the numbers presented here are most likely an underestimation, and some of animation's impact will be captured in either unscripted or other television.[18]

The yearly average production spend (including VFX and post-production) of Section 481 eligible animation productions in the years 2021-2023 was €73.7 million, with 82% stemming from international productions.

The Section 481-supported animation subsector in Ireland, averaged over 2021 to 2023, had a significant yearly economic impact, generating 668 direct FTEs and 949 FTEs in total.[19] This subsector contributed an average GVA of €55.6 million and provides labour compensation of €53.5 million annually.

Table 15. Average economic impact of animation, Ø 2021-2023

	Direct	Indirect	Induced	Total
Employment (FTEs)	668	199	82	**949**
Labour compensation (€m)	39.9	9.4	4.3	**53.5**
GVA (€m)	26.5	19.5	9.6	**55.6**

Source: Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, see Annex A for methodology on impact ratios.

The total economic impact of the animation subsector in Ireland from 2021 to 2023 revealed significant fluctuations in employment, labour compensation, and GVA. In 2021, the subsector supported 1,406 FTEs, generating a GVA of €79.2 million and labour compensation of €76.3 million. However, there was a notable decline in 2022, with employment supported by Section 481 productions dropping to 370 FTEs and a GVA of only €21.9 million, likely influenced by fewer large-scale productions during that period. By 2023, the subsector rebounded with 1,073 FTEs and a GVA of €65.7 million. Notable domestic productions include *My Father's Dragon, Fia's Fairies, Kiva Can Do* and *Lu and the Bally Bunch*. Significant international examples supported through Section 481 in this timeframe include *Grimsburg*, *The Cuphead Show*, *Fairly Odd Parents* and *Rick and Morty*.

Table 16. Total economic impact of animation, 2021-2023

	2021	2022	2023
Employment (FTEs)	1,406	370	1,073
Labour compensation (€m)	76.3	21.1	63.3
GVA (€m)	79.2	21.9	65.7

Source: Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, see Annex A for methodology on impact ratios.

[18] Based on desk-based research and the mapping of the animation studios located in the Republic of Ireland, this is estimated to affect around 50 FTEs.

[19] As above, expenditures related to VFX and post-production have been removed from production spend and are presented in their own section.

VFX and post-production

The VFX and post-production subsector in Ireland has rapidly evolved into a key player in the global film and television landscape, leveraging cutting-edge technology and skilled talent. With a blend of creativity and technical expertise, Irish VFX studios have contributed to a variety of high-profile projects across feature films, television series, and commercials. This growth has been supported by initiatives such as the Section 481 tax relief scheme. The subsector's success stories include high-profile projects such as Marvel Studios' *WandaVision* and *Spider-Man: No Way Home*, Netflix's *The Irishman*, and HBO's *Game of Thrones*.

In early 2024, it was announced that Screen Ireland's NTA Network is expanding to include an NTA for VFX. This new initiative aims to attract and train more Irish talent in the VFX subsector, addressing the industry's growing skills needs.

The six main VFX and post-production studios in Ireland—EGG VFX, Element VFX, Piranha Bar, Outer Limits, SSVFX, and Windmill Lane—are also members of VFX Ireland, the country's trade association for VFX companies. Based on recent figures from the VFX Ireland Report 2024, they employed 258 workers on the VFX side, of which nearly 80% are creative staff and 20% are production staff.[20] Next to the six big VFX studios, there were a larger group of small post-production companies. After mapping these companies, it was estimated that the VFX and post-production subsector employed a total of 431 permanent staff members. Additionally, there was a significant number of freelancers, trainees and apprentices working within the sector. Although exact figures for these groups were not available, based on previous ratios of freelancers to permanent employees, their numbers were estimated to be around 409.

The economic impact of the VFX and post-production subsector in 2023 highlighted its significant contribution to the Irish economy. The table indicates that the subsector supported a total of 767 FTEs, with 613 directly employed in VFX and post-production activities. In terms of labour compensation, the subsector generated approximately €41.8 million, with €34.1 million attributed to direct compensation. The GVA contribution of the subsector was estimated at €46.5 million, with €30.1 million generated directly.

Table 17. Economic impact of VFX and post-production, 2023

	Direct	Indirect	Induced	Total
Employment (FTEs)	613	103	51	**767**
Labour compensation (€m)	34.1	4.8	2.9	**41.8**
GVA (€m)	30.1	10.0	6.4	**46.5**

Source: Business-level survey, VFX Association, desk-based research, see Annex A for methodology on impact ratios.

Digital games[21]

This section provides estimates of the economic contribution of Irish-owned digital games development companies, which design and program games for platforms such as consoles, mobile devices, and social media. Data on this subsector is limited due to the small size and fluid nature of these companies, many of which are home-based and frequently emerge and disappear. Triangulating

[20] VFX IRELAND REPORT 2024 - Charting Ireland's VFX Future (VFX Ireland, 2024). See: https://www.screenireland.ie/images/uploads/general/VFX-Ireland-Report-2024-V13-DIGITAL.pdf

[21] Please note that the QA and publishing of digital games is captured in a separate section.

findings from research by Imirt, the Irish game developer representation, along with the desk-based review and industry survey for this report, indicated that around 80 companies are operating as development studios (about 80%) or providing services and technologies for games development (about 20%) in the Republic of Ireland. The vast majority of these companies employed fewer than five people. Some of the bigger names in the subsector included Dublin-based Black Shamrock, Scopely, Demonware and Playrix, as well as Galway-based Romero Games.

To bolster growth in the industry, the Irish government introduced a tax relief scheme for game development in 2021, which provides up to 32% relief on eligible expenditure for qualifying projects. Known as Section 481A, this initiative aims to support the creation of high-quality games while enhancing Ireland's appeal as a destination for both local and international studios. Within a pre-budget 2025 submission, Imirt proposed a few improvements to Section 481A, including permitting claims for partial game development projects, revising the cut-off point for qualifying expenditure to better reflect industry standards, and including third-party work undertaken in Ireland as eligible costs.[22]

The economic impact of digital games development in Ireland for 2023 is reflected in Table 18, which shows a total of 1,147 FTEs supported by the subsector. Of these, 995 FTEs were directly related to digital game development, contributing €30.0 million in total labour compensation. The GVA generated by this subsector was estimated at €46.7 million, with direct contributions amounting to €37.3 million.

Table 18. Economic impact of digital games development, 2023

	Direct	Indirect	Induced	Total
Employment (FTEs)	995	76	76	**1,147**
Labour compensation (€m)	26.5	1.3	2.2	**30.0**
GVA (€m)	37.3	4.6	4.9	**46.7**

Source: Business-level survey, Imirt, CRO filings, desk-based research, see Annex A for methodology on impact ratios.

VR and AR

The Irish immersive economy is a rapidly expanding subsector encompassing technologies such as VR and AR. This growth is fuelled by increased investment in content creation, innovation, and skills development, positioning Ireland as a leader in the immersive tech space. With applications spanning industries like entertainment, healthcare, and education, this subsector is creating new economic opportunities and transforming how businesses and individuals interact with digital environments.

Eirmersive, the voice of the immersive subsector in Ireland, published a report in 2022 that reviewed Ireland's current capacity and strengths in immersive technology and provided recommendations to enhance business growth.[23] It also outlined strategies to boost foreign direct investment, aiming to position Ireland as an attractive hub for immersive technology. Based on a domestic industry survey, they estimated that the Immersive Technology subsector had over 750 employees in Ireland in 2022.

[22] Pre-Budget 2025 Submission on Proposed Improvements to Section 481A Digital Games Tax Credit (DGTC) (Imirt, 2024). See: https://www.imirt.ie/prebudget-2025-submission-on-proposed-improvements-to-section-481a-digital-games-tax-credit-dgtc

[23] The Irish Immersive Economy - Irish Immersive Technology Industry Landscape 2022 (Eirmersive, 2022). See: https://www.skillnetireland.ie/uploads/attachments/The-Irish-Immersive-Economy-report.pdf

Table 19 outlines the economic impact of the VR and AR subsector in Ireland for 2022, revealing significant contributions to employment and economic activity. The subsector was estimated to support a total of 939 FTEs, with 750 FTEs directly related to VR and AR technologies. The total labour compensation amounted to €49.4 million, with direct compensation accounting for €40.3 million. Additionally, the GVA generated by the subsector is estimated at €54.9 million, of which €35.6 million was attributed to direct activities.

While these figures offer a useful first estimate of the economic impact of the Irish VR and AR economy, several limitations should be noted. Due to the absence of specific impact ratios for the VR and AR subsector, the assessment relied on those from the VFX and post-production subsector, which may not accurately represent the distinct dynamics of VR and AR. Additionally, the figures in the Eirmersive report captured only a portion of the broader immersive industry.

Table 19. Economic impact of VR and AR, 2022

	Direct	Indirect	Induced	Total
Employment (FTEs)	750	126	63	**939**
Labour compensation (€m)	40.3	5.7	3.4	**49.4**
GVA (€m)	35.6	11.8	7.5	**54.9**

Source: Eirmersive, see Annex A for methodology on impact ratios.

Distribution and publishing

Distribution - Film, television, animation, documentary

The distribution subsector in Ireland plays a crucial role in the success of various media forms, including film, television, animation, and documentaries. This subsector is responsible for bringing content to audiences, both domestically and internationally, ensuring that Irish stories and productions reach a wider market.

Ireland is home to several well-established film distribution companies that excel in promoting both local and international titles. The four Irish-owned companies operating in this subsector are Wildcard Distribution, Eclipse Pictures, Volta Pictures and Break Out Pictures. Notably, Wildcard Distribution released the Oscar-nominated animation *Wolfwalkers*, while Breakout Pictures has been involved in the distribution of *An Cailín Ciúin*, which garnered recognition with an Academy Award nomination for Best International Feature Film. Next to Irish companies, international companies such as Disney Ireland, Paramount Pictures, Sony Pictures Releasing, Twentieth Century Fox, Universal Pictures International Ireland, and Warner Bros also play a significant role in the distribution landscape in Ireland. However, their contribution in terms of employment in the Republic of Ireland is limited.

Table 20 presents the economic impact of distribution across film, television, animation, and documentary subsectors for 2023. The total employment in this subsector amounted to 59 FTEs, with 25 FTEs directly tied to distribution activities. Labour compensation totalled €4.0 million, with direct compensation at €1.9 million. The GVA for the distribution subsector was €6.6 million, comprising €1.9 million directly generated. While the overall impacts were relatively small due to the limited economic footprint of international distributors in Ireland, there were notable contributions from important Irish-owned distributors, which played a significant role in supporting the audiovisual sector as a whole.

Table 20. Economic impact of distribution - film, television, animation, documentary, 2023

	Direct	Indirect	Induced	Total
Employment (FTEs)	25	25	9	**59**
Labour compensation (€m)	1.9	1.6	0.4	**4.0**
GVA (€m)	1.9	3.6	1.0	**6.6**

Source: Business-level survey, CRO filings, desk-based research, see Annex A for methodology on impact ratios.

Publishing and QA – Digital games

The digital games publishing and QA subsector in Ireland is crucial to the success of the digital games industry, both domestically and internationally. This subsector encompasses the publishing of digital games, including marketing, distribution, and post-launch support, while also ensuring that products meet rigorous quality standards through thorough testing processes. Ireland boasts several prominent game publishers, including the Irish branches of major international companies such as Electronic Arts and Activision Blizzard. The industry mapping identified 12 companies active in digital games publishing or QA.

The publishing and QA of digital games contributed to a total of 1,604 FTEs, with 1,176 FTEs directly linked to publishing activities. Labour compensation in this subsector reached €108.7 million, with €80.2 million attributed to direct employment. Additionally, the GVA generated was €156.3 million, of which €103.3 million was directly associated with publishing. This substantial economic impact highlighted the significance of the digital games publishing and QA subsector within Ireland's broader games industry, bolstered by both international and local publishers operating in the market.

Table 21. Economic impact of Publishing – Digital Games, 2023

	Direct	Indirect	Induced	Total
Employment (FTEs)	1,176	321	107	**1,604**
Labour compensation (€m)	80.2	20.4	8.2	**108.7**
GVA (€m)	103.3	34.0	19.0	**156.3**

Source: Business-level survey, Imirt, CRO filings, desk-based research, see Annex A for methodology on impact ratios.

Transmission and Exhibition

Cinema exhibition

The cinema exhibition subsector in Ireland is a vibrant and essential part of the country's cultural landscape, providing audiences with access to a wide range of films, from blockbuster hits to independent productions. As of 2023, there were 36 cinema exhibition companies operating across the Republic of Ireland, with a footprint of 161 sites. These cinemas collectively offered around 633 screens and approximately 92,000 seats, making them integral venues for film distribution and audience engagement.[24]

[24] These statistics are based on data from Screen Ireland, complemented with information collected from Cinema Treasures and the cinemas' websites.

In terms of financial performance, the cinema subsector generated €101.7 million in gross box office receipts in 2023, marking an 11% increase from €91.2 million in 2022. This resurgence reflects a significant recovery from the pandemic, when box office revenues plummeted to €48.7 million in 2021 due to closures and the implementation of heavy restrictions.[25]

Among the largest players in the Irish cinema exhibition market were Odeon Cinemas, Irish Multiplex Cinemas, and Omniplex, which dominated the landscape with multiple locations and a diverse selection of films. Other notable companies, such as the Lighthouse Group and the Irish Film Institute (IFI), significantly enriched the independent cinema scene by showcasing a variety of arthouse and independent films, thus promoting a broader range of cinematic voices in Ireland.

From 2021 to 2023, the cinema exhibition industry in Ireland generated a significant economic impact, contributing a total GVA of €90.4 million. The industry also provided approximately €43.2 million in labour compensation and supported a total of 1,095 FTEs. The direct economic impact of the cinema exhibition industry was notable, with a GVA of €46.7 million and 694 FTEs. This subsector offered valuable employment opportunities, particularly for young, part-time, and inexperienced workers, serving as an accessible entry point into the workforce through entry-level positions that helped individuals gain essential skills and experience. In addition to its direct contributions, the cinema exhibition industry generated significant indirect and induced effects, particularly through its contributions to the food and beverage sector.

Table 22. Average economic impact of cinema exhibition, Ø 2021-2023

	Direct	Indirect	Induced	Total
Employment (FTEs)	694	283	118	**1,095**
Labour compensation (€m)	22.3	14.2	6.7	**43.2**
GVA (€m)	46.7	28.7	14.9	**90.4**

Source: Screen Ireland, Odeon, see Annex A for methodology on impact ratios.

Table 23 illustrates the total economic impact of the cinema exhibition industry from 2021 to 2023. Employment in the subsector rose significantly, increasing from 698 FTEs in 2021 to 1,340 FTEs in 2023. Labour compensation grew from €26.1 million to €54.6 million, while GVA increased from €54.6 million to €114.1 million. This growth aligned with a recovery in box office receipts, which reached €101.7 million in 2023, an 11% rise from €91.2 million in 2022, highlighting the industry's resurgence from pandemic-related challenges.

Table 23. Total economic impact of cinema exhibition, 2021-2023

	2021	2022	2023
Employment (FTEs)	698	1,246	1,340
Labour compensation (€m)	26.1	49.0	54.6
GVA (€m)	54.6	102.4	114.1

Source: Screen Ireland, Odeon, see Annex A for methodology on impact ratios.

[25] Based on data provided by Screen Ireland.

Television broadcasting

The television broadcasting subsector in Ireland is dominated by a few key players that provide a mix of public service and commercial content. The main broadcasters include RTÉ, TG4 and Virgin Media Television. RTÉ, as the national public service broadcaster, operates multiple television channels, including RTÉ One and RTÉ Two, and derives revenue primarily from the TV license fee, which funds its public service broadcasting obligations. In recent years, RTÉ has faced challenges due to declining license fee income and increasing competition, prompting efforts to diversify its revenue streams, including advertising and partnerships. TG4, the Irish-language broadcaster, relies mainly on government funding and advertising revenue, fulfilling a unique role in promoting the Irish language and culture. Meanwhile, Virgin Media Television, which operates channels such as Virgin Media One and Virgin Media Two, generates revenue primarily through advertising and subscription services, positioning itself as a strong competitor in the market. Sky is also a significant player, offering subscription-based services and third-party content. However, its multinational structure means no specific data is available to assess its economic impact in Ireland for television broadcasting. Furthermore, its business model, which relies heavily on subscription services, differs significantly from the other broadcasters mentioned.

This section focuses specifically on the economic impact of TV broadcasting in Ireland, with radio broadcasting excluded for the purposes of this report. Production, whether commissioned by broadcasters or created in-house, was covered in the live action production section. Figures related to in-house productions were deducted here, as broadcasters employ this staff directly, meaning their economic impact has already been captured in previous sections.

From 2021 to 2023, Ireland's TV broadcasting subsector supported an average of 1,957 FTEs each year, consisting of 802 direct, 939 indirect, and 215 induced roles. The annual labour compensation amounted to €124.9 million, while the total GVA contribution of the subsector reached €190.9 million annually on average between 2021 and 2023.

Table 24. Average economic impact of TV broadcasting, Ø 2021-2023

	Direct	Indirect	Induced	Total
Employment (FTEs)	802	939	215	**1,957**
Labour compensation (€m)	68.7	43.5	12.7	**124.9**
GVA (€m)	81.3	81.3	28.2	**190.9**

Source: Broadcasters, see Annex A for methodology on impact ratios.

Table 25 outlines the total economic impact of TV broadcasting from 2021 to 2023. Employment levels remained relatively stable, with FTEs fluctuating slightly from 1,960 in 2021 to 1,978 in 2023. Labour compensation increased consistently over the years, rising from €119.6 million in 2021 to €131.3 million in 2023, reflecting both growth in the subsector and adjustments for inflation. Similarly, GVA showed steady growth, climbing from €182.8 million to €200.6 million during the same period. The economic impact of the TV broadcasting subsector tends to be stable due to the mostly consistent revenue streams, in contrast to other areas of the audiovisual sector that are subject to greater fluctuations, for example due to large productions.

Table 25. Total economic impact of TV broadcasting, 2021-2023

	2021	2022	2023
Employment (FTEs)	1,960	1,932	1,978
Labour compensation (€m)	119.6	123.8	131.3
GVA (€m)	182.8	189.3	200.6

Source: Broadcasters, see Annex A for methodology on impact ratios.

Video on demand

The VOD subsector in Ireland has emerged as a dynamic and essential component of the media landscape, providing audiences with convenient access to a diverse range of films, television shows, and original content. Ireland's VOD market has experienced rapid growth, more than doubling in size since 2019 to reach €196 million in 2023. This growth, fuelled by increased consumer adoption of multiple streaming services and the impact of the COVID-19 pandemic, is expected to continue at a compound annual growth rate of 8.9%, reaching €299 million by 2028, with subscription-based VOD accounting for 88% of the total market.[26]

However, much of the revenue generated by Ireland's VOD market comes from foreign-owned platforms, such as Netflix, Amazon Prime, Apple TV and Disney+, with profits typically repatriated to their parent companies abroad. This limits the extent to which these revenues directly benefit the local Irish economy, especially in terms of employment.

In addition to these international players, the main Irish VOD are provided by the broadcasters with each of them offering on-demand content through their players. This also includes Sky, which offers VOD services through its Sky Go platform, providing subscribers with access to a range of content. There are two more platforms active in the space, Volta.ie and IFI@Home that focus on promoting independent and Irish films.[27]

The non-monetised VOD activities of Irish broadcasters were already included in the economic impact assessment of the TV broadcasting segment. Beyond this, the economic impact of the VOD subsector in Ireland remained minimal in 2023. After consulting with the rest of the Irish-based VODs, direct FTEs were not more than 10 direct FTEs. Labour compensation in the subsector reached €0.8 million, and the total GVA stood at €0.9 million. This limited economic contribution largely reflects the dominance of international VOD platforms, which have minimal direct impact on the Irish economy. Local broadcasters' on-demand platforms and Irish-focused services like Volta.ie and IFI@Home are part of broader companies with only a few people specifically working for the VOD element.

[26] Entertainment & Media Outlook 2024-2028 (PWC Ireland, 2024). See: https://www.pwc.ie/media-centre/press-releases/2024/entertainment-media-outlook-2024-2028.html#:~:text=Ireland's%20Video%2DOn%2DDemand%20(,of%20%E2%82%AC196m%20in%202023.

[27] Please note that Volta.ie will seize to exist on November 30, 2024.

Table 26. Economic impact of VOD, 2023

	Direct	Indirect	Induced	Total
Employment (FTEs)	10	-	-	**10**
Labour compensation (€m)	0.8	-	0.0	**0.8**
GVA (€m)	0.8	-	0.1	**0.9**

Source: Desk-based research, stakeholder engagement, see Annex A for methodology on impact ratios.

Regional impacts

The Irish audiovisual sector has traditionally been concentrated in Dublin and Wicklow, which serve as the primary hubs for production, infrastructure, and talent. While this centralisation has built a robust industry base, it has also created challenges for both the region and the broader sector. High levels of production activity in Dublin and Wicklow have led to significant pressures on infrastructure, workforce capacity, prices and resources, creating a need for a more geographically balanced industry. Stakeholders have emphasised that enabling regional development is not just about fostering opportunities outside Dublin and Wicklow but also about relieving these core hubs to ensure their long-term sustainability.

A more balanced nationwide distribution of audiovisual activity would not only alleviate pressures on the core hubs of Dublin and Wicklow but could also deliver additional benefits. It would create economic opportunities in underrepresented regions, diversify the stories and perspectives depicted in Irish film and TV, and promote the Irish language in areas where it is more commonly spoken, enriching Ireland's cultural heritage. Regional growth would also invigorate local economies, preserve unique regional identities, and strengthen community-based creative industries, fostering a more inclusive and sustainable sector.

Regional production faces significant challenges, particularly the higher costs associated with a lack of local crew. It's estimated that filming outside Dublin and Wicklow can lead to an 8% increase in costs, as specialist talent needs to be brought in from more centralised areas.[28] This not only adds logistical complexity but also financial strain on production, making regional growth more difficult. These increased costs remain a key barrier to expanding the audiovisual sector sustainably in the regions.

Recognising these opportunities and barriers, Screen Ireland and other bodies have introduced initiatives to support regional production. Programmes such as Screen Ireland's NAPF aim to encourage regional activity, while the Western Region Audiovisual Producers (WRAP) Fund focuses on counties Galway, Mayo, Roscommon, Sligo, Donegal, Leitrim, and Clare. Although the regional uplift tax incentive has now been phased out, it previously provided significant relief for productions in designated assisted regions, demonstrating the potential of targeted interventions to stimulate growth. Continued investment in and refinement of such measures remains crucial for building a sustainable and inclusive audiovisual industry in Ireland.

This section of the report offers an initial analysis of the audiovisual sector's economic contributions in Dublin and Wicklow compared to those in the rest of Ireland. However, several limitations should be noted. Regional multipliers are not available, so the same impact ratios are applied across all areas, and while Section 481 and the NAPF data provide a reliable foundation, the distribution of production

[28] Budget 2025 Submission on behalf of the Western AV Forum (Ardán, 2024). See: https://ardan.ie/wp-content/uploads/2024/07/WAVF-Budget-Submission-2025.pdf

is not available for most commercial or broadcaster-led productions. Outside of live action production, the estimates are based on the location of company headquarters, which may not accurately reflect regional spending.

Live action productions

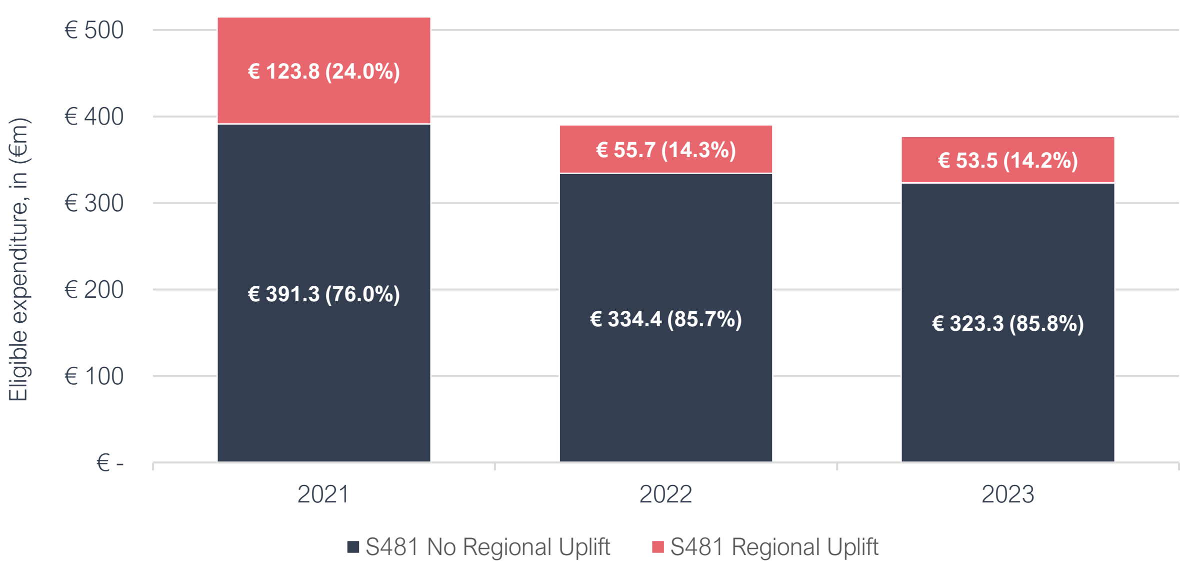
Section 481 productions

Section 481 productions benefited from an additional tax incentive known as the regional uplift, available from 2019 to 2023, which was designed to stimulate audiovisual production filmed in areas designated as assisted regions under the State aid regional guidelines. Introduced as a temporary measure, the uplift aimed to decentralise the sector, encouraging film, television, creative documentary and animation productions to invest in more diverse regions across the country. By offering extra relief on top of the existing Section 481 incentive, the regional uplift sought to boost local economies, create employment opportunities, and develop production infrastructure in underrepresented areas.

The uplift initially provided an additional 5% tax relief in its first year, gradually phasing out over time: it decreased to 3% in 2022 and then to 2% in 2023. The incentive’s automatic nature, relying on predefined criteria rather than discretionary approvals, was key to its success in fostering regional investment. Although temporary, the regional uplift played an important role in promoting regional engagement within Ireland's audiovisual sector and has provided insights into the potential benefits of geographically dispersing production activity.

On average, between 2021 and 2023, around 18% of Section 481 production spend occurred in the assisted regions. While there was an overall decline in total expenditure during this period, the share of regional uplift supported expenditure fell notably. The percentage of production spend attributed to regional uplift decreased from 24% in 2021 to 14% in 2023. Additionally, the number of productions supported by the regional uplift also decreased, from 24 in 2021 to 17 in 2022, and 16 in 2023. This decline aligns with the phasing out of the regional uplift tax relief, which decreased from 5% in 2021 to 3% in 2022, and 2% in 2023.

Figure 6. Regional uplift eligible expenditure and its share of total expenditure for Section 481 productions



Source: Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media

Table 27 displays the regional distribution of the total economic impact for production that received Section 481 (including animation and VFX and post-production related expenditures). The total economic impact (direct + indirect + induced) of Section 481 productions that received the regional uplift between 2021 and 2023 included the support of 1,141 FTEs, generating €59.9 million in labour compensation and contributing €55.1 million in GVA.

Table 27. Average total economic impact of Section 481 by regions, Ø 2021-2023

	Productions without regional uplift	Productions with regional uplift
Employment (FTEs)	5,083	1,141
Labour compensation (€m)	269.6	59.9
GVA (€m)	247.9	55.1

Source: Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, see Annex A for methodology on impact ratios.

Nationwide Additional Production Fund

The NAPF is an additional production loan provided by Screen Ireland for live action and animation feature films, television, and short films to incentivise nationwide activity.[29] The fund operates under three strands:

1) **Local Productions:** Up to €300,000 for film and TV projects with budgets exceeding €1 million.[30]
2) **Short Films:** Up to €5,000 for live action shorts.
3) **International Productions:** Up to €800,000 for projects with a minimum Section 481 eligible expenditure of €5 million, requiring a 20:1 production spend leverage.

The NAPF funding is open to Irish production companies (i.e. production companies registered in Ireland, with an office and staff based in Ireland) and producers applying under strand 3 of international live action productions would be required to apply through an Irish producer.

In 2023, 18 productions benefitted from the NAPF, receiving funding ranging from €3,000 to €300,000, with total support amounting to €2.6 million. Additionally, six of these productions also received the regional uplift through Section 481. The total economic impact (direct + indirect + induced) of productions receiving funds from NAPF in 2023 was 549 FTEs, €27.9 million in GVA and €30.4 million in labour compensation. About 74% of this impact was generated by production that also received the regional uplift. Hence, these figures are also reflected in Table 27 for the productions with regional impact. In addition, NAPF supported 12 productions that were not eligible for the regional uplift, either because they were shorts or because they were produced outside of Dublin + Wicklow but not in areas designated as an assisted region under the State aid regional guidelines, such as Cork. These productions generated a total economic impact of 145 FTEs, €8.0 million in labour compensation and €7.4 million in GVA.

[29] Nationwide Additional Production Fund (Screen Ireland, 2024). See: https://www.screenireland.ie/funding/production-loans/nationwide-additional-production-fund

[30] Total funding provided by Screen Ireland can only be provided up to 65% of the total budget.

Table 28. Total economic impact of production supported by NAPF, 2023

	Productions supported by NAPF and regional uplift	Productions supported by NAPF without regional uplift
Employment (FTEs)	404	145
Labour compensation (€m)	22.3	8.0
GVA (€m)	20.5	7.4

Source: Screen Ireland, see Annex A for methodology on impact ratios.

With the regional uplift fully phased out in 2024, Screen Ireland significantly increased its support for regional productions through the NAPF. To date, another 18 productions have received funding, totalling €3.9 million, representing a 50% increase from 2023.

WRAP Fund

The WRAP fund plays a crucial role in bolstering the regional economy in the West of Ireland, covering the counties of Clare, Donegal, Galway, Leitrim, Mayo, Roscommon, and Sligo, by investing in local audiovisual projects, which contributes to job creation and industry development. Unlike other initiatives, WRAP operates as a commercial fund with a clear aim to generate a return on its investments, ensuring sustainability and the replenishment of resources for future projects. A joint initiative between Ardán and the Western Development Commission, the fund has supported 32 projects since its inception in 2018, leading to over €33 million in regional spending, with an investment of €2.69 million resulting in a €12:€1 impact.[31] WRAP has helped facilitate approximately 500 regional crew positions, employed over 150 regional trainees, and engaged more than 1,500 regional extras. WRAP can invest up to €200,000 in productions produced or co-produced by local companies, enhancing the region's screen industry and promoting sustainable economic growth.

Digital productions and development

To conduct the regional impact analysis for digital productions (excluding animation, which is integrated into Section 481 productions), the headquarters of all active companies were identified to estimate where their employees are based. Although this does not directly indicate where spending occurred, it served as a useful approximation for understanding the regional distribution of the digital production and development segment in Ireland.

Around 23% of employees of the digital production and development segment were located outside of the Dublin and Wicklow area. While nearly all VFX and post-production work was concentrated in Dublin and Wicklow, approximately 15% of game development occurred outside this hub. Notable examples of medium-sized companies based in Galway included Spooky Doorway and Romero Games. The VR and AR subsector was even more dispersed, with only about 52% of companies being located in Dublin or Wicklow, according to the survey of the Irish Immersive Economy report.[32] Other clusters identified by the survey were Cork, Limerick, Sligo, Waterford and Westmeath.

From 2021 to 2023, the total annual economic impact of digital production and development in the regional area (excluding Dublin and Wicklow) amounted to 633 FTEs, €28.7 million in labour

[31] WRAP continues to grow and sustain film and AV industry in the West of Ireland (Reynolds, 2024). See: https://wrapfund.ie/wrap-continues-to-grow-and-sustain-film-and-av-industry-in-the-west-of-ireland/

[32] The Irish Immersive Economy - Irish Immersive Technology Industry Landscape 2022 (Eirmersive, 2022). See: https://www.skillnetireland.ie/uploads/attachments/The-Irish-Immersive-Economy-report.pdf

compensation, and €33.9 million in GVA.

Table 29. Average total economic impact of digital production and development by regions, Ø 2021-2023

	Dublin + Wicklow	Regional
Employment (FTEs)	2,220	633
Labour compensation (€m)	92.6	28.7
GVA (€m)	114.2	33.9

Source: Desk-based research for headquarter, see individual report sections for detailed information on data sources and Annex A for methodology on impact ratios.

Distribution and publishing

The distribution and publishing segment of the audiovisual segment showed the highest regional spread of the four presented segments. While the distribution of film, television, documentaries and animation was entirely located in the Dublin and Wicklow area, the digital games publishing and QA subsector had a decent amount of regional representation. This is mainly driven by two large companies that were located outside the main hub, Electronic Arts in Galway and Blizzard Entertainment in Cork.

The total economic impact of distribution and publishing in the regional area (excluding Dublin and Wicklow) from 2021 to 2023 included 691 FTEs, €46.9 million in labour compensation, and €67.4 million in GVA per year.

Table 30. Average total economic impact of distribution and publishing by regions, Ø 2021-2023

	Dublin + Wicklow	Regional
Employment (FTEs)	972	691
Labour compensation (€m)	65.9	46.9
GVA (€m)	95.5	67.4

Source: Desk-based research for headquarter location, see individual report sections for detailed information on data sources and Annex A for methodology on impact ratios.

Exhibition and transmission

In the exhibition and transmission segment, TV broadcasting and VOD were split based on headquarters data, while the location of cinema screens was used as an approximation for exhibition. The regional contribution of this segment was most likely an underestimation as RTÉ is operating regional offices, but no information on the split of the TV broadcasting employees was publicly available.

About 31% of economic impact of this segment happened outside of Dublin and Wicklow, with the contribution of cinemas being the main driver of the regional impact. From 2021 to 2023, exhibition and transmission contributed to the regional economy with 1,049 FTEs, €47.5 million in labour compensation, and €90.4 million in GVA yearly.

Table 31. Average total economic impact of exhibition and transmission by regions, Ø 2021-2023

	Dublin + Wicklow	Regional
Employment (FTEs)	2,013	1,049
Labour compensation (€m)	121.5	47.5
GVA (€m)	191.9	90.4

Source: Desk-based research for headquarter location, see individual report sections for detailed information on data sources and Annex A for methodology on impact ratios.

Other impacts

The audiovisual sector in Ireland provides substantial economic benefits, as outlined in this report, but its broader contributions reach well beyond economic benefits for the immediate sector and its value chains. Key spillover effects or 'positive externalities' include enriching Irish identity, supporting cultural heritage, and attracting international tourism, with hotels, restaurants, and attractions benefiting from increased activity linked to interest in filming locations.

While this report primarily focuses on assessing the sector's economic value and skills landscape, it is equally important to recognise its vital role in promoting the Irish language, identity, and values through the power of storytelling on screen.

Research commissioned by Screen Ireland in 2022, looking into the cultural dividend of Irish film and television productions, showed the powerful, wider cultural impact such productions have.[33] The research found a range of positive cultural impacts generated by such productions. These included a boost in tourism driven by screen-based content; the preservation and promotion of the Irish language; and an enhancement of Ireland's reputation internationally, due to wider global recognition of Irish audiovisual work and the expanded, positive depiction of Irish landscapes, culture, and people on screen.

Screen tourism

Tourism Ireland's sentiment tracking research from 2024 showed that films, television and travel shows were a source of travel inspiration for 26% of respondents.[34] Films and television were on par with other sources like travel websites and booking platforms, and higher than social media and travel blogs. This aligns with views of stakeholders interviewed for this study, who felt that screen-based tourism is more efficient in showcasing Ireland positively to mass audiences and attracting tourists, as compared to targeted advertising or promotional campaigns.

In 2019, research conducted by Failte Ireland had similar findings to the sentiment tracking research.[35] The survey found that between 2014 and 2019, films and television drama steadily grew in importance as a source of influence in attracting people to Ireland. By 2019, a higher proportion of travellers were influenced by film and television to travel to Ireland, with this being highest for travellers from long-haul destinations, coming into Ireland from outside both mainland Europe and North America.

[33] The Cultural Dividend Generated by Ireland's Section 481 Film and Television Incentive (Olsberg SPI, 2023). See: https://www.screenireland.ie/images/uploads/general/The_Cultural_Dividend_Generated_by_Section_481_Report_January_2023.pdf

[34] Tourism Ireland surveyed 7062 overseas holidaymakers as of June 2024. Respondents were asked to select up to 3 sources of inspiration for travel. Tourism Ireland Sentiment Tracking (Tourism Ireland and Red C, July 2024). See: https://www.tourismireland.com/docs/default-source/sentiment-tracker-research/sentiment-tracker-research---july-2024.pdf?sfvrsn=84f8b64b_1

[35] Findings of this survey was shared with Alma Economics.

While there is little empirical data on the extent and scope of tourism generated by screen productions, there is a wide range of anecdotal evidence to underscore the notable amount of tourism attributable to screen productions. The Cultural Dividend report, published in 2022, found that the series, *Normal People* led to an uplift in tourism in key locations depicted in the series, such as Streedagh Beach, Ben Bulben and Tubbercurry in Sligo and Trinity College in Dublin.[36] Stakeholders interviewed for this study have reported that there has been an influx of tourism prompted by recent film and television productions. Productions like *An Cailín Ciúin (The Quiet Girl)*, *Banshees of Inisherin*, and most recently, *Kneecap*, have been known to attract scores of international tourists to Ireland.

Banshees of Inisherin released in 2022 is a particularly good example of tourism prompted by screen productions. Interviewed stakeholders reported that *Banshees of Inisherin,* helped boost travel to the West Irish isles of Achill Island and Inishmore, where it was filmed. The locations were an integral part of the film, with viewers going as far as to describe Ireland as a "character in the film". Most viewers appreciated the scenic beauty of the Irish islands, which contrasted with the film's grim storyline. In this way, the locations contributed to the success of the film, while simultaneously boosting the profile of the islands through its wide international reach.

The momentum created by the film was further capitalised by Tourism Ireland, who published its 'behind-the-scenes' advertorial featuring locations and the film's cast and crew. This advertorial garnered 29 million views on YouTube, further pushing these locations to the screens of global audiences across 12 countries. According to interviewees of this study, these promotional efforts have borne fruit, and the isles have seen a jump in tourism since the film's release, despite being "*off the beaten path*" and requiring "*some effort to get there*". Other similar 'behind-the-scenes' videos produced by Tourism Ireland include *Irish Wish*, *Bodkin*, *Vikings: Valhalla*, and *Derry Girls*, among others.

Importantly, the tourism body of Achill Island currently promotes key locations featured in the film, as part of a '*Banshees of Inisherin* Locations Trail' on its website.[37] The website feature includes a map, notes and pictures of the particular spots, shops, pubs, and beaches portrayed in the film; guided tours are also offered on request.

While feature films like *Banshees of Inisherin* bring Irish locations to the big screen, films released on VOD platforms are equally useful in prompting screen tourism opportunities. Research carried out by Netflix and the World Tourism Organisation in 2021 surveyed over 8000 Netflix viewers from 5 countries, to confirm that viewers are more likely to visit a country after watching that country or culture on screen.[38] Echoing this, interviewees noted the potential for screen tourism prompted by VOD releases, with some pointing to the film, *Irish Wish,* which held the number 1 spot on Netflix, with 25.5 million views through its release week in March, 2024.[39] Its visually pleasing portrayal of featured Irish locations were taken to global audiences through VOD, which is a scalable mode of screen content distribution.

[36] The Cultural Dividend Generated by Ireland's Section 481 Film and Television Incentive (Olsberg SPI, 2023). See: https://www.screenireland.ie/images/uploads/general/The_Cultural_Dividend_Generated_by_Section_481_Report_January_2023.pdf

[37] Banshees of Inisherin Locations Trail (Achill Tourism, 2024). See: https://achilltourism.com/banshees-of-inisherin-locations-trail/#map

[38] Cultural Affinity and Screen Tourism – The Case of Internet Entertainment Services (World Tourism Organisation and Netflix, 2021). See: https://doi.org/10.18111/9789284422838

[39] Top 10 Week of March 18 (Netflix, 2024), see: https://about.netflix.com/en/news/top-10-week-of-mar-18-irish-wish-and-the-gentlemen-take-the-top-spots

Promotion of the Irish language and cultural education

The 2021 study by Netflix and the World Tourism Organisation found that aside from screen tourism, exposure to new cultures on screen can help drive cultural affinity towards the featured country; with audiences being attracted to the cultural products, local language, history, landmarks and people.[40] Such engagement is particularly valuable for Ireland, in view of their longstanding efforts to preserve and promote the Irish language and encourage international engagement with their cultural heritage.

Anecdotal evidence from this study confirmed the role of films in the promotion of Irish cultural identity and language. *Kneecap* is the most recent and most frequently cited example by interviewees. The film is based on an Irish language rap trio and their rise to fame. The film's storyline plays out against the wider political backdrop of efforts for the preservation of the Irish language and national identity in Northern Ireland; and a central theme of the film is the increased engagement with the Irish language and cultural identity through music. The film was well received by audiences following release; and its selection as Ireland's entry into the Oscars, has brought the rap trio's story to wider international audiences, continuing the promotion on screen.[41,42] The 2022 film *An Cailín Ciúin* (The Quiet Girl), was another production that successfully promoted the Irish language and culture. According to media reports, the film was the highest-grossing (over €1 million) Irish language film of all time.[43] The film premiered at several renowned film festivals, such as the Sydney Film Festival and the Berlinale, even going on to win awards at the Berlinale.[44] It was the first Irish language feature film to be shortlisted and nominated for the Oscars, indicating the growing creative renown of Irish language filmmaking.[45] Following its success at the box office and film festivals, the film was distributed to international markets such as the US, Australia and New Zealand, further promoting international engagement with Irish language and culture as depicted through the film. It received development funding through the Cine4 initiative, which is a collaboration between Screen Ireland, TG4, and Coimisiún na Meán.

Films are also useful in promoting cultural education, with international viewers becoming acquainted with specific national events or ways of life in certain historical periods of time. Interviewed stakeholders mentioned That They May Face the Rising Sun – a 2023 film based on a rural Irish community in the 1980s, which was praised as an accurate, moving, and popular portrayal of Ireland in the 1980s. Promotional activities developed around such documentary films further boost cultural education, and in turn, cultural engagement. For instance, following the release of the documentary, Mrs Robinson in 2024, Lighthouse Cinema and Pálás Cinema offered an exhibition into the archives of Mary Robinson. The exhibition featured a collection of documents and artifacts from Mary Robinson's life and career.[46]

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40 Cultural Affinity and Screen Tourism – The Case of Internet Entertainment Services (World Tourism Organisation and Netflix, 2021). See: https://doi.org/10.18111/9789284422838

41 Kneecap breaks £1m at UK-Ireland box office as Alien: Romulus holds lead with £2m (Screen Daily, 27th August 2024). See: https://www.screendaily.com/news/kneecap-breaks-1m-at-uk-ireland-box-office-as-alien-romulus-holds-lead-with-2m/5196565.article

42 Kneecap selected as Ireland's entry for Oscars 2025 international film race (Screen Daily, 2nd August 2024). See: https://www.screendaily.com/news/kneecap-selected-as-irelands-entry-for-oscars-2025-international-film-race/5195954.article

43 An Cailín Ciúin: 'A breakthrough moment' for Irish language films (BBC, 30th October 2022). See: https://www.bbc.co.uk/news/uk-northern-ireland-63286110

44 New horizons: An Cailín Ciúin surpasses €600,000 at the UK and Irish box office, continuing to break records for Irish-language film (Screen Ireland, 10th June 2022). See: https://www.screenireland.ie/news/new-horizons-an-cailin-ciuin-the-quiet-girl-surpasses-600000-at-the-uk-and-irish-box-office-continuing-to-break-records-for-irish-language-film

45 An Cailín Ciúin / The Quiet Girl makes history as the first Irish-language feature film to be shortlisted for the Oscars (Screen Ireland, 21st December, 2022). See: https://www.screenireland.ie/news/an-cailin-ciuin-the-quiet-girl-makes-history-as-the-first-irish-language-feature-film-to-be-shortlisted-for-the-oscars

46 From the Desk of Mrs. Robinson at Light House Cinema and Palas, (Light House, 2023). See: https://www.lighthousecinema.ie/news/post/from-the-desk-ofmrs-robinson-at-light-house-cinema-palas

Recommendations for future research

There is room for further research into the extent and scope of tourism activity generated by screen production. At the outset, such research would require robust and transparent data linking motivations for tourism to specific productions and locations featured therein. Research would need to address key limitations in data collection, such as the challenge of recruiting reliable participants and gathering a sufficiently large sample size.

Areas of investigation may relate to the screen tourism prompted by live action production, as opposed to other formats, e.g., animation, and digital games. Similarly, it is currently not known whether the scope of screen tourism is higher through certain modes of distribution, such as VOD platforms, as opposed to cinemas. Such research and evidence can further inform cultural policy and/or tourism strategy. Further, the compounding effect of other factors in boosting tourism choices is another potential area of research.

Skills analysis

Summary of findings

The skills analysis reveals both strengths and challenges within the Irish audiovisual sector, highlighting key gaps, training needs, and areas for development to sustain and grow the industry.

- **Skills gaps and priority areas**: While Ireland has a strong foundation of creative and technical skills, ongoing development in business and project management skills remains critical. Many professionals require training in production budgeting, legal knowledge, self-promotion, and adapting to new industry tools. Business development, especially for early-career professionals, emerged as a priority area, with calls for more commercial awareness training to mitigate exploitation risks and promote sustainable career pathways.
- **Learning and development opportunities:** Existing training, offered by organisations such as Screen Ireland and its NTAs, was widely valued for its variety and relevance. However, more regionally distributed, affordable, and hands-on learning opportunities are needed. Stakeholders advocated for practical, on-the-job training formats such as micro-credentialing, shadowing, and mentorship to provide flexible, accessible pathways into and across the sector. Stronger collaborations between training providers and industry were also seen as important in improving the relevance and effectiveness of learning and development opportunities.
- **Career development and sustainability:** Work-life balance, regional job opportunities, clear progression pathways, and consistent work are top priorities for a sustainable career in the audiovisual sector. Sector retention may benefit from clearer career mapping, work-based accreditation, and incentives for regional production, helping professionals stay within the sector without needing to relocate.
- **Talent shortages and growing talent pools:** The audiovisual sector in Ireland is facing talent shortages, especially in some HOD roles, trainees, and producers in Ireland's regions. This gap is driving reliance on international crews, which increases costs and limits local talent development. Expanding skill transfer opportunities between sectors like animation, games, and screen production, and putting in place bridging programmes to address skills gaps and shortages, were noted as being important. Similarly, the promotion of careers to those outside the sector and demystification of sector roles and pathways can attract more workers into the sector and promote the growth of the sector workforce.
- **Adapting to change**: Stakeholders emphasised the need to keep pace with emerging technologies and sustainability and EDI standards to ensure the sector remains competitive, sustainable, and inclusive. They viewed generative AI and virtual production as transformative but warned that limited training and confidence could create skill gaps as these technologies become more integral. Sustainability practices were seen as crucial for meeting environmental goals, though smaller productions require more support to implement them effectively. While EDI initiatives have advanced, there was a call for improved support for neurodivergent professionals and professionals with disabilities.

Background and methodology

Understanding the skills and development needs of the Irish audiovisual sector is essential for fostering growth and innovation. This skills analysis highlights key themes shaping the industry today and serves as an important update since the most recent comprehensive assessment conducted by Screen Ireland in 2020.[47]

This skills analysis employs a triangulation approach, drawing from several key data sources—including individual and business-level surveys, stakeholder interviews, and extensive desk-based research—to ensure a comprehensive and nuanced view of the sector's skill landscape, highlighting both current capabilities and areas for development within the Irish audiovisual industry.

- **Individual-level survey:** The individual-level survey targeted anyone currently or previously working in the Irish audiovisual sector. It aimed to gather insights on skills, learning, and development needs to foster an inclusive and equitable environment. Key topics included career development, training opportunities, factors influencing retention, and the impact of new technologies. This survey is designed to inform future policies and strategies for the sector by understanding the experiences and needs of individuals across various roles and career stages.
- **Business-level survey:** Distributed to companies in the Irish audiovisual sector, this survey specifically targeted individuals knowledgeable in financial and employment data, such as CEOs, CFOs, and Finance Directors. While its main focus was on gathering data for the economic impact analysis, it also delved into topics such as skill gaps, and training priorities within organisations. This survey provided insight into company-level skills needs, workforce gaps, and skills development initiatives, with the aim of informing future sector policies.
- **Stakeholder interviews:** Semi-structured interviews with business representatives, and sector stakeholders (such as industry associations, educational institutions, and government bodies) provided qualitative insights into skills gaps and sector challenges. A list of participating organisations is provided in Annex C.
- **Desk-based review:** Secondary research of reports, industry publications, and institutional documents offered background context, including key trends, best practices and existing skill development provisions.

Respondent profiles surveys[48]

The individual-level survey, conducted from 25th September to 14th October 2024, gathered 290 responses, predominantly from professionals in the audiovisual sector. Film production emerged as the most represented subsector, with 46% of respondents identifying as part of it, followed by scripted television (33%), digital games development (19%), documentary production (18%) and animation (17%). The majority of respondents were either freelance or self-employed (40%), with 33% being employees and 13% employers. Regarding their experience in the sector, over half (56%) have worked for more than ten years in the sector, while 29% have been in the industry for 3-6 years, and 17% have been in the sector between 6 to 10 years. A minority of respondents (8%) have been in the sector for 1-2 years, and 6% of respondents have been in the sector for less than a year. Geographically, 58% of respondents operate in Dublin, with notable representations from Galway (15%), Wicklow (14%) and Cork (8%).

[47] Skills Needs Analysis Report for the Screen Sector in Ireland 2019-2020 (Screen Ireland, 2020). See: https://www.screenireland.ie/images/uploads/general/Screen_Skills_Ireland_2019_Report_vG.pdf

[48] Detailed respondent profiles can be found in Annex C.

The business-level survey was conducted alongside the individual-level survey and received 269 responses from a variety of audiovisual subsectors. Among the 214 businesses that responded to the subsector question, 46% were involved in film production, 32% in scripted TV, 23% in documentaries, 20% in unscripted TV, and 17% in animation. Businesses were predominantly located in Dublin (60%), followed by Wicklow (17%) and Galway (10%). Additionally, 21% of businesses indicated that they operate across all counties. This diversity in subsector representation and geographic distribution underscores the broad reach of the audiovisual industry within Ireland.

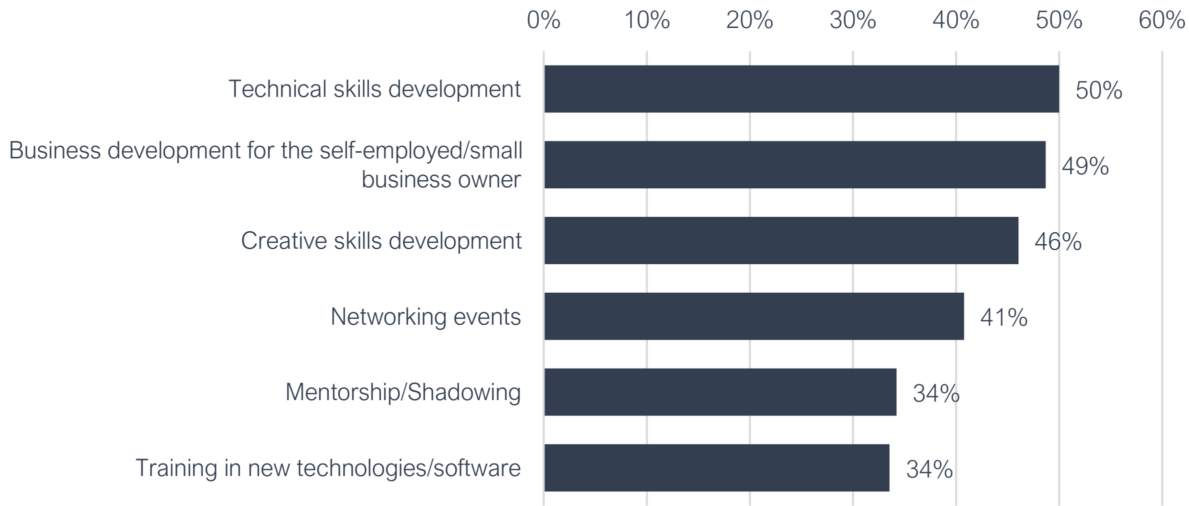
A more detailed breakdown of respondent profiles for both the individual and business-level surveys is provided in Annex C.

Priorities for training and skills development

Priority areas for individuals' skills development were largely identified around business skills and responding to changes in the industry

Individual-level survey respondents were asked to indicate the most important factors when dealing with training and learning needs. Around half of the respondents believed that technical skills (50%) and business development skills (49%) were important factors, followed by creative skills development (46%). Other factors frequently mentioned by respondents for priorities around training and learning needs were networking events (41%), mentorship/shadowing (34%) and training in new technologies/software (34%).

Figure 7. Importance of factors for training and learning needs



Source: Individual-level survey conducted by Alma Economics.

Many participants highlighted that Ireland has an excellent resource of creative skillsets, and that technical skills in many areas are well-addressed by NTAs and other providers. However, both survey respondents and interview participants emphasised the need for **continuous skills development** and training opportunities, particularly in adapting to evolving sector needs.

When asked to identify priority areas for learning and skills development, survey respondents reported prioritising learning in areas such as **virtual technologies** (e.g., AI and virtual production), **project management, production budgeting and accounting, legal knowledge, industry tools,** and **soft skills.** This focus was echoed by interview participants, who highlighted the importance of addressing these gaps through strategic partnerships and adapting training to align skills with the latest developments in the audiovisual sector. The development of new, wider and/or more transferable skill sets was viewed as important for enabling respondents to get additional work opportunities and mitigate against periods of work drought – a commonly reported issue. Several respondents noted the importance of legal knowledge and learning about the protection of intellectual property (IP) rights in their work, in view of the reported historical trend of screen performers, in particular, losing control of their IP in productions because they did not sufficiently understand their employment contracts.

Business development was a key priority area, with respondents aiming to expand their clientele and/or professional networks to access more work. Participants noted that early career professionals may be more passionate about developing creative and technical skills, but spend little time on developing an understanding of how the sector works or how to sustainably build a career. Some interviewees felt that a lack of **commercial awareness and business acumen** could leave creative professionals at risk of exploitation in the sector.

Marketing, distribution and promotion of work portfolios were also noted by survey respondents and interviewees, who highlighted the importance of increasing visibility of work. For example, marketing training for filmmakers would support the promotion of films internationally and to specific audiences. Several interview participants felt that integrating marketing roles within production teams, or adding marketing responsibilities to current roles, could bridge this skills gap by helping professionals better package and promote their work. One example given was marketing training for cinemas to boost engagement, particularly as Ireland's film production volume grows. For highly collaborative roles, such as screen composers, it was noted that **networking, team working,** and **self-promotion skills** are needed; interviewees noted this has become more difficult now that more training and events are held online.

Project management skills were highlighted repeatedly, notably for producers. This need may be more acute in fast-growing sub-sectors; for example, as the volume of unscripted productions has grown, it has required more studio space and consequently, better management of teams and processes such as set building.

Another notable priority area for respondents was to **expand their creative production portfolios or start their first creative projects.** A number of respondents noted their interest in script writing, directing and/or producing their first project in the live action, unscripted, and games sub-sectors. Relatedly, **support with acquiring relevant production and development funding** was a priority for several respondents. Interviewees similarly highlighted a need for more targeted business support, including guidance on securing funding within specific sectors, such as digital games, and equipping creative professionals to develop commercially viable work.

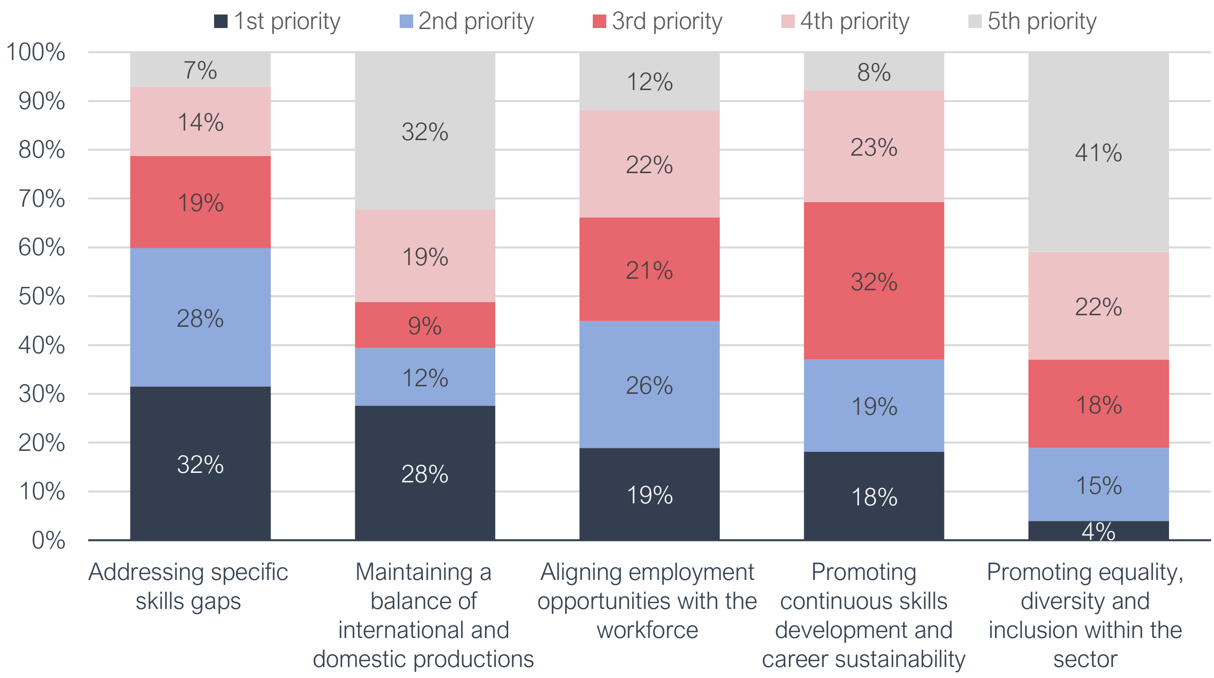
Numerous stakeholders identified the **threat that AI poses to early career skills**, as many of the tasks that people historically have trained on can now be automated. Training was suggested to teach students and recent graduates how to use AI effectively and proportionately, including when it should not be used, such as around creative processes and refining one’s craft.

Business-level survey responses highlighted the need for both business and technical skills development

Business-level survey respondents were asked to rank priorities for developing and maintaining skills in the audiovisual sector according to the level of importance on a scale from 1 to 5 – with 1 being the most important and 5 being the least important. The most pressing priority selected by business-level survey respondents was addressing specific skills gaps (32% identifying this as most important).

Opinions were divided when it came to maintaining a balance between international and domestic production, with 28% of business respondents seeing it as the number one priority, while 32% ranked it as the least important priority. Only 4% of business respondents believed that EDI was the most pressing issue out of the five mentioned.

Figure 8. Businesses' priorities for development and maintaining skills ranking



Source: Business-level survey conducted by Alma Economics.

Business-level survey respondents were then asked to specify the most critical skills gaps in Ireland's audiovisual sector. They identified a broad range of gaps across departments, highlighting areas that need urgent attention. The table below summarises these findings, combining related roles across production genres to reflect the diverse needs identified by respondents.

Development	Production Management / Editorial	Post-production
• Directors (HOD) • Researchers (documentaries/unscripted)	• Production accountancy • Administrative skills • Line producing (lower budget scripted television) • Production management • Production coordination • Assistant producing	• Editing

Technical / Sound / Engineering	Animation, Digital Production and Development	Other General Skills
• Cinematography (DOP in documentaries) • Lighting • Rigging • Electrics • Sound recording	• Grading • Mixing • Stop-motion animation • Motion graphics • CG imagery • Motion design • Programming	• Communication • Leadership • Critical thinking • Business affairs • Financial skills • Taxation

Source: Business-level survey conducted by Alma Economics.

The most commonly identified skills gap was in production accountancy, followed by technical skills, particularly in editing. Respondents also highlighted significant gaps in development departments (e.g., directors) and key roles within production management (e.g., line producers, assistant producers, production coordinators, and production managers), which could impact production pipelines if not addressed. Additionally, a few respondents pointed out the need for more Irish language producers and directors.

As shown in the chart, respondents identified specific HOD and technical roles facing gaps across different production genres. For example, there is a shortage of experienced directors of photography (DOPs) and researchers in documentaries and unscripted production, as well as line producers in lower-budget scripted television. In digital content production, both the Irish games and animation sectors were noted as requiring skills development interventions.

Addressing skills gaps through expanding accessibility and improving collaboration

Existing initiatives by Screen Ireland and National Talent Academies are making positive contributions to talent development

Many survey respondents appreciated the wide variety of affordable or free training courses and skills development opportunities provided by Screen Ireland and the NTAs. The masterclasses, industry mentorships, and networking opportunities were found to be beneficial for the sector. Respondents largely found the available skills development opportunities to be relevant for their work; games and animation sector respondents particularly contrasted the current offer to the past, noting there are now more training opportunities relevant to their sectors. Programmes such as the Safe to Create,[49] Passport to Production,[50] advanced producer courses,[51] the Indiedev cross-border games prototype

[49] Safe to Create (2024). See: https://www.safetocreate.ie/

[50] Passport to Production (Screen Ireland, February 2024). See: https://www.screenireland.ie/courses/passport-to-production-february-2024

[51] Postgraduate Diploma in Advanced Producing (Screen Ireland, September 2024). See: https://www.screenireland.ie/courses/postgraduate-diploma-in-advanced-producing

fund programme,[52] and the shadowing opportunities offered on Screen Ireland's NTA courses[53] were specifically mentioned by respondents.

Participants provided a number of examples of shadowing and mentoring schemes that facilitated on the job learning in the sector. Screen Ireland's NTA for Film and Television has delivered shadowing and mentoring opportunities for individuals across Ireland, including a mentoring scheme for producers to enhance business development skills. Participants highlighted that shadowing and mentoring opportunities were typically based in Dublin and Wicklow, acting as a barrier to individuals living in other parts of Ireland from accessing these opportunities. Some schemes are in place to address this; for example, Ardán has produced funding to cover the additional costs of taking up opportunities in Dublin and Wicklow. Imirt has developed mentorship incubators in Dublin and Galway for independent game developers to support creative and business skills development.

Improvements could be made in regional distribution of training and diversity of opportunities across sub-sectors and genres

Several suggestions for improvements in skills and training were put forward by respondents. A need for more skills training and workforce capacity development efforts led by Screen Ireland or through its NTAs in regions outside sector hubs was raised by several respondents. It was highlighted by these respondents that existing skills development opportunities are commonly Dublin-based, making it difficult for those based in other regions to access such opportunities, particularly given the high costs of travelling to and living in Dublin. Smaller independent, local companies, particularly small digital games developers, in the regions, highlighted the need for more funding support and financing opportunities for them. Digital game sector respondents also highlighted the need for expanded and bespoke training opportunities for the sector. Respondents reported that there is room for more training and skills development support in genres such as documentary or unscripted filmmaking, and for Irish language talent and crew. Notably, suggestions for regional skills and workforce development were dependent on better work continuity in the regions. A majority of respondents highlighted the need for increased support to ensure work continuity in the regions, with several respondents outlining the importance of effectively integrating graduates and other new entrants into the sector workforce. Work continuity in regional areas was also noted by many respondents as being important to ensure retention of sector workforce in the regions.

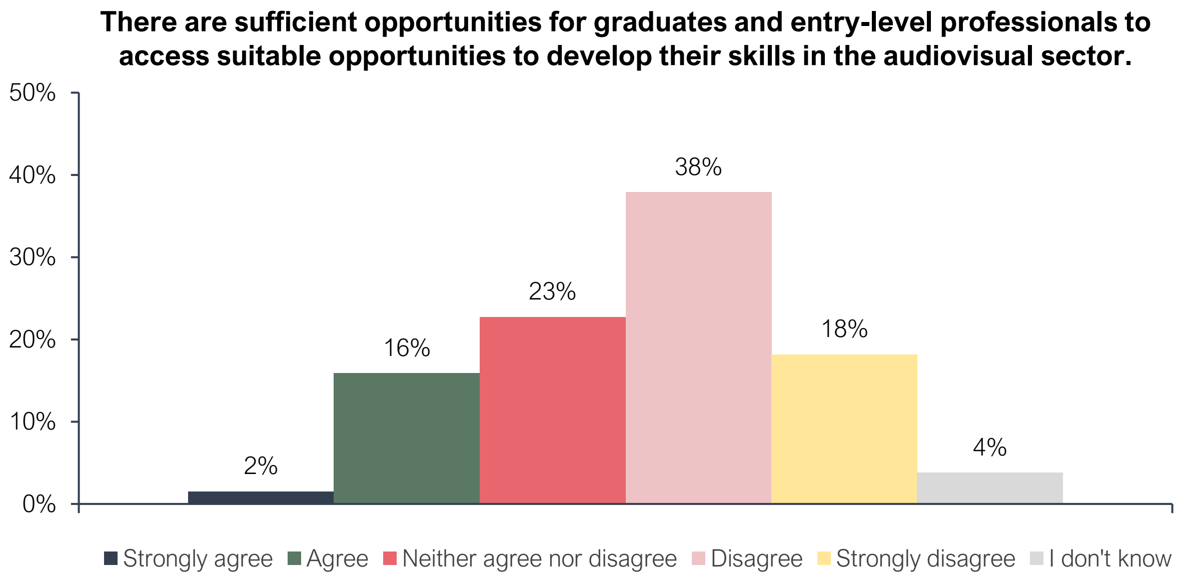
Opinions differed about the adequacy of training and learning opportunities

In the business-level survey, respondents were asked about the sufficiency of skills development opportunities for graduates and entry-level professionals in the audiovisual sector. The majority of respondents (56%) either disagreed or strongly disagreed with this statement. Only 2% of respondents strongly agreed that sufficient opportunities exist.

[52] Indiedev 2024: The Cross-border Games Prototype Fund (NI Screen, 15th May 2024). See: https://www.screenireland.ie/news/indiedev-2024-seven-teams-announced-for-cross-border-games-prototype-fund

[53] Film & TV Drama Shadowing: Writers, Development Executives and Script Editors (Screen Ireland, 2024). See: https://www.nationaltalentacademies.ie/courses-activities-programmes/film-tv-drama-shadowing-writers-development-executives-script-editors-2023#:~:text=The%20National%20Talent%20Academy%20for,feature%20films%20and%20television%20drama; Film & TV Drama Shadowing: Producers (Screen Ireland, 2024). See: https://www.nationaltalentacademies.ie/courses-activities-programmes/film-tv-drama-shadowing-producers

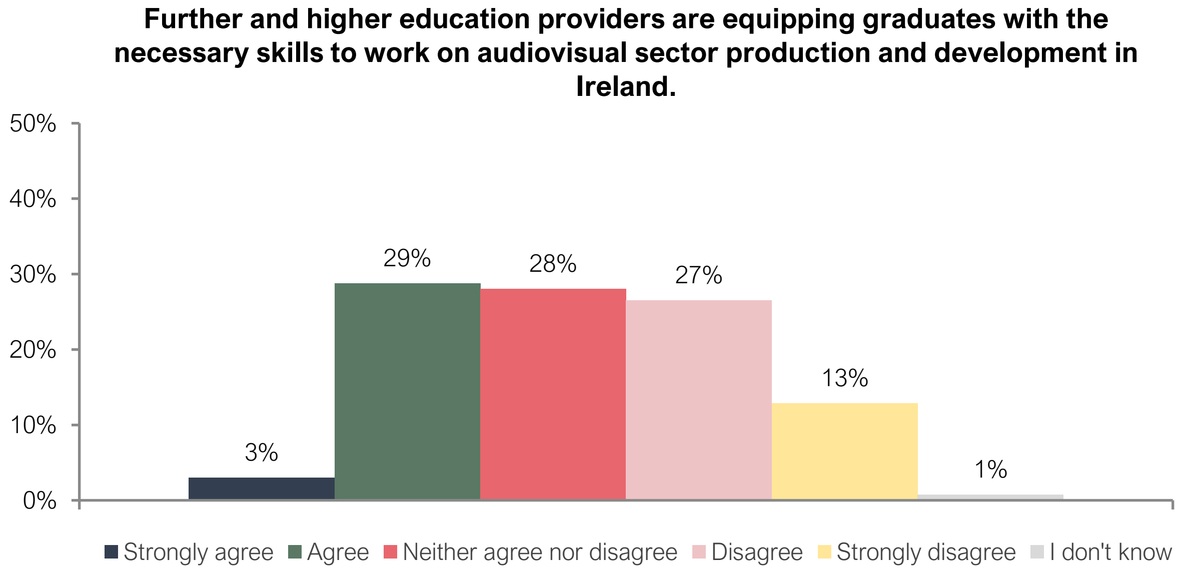
Figure 9. Skills development opportunities for graduates and entry-level professionals



Source: Business-level survey conducted by Alma Economics.

Business respondents were divided about whether further and higher education providers were preparing graduates well to work in the audiovisual sector. A very similar share of respondents either agreed (29%), disagreed (27%) or neither agreed nor disagreed (28%) with the statement. However, very few respondents (3%) strongly agreed while 13% strongly disagreed.

Figure 10. Preparation of graduates by higher and further education for the job market



Source: Business-level survey conducted by Alma Economics.

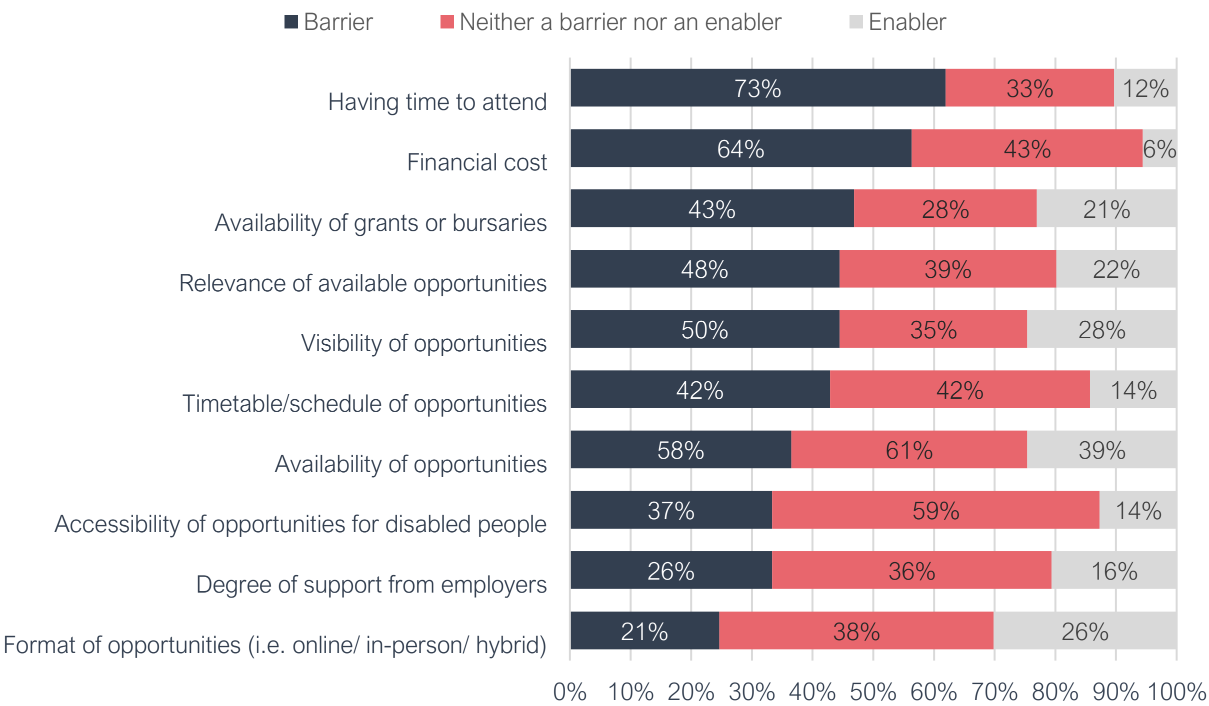
Most respondents noted that affordable, practical, on-the-job training programmes and mentorships are most useful in addressing their learning and development needs. There was a noted preference for such training having a more regional focus, and addressing core subject areas such as legal, business development, management and accounting. Several respondents mentioned Screen Ireland and the

NTAs and as a source of support for their learning and development needs, while others reported the need for more engagement by guilds and unions working in the Irish audiovisual sector. Overall, adequate funding and logistical support to enable people to access various training opportunities, particularly for anyone living in regions outside the sector hubs, were widely noted as a key requirement in this regard.

Having time to attend was the biggest barrier to accessing training opportunities, along with financial cost

Since the Covid-19 pandemic, Screen Ireland's skills training programme has been free. However, when asked about the biggest barriers and enablers to accessing training and development opportunities, individual-level survey respondents highlighted financial cost and availability of grants or bursaries (or the lack thereof) as barriers, indicating that reinstating fees may in fact affect accessibility. 62% stated "Having time to attend" is a barrier. Other notable barriers included the relevance of available opportunities. The format, availability and visibility of opportunities were most often identified as enablers to accessing training and development opportunities.

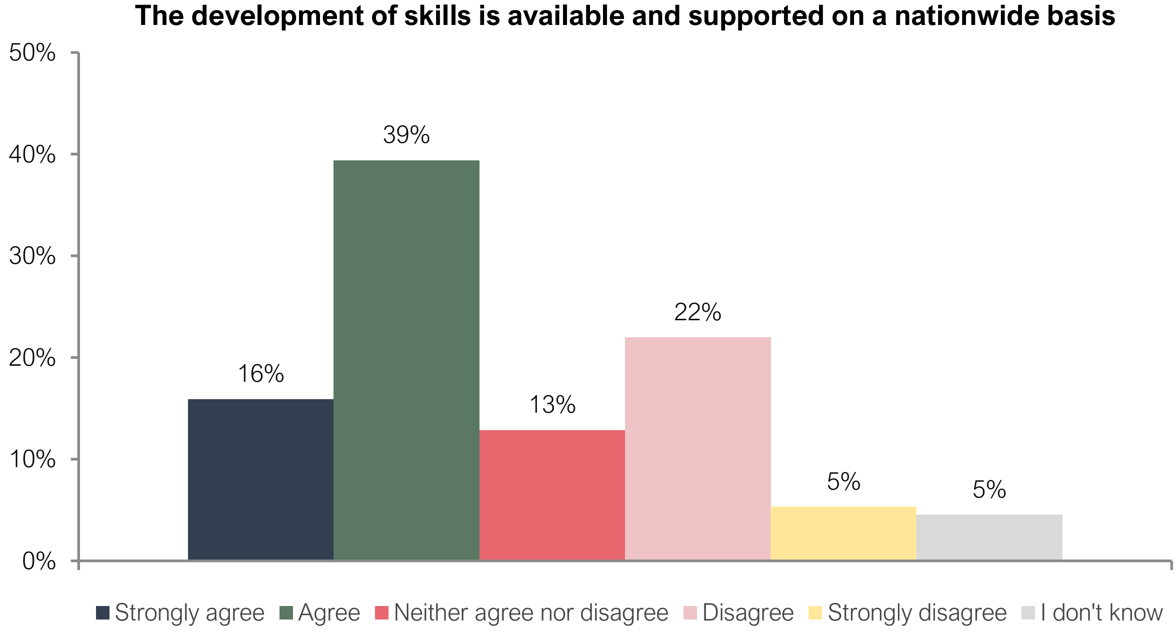
Figure 11. Barriers and enablers to accessing training and development opportunities



Source: Individual-level survey conducted by Alma Economics.

Respondents also identified the need to prioritise support for work continuity, particularly in West Ireland and regions outside Dublin and Wicklow (as this is where a majority of productions were taking place). Finally, stronger funding and financing support for smaller, local, Irish companies was commonly noted as a key focus area. In the business survey, respondents were asked whether they agreed with the fact that the development of skills is available and supported on a nationwide basis. The majority (55%) of respondents either agreed or strongly agreed, while 13% neither agreed or disagreed and 27% disagreed or strongly disagreed.

Figure 12. Availability and support of skills development on a nationwide basis



Source: Business-level survey conducted by Alma Economics.

Need for tailored approaches to skills development across sub-sector and career levels

On-the-job learning is best suited to the sector’s needs, but support is needed to enable this

Participants highlighted the need for **longer, continuous learning and skills development** opportunities as opposed to short-term courses. **On-the-job learning** was emphasised as vital for professionals to gain real-world experience, with shadowing and mentoring noted as particularly effective methods. These approaches allow for opportunities to engage with different structures and work patterns, including cross-genre and cross-sector working.

Suggestions for expanding **work placements, traineeships, and apprenticeships** also emerged, although the short duration of many audiovisual projects can limit their feasibility. Some participants proposed alternatives, such as a **flexible placement model** adapted from the offshore wind sector or **micro-credentialing** to allow apprentices to accumulate experience through short-term projects. These solutions could provide practical, adaptable pathways for early career professionals to gain experience while meeting the sector's structural demands. In sub-sectors such as games and animation which are less project-based and allow for longer-term structured placements, several stakeholders suggested a system where Screen Ireland (or another body) subsidised 50% of interns’ salary. This would enable high-quality learning opportunities that are open to those who cannot afford to take on low-paid or unpaid work.

Encouraging small-scale productions can help early career professionals develop their skills

Many suggested that availability of **small-scale funding pots** without conditions and with 'freedom to fail' could significantly benefit less experienced professionals. For example, digital games stakeholders highlighted that finishing the development of a game is a skill in itself, and encouraging early-career game developers to complete small games may be more beneficial than training that covers many technologies but without depth. Micro and low-budget films were also noted to be opportunities for honing creative skills that are more challenging on higher-budget productions.

Greater collaboration between the industry and training providers was seen as the best route to improving training and skills development

Interviewees expressed a desire for **strategic planning and partnerships** between Screen Ireland and relevant agencies to better support skills development and career progression within the audiovisual sector. Participants suggested that education providers (both public and private) and sector organisations could benefit from stronger partnerships to facilitate students' access to up-to-date technology and industry practices. Some acknowledged there were ongoing efforts to build partnerships between Screen Ireland and other organisations such as the NTAs and specific Guilds. However, while this had led to tangible progress in some areas, they felt it required more strategic leadership and systematic data monitoring.

For instance, collaboration with Skillnet could allow educational institutions to offer hands-on experience with the latest equipment. Participants also pointed to models from other industries, such as pharmaceuticals, where companies and universities cooperate to teach students about advanced virtual systems, as potential inspiration for improving Ireland's audiovisual training infrastructure. For new and expensive technologies such as Virtual Production, it was suggested that **consolidating resources to create a state-of-the-art hub** where professionals can learn at the highest level may be preferable to spreading funds thinly across many institutions.

Interviewees highlighted the importance of **maintaining networks within the sector** to enable knowledge sharing, especially between experienced and emerging professionals in technical roles like lighting and set design. This networking approach could prevent skills from being lost as professionals approach retirement. Some education providers have proposed initiatives to involve retiring professionals in delivering training courses, which may help bridge this knowledge gap. Increased knowledge exchange and cross-sector networking, such as panels, festivals, and celebration events were also noted as opportunities to share learning and identify shared needs. This also facilitates good relationships and opportunities for collaboration.

Skip Ahead: Australia's Digital Bridge for the Next Generation of Content Creators

Screen Australia's Skip Ahead initiative, launched in 2014 in partnership with YouTube Australia, serves as a transformative platform for emerging online content creators. The programme aims to help YouTubers and digital storytellers expand their creative ambitions and production capabilities, effectively bridging the skill gap between online content creation and traditional media production.[54] With over AUD 4.7m allocated to support 37 teams, Skip Ahead provides substantial funding— between AUD120,000 to AUD 150,000 per project—and invaluable mentorship from industry veterans.[55] This initiative enables a new generation of creators to elevate their craft and reach wider audiences, fostering innovation in the Australian media landscape.

Skip Ahead has led to launching careers with notable commercial success. Most significantly, Skip Ahead helped launch Danny Philippou and Michael Philippou, who went on to jointly direct the Australian film Talk to Me, which grossed $92m against a budget of only $4.5m and subsequently achieved VOD success on Netflix after its theatrical run.[56] Skip Ahead was also key to launching Theodore Saidden and Nathan Saidden, who went on to create the Australian TV show, Superbro, which has achieved international success with 2 seasons on Netflix.[57] Either of these successes alone would represent an excellent return on the total Skip Ahead outlay, which has leveraged a relatively small amount of funding to launch significant new screen activity in Australia.

Both Talk to Me and Superbro contain considerable Australian cultural value via capturing a diverse range of depictions of life in Australia. More generally, Skip Ahead's focus on diverse content continues to be evident in its recent rounds, which have funded projects ranging from children's programming to esports documentaries. This approach not only cultivates fresh talent but also ensures a pipeline of innovative content that reflects the evolving tastes of digital viewers.

Skip Ahead's success offers critical lessons for integrating new generations into the audiovisual sector. By recognising the potential of online creators and providing them with resources typically reserved for traditional media, the programme effectively bridges the gap between digital and mainstream production. Workshops led by industry leaders equip participants with essential storytelling and production skills, preparing them to navigate audience engagement and monetisation complexities.

Building sustainable careers in the audiovisual sector

A range of factors were identified as key for establishing sustainable careers in the audiovisual sector

In the business survey, respondents were asked whether sufficient opportunities exist in the audiovisual sector for more experienced professionals to develop their skills and sustain a career in their profession without moving sectors or having to leave Ireland. The majority of respondents either disagreed or strongly disagreed with this statement, with 33% and 18% of respondents respectively. 20% of respondents agreed that there are enough opportunities, while only 4% strongly agreed.

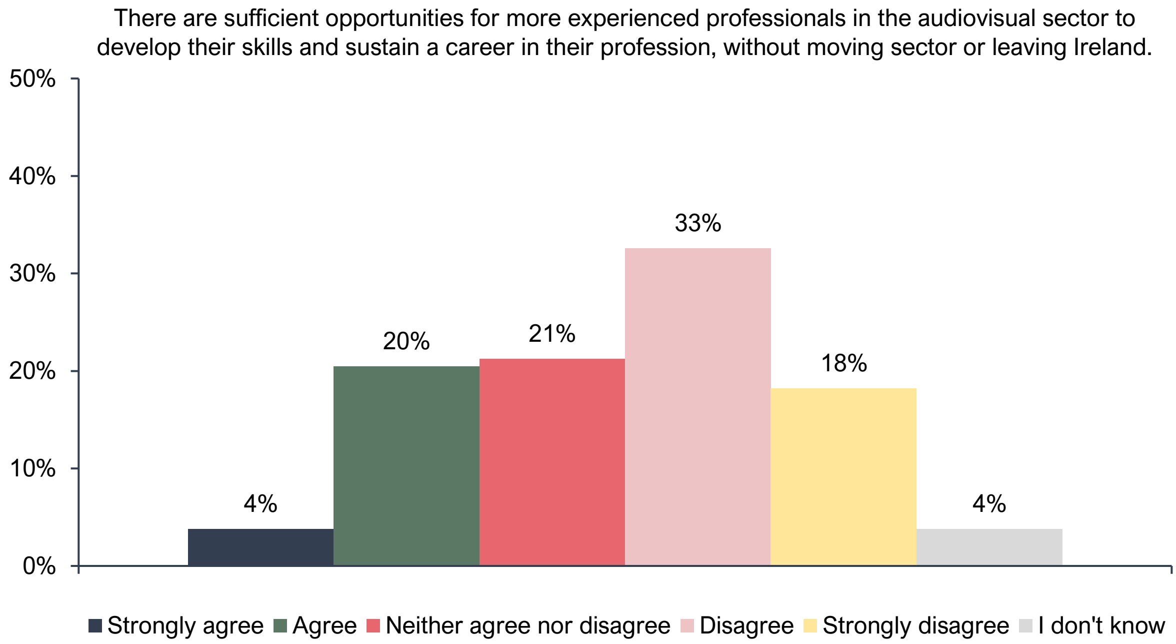
54 Screen Australia and Youtube Australia Announce Skip Ahead Recipients (Screen Australia, February 2023). See: https://www.screenaustralia.gov.au/sa/media-centre/news/2023/02-21-skip-ahead-recipients

55 Screen Australia and Youtube Australia Announce Online Creators Set to Skip Ahead (Screen Australia, July 2024). See: https://www.screenaustralia.gov.au/sa/media-centre/news/2024/07-17-skip-ahead-announcement

56 Talk to Me (The Numbers, 2024). See: https://www.the-numbers.com/movie/Talk-To-Me-(2022-United-Kingdom)#tab=summary

57 'Suoerwog' Duo Working on Netflix Series 'Son of a Donkey' (If, May 2024). See: https://if.com.au/superwog-duo-working-on-netflix-series-son-of-a-donkey/

Figure 13. Skills development opportunities for more experienced professionals



Source: Business-level survey conducted by Alma Economics.

Individual-level survey respondents highlighted sustained, long term, and continuous work opportunities were important for sustaining a career in the sector, with some respondents highlighting **the need for more work opportunities in regional areas** outside hubs such as Dublin and Wicklow. Clear and **well-defined career progression routes** were stressed by respondents as an important change to be made in the sector. Games sector respondents specifically highlighted the need for new and increased tax incentives for the Irish games sector, which would have a ripple effect in improving salaries and work continuity.

Other key noted measures include **better working conditions** on set, improved work-life balance and flexible working arrangements for those with families and/or caring responsibilities. Improved work culture on set was a commonly suggested retention measure, with respondents stressing the need for better management, and stronger wellbeing and safeguarding policies.

Individual-level survey respondents were asked to outline up to 3 top priorities when considering pursuing a personally and financially sustainable career in the audiovisual sector. The findings reveal that opportunities to balance work with other life responsibilities (47%), understanding how to develop and maintain a portfolio that generates income (47%), and understanding the implications of working as an independent/freelancer or registering a company (46%) were the priorities with the highest response rates.

Figure 14. Priorities for a personally and financially sustainable career

Source: Individual-level survey conducted by Alma Economics.

Improving career retention through accessibility, balanced workloads and increased regional opportunities

Participants linked better career retention to initiatives that remove barriers to staying in the audiovisual sector, promote clear progression pathways, and address gaps within these pathways. Notable barriers identified included **burnout resulting from long working hours** and a **lack of accessibility for disabled and neurodivergent individuals** within the workplace. Participants also noted that the variable and flexible nature of work in the sector can be a barrier to retention, disproportionately impacting some workers – for instance, women with child-care responsibilities often find it difficult to stay in the sector because they find it difficult to balance their responsibilities with the job.

Illustrative examples by participants showed that while some companies may support career sustainability initiatives in principle, they often resist implementing the structural changes necessary to facilitate this in practice, disproportionately impacting professionals based on gender and class. Another example highlighted was a general lack of awareness regarding disability and neurodiversity within the sector, which has led to missed opportunities for creating more accessible working environments.

Some participants indicated that **promoting production activity throughout Ireland** is crucial for enhancing career retention. Initiatives such as offsetting costs for bringing crews to productions outside of Dublin and the Wicklow regional film development uplift scheme under the Section 481 Film Tax Credit have been identified as effective measures. These initiatives reduce the necessity for professionals to commute to major production hubs and stimulate employment opportunities for locally based professionals. The emergence of low-budget production activity in County Leitrim was highlighted as an example of a developing specialised hub, independent of Dublin and Wicklow's production landscape.

Some participants suggested that the audiovisual sector could make **more use of data** to provide evidence of career progression for early career professionals, including what specific routes look like and how to navigate them, modelling an approach used by Film Cymru in Wales. Ffilm Cymru has committed to improved workforce data collection and publication as part of their Film for Everyone strategy, which informs funding decisions and strategic activities.[58] They also use a data-driven approach in setting targets and objectives, in a bid to enhance the effectiveness of workforce development and EDI measures and activities.

Other participants suggested the industry adopt targeted solutions such as job-sharing to improve retention of parents and workers with caring responsibilities. Raising Films, a non-profit organisation, supports parents and carers through information, campaigns, and funding, ultimately aiming to help them stay in the sector. Raising Film's 'Return to Work' programme, launched in collaboration with the NTAs, was well noted by sector stakeholders, as a successful initiative providing an avenue back into the sector for BTL crew who had to pause or stop their careers due to caring responsibilities.

Job-sharing initiatives that improve retention: UK, Bectu Vision's Take Two Initiative

Bectu Vision's Take Two initiative, launched in 2019, was aimed at addressing skills gaps in Scotland's screen production sector by improving retention of crew. The initiative enabled flexible working and job-sharing options through a range of efforts. Take Two was developed in collaboration with job sharing consultancy, Further&More, and offered a range of flexible working solutions to programme participants, free of charge. Their offer included a job-sharing blueprint, job share coaching, information sessions and advice, support for job sharers and production, and advocacy for job sharing and flexible working.[59]

The job-share blueprint is a particularly useful resource in streamlining job sharing in the screen sector, which can be difficult to navigate for job sharers given the flexible and project-based nature of work. It provides detailed guidance on how potential job-sharers may approach their recruitment process, how they may find job-sharing partners, how to participate in joint interviews, among other points.[60] The blueprint also provides helpful guidance on what roles and/or crew positions can be shared and how to structure their time share and responsibilities with their job-share partners.

Bectu's Take Two initiative received the Raising Films' Ribbon in 2019 – which is an award for initiatives that enable parents and carers to work in the screen industries.[61] The initiative was supported by Screen Scotland, Scottish Union Learning and BBC.

[58] Film for Everyone (Ffilm Cymru, 2024). See: https://ffilmcymruwales.com/film-everyone

[59] Take Two (Bectu Vision, 2019). See: https://bectu.org.uk/bectu-vision-taketwo/

[60] Take Two: a job share blueprint for film & TV crew (Bectu Vision, 2019). See: https://members.bectu.org.uk/advice-resources/library/3158

[61] A resource for job sharing and flexible working (Raising Films, 2019). See: https://www.raisingfilms.com/job-sharing/

Creating a resilient audiovisual workforce: addressing talent shortages and expanding opportunities

Talent shortages identified for HODs, trainees and regional producers

Individual-level survey respondents identified many BTL crew roles that are currently in demand across various sector departments. The most in-demand job roles were found in the production department, followed by post-production, production accounting, and art departments. When analysed by levels of seniority, there is currently **a high demand for experienced, head-of-department (HOD) roles** across all identified departments. This is also in line with feedback from business-level survey respondents, who reported skills shortages in HOD roles across departments (further detailed in the sub-section below). Individual-level respondents also noted that **trainee roles were also highly sought after**, which coincides with an increasing reliance by productions on trainee and entry-level roles to take on senior-level responsibilities at unchanged levels of pay, being noted by some respondents.

Respondents noted that producers (including trainee producers) were highly in demand in the West of Ireland and other regional areas outside sector hubs. IT roles across the sector, such as software developers, were perceived to be moving out of the audiovisual sector into other sectors that are better paid. Experienced freelancers were also found to be in demand. A few respondents also noted the lack of Irish-speaking producers and editors.

The chart below summarises the roles that individual-level survey respondents identified as being most in demand. While this is not an exhaustive and/or comprehensive list of all sector roles currently in demand, it provides a helpful indication. Given that departments tend to vary across production genres, multiple departments have been combined to include the wide range of roles identified by respondents in the chart below.

Development Department	Production Management and Editorial Department	Art and Craft Department
• Directors (HOD)	• Location managers (HOD)	• Artists (all levels)
• Executive Producer (HOD)	• Producers (all levels)	• Costumes
• Writers	• Script supervisors	• Set decorators
• Storyboard artists	• Line producers	• Storyboard artists
	• Production managers	
	• Assistant directors (mainly, 1st assistant directors)	
	• Script coordinators	
	• Production assistants	
	• Accounting (all levels)	

Post-Production Department	Technical / Sound / Engineering Department	Animation, Digital Production and Development
• Editors • Sound engineers (experienced) • Trainee editors	• Director of photography (HOD) • Cinematographers • Gaffers (all levels) • Lighting technicians • Vision engineers • Camera trainees	• Senior back-end engineers • Senior digital game programmers • Technical directors (experienced) • Unreal engine developers (mid-to-senior levels) • VFX supervisors • VFX coordinators • Animators (all levels) • 3D animators • 3D artists • 2D/3D riggers • Motion designers • Software developers

Local talent shortage fuels reliance on international crew

Individual-level survey respondents were asked to describe the impact that the role shortages they identified would have on the sector. A majority of respondents felt that role shortages have stretched existing crew capacity in Ireland, which are having wide ranging impacts. They noted that shortages in key roles in the production department limits the Irish screen sector's capacity for good quality, local productions. Such impacts are disproportionately felt by respondents in regional areas, given the concentration of production infrastructure, services and funding support in hubs such as Dublin and Wicklow.

The need for bridging programmes in addressing critical skills gaps and shortages

Talent shortages in key senior roles and skills gaps in critical business and commercial skills underscore the need for effective bridging programmes in Ireland. Targeted bridging programmes can tailor skills development efforts to address specific gap areas, removing bottlenecks and streamlining work pipelines. Such programmes can also create talent pipelines into the sector, attracting talent and crew in sector roles facing shortages. Programmes may also be tailored to promote sectoral development by creating more work opportunities, which can in turn help retain talent in the sector, thereby strengthening talent pipelines.

Bridging skills gaps while growing the local sector: UK Games Fund Tranzfuser Programme

The UK Games Fund (UKGF) has been running since 2015, with an aim to grow the UK games development sector.[62] The UKGF's Tranzfuser programme was launched to support UK's games development talent and create pathways to enterprise for new games graduates.[63] Its specific intention is to help bring games graduate teams together for the creation of new games IP and support the development of new games studios. Tranzfuser supports graduates through the entire games development life cycle – taking them from concept and prototyping to publishing. The UKGF supports studios that successfully pitch at the showcase event at the end of the Tranzfuser programme.[64]

Tranzfuser supports various strands of training activity. Participating teams are required to participate in the Games Biz Academy, which is a one stop digital platform to support learning for all teams in the competition. Training provided includes sessions on pitching skills, and other commercial and business skills development. Teams are also provided with facilitators who meet regularly to check in on progress and provide support. The programme culminates in the final pitching session, where winning prototypes are chosen. Participating teams win £7,500 during the course of the programme to cover expenses, build their prototypes and hone their skills, while teams winning at the pitch are eligible to receive grant support up to £25,000.

Tranzfuser is an example of a successful bridging programme in the UK's games sector. By providing grant funding for winning games prototypes, the programme boosts the growth of new game development studios in the UK and the generation of local games IP in the UK. Simultaneously, through the programme, participating teams are given training business and commercial skills, industry mentorship, and other relevant technical skills training. While preparing for the pitch, they develop experience in project planning, management and financing. In this way, Tranzfuser helps create talent pools in games development, alongside local sector development in the UK.

The programme has established and funded 27 companies since launching in 2016. In 2024 alone, the programme selected 19 teams, and chose 4 teams for UKGF grant support, while selecting 3 more teams for a similar games development programme to be held in Scotland.[65] In 2019, a UKGF independent evaluation evidence found a return of £5 for every £1 of public funds, demonstrating the notable commercial value of the programme.

[62] About UK Games Fund (UK Games Fund, 2024). See: https://ukgamesfund.com/about-ukgf/

[63] Tranzfuser (Tranzfuser, 2024). See: https://tranzfuser.com/

[64] About (Tranzfuser, 2024). See: https://tranzfuser.com/about-us

[65] Tranzfuser 2024: A Record-breaking Year (Tranzfuser, 2024). See: https://tranzfuser.com/2024/11/tranzfuser-2024-a-record-breaking-year/

Building strong talent pathways, through skills transfer, and demystification of the sector

Transferability of skills within the audiovisual sector was particularly important for stakeholder participants working in the animation and games sectors. Such an opportunity for skills transfer was further underscored by examples put forward by participants, noting that the Irish digital games industry lacks experienced individuals compared to other countries. Other examples highlighted the existing appetite within the games and animation sectors to diversify and collaborate, which should be facilitated within the audiovisual sector. This may include pathways for animators to move into the games sector or funding for animation studios to develop games.

Participants also recognised the importance of skills transferability in attracting people from other sectors to work in the audiovisual sector. These participants felt the sector should be doing more to promote audiovisual careers among those from outside the sector, for example through specific advertising and marketing campaigns, and bringing in skills that are in demand in the sector such as accounting skills. Participants in a regional stakeholder workshop felt that specific information and support should be provided to Irish speakers to enter the sector, recognising they have relevant language skills for Irish-language productions, but would require tailored training in audiovisual skills.

Demystifying the sector and promoting public knowledge sector roles

Participants felt that there is a need to develop viable talent pathways into the sector. Strong talent pathways can bridge critical gaps while growing the local crew base. A key noted hurdle to the attraction of crew and talent into the sector is the lack of awareness and knowledge of sector roles. New graduates, in particular, are typically unaware of the wide variety and breadth of crew roles, and/or how roles, skills and competencies vary across sector departments.

To address this, participants noted the need for demystification of the sector. Potential new entrants need more knowledge about the wide variety of roles and the broad range of skillsets required in sector departments across the various production types, genres and formats. Some stakeholders also mentioned the need for more promotional interventions at the primary and secondary school levels, noting that the sector should promote itself as a viable career option for school-going students. Expansion of such initiatives for secondary school students, in the form of extracurricular activities and/or career awareness initiatives, can also help attract individuals from lower socio-economic backgrounds, who are typically excluded from sector networks. Some participants also noted that they can benefit from more signposting of available opportunities in the sector. Suggestions to better promote the sector included ‘behind-the-scenes’ videos and films which introduce the full range of roles in the sector; and travelling road shows to schools, including to schools currently under the Delivering Equality of Opportunity In Schools initiative, to ensure access to individuals from all backgrounds.

Demystifying the screen sector for new entrants: Canada, British Columbia’s Creative Pathways initiative

Creative BC, Canada’s creative sector organisation for the province of British Columbia, has collaborated with the Motion Picture Production Industry Association to develop ‘Creative Pathways’. Creative Pathways provides comprehensive guidance to new entrants on every aspect of audiovisual production – ranging from an understanding of how production takes place, to a robust overview of roles in live action and digital content production.

Important sector overviews and information are provided in an engaging way, thereby maximising reach among young people, and those who are unfamiliar with sector processes, jargon and workflows. For instance, the guidance includes dedicated webpages explaining “how production takes place” across live action and animation production, while other pages explain the key stakeholders in audiovisual production by guiding “who makes shows” and outlines British Columbia’s location and infrastructure offer through the web page titled, “where shows get made”.

Creative Pathways’ career guidance pages targeted at new sector entrants are particularly notable. Separate guidance is provided for live action production (including ATL and BTL roles) and digital content production (i.e. animation, VFX and post-production).[66] Each guidance page provides (i) a clear outline of available roles, (ii) useful sector networks that new entrants should know about, and (iii) all the steps required for new entrants to enter and advance in the sector.[67] Each of the specific webpages also provides useful guidance on the annual median wages for the roles, and some information on the typical number of productions coming taking place in British Columbia per year.

Creative Pathways also offers a range of additional resources to support workforce development.[68] These include a dictionary of terms, an overview of competencies required for various roles and departments, help in building portfolios, relationships and networks and dedicated sector guidance for parents and career counsellors. There is also a dedicated opportunities page which signposts available opportunities for work and skills development in BC.[69]

Creative Pathways increases public knowledge of sector workflows and processes. Resultantly, the sector is made more accessible to new entrants, particularly given the audiovisual production sector is typically tightly networked, difficult to enter, and as noted by Creative BC, “vast and complex without a single entry point.”

Adapting to change: Driving innovation and inclusion in the audiovisual sector

The role of new and emerging technologies

Respondents were asked to rank the impact different technologies and platforms could potentially have on their careers over the next 5 years on a scale from 1 to 5 (with 1 being not at all impactful and 5 being extremely impactful). Video-sharing platforms (28%), generative AI (22%) and virtual production (17%) were selected as extremely impactful by the largest share of respondents. In addition, respondents were unsure about how impactful trans-media production could be for their careers.[70]

[66] Careers (Creative BC, 2024). See: https://creativepathwayscanada.com/careers/

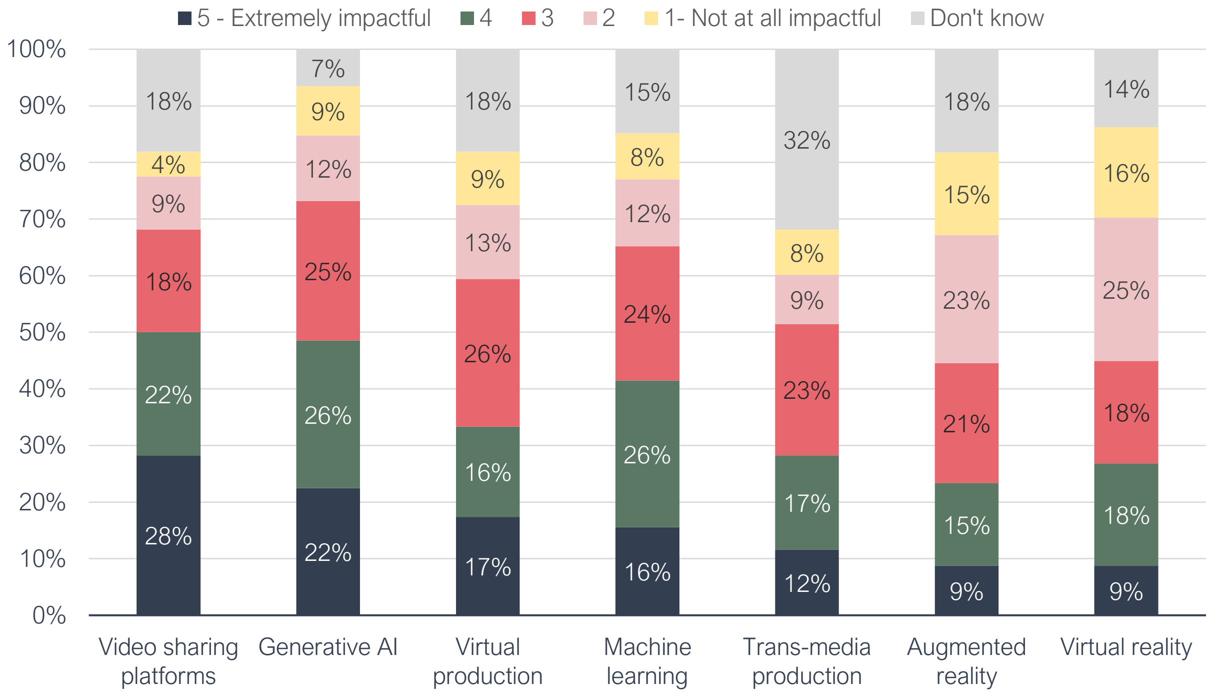
[67] Below-the-line (Creative BC, 2024). See: https://creativepathwayscanada.com/careers/below-the-line/

[68] Resources (Creative BC, 2024). See: https://creativepathwayscanada.com/careers/resources/

[69] Opportunities (Creative BC, 2024). See: https://creativepathwayscanada.com/opportunities/

[70] Trans-media production involves creating content across various platforms, where each platform offers a unique perspective on the overarching narrative.

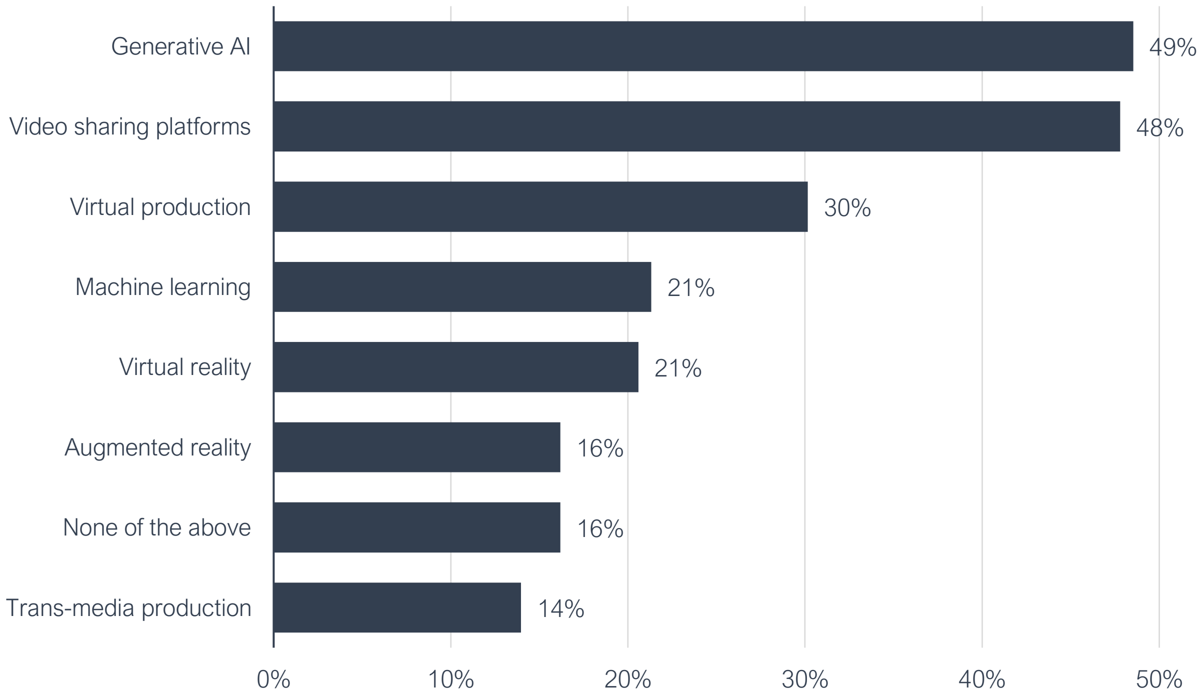
Figure 15. Impact of different technologies and platforms on career over the next 5 years



Source: Individual-level survey conducted by Alma Economics.

Individual respondents were then asked which of these platforms they have used in the past or plan to use in the future. The majority of responses were allocated to the use of generative AI (48%), video-sharing platforms (47%) and virtual production (30%).

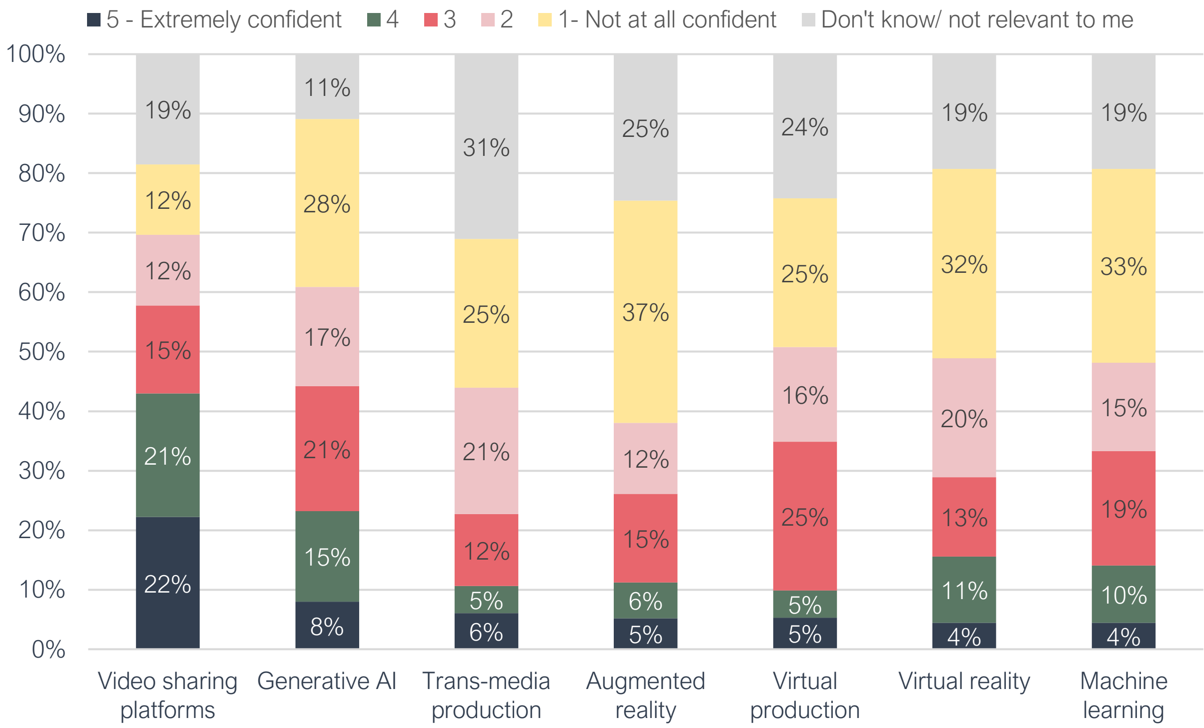
Figure 16. Usage of different technologies and platforms in the past and future



Source: Individual-level survey conducted by Alma Economics.

When asked about the level of confidence with respect to the use of these technologies and platforms, individual respondents were asked to rate each technology/platform from 1 – not at all confident to 5 – extremely confident. With the exception of video-sharing platforms, the option of "1 – Not at all confident" was the most selected option for each of the technologies/platforms presented, indicating low overall confidence in the usage of these new technologies among respondents.

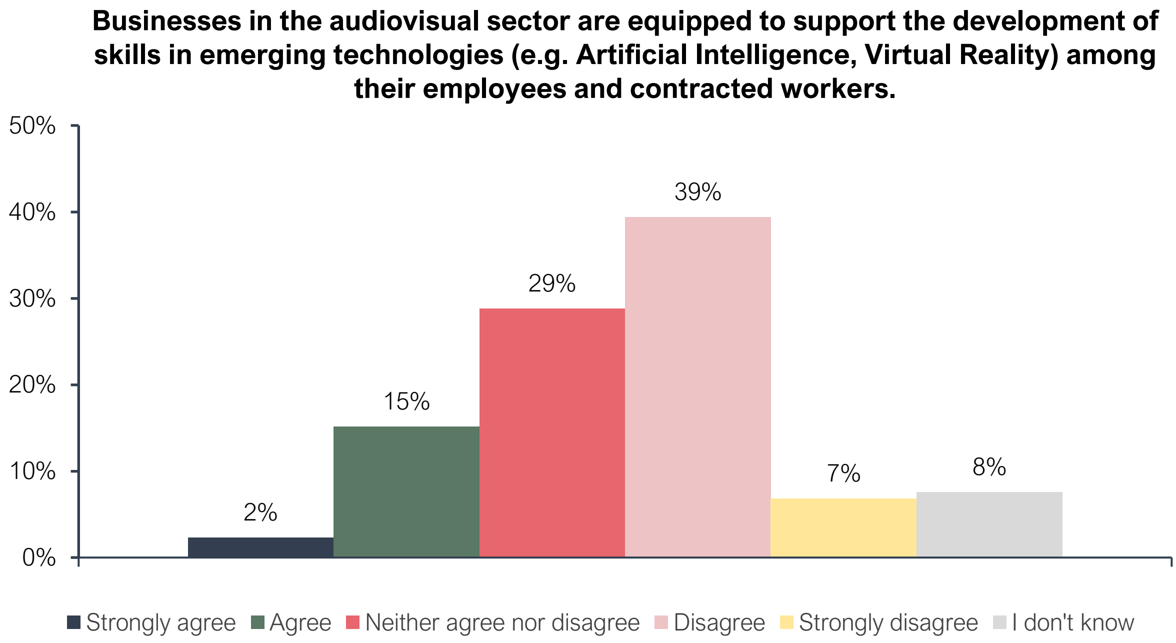
Figure 17. Confidence with respect to the usage of different technologies and platforms



Source: Individual-level survey conducted by Alma Economics.

When asked about whether they think businesses in the audiovisual sector are equipped to support skill development in emerging technologies among their employees and contracted workers, 39% oof respondents disagreed. Another 29% were neither agreeing nor disagreeing and 15% agreed. Only 2% of respondents strongly agreed with the statement.

Figure 18. Businesses' capabilities to support skills development in emerging technologies among their employees and contracted workers



Source: Business-level survey conducted by Alma Economics.

Individual-level survey respondents' views on the impact of new technologies on their careers were varied. Some respondents felt that new technologies such as Generative AI, AR/VR, and machine learning would negatively affect the sector, while others felt that such technologies may be harnessed effectively by the sector.

Those predicting a negative impact felt that the use of new technologies would reduce production budgets and lead to job losses. Job security concerns were particularly expressed for sectors like games, VFX and post-production. Some concerns were noted in environmental sustainability, with the difficulty in predicting the scale of energy use by generative AI impacting effective implementation of sustainability measures. A need for stricter legal regulations was highlighted, in view of IP and data scraping concerns relating to the use of AI in screen production.

On the other hand, some respondents felt that new technologies would never fully replace human input in creative production. Some respondents noted from experience that machine learning and generative AI have little applicable value to the production process, and would not significantly impact production activity or jobs. The benefits of generative AI in sectors such as animation, where AI generated 3D models, rigging and animation have been useful, and games engines such as Unreal and Unity, show the need for better sector preparedness to usefully harness such benefits.

From Pixels to Production: How Sheridan and Warner Media Access are Pioneering Virtual Filmmaking in Canada

In 2022, Ontario-based Sheridan College, known for its VFX training offer, introduced a micro-credential course in virtual production, in collaboration with Warner Bros Discovery Access, and the City of Toronto local authority.[71] The course aimed at training people in virtual technology skills that are currently in demand, and making such training accessible to people from traditionally underrepresented communities.

Training was provided across a 12-week period in technical skills relevant to virtual production and soft skills such as collaboration and leadership. Modules covered included Introduction to Virtual Production, Personal/Professional Development, Virtual Production Art Direction in Unreal Engine, Motion Capture Technician, and Unreal Engine On-Set Technician. In-person, hands-on training was also provided to students at the Pinewood Toronto Studios (owned by Sheridan College). A total of 30 students were trained under the programme.

The initiative benefited from the collaboration between industry, local government, and education providers. Each of the three institutions contributed valuably to the initiative, making it more effective. Sheridan College led the design and roll-out of the programme for its students, with hands-on training offered at Pinewood Studios, owned by the Screen Industries Research and Training Centre (a research centre of Sheridan College); Warner Media Access contributed to the development of the programme, adding to its industry relevance, and announced its sponsorship of the participation of five students from underrepresented groups annually for three years; and finally, the City of Toronto's xoTO Screen Industry Pathways enabled the programme to maximise the programme's reach and integrate participants into industry jobs.[72]

Notably, the Sheridan college received more than CA$428,000 through the Ontario micro-credentials challenge fund by the Ontario Ministry of Colleges and Universities for the virtual production micro-credential course.[73]

As of 2024, Sheridan College offers 2 micro-credential courses in Virtual Production, offering three mandatory classes each – one in art direction in the Unreal Engine, and the other on developing on-set technician competencies on the Unreal Engine.[74]

Promotion of equality, diversity and inclusion

In assessing the extent to which the audiovisual sector is successful in addressing different areas of EDI, individual respondents ranked each area from “Completely” to “Not at all”. The majority of respondents believed that the audiovisual sector was either completely or somewhat successful in addressing the areas of sexual orientation, race and ethnicity and gender and gender identity. The areas where respondents displayed the most concerns were age, disability and membership of the traveller community.

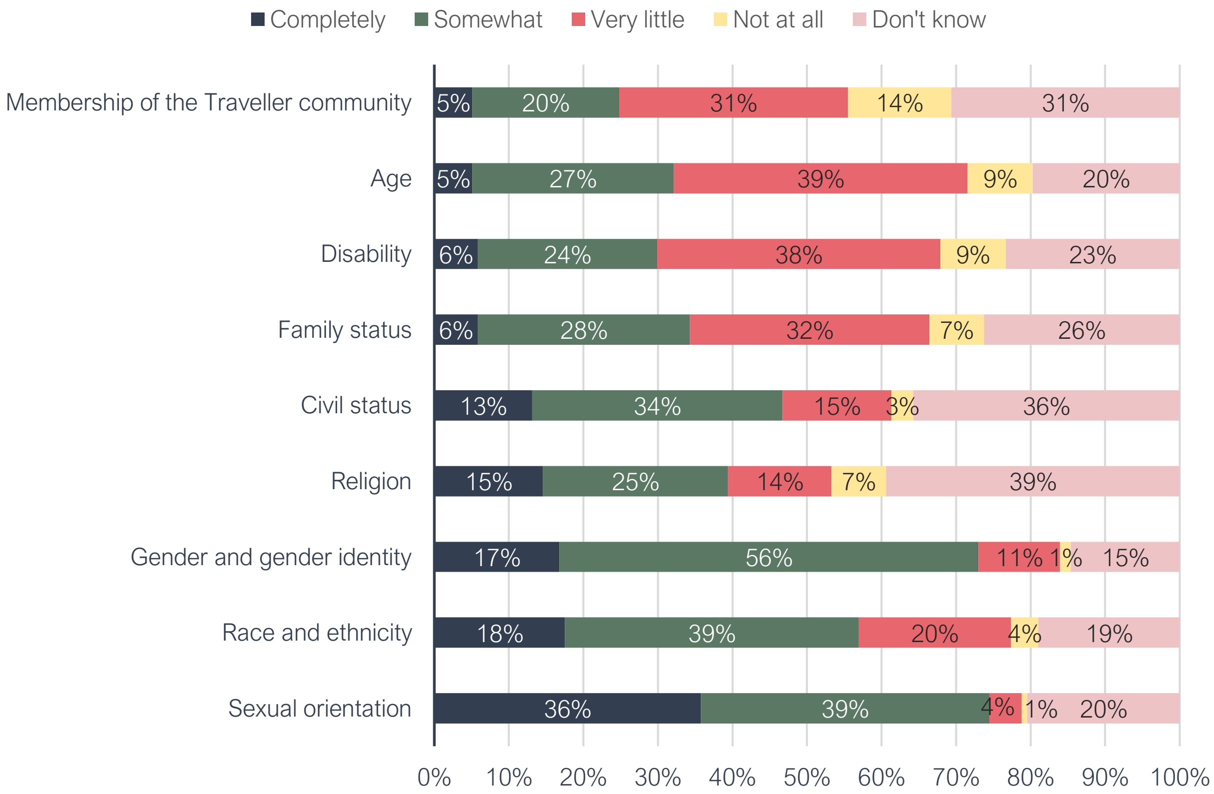
[71] Sheridan Partners with WarnerMedia Access Canada and the City of Toronto to create and deliver first Virtual Production micro-credential with focus on equity, inclusion (Sheridan Newsroom, 2022). See: https://www.sheridancollege.ca/newsroom/news-releases/2022/04/sheridan-partners-with-warnermedia-and-the-city-of-toronto

[72] Sheridan College x WBD Access Canada Virtual Production Micro-Credential Program (Warner Bros. Discovery Access, 2022). See: https://www.warner-access.com/programs/sheridan-college-x-wbd-access-canada-virtual-production-micro-credential-program

[73] Sheridan Annual Report 2022-2023 (Sheridan College, 2023). See: https://media-www.sheridancollege.ca/

[74] VR, AR and Virtual Film Production (Sheridan Continuing and Professional Studies, 2024). See: https://caps.sheridancollege.ca/info/landing/vr-ar-virtual-film-production

Figure 19. Extent to which the audiovisual sector is successful in addressing EDI areas

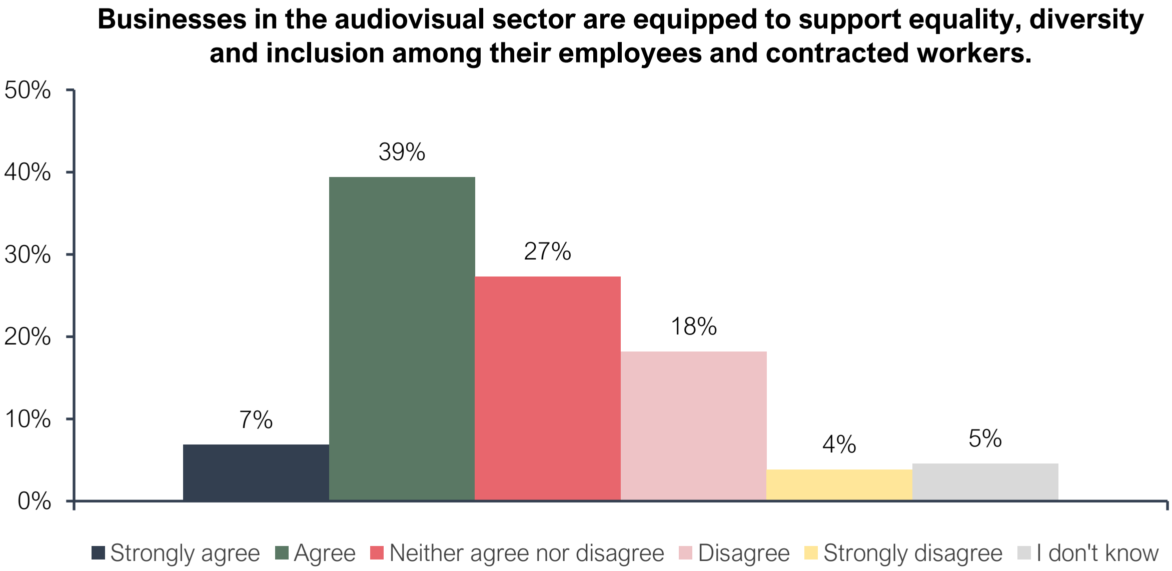


Source: Individual-level survey conducted by Alma Economics.

Individual-level survey respondents widely felt that EDI measures have tended to focus on people with certain protected characteristics, as opposed to others. For instance, while respondents felt measures to improve gender parity have increased, they believed people with disabilities and neurodivergent workers continue to feel left out of the sector. Similarly, some respondents reported that people with caring responsibilities find it difficult to work in the sector due to long hours, gaps in employment, and inflexible work patterns – all of which force them to leave the sector. A lack of diversity in leadership and management positions in sector organisations was commonly highlighted by survey respondents as being a key challenge to achieving inclusion.

Businesses felt that, for the most part, they are well equipped in supporting EDI among their employees and contracted workers, with 39% agreeing. However, only 7% showed strong agreement and 22% showed some level of disagreement.

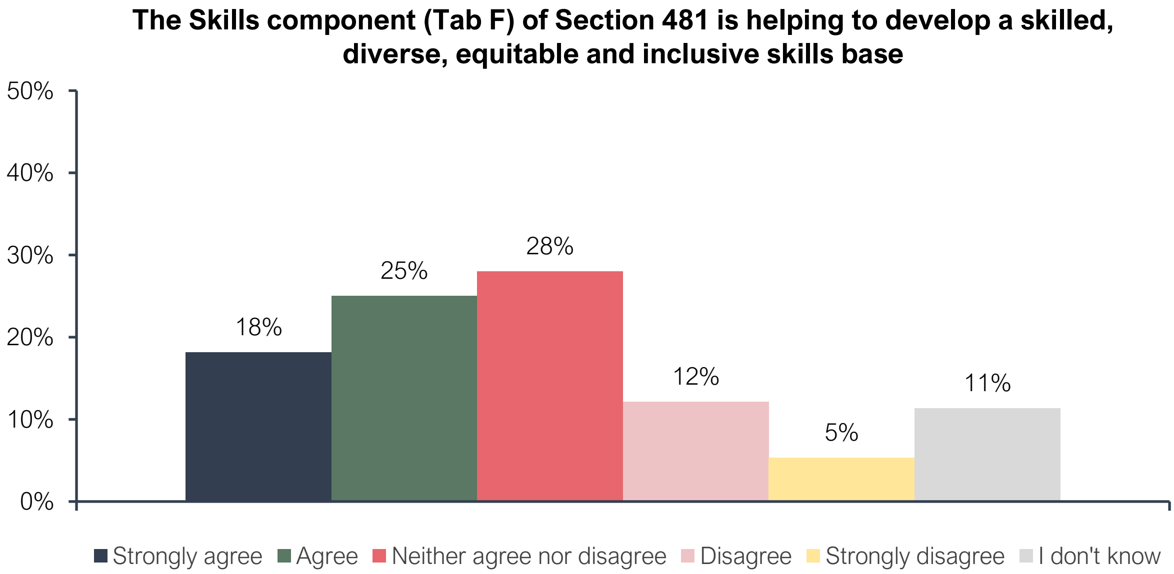
Figure 20. Businesses' capabilities to support EDI among their employees and contracted workers



Source: Business-level survey conducted by Alma Economics.

The skills component (Tab F) of Section 481 was seen as supportive in the development of a skilled, diverse, equitable and inclusive skills base. 43% of business respondents either strongly agreed or agreed with it being helpful, while only 17% showed some disagreement with this statement.

Figure 21. Impact of skills component of Section 481



Source: Business-level survey conducted by Alma Economics.

Suggested interventions highlighted by respondents to address EDI challenges included quotas for people with protected characteristics across roles on productions, greater funding support for freelancers and particularly those with protected characteristics, clearer and more accessible sector pathways and networks for such workers, and wellness and safeguarding of such workers in workplaces. Recent research published by Safe to Create provided a comprehensive picture of the experiences of Irish creative sector workers with protected characteristics. The report, published in July 2024, surveyed over 500 individuals working in the creative sectors, including film, and showed that significant barriers still exist for minoritised creative sector workers. The research found, among other things, that over 50% of racially and ethnically minoritised and disabled workers face discrimination and microaggressions based on their identity; similarly, a majority of racially and ethnically minoritised and disabled workers felt they faced barriers to work opportunities.[75]

Some respondents cited successful EDI strategies from experience; these include Raising Films Return to Work Programme to encourage a return to work of parents and carers, and Screen Ireland's funding initiatives to improve inclusion in the sector, among other rigorous EDI measures.[76] Among Screen Ireland's funding initiatives, respondents specifically mentioned Screen Ireland's Animation and VFX Pathways Fund, and the wider Screen Ireland Pathways EDI funding scheme that provides funding for producers to hire people with protected characteristics on set.[77]

Inclusive Storytelling: How Screen Yorkshire's Beyond Brontës is Transforming Regional Film Talent

Beyond Brontes is a skills development initiative for individuals with protected characteristics run by Screen Yorkshire, the screen organisation for England's Yorkshire and Humber region. The initiative aims to remedy under-representation in the screen industries, by training individuals with protected characteristics and helping them find work in the screen sector.[78] The initiative is open to individuals aged 19 or over with protected characteristics living in West Yorkshire. Protected characteristics include gender, race/ethnicity, age, disability, LGBTQ+ identity, and religion, among others. The initiative is free of cost for most applicants, which encourages participation among people from a wide variety of socio-economic backgrounds.[79] *Beyond Brontes* is run with funding by the Mayor of West Yorkshire and the West of Yorkshire Combined Authority.

Training is provided part-time, over six weeks, in the form of masterclasses, workshops, and one-on-one sessions, on sector opportunities, pathways, CV and interview skills, and set etiquette training. In previous years, training has also included on-set internships or work placements. Notably, the initiative demystifies the sector for sector entrants. It does so by introducing participants to the full breadth of sector roles across the production pipeline, ranging from research, development, production, to post-production, and distribution; and acquaints them with BTL crew roles in departments such as locations, costume, hair and make-up, art department, lighting, camera, and sound. Following the training, Beyond Brontes helps participants secure their first job through skills assessments and practical help; notably, participants' availability to work in the sector within six months following the course is an eligibility requirement for the course.

Beyond Brontes is an example of a successful programme led by regional public sector organisations that integrates underrepresented individuals into the screen workforce. To do this, the initiative makes use of collaborations with key industry stakeholders, particularly producers,

[75] Amplify: A Call for Transformative Action (Safe to Create, 2024). See: https://www.safetocreate.ie/wp-content/uploads/2024/07/ITIS2C_Amplify_2024_Report_INSIDE_With_Appendix_WEB.pdf

[76] Expression of Interest Raising Films Ireland – Return to Work Programme (Screen Ireland, 2024). See: https://www.nationaltalentacademies.ie/courses-activities-programmes/expression-of-interest-raising-films-ireland-return-to-work-programme#:~:text=Raising%20Films%20Ireland%20is%20a,Industry%20for%20carers%20and%20parents

[77] Animation & VFX Pathways Fund (Screen Ireland, 2024). See: https://www.screenireland.ie/funding/distribution-loans/animation-vfx-pathways-fund

[78] Beyond Brontes: The Mayor's Screen Diversity Programme (Screen Yorkshire, 2024). See: https://www.screenyorkshire.co.uk/beyond-brontes-a-screen-diversity-programme/

[79] A small fee is applicable for any applicants who are already employed in the screen sector.

studios and networks (e.g. Channel4 and ITV), to ensure participants can receive practical, set-ready training, and/or be placed on new or ongoing productions following their training, thereby helping them stay in the sector. This helps Screen Yorkshire achieve dual objectives of (a) improving access to the sector for underrepresented workers, and (b) building a strong local crew base equipped with relevant skills.[80]

Since being launched in 2019, the initiative has supported over 200 individuals, placing them on a range of successful productions, such as *Bridgerton*, *The Witcher*, and *Gentleman Jack*, among others.[81] It is also noted that over three quarters of participants have found work in the creative sector as a direct result of the scheme.[82] Participants have noted that the initiative "*made access into the industry less daunting*"[83] while participating productions have noted that the initiative "*will help create a level playing field for young people who wish to pursue a career in film and TV*".[84]

Environmental sustainability

Many respondents indicated the need for compliance with the UK-based British Academy Film Awards (BAFTA) Albert production sustainability practices, with some suggesting an increased use of their carbon calculator that helps to measure a production's carbon footprint.[85] The BAFTA Albert is well known in the wider international sector for its work in developing the studio sustainability standard, which is a voluntary sustainability assessment that provides participating studios with a performance report and benchmarks performance against other participants around the world. The BAFTA Albert carbon calculator is also well regarded – both by stakeholders in Ireland and the wider global screen sector, as a curation of mechanisms, tools and support to assess and eventually reduce productions' carbon footprint. BAFTA Albert's work in incentivising the adoption of sustainable practices on set and creating an international network of studios that work together to achieve production sustainability in a unified way, has been recognised as particularly notable for the international screen sector.[86]

Screen Ireland currently operates a Sustainability Plan, introduced ahead of the EU sustainability regulations. Amongst its various commitments under the plan, Screen Ireland made it mandatory for live action scripted productions funded by Screen Ireland, to use a carbon calculator on set.[87]

Hiring experienced, locally recruited sustainability officers and/or sustainability crew on set was mentioned by survey respondents. Notably, Screen Ireland's sustainability advisor pilot fund introduced in 2023, provides funding support to productions for staffing a sustainability advisor on set.

[80] Latest available data published by Screen Yorkshire shows that the local screen industries in Yorkshire and Humber have grown in recent years, and are estimated to support 12,000 jobs (directly and indirectly) with a turnover of more than £1 billion. Screen Yorkshire (2024). See: https://www.screenyorkshire.co.uk/about/

[81] Beyond Brontes: The Mayor's Screen Diversity Programme (Screen Yorkshire, 2024). See: https://www.screenyorkshire.co.uk/beyond-brontes-a-screen-diversity-programme/

[82] Beyond Brontes: The Mayor's Screen Diversity Programme (Screen Yorkshire, 2024). See: https://www.screenyorkshire.co.uk/news/beyond-brontes-the-mayors-screen-diversity-programme/

[83] Beyond Brontes: The Mayor's Screen Diversity Programme (Screen Yorkshire, 2024). See: https://www.screenyorkshire.co.uk/beyond-brontes-a-screen-diversity-programme/

[84] Beyond Brontes Selects 50 New Screen Talents (Screen Yorkshire, 2019). See: https://www.screenyorkshire.co.uk/news/beyond-brontes-selects-50-bright-new-screen-talents/

[85] BAFTA Albert (BAFTA, 2024), see: https://wearealbert.org/

[86] Best Practice in Screen Sector Development (Olsberg SPI, September 2024). See: https://afci.org/wp-content/uploads/2024/09/Best-Practice-in-Screen-Sector-Development-Final-2024-09-18.pdf

[87] The Coimisiún na Meán is an international partner of the BAFTA owned Albert carbon calculator, and will be running the calculator in Ireland, as a territory partner from 2025.

The sustainability advisor would be responsible for overseeing participating productions to complete their carbon footprint assessment, reduce emissions, and adhere to Screen Ireland's sustainability standards for live action.[88]

Interviewees noted the need for joined-up and long-term thinking in relation to sustainability training, pre-empting upcoming guideline changes. The role of Screen Ireland and other relevant bodies was highlighted in giving the sector plenty of notice and guidance around implementing any new measures, to avoid sustainability becoming onerous and expensive.

Survey respondents stressed the need to ensure sustainability practices are well integrated in all departments and throughout the entire production chain. In this regard, increased awareness of relevant and effective sustainable practices, and robust sustainability training for productions were noted. Other suggestions included the adoption of various best practice on set, such as increased recycling, reducing plastic use, and reducing carbon footprint; some respondents suggested reducing the use of generative AI, which tends to use large amounts of energy.

Smaller, independent productions reported difficulties in adopting sustainable practices due to budget constraints. As a result, more financial incentives or grants to support the adoption of alternative and sustainable production processes were suggested, while some others suggested the creation of best practice blueprints for productions of all sizes.

Interviewees highlighted that there is a growing body of knowledge across sustainability specialists, but there is a need for clear channels of information-sharing, with practical information centralised and made open-access across the sector.

Greener Future for Film: NZFC's Uplift Model Empowers New Zealand's Sustainability Workforce

The New Zealand Film Commission (NZFC) incentivises the staffing of sustainability officers and/or other production sustainability crew, for productions seeking a 5% uplift to New Zealand's screen production rebate.[89] To achieve this, the NZFC operates a points-based system, which awards points for various compliance actions; these points are then totalled in favour of the uplift.

Per the latest rules, a maximum of 7 points are available to producers who meet sustainability obligations. Of these, a minimum of 3 points towards sustainability obligations are mandatory for producers seeking the uplift. Mandatory obligations include the development of a sustainability action plan and delivery of a sustainability report. Under the sustainability action plan would be required to appoint a sustainability officer, or a member of production staff formally made responsible for overseeing the implementation of the sustainability action plan.

Separately, another 4 points are available on a voluntary basis, for the appointment of an experienced sustainability officer on the production. The sustainability officer so appointed, must be a New Zealand citizen or resident and would have various duties, including overseeing the implementation of the sustainability action plan, and training a sustainability trainee or intern (also a New Zealand trainee or intern) for a minimum duration.

Through its uplift model, the NZFC illustrates an effective way of creating work opportunities for NZ-based screen production sustainability crew by incentivising incoming productions.

[88] Sustainability Standards Live Action Production (Screen Ireland, 2023). See: https://www.screenireland.ie/images/uploads/general/V1.4_Sustainability_Standards_-_Live_Action_Production_-_08_.12.2023.pdf

[89] NZSPR Criteria for International Productions (New Zealand Film Commission, 2023). See: https://www.nzfilm.co.nz/resources/nzspr-criteria-international-productions

Simultaneously, sustainability staff receive practical, hands-on work experience due to working on ongoing, often big-budget international productions. Specified duties of the sustainability officers on a production also include training of sustainability trainees and/or interns, which further contributes to the ongoing development of the next generation, NZ-based sustainability workforce.

The NZFC provides guidance to producers on recruiting the relevant NZ-based sustainability crew for their productions, to get the points necessary for the uplift.[90] Through this guidance, the NZFC connects applicants to local organisations such as the NZFC supported Greenlit, who maintain up-to-date directories of experienced sustainability officers in New Zealand and Australia.[91] Greenlit also provides robust support to producers on all aspects of production sustainability, ranging from shedding light on the full scope of crew roles, skills and competencies in the sustainability department, to making available comprehensive resources for the development of sustainability action plans and budgeting for sustainability. In this way, international producers are supported in recruiting such staff locally, and collaborating with local sector stakeholders in the development of production sustainability crew.

[90] 5% Uplift – Guidance Document (New Zealand Film Commission, 2023). See: https://www.nzfilm.co.nz/resources/5-uplift-guidance-document

[91] Greenlit (2024). See: https://greenlit.org.nz/

Talent and content case studies

Screen Ireland has been instrumental in nurturing and promoting Irish screen talent while elevating the reputation of Irish film both locally and internationally. Strategic funding and support for training and development initiatives have enabled filmmakers and performers to hone their talents and learn through practice in supportive, professional environments. This has promoted diversity within the sector and maximised the range and quality of Irish talent, demonstrating Ireland's position as a hub for innovative, culturally rich and globally appealing productions.

Kate Dolan: rising filmmaker bringing fresh perspectives to Irish cinema

Kate Dolan graduated from the National Film School, IADT in 2012 with an Honours Degree in Film and Television Production. Since graduating, Kate directed a number of short films.[92] These included the Screen Ireland funded film, *Catcalls* (2017), a short horror film that offers a critique of gender-based violence in Ireland. *Catcalls* won Best Short Film at the Young Directors Award Ireland and premiered at major international film festivals such as BFI London Film Festival, Fantastic Fest, and Fantasia Film Festival.

In 2019, Screen Ireland selected Dolan to take part in the Point of View (POV) scheme,[93] based on a script she wrote for the film, *You Are Not My Mother* (2021). POV amplified female filmmakers' voices in Ireland by providing funding and resources for first-time feature film directors. Through POV, Dolan secured a budget of €400,000 to shoot *You Are Not My Mother* in 2020.

You Are Not My Mother has gone on to win critical acclaim on the international stage, including a Premiere at the Toronto International Film Festival[94] in 2021, winning the Jury Prize at the Gérardmer Film Festival and winning the Discovery Award at the Dublin International Film Festival, both in 2022. Since completing *You Are Not My Mother*, Dolan has brought her work to audiences on the international stage. She has directed episodes of acclaimed crime drama *Kin*, for which she won the Director (Drama) award[95] at the Irish Film and Television Awards (IFTA) in 2023 and *The Tourist,* reaching audiences beyond Ireland through platforms such as AMC+, BBC and Netflix. She is currently directing *SOULM8TE*, an anticipated spin-off production of the worldwide box office success, *M3GAN* (2022). These opportunities and awards have cemented Dolan's reputation as one of Ireland's rising filmmakers and illustrate how Screen Ireland has contributed to supporting and showcasing emerging Irish talent globally.

[92] Kate Dolan (Screen Directors Guild of Ireland, 2024). See: https://sdgi.ie/directors/kate-dolan-2/

[93] Screen Ireland selects inaugural six projects for female filmmakers scheme (Tom Grater, 2018). See: https://www.screendaily.com/news/screen-ireland-selects-inaugural-six-projects-for-female-filmmakers-scheme-exclusive/5132782.article

[94] You Are Not My Mother (Toronto International Film Festival, 2024). See: https://tiff.net/events/you-are-not-my-mother

[95] Lisa Mulcahy & Kate Dolan Win at IFTAS (Screen Directors Guild of Ireland, 2024). See: https://sdgi.ie/lisa-mulcahy-kate-dolan-win-at-iftas/

Barry Keoghan: from local talent to global star

Academy Award and Golden Globes-nominated actor, Barry Keoghan, was listed in The Irish Times' list of greatest Irish actors of all time[96] following his meteoric success within Ireland and internationally. Keoghan made his acting film debut playing a small role in the Irish crime drama, *Between the Canals* (2011),[97] which received funding from the Irish Film Board, (the predecessor to Screen Ireland), responding to an open casting call advertised on a shop window.[98] Following this, in 2012, Keoghan received a place on the inaugural Full Time Programme for Screen Acting[99] at the National Screen Acting School of Ireland and took part in training events developed with support from Screen Ireland, such as a screen acting workshop. Keoghan went on to secure increasingly larger roles in productions such as *'71* (2014) and *Mammal* (2016) and bolstered his profile as an emerging Irish talent by featuring in UK and Ireland Stars of Tomorrow, an initiative supported by Screen Ireland. Following the positive critical reception he received for these roles and others, he was nominated for the prestigious BAFTA Rising Star Award.[100]

Keoghan went on to gain further critical acclaim through various roles on low-budget and independent productions, including *Calm with Horses* (2019), a film developed and co-financed by Film4 and Screen Ireland with the participation of the WRAP fund.[101]

Since then, Keoghan has been recognised for various high-profile roles, including receiving a nomination for the Academy Award for Best Supporting Actor, as well as winning the BAFTA Award for Best Actor in a Supporting Role for his performance in the *Banshees of Inisherin* (2022). The film was shot in Ireland and utilised the Irish Government's Section 481 tax relief[102]. Keoghan has garnered critical acclaim for his role in *Banshees of Inisherin*[103] and other productions such as *Dunkirk* (2017)[104], the *Killing of a Sacred Deer* (2017)[105] and *Saltburn* (2023)[106]. This has seen him become a poster boy for Irish screen talent and elevated the Irish film industry's profile globally.

[96] The 50 greatest Irish film actors of all time – in order (Donald Clarke and Tara Brady, 2020). See: https://www.irishtimes.com/culture/film/the-50-greatest-irish-film-actors-of-all-time-in-order-1.4271988

[97] BETWEEN THE CANALS (Irish Film Institute, 2024). See: https://ifi.ie/film/between-the-canals/

[98] The wildness of Barry Keoghan (Douglas Greenwood, 2022). See: https://www.gq-magazine.co.uk/culture/article/barry-keoghan-interview-2022

[99] Full Time Programme (1 Year) (Bow Street Academy, 2024). See: https://bowstreet.ie/full-time-programme-1-year/

[100] EE Rising Star Award in 2019 (BAFTA, 2019). See: https://www.bafta.org/stories/ee-rising-star-award-in-2019

[101] Calm with Horses nominated for 4 BAFTAs (Element Pictures, 2024). See: https://elementpictures.ie/news/calm-with-horses-nominated-for-4-baftas/

[102] Banshees of Inisherin co-producer got €72.5m in Irish tax credits (Gordon Deegan, 2023). See: https://www.irishtimes.com/business/2023/03/29/banshees-of-inisherin-co-producer-got-725m-in-irish-tax-credits/

[103] Barry Keoghan doesn't mean to be a scene-stealer (Calum Marsh, 2022). See: https://www.nytimes.com/2022/11/01/movies/barry-keoghan-banshees-inisherin.html

[104] Barry Keoghan interview (Gwilym Mumford, 2018). See: https://www.theguardian.com/film/2018/sep/03/barry-keoghan-american-animals-star-interview

[105] The Killing of a Sacred Deer review – uneasy about a boy (Mark Kermode, 2017). See: https://www.theguardian.com/film/2017/nov/05/killing-of-sacred-deer-review-yorgos-lanthimos-colin-farrell-nicole-kidman

[106] A comedy of ourselves: Emerald Fennell on Saltburn (Marya E. Gates, 2023). See: https://www.rogerebert.com/interviews/emerald-fennell-interview

Colm Bairéad: championing Irish language and culture on the international stage

Irish film director and screenwriter, Colm Bairéad, made his feature film debut with *An Cailín Ciúin*[107] (The Quiet Girl) at the 2022 Berlin Film Festival. The film is a coming-of-age drama in the Irish language, based on Claire Keegan's short story *Foster*. Prior to this, Bairéad has written and directed various short films, documentaries and television mini-series such as Finné,[108] which is a critically acclaimed and award-winning[109] series of documentaries broadcast on TG4. Bairéad is currently working on his next production, *Mary Rose*, which has received production funding and support from Screen Ireland.

An Cailín Ciúin received development and production funding from Cine4,[110] a scheme funded by TG4, Screen Ireland and Coimisiún na Meán. The film was also in receipt of the Irish Government's Section 481 tax incentive. *An Cailín Ciúin* and Cine4 show how Screen Ireland has promoted Irish language and culture both within Ireland and internationally through its funding and support for projects that highlight Ireland's culture, language and storytelling excellence.

The film achieved monumental success, becoming the highest-grossing Irish-language film of all time,[111] taking €1million at the box-office following just 22 weeks in cinemas in Ireland and the UK. It received widespread critical acclaim, receiving ten nominations and winning seven awards[112] at the Irish Film & Television Awards. It was later selected as Ireland's submission for Best International Feature Film at the 95th Academy Awards, becoming the first Irish language film in history to achieve the nomination. The 'Promotion of the Irish language and cultural education' section of this report further details the contribution of *An Cailín Ciúin* in the promotion of Irish language and culture on the international stage.

Small Things Like These: the role of cinematic storytelling in national conversation

Small Things Like These (2024)[113] is a feature film adaptation of Claire Keegan's novel of the same name, that powerfully explores societal complicity surrounding Ireland's Magdalene Laundries. The film stars Cillian Murphy and Emily Watson and is set in small-town Ireland during the 1980s.

Screen Ireland played a pivotal role in providing production funding and support,[114] ensuring *Small Things Like These* could be shot entirely in Ireland. Filming primarily took place in New Ross, County Wexford, authentically portraying the economic and cultural landscape of the 1980s. It also enabled the use of local crew, underscoring Screen Ireland's commitment to promoting production activity and creating job opportunities across Ireland.

[107] AN CAILÍN CIÚIN (Irish Film Institute, 2024). See: https://ifi.ie/film/an-cailin-ciuin-2022/

[108] Finné (IMDB, 2024). See: https://www.imdb.com/title/tt12502028/?ref_=nm_flmg_job_1_cred_t_2

[109] TG4's 'Finné' scoops prestigious Justice Media Award (TG4, 2019). See: https://www.tg4.ie/en/information/press/press-releases/2019-2/tg4s-finne-scoops-prestigious-justice-media-award/

[110] An Cailín Ciúin Hits €1 Million at Ireland and UK Box-Office (TG4, 2022). See: https://www.tg4.ie/en/information/press/press-releases/2022-2/an-cailin-ciuin-hits-e1-million-at-ireland-uk-box-office/

[111] Annual Report Ráitis Airgeadais 2022 (Screen Ireland, 2022). See: https://www.screenireland.ie/images/uploads/general/Annual_Report_2022.pdf

[112] IFTA announces an Cailín Ciúin as Ireland's entry for Oscars 2023 - Best International Feature (IFTA, 2022). See: https://www.ifta.ie/awards/news/QUIETGIRLOSCARS.html

[113] SMALL THINGS LIKE THESE (Irish Film Institute, 2024). See: https://ifi.ie/film/small-things-like-these/

[114] Screen Ireland Launches Its 2024 Slate of over 40 Film, TV Drama, Documentary and Animation Projects (Screen Ireland, 2024). See: https://www.screenireland.ie/news/screen-ireland-launches-its-2024-slate-of-over-40-film-tv-drama-documentary-and-animation-projects

Small Things Like These was the first Irish feature film to open the Berlinale[115] and has served to elevate Ireland's reputation for high-quality, emotionally resonant storytelling among international audiences. It has received critical acclaim, particularly for the performances of Murphy and Watson[116] in conveying the moral ambiguities and tensions at the heart of the story. The film has also been lauded for its cinematography and production design[117] in faithfully portraying the emotion and atmosphere captured in the book.

The release of *Small Things Like These* on screen (and the original novella in 2021) has come at a time when the moral injustices of the Magdalene Laundries are being increasingly and more openly discussed in Irish society. Around 10,000 women and girls were detained in Magdalene Institutions between 1922 and 1996, where they were required to undertake unpaid labour in laundering and needlework.[118] In 2011, the United Nations Committee Against Torture called on the Irish Government to set up an independent inquiry into the Magdalene Laundries and allegations of abuse there.[119] In 2013, the Irish Government published a report to establish the facts of the Irish state's involvement in the Magdalene Laundries.[120]

The film adaptation has contributed to this conversation[121] through its nuanced, unflinching examination of how individuals processed what was happening at the time. The film's understated narrative and open-ended conclusion have ensured this societal issue has resonated with audiences internationally and prompted reflection and continued scrutiny of the impact of the Magdalene Laundries today.

115 Small Things Like These (Berlinale, 2024). See: https://www.berlinale.de/en/2024/programme/202415260.html

116 Small Things Like These review - less is more in stirring Irish drama (Demetrios Matheou, 2024). See: https://theartsdesk.com/film/small-things-these-review-less-more-stirring-irish-drama

117 Small Things Like These (Roger Robinson, 2024). See: https://writersmosaic.org.uk/reviews/small-things-like-these/

118 Justice for Magdalenes Research. See: https://jfmresearch.com/home/preserving-magdalene-history/about-the-magdalene-laundries/

119 UN torture committee calls for independent probe into Magdalene abuse (Irish Examiner, 2011). See: https://www.irishexaminer.com/news/arid-30507887.html

120 Report of the Inter-Departmental Committee to establish the facts of State involvement with the Magdalen Laundries, Department of Justice (2013). See: https://www.gov.ie/en/collection/a69a14-report-of-the-inter-departmental-committee-to-establish-the-facts-of/?referrer=https://www.justice.ie/en/JELR/Pages/MagdalenRpt2013

121 Film of the week: Small Things Like These (Roe McDermott, 2024). See: https://www.hotpress.com/film-tv/film-of-the-week-small-things-like-these-by-roe-mcdermott-23057545

Annex A: Economic impact methodology

Overview

- This analysis generally aligns with the approach outlined by Olsberg and Nordicity in 2017 for updating the economic assessment, with several important modifications that reflect the evolving audiovisual landscape.[122] Unlike the 2017 report, which assessed both the audiovisual and radio sectors, this analysis focuses exclusively on the audiovisual sector. Moreover, it introduces a more granular approach by providing initial estimates of economic impact across different production segments - including documentaries, scripted television, unscripted television, and film - which were not separately estimated in previous assessments. Another notable expansion is the inclusion of virtual reality (VR) and augmented reality (AR) as emerging subsectors, reflecting Ireland's growing immersive economy and the new opportunities for storytelling and audience engagement created by these technologies. Where needed, the data sources used in this analysis have been updated and refined, ensuring they reflect the most current and accurate information available for the Irish audiovisual industry.
- To calculate direct, indirect, induced and total economic impact of each subsector, updated versions of the impact ratios (FTE employment, labour-compensation and GVA) published in the economic impact assessment by Olsberg and Nordicity in 2017 were applied.[123]
    - To ensure those impact ratios can be used as a baseline, the assumption of a stable profile of good and service expenditures was tested and deemed as upheld.
    - Employment impact ratios were adjusted to account for inflation in wages and compensation from 2016 to 2023. This adjustment reflected nominal wage inflation trends in the Irish economy, as reported by the Central Statistical Office. For each year in this period, the employment impact ratios were reduced by a percentage equal to the reported wage inflation. For example, an x% increase in wage inflation leads to an x% reduction in the employment impact ratio before applying it to adjusted turnover or production spending for 2023.

Details for each subsector

Film

- Production spend data on Section 481 productions was sourced from the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media (TCAGSM).
- Production spend data on shorts (not eligible for Section 481) supported by Screen Ireland was sourced from Screen Ireland.
- The expenditures on VFX and post-production were deducted from production spend. The expenditures per segment were calculated by splitting the total spend on VFX and post-production based on the revenues created for the VFX and post-production subsector from each segment.

[122] Economic Analysis of the Audiovisual Sector in the Republic of Ireland (Olsberg SPI & Nordicity, 2017). See: https://www.screenireland.ie/images/uploads/general/Olsberg_Report.pdf

[123] Economic Analysis of the Audiovisual Sector in the Republic of Ireland (Olsberg SPI & Nordicity, 2017). See: https://www.screenireland.ie/images/uploads/general/Olsberg_Report.pdf

Scripted television

- Production spend data on Section 481 productions was sourced from the TCAGSM department.
- For productions commissioned or produced in-house (not eligible for Section 481) by non-commercial broadcasters, information on expenditures, the share of commissioned productions that were not supported by Section 481 (the rest is already counted in production spend data from Section 481 productions) and genre splits across both commissions and in-house work were sourced from annual reports of the broadcasters, the RTÉ independent productions 2022 annual report and direct enquiries to the broadcasters.[124]
- The expenditures on VFX and post-production were deducted from production spend. The expenditures per segment were calculated by splitting the total spend on VFX and post-production based on the revenues created for the VFX and post-production subsector from each segment.

Unscripted television

- Unscripted television was defined as including a variety of formats, such as observational documentaries, docuseries, factual entertainment, lifestyle shows, quizzes, contests, game shows, studio and panel shows, and reality shows.[125]
- As this genre was not eligible for Section 481 support for the years investigated, all production spend was calculated based on in-house productions and commissioned work by the non-commercial broadcasters. Again, information on expenditures, the share of commissioned productions that were not supported by Section 481 (the rest is already counted in production spend data from Section 481 in the scripted television section) and genre splits across both commissions and in-house work were sourced from annual reports of the broadcasters, the RTÉ independent productions 2022 annual report and direct enquiries to the broadcasters.[126]
- The expenditures on VFX and post-production were deducted from production spend. The expenditures per segment were calculated by splitting the total spend on VFX and post-production based on the revenues created for the VFX and post-production subsector from each segment.

Other television

- Data from commercial broadcasters was much sparser.
  - For in-house productions the approximation suggested by Olsberg and Nordicity was used: Multiplying the estimated total turnover in the commercial television broadcasting segment by 20%.[127]
  - Similarly, for commissioned productions, the ratio of commercial broadcaster commission spend to commercial broadcaster turnover was estimated and applied based on the figures used in the economic impact assessment of Olsberg and Nordicity.

[124] Independent Productions Annual Report 2022 (RTÉ, 2022). See: https://about.rte.ie/commissioning/wp-content/uploads/sites/3/2023/06/RTE-Independent-Productions-Annual-Report-2022-2.pdf

[125] Budget 2025: Lights, camera, tax break (RTÉ, 2024). See: https://www.rte.ie/news/analysis-and-comment/2024/1005/1473650-production-tax/

[126] Independent Productions Annual Report 2022 (RTÉ, 2022). See: https://about.rte.ie/commissioning/wp-content/uploads/sites/3/2023/06/RTE-Independent-Productions-Annual-Report-2022-2.pdf

[127] Economic Analysis of the Audiovisual Sector in the Republic of Ireland (Olsberg SPI & Nordicity, 2017). See: https://www.screenireland.ie/images/uploads/general/Olsberg_Report.pdf

- This category also included production spend on sports, news, and current affairs programming from all broadcasters, including RTÉ and TG4. Again, information on expenditures, the share of commissioned productions that were not supported by Section 481 (the rest is already counted in production spend data from Section 481 in the scripted television section) and genre splits across both commissions and in-house work were sourced from annual reports of the broadcasters, the RTÉ independent productions 2022 annual report and direct enquiries to the broadcasters.[128]
- The expenditures on VFX and post-production were deducted from production spend. The expenditures per segment were calculated by splitting the total spend on VFX and post-production based on the revenues created for the VFX and post-production subsector from each segment.

Creative documentary (Section 481)

- Production spend data on Section 481 productions was sourced from the TCAGSM department.
- The expenditures on VFX and post-production were deducted from production spend. The expenditures per segment were calculated by splitting the total spend on VFX and post-production based on the revenues created for the VFX and post-production subsector from each segment.

Commercial

- The mapping for this subsector focused on members of the Commercial Producers Ireland association, a voluntary organisation of independent Irish commercial production and post-production companies. However, VFX and post-production companies were excluded from the mapping, as their economic impact is captured in a separate section.
- Employment was estimated through various sources, including the business-level survey, desk-based research of searching websites and social media pages (LinkedIn) and accessing CRO filings for bigger companies.

Animation

- Production spend data on Section 481 productions was sourced from the TCAGSM department.
- The expenditures on VFX and post-production were deducted from production spend. The expenditures per segment were calculated by splitting the total spend on VFX and post-production based on the revenues created for the VFX and post-production subsector from each segment.
- As animation productions commissioned by broadcasters could not be split out based on publicly available data, further research was conducted to get an estimate of the underestimation of the subsector (that was captured in one of the television segments instead). This included a mapping of members of Animation Ireland and a subsequent estimate of employment for the animation subsector in the Republic of Ireland (some members are based in Northern Ireland). Employment was estimated through various sources including the business-level survey, desk-based research of searching websites and social media pages (LinkedIn) and accessing CRO filings for bigger companies.

[128] Independent Productions Annual Report 2022 (RTÉ, 2022). See: https://about.rte.ie/commissioning/wp-content/uploads/sites/3/2023/06/RTE-Independent-Productions-Annual-Report-2022-2.pdf

VFX and post-production

- For the six main VFX studios data on companies and employment was sourced from the recently published VFX Ireland report.[129]
- The mapping of smaller post-production companies and the estimation of their employment contribution was based on the business-level survey, desk-based research of searching websites and social media pages (LinkedIn) and accessing CRO filings for bigger companies.
- While data on freelancers active in this subsector were not directly available, an estimate was produced by calculating and applying the ratio of freelancers to permanent employees reported in the 2017 Olsberg and Nordicity economic impact assessment.[130]

Digital games

- The mapping of companies operating in this subsector was based on triangulating findings from research by Imirt, the Irish game developer representation, along with the desk-based research and findings from the business-level survey for this report.
- Employment was then estimated through various sources including the business-level survey, desk-based research of searching websites and social media pages (LinkedIn) and accessing CRO filings for bigger companies.

VR and AR

- Employment figures were sourced from The Irish Immersive Economy.[131]
- Due to a lack of specific impact ratios for the VR and AR subsector, the assessment relied on impact ratios for the VFX and post-production subsector.

Distribution – Fim, television, animation, documentary

- The mapping of this subsector was based on desk-based research and data from Screen Ireland.
- Employment was estimated through various sources including the business-level survey, direct stakeholder engagement, desk-based research of searching websites and social media pages (LinkedIn) and accessing CRO filings for bigger companies.

Publishing and QA – Digital games

- The mapping of companies operating in this subsector was based on triangulating findings from research by Imirt, along with the desk-based research and findings from the business-level survey for this report.
- Employment was then estimated through various sources, including the business-level survey, desk-based research of searching websites and social media pages (LinkedIn) and accessing CRO filings for bigger companies.

[129] VFX IRELAND REPORT 2024 - Charting Ireland's VFX Future (VFX Ireland, 2024). See: https://www.screenireland.ie/images/uploads/general/VFX-Ireland-Report-2024-V13-DIGITAL.pdf

[130] Economic Analysis of the Audiovisual Sector in the Republic of Ireland (Olsberg SPI & Nordicity, 2017). See: https://www.screenireland.ie/images/uploads/general/Olsberg_Report.pdf

[131] Irish Immersive Technology Industry Landscape 2022 (Eirmersive, 2022). See: https://www.skillnetireland.ie/uploads/attachments/The-Irish-Immersive-Economy-report.pdf

Cinema exhibition

- The mapping of this subsector was mainly based on data from Screen Ireland, including cinema operators, sites and seats. Where needed data gaps were filled by desk-based research.
- Gross box office receipts were also sourced from Screen Ireland.
- Total turnover for the subsector was estimated by calculating the ratio of gross box office revenues to total revenues for a major cinema operator based on their publicly available financial reports. This ratio was then applied for the whole subsector.

Television broadcasting

- Gross turnover was calculated by adding revenue created specifically by TV broadcasting for all broadcasters. These figures were sourced from publicly available annual reports. While Virgin Media Television and TG4 do not offer radio broadcasting, so total broadcasting revenue can be used. However, for RTÉ revenues associated with radio broadcasting need to be deducted. Their annual reports state the share of licence fees used for television. For commercial revenue, the share of revenue originating from radio broadcasting can be calculated based on the year-on-year increases reported for radio trading.
- The value of in-house television productions was deducted from gross turnover, as broadcasters employ this staff directly, meaning their economic impact has already been captured in previous sections.

Video on demand

- The mapping of this subsector was based on desk-based research and data from Screen Ireland.
- Employment was estimated through various sources, including the business-level survey, direct stakeholder engagement, desk-based research of searching websites and social media pages (LinkedIn) and accessing CRO filings for bigger companies.

Annex B: Stakeholder engagement

Type of stakeholder engagements

- **Online scoping interviews with Screen Ireland**
- **66 online 1-1 interviews with stakeholders**, including industry trade bodies, audiovisual sector guilds, sector experts, skills organisations, film festivals, studios, distributors, broadcasters, government and regulators.
- **In-person workshops and focus groups:**
    - Regional workshop (Galway): 13
    - Horizon scan workshop (Dublin): 17 sector stakeholders / members of the Screen Ireland team
    - Screen Producers Ireland focus group (Dublin): 10
- **Survey participants:**
    - Business-level survey: 269
    - Individual survey: 290

Participating companies and organisations

Access Cinema
Animation Ireland
Ardán
Ardmore Studios
The Arts Council
Atlantic Technological University
Bandit Films
Bow Street Academy - the National Screen Acting School of Ireland
Breakout Pictures
Cartoon Saloon
Century Cinemas
Clermont Screen Hub (Crew Academy East)
Coimisiún na Meán
Cork International Film Festival
Creative Heartlands
Crew Academy West
Crossing the Line Productions
Cue One Productions
Cultural & Creative Industries Skillnet
Culture Ireland
Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media
Department of Further and Higher Education, Research, Innovation and Science
Donegal Film Office
Dreamfeel
Dublin Film Festival
Dún Laoghaire Institute of Art, Design and Technology
Eclipse Pictures
Éiru Films
Element Pictures
Enterprise Ireland
Galway Film Fleadh
Great Island Productions
High Res Film & Television Production Ltd.
Higher Education Authority
IDA Ireland
Imirt
Indie Pics
Irish Equity
Irish Film Institute
Kite Entertainment
Marmalade Films
Metropolitan Films
Northern Ireland Screen
Pale Rebel Productions
RTÉ
Saffery
Saffron Films
Screen Composers Guild of Ireland
Screen Directors Guild of Ireland
Screen Greening Coalition
Screen Guilds of Ireland
Screen Producers Ireland
SIPTU
stop.watch television
StoryToys

Subotica Films
Sustainability Guild
Sustainability Media Network
Technological University Dublin
TG4
The Lir Academy
Tourism Ireland
Troy Studios
VFX Association Ireland
Virgin Media Television
Viridian Software
Volta Pictures
West Cork Film Studios
Wildcard Distribution
Windmill Lane Pictures
WRAP Fund
Writers Guild of Ireland
Young Irish Filmmakers

This list includes those who were directly engaged through an interview, workshop, or focus group. We would additionally like to thank all who contributed in other ways, such as completing or distributing surveys, and sharing data. Some participating organisations opted not to be named.

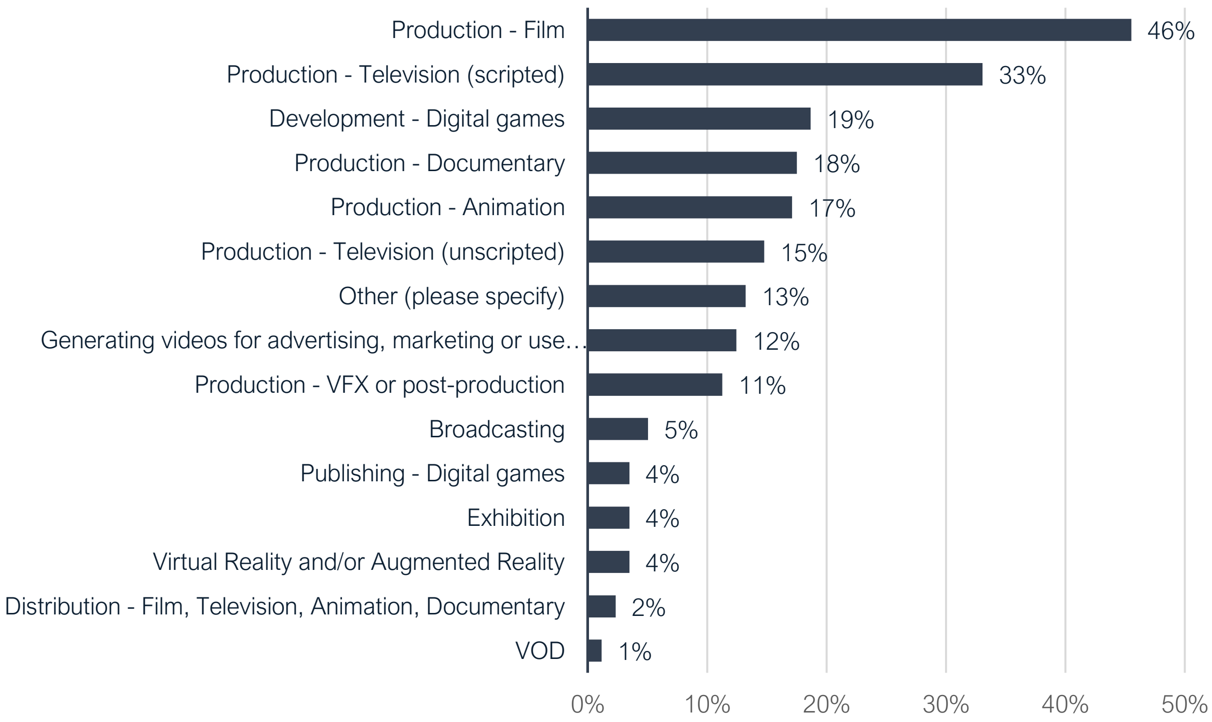
Annex C: Respondent profiles surveys

Respondent profiles surveys

Individual level survey

The individual-level survey was open for submissions from the 25th of September 2024 to the 14th of October 2024 and received 290 responses.[132] Regarding subsectors, the survey responses reflected a wide span of the audiovisual sector. The most well-represented subsector was film production, as 46% out of the 257 respondents selected this option.[133] This was followed by individuals operating in scripted TV (33%), digital games development (19%) and the production of documentaries (18%). Examples of respondents who chose the option "Other" include actors, individuals involved in training within the audiovisual sector, virtual productions, make-up artists and individuals producing music for the audiovisual sector.

Figure 22. Proportion of individual-level survey respondents working in audio-visual subsectors



Source: Individual-level survey conducted by Alma Economics.

When asked about their employment status, the majority of the 255 survey respondents who answered this question indicated that they are freelance or self-employed (40%), followed by employees (33%). A smaller proportion are employers (13%), while 7% are unemployed.

[132] Not all respondents answered every question, which explains the varying totals for each question.

[133] Please note that respondents were able to pick multiple options, as, for example, most production companies operate in several subsectors.

Table 32. Employment status for individual-level survey respondents

Type of employment	Count	Share
Freelance/self-employed	102	40%
Employee	85	33%
Employer	32	13%
Unemployed	17	7%
Other	14	5%
Full-time education	3	1%
Retired	2	1%
All respondents	**255**	**100%**

Source: Individual-level survey conducted by Alma Economics.

In addition, respondents were given the option to indicate the time they have been working in the audiovisual sector. 239 respondents answered this question, in which more than half (56%, 135 respondents) have worked more than 10 years, 69 (29%) worked in the sector between 3-6 years and only 33 respondents (15%) have worked less than 3 years in the industry.

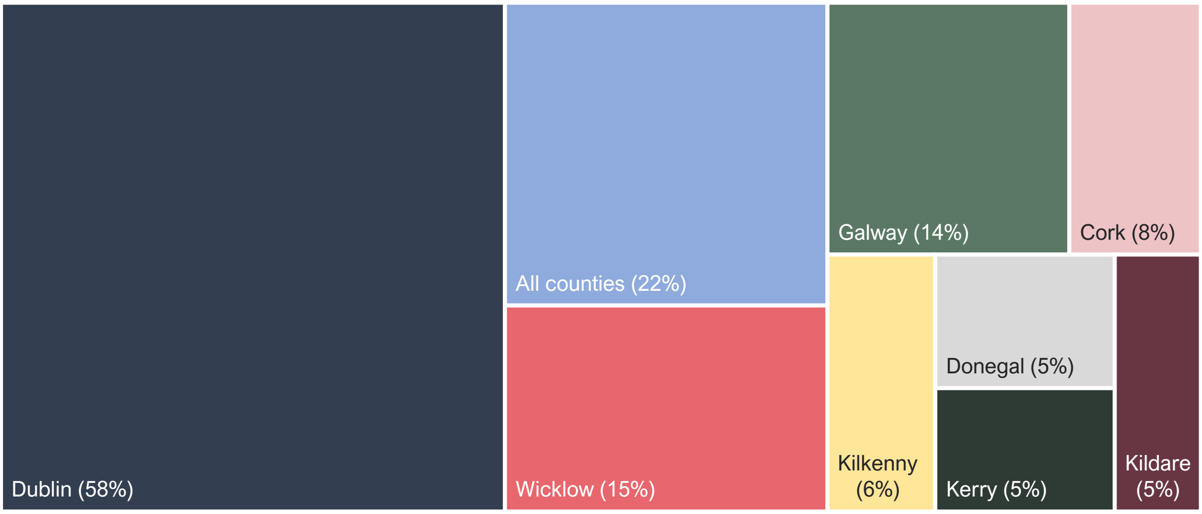
Table 33. Duration working in the sector for individual-level survey respondents

Duration working in the sector	Count	Share
More than 10 years	135	56%
6-10 years	40	17%
3-5 years	29	12%
1-2 years	18	8%
Between 6 months and a year	10	4%
Less than 6 months	5	2%
I have left the sector	2	1%
All respondents	**239**	**100%**

Source: Individual-level survey conducted by Alma Economics.

When asked about which counties they operate in, 239 survey participants answered this multiple-choice question. The survey data revealed a strong concentration of respondents operating in Dublin, with 58% indicating a presence there, followed by 22% who serve all counties. Galway and Wicklow also had notable representation, at 14% and 15% respectively. Cork (8%) and Kilkenny (6%) were the other two counties where more than 5% of survey respondents operate.

Figure 23. Regional distribution of individual-level survey respondents (shows all options selected by more than 5% of respondents)

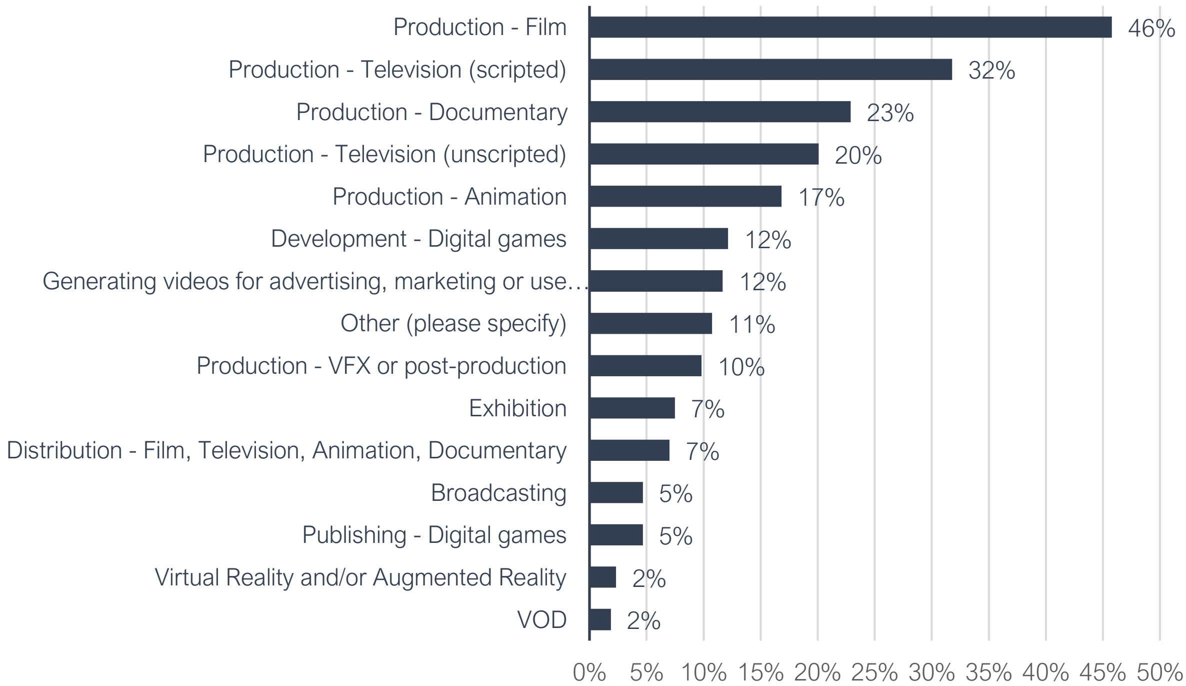


Source: Individual-level survey conducted by Alma Economics.

Business-level survey

The business-level survey was open for submissions from the 24th of September 2024 to the 14th of October 2024 and received 269 responses. Survey responses covered a broad range of subsectors within the audiovisual sector, with respondents able to select multiple options. Of the 214 businesses that answered this question, most of them operated on the production/development side with 46% involved in film, 32% in scripted TV, 23% in documentaries, 20% in unscripted TV and 17% in animation. Respondents that chose the option "Other" included, among others, film festivals, legal services and companies involved in the training of the audiovisual sector.

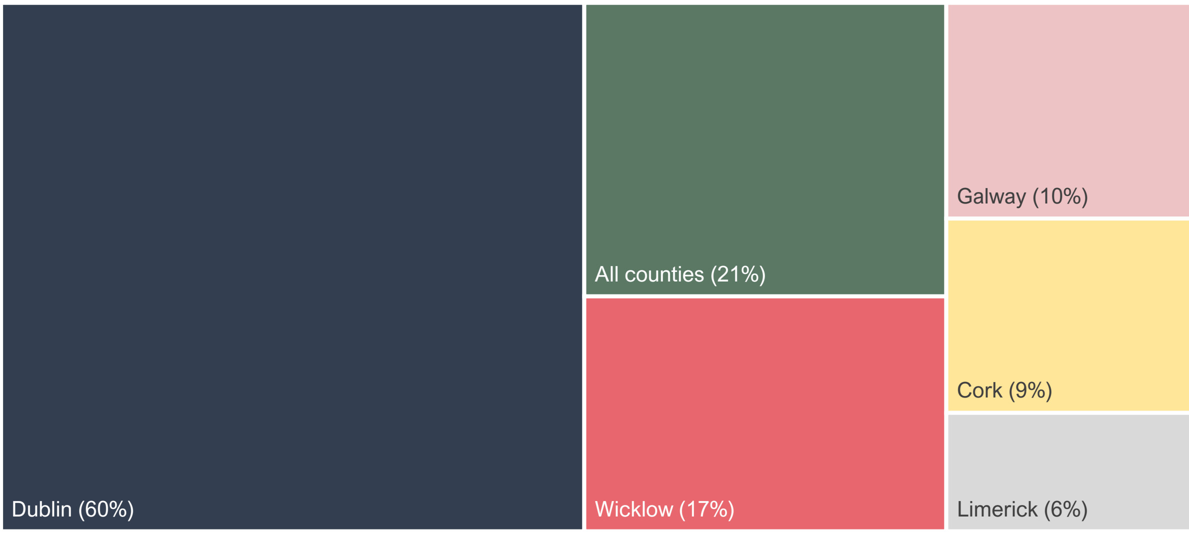
Figure 24. Proportion of business-level survey respondents working in audio-visual subsectors



Source: Business-level survey conducted by Alma Economics.

Respondent businesses operated across most of the counties that constitute Ireland. Dublin concentrated more than half of the respondents' business operation location (116 respondents, 60%), followed by Wicklow (32 respondents, 17%), Galway (20 respondents, 10%) and Cork (18 respondents, 9%). 40 respondents (21%) stated they operate in all counties.

Figure 25. Regional distribution of business-level survey respondents (shows all options selected by more than 5% of respondents)



Source: Business-level survey conducted by Alma Economics.

Annex D: Current Learning and Skills Development Provision

This section presents a comprehensive overview of the current learning and skills development opportunities available for Ireland's audiovisual sector. Drawing on a detailed review of programmes offered by key institutions—including the NTAs, Screen Ireland, the Institute of Art, Design and Technology (IADT), and Ballyfermot College of Further Education (BCFE)—the analysis highlighted a range of specialised courses and qualifications, spanning screenwriting, production management, technical skills, animation, and VFX. While the table below tabulates these offerings to outline the "supply" of sector skills, it may not be exhaustive, as new programmes and providers continue to emerge.

Live Action / Film and Television Production

DEVELOPMENT			
Skills Category	**Name of Opportunity**	**Institution**	**Length**
Screen writing	Script Mentorship Scheme	NTA – Film & TV	Not specified
Screen writing	Screenwriting for Film and Television	IADT	18 months
Screen writing	Script Development Workshop	NTA – not specified	1 day
Screenwriting	The Art of Screenwriting	The Lir	10 weeks
Short Film production, writing, commissioning	Ardán / RTÉ Short Film Commission	NTA – Film & TV	Not specified
Screenwriting	Writing Television Drama	IADT	Not specified
Screen writing	Certificate in Writing Television Drama	Creative Skillnet	5 months
Screen writing / filmmaking (general)	Filmmaking, Scriptwriting and Photography	BCFE	1 year
Development	Creative Development for Unscripted TV (Certificate course)	IADT/Creative Futures Academy	14 weeks
Development	Content Development for Film and Television	Kerry Education and Training Board	41 weeks
PRODUCTION MANAGEMENT			
Skills Category	**Name of Opportunity**	**Institution**	**Length**
Production, photography, and audio production	MA in Documentary Practice	Dublin City University (DCU)	1 year
Production	Mentorship Programme for Producers	NTA – not specified	6 months
Production	Introduction to the Production Department	NTA – not specified	1 day

Production	Passport to Production	NTA – not specified	6 days
Production	Bachelor of Arts in Film Television and Screen Media Production	Griffith College	3 years
Production	Bachelor of Arts (Honors) in Film Television and Screen Media Production	Griffith College	3 years
ART/CRAFT			
Skills Category	**Name of Opportunity**	**Institution**	**Length**
Set, costume and character design	Design for Film	IADT	4 years
POST-PRODUCTION			
Skills Category	**Name of Opportunity**	**Institution**	**Length**
Sound design	Immersive Sound Design for Film (Certificate Course)	IADT	2-3 weeks
TECHNICAL			
Skills Category	**Name of Opportunity**	**Institution**	**Length**
Camera Operation	Cinematography Level 5 (QQI Certificate Course)	BCFE	1 year
Across BTL roles	Crew Mentoring Programme	NTA – not specified	5-20 hours
ABOVE-THE-LINE TRAINING / CROSS-SECTORAL TRAINING			
Skills Category	**Name of Opportunity**	**Institution**	**Length**
Design (across formats)	Multimedia	DCU	3 years
Acting	Programme for Screen Acting	Bow St. Academy	1 year
Acting	Programme for Screen Acting	Bow St. Academy	6 months
Acting	Introduction to Screen Acting	The Lir	10 weeks
Acting	Intermediate Screen Acting	The Lir	10 weeks
Voice-over acting (across formats)	Introduction to Voice-Over Acting - Weekend Course	The Lir	2 days
Sustainability Advisor	Sustainability Advisor Training	NTA – Crew Academy East	1.5 hours
Various skills in factual/short film production	Short Film & Factual Video Production (Certificate Course)	BCFE	1 year
Various skills in documentary production	Multicamera Documentary Production Traineeship	BCFE	1 year

OTHER GENERAL SECTOR TRAINING			
Skills Category	**Name of Opportunity**	**Institution**	**Length**
Filmmaking (general)	Film & Broadcasting	Technological University Dublin (TUD)	4 years
Portfolio preparation	Certificate in Screen Industry Portfolio Preparation	Cultural and Creative Skillnet, TUD and Screen Ireland	Not specified
Understanding of sector pathways	Postgraduate Certificate in Strategic Development for Creative Professionals	Cultural and Creative Industries Skillnet and Creative Futures Academy	1 year
Management	Managing People in the Screen Industry	Cultural and Creative Industries Skillnet	3 days
Industry Practice	BA (Hons) in Screen Industry Practice	Cultural and Creative Industries Skillnet, TUD and Screen Ireland	1.5 years

Source: Desk-based research.

Digital Content Production

ANIMATION			
Skills Category	**Name of Opportunity**	**Institution**	**Length**
Legal	Legal Aspects of Production (Workshop)	Creative Skillnet / Animation Ireland	1 hour
3D animation	3D Animation Next Step Bootcamp	Screen Ireland	3 Days
2D animation	2D Animation Next Step Bootcamp	Screen Ireland	3 Days
2D design	Colour and Shape in Visual Development	NTA - Not specified	8 days
Filmmaking	How to Make an Animated Short Film	NTA - Not specified	1 day
Production Management	Production Management for Animation	IADT	15 weeks
Animation (general)	Animation	IADT	18 months
Animation Drawing	Animation Drawing Studies	BCFE	1 year
Computing	Classical & Computer Animation Level	BCFE	2 years
Animation (general)	Animation (Visual Media) BA (Hons)	BCFE	2 years
Animation (general)	Certificate in Animation	Griffith College	1 year
2D and 3D animation	Certificate in 2D & 3D Digital Animation Production	Dundulk IT	1 year

Animation (general)	Digital Animation – BSc	Technological University of the Shannon (TUS), Clonmel	4 years
Animation (general)	Animation	IADT	4 years
3D Animation	3D Animation	IADT	4 years
Animation	Animation (Creative Media)	Kerry Education and Training Board	38 weeks
DIGITAL GAMES			
Skills Category	**Name of Opportunity**	**Institution**	**Length**
Games production and design	Games Production & 3D Graphics	BCFE	1 year
Games production and design	Advanced Games Production & Design	BCFE	2 years
	Games (Visual Media) BA (Hons)	BCFE	2 years
Games design	Game Art and Design – BSc	TUS Clonmel	4 years
Games production and design	Games Production & 3D Graphics	BCFE	1 year
Games design	Computer Games Design (Creative Media)	Kerry Education and Training Board	38 weeks
VFX			
Skills Category	**Name of Opportunity**	**Institution**	**Length**
Compositing	Introduction to Compositing 2023	Screen Ireland / Creative Skillnet / VFXAI / CMAI	2 months
Adobe interface	Introduction to Adobe After Effects	Screen Ireland / National Film & Television School, UK	3 days
VFX workflows	From Pre-Vis to Post Production: Managing the VFX Workflow with Mario Beck	NTA – VFX	1 day
VFX workflows	An introduction to the VFX Production Department using Flow (formerly ShotGrid)	NTA - Not specified	4 days
Compositing	Introduction to Compositing: Rotoscope, Tracking and Clean up Artist for VFX	CMAI	6 weeks
Software training	Introduction to Houdini	CMAI	Not specified
Games Engine training	Unreal Training for the VFX Pipeline	CMAI	Not specified

Special Effects	Certificate in FX for Film & TV	Cultural and Creative Industries Skillnet and TUS	12 weeks
Technical art	Certificate in Technical Art & Pipeline	Cultural and Creative Industries Skillnet and TUS	12 weeks
CROSS SECTORAL TRAINING			
Skills Category	**Name of Opportunity**	**Institution**	**Length**
Games engine training (for animation, VFX, and digital games)	Unreal Engine 5 Workshop with Escape Studios	Screen Ireland	5 days
Cross-sector skills	Animation, VFX & Games Graduate Traineeship 2024 Round 2	Screen Ireland	3 months
Cross-sector skills	Animation, VFX & Games Graduate Traineeship 2024	Screen Ireland	3 months
360 filming/editing, Immersive sound, Game Engines, Photogrammetry	Introduction to XR / Immersive Storytelling	IADT	8 weeks
Post-production, Visual-effects, Video Production and Animation	Advanced Skills for Visual Effects, Video and Animation Post-Production Traineeship	BCFE	2 years
Virtual Production, Media Management and Postproduction	BA (Hons) Immersive Media Production	BCFE	4 years
Digital Media Production	Creative Digital Media (Certification Course)	Cork College of FET	1 year
Computing	Bsc (Honours) in Creative Computing	South East Technological University	4 years
Virtual Production	Virtual Production an Introduction to the Pipeline	CMAI	Not specified
Cross sectoral skills	MSc in Creative Digital Media & UX	TUD	1.5 years
Cross sectoral skills	BA (Hons) in Creative Digital Media	TUD	4 years
Cross sectoral skills	BA (Hons) in Media Production and Digital Arts	TUD	4 years
Cross sectoral skills	BA (Hons) in Design – Visual Communication	TUD	4 years

Source: Desk-based research.

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