Fís Éireann
Screen Ireland

Key Statistics
Olsberg SPI Report
1.0 — 02/2019

Introduction

In June 2018 the Olsberg SPI report was published. This report had been commissioned by Government to measure the value of the audiovisual sector and to make strategic recommendations for growth. The report used baseline data from 2016 which had been the highest year on record. In 2017 there was a 10% increase in production activity. The report included live-action (film and TV), animation (film and TV), games, commercials and the radio sector. It also looked at the values in the Irish economy of the exploitation value chain.

—

Teresa McGrane
Deputy Chief Executive

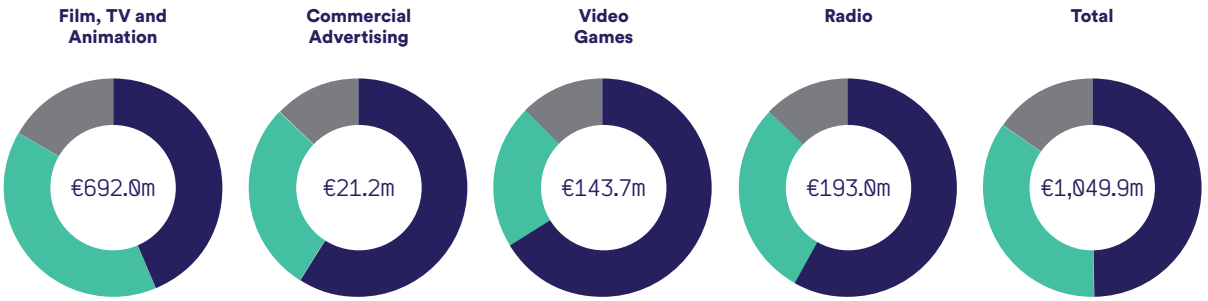
Gross Added Value		Employment (FTE's)		
Total Gross value of the Audiovisual Sector in Ireland (including Radio).	Total Gross Value of the Film, TV and Animation in Ireland.	Total Gross Employment in the Audiovisual Sector in Ireland (including Radio).	Total employment in the Film, TV and Animation Sector (this includes direct/ indirect and induced employment of the Film, TV, Animation sector including exploitation).	Total employment in Film, TV and Animation only (excluding in-house broadcasters).
€1,049.90	€692.80	16,930	11,960	6,510

Contents

Gross Value Added (1/2)

Figure 1: In the audiovisual and radio sectors in Ireland (€m), 2016

- DIRECT IMPACT
- INDIRECT IMPACT
- INDUCED IMPACT

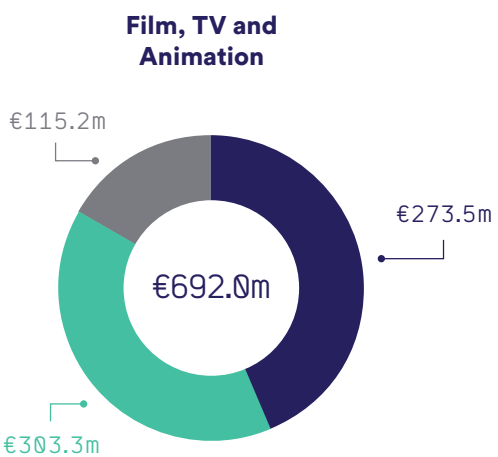


	Film, TV and Animation	Commercial Advertising	Video Games	Radio	Total
DIRECT IMPACT	€303.3m	€12.5m	€95.40m	€112.10m	€523.30m
INDIRECT IMPACT	€273.5m	€6.0m	€30.60m	€56.50m	€366.70m
INDUCED IMPACT	€115.2m	€2.70m	€17.70m	€24.40m	€159.90m

Figure 2: In the Film, TV and Animation Sector in Ireland (€m), 2016 (Detail)

- DIRECT IMPACT
- INDIRECT IMPACT
- INDUCED IMPACT

Source: Olsberg · SPI/Nordicity estimates based on data from RTÉ, BAI, CRAOL, Irish Times, Core Media, IFB, Imirt, industry surveys, company accounts, ONS, Indecon and CSO.



Gross Value Added (2/2)

Figure 3: In the Film, TV and Animation Sector in Ireland (€m), 2016

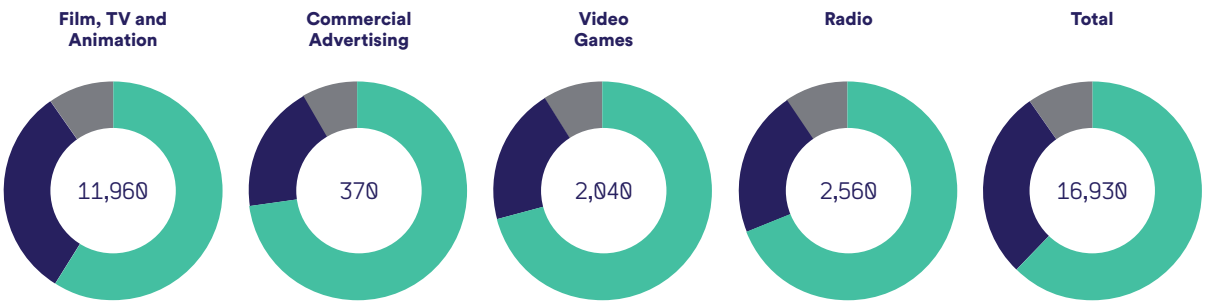
	FILM, TELEVISION & ANIMATION			
	Direct Impact	**Indirect Impact**	**Induced Impact**	**Economic Impact**
Live Action Production				
Independent/Inward Production	69.2	85.7	39.5	194.5
In-house Production	61.2	51.6	18.9	131.7
Digital Production				
Post-production/ VFX	18.5	6.1	3.9	28.6
Animation Production	24.1	17.8	8.8	50.6
Distribution				
Distribution	3.1	5.7	1.6	10.4
Transmission				
Cinema Exhibition	52.3	32.2	16.7	101.3
TV Broadcast	74.3	74.3	25.7	174.3
VOD	0.6	0.0	0.1	0.7
TOTAL:	**303.3**	**273.5**	**115.2**	**692.0**

Source: Olsberg · SPI/Nordicity estimates based on data from RTÉ, BAI, CRAOL, Irish Times, Core Media, IFB, Imirt, industry surveys, company accounts, ONS, Indecon and CSO. *Total number of workers/employees: Live action independent/inward production, 6,300; post-production/VFX, 822; animation, 940; cinema exhibition, 1,600. NB: Numbers may not sum due to rounding.

Employment (1/3)

Figure 4: In the audiovisual and radio sectors in Ireland (€m), 2016

- DIRECT IMPACT
- INDIRECT IMPACT
- INDUCED IMPACT

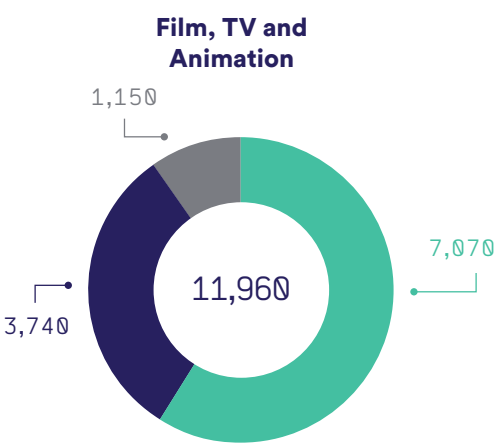


	Film, TV and Animation	Commercial Advertising	Video Games	Radio	Total
DIRECT IMPACT	7,070	270	1,450	1,770	10,560
INDIRECT IMPACT	3,740	70	410	550	4,770
INDUCED IMPACT	1,150	30	180	240	1,600

Figure 5: In the Film, TV and Animation Sector in Ireland (€m), 2016 (Detail)

- DIRECT IMPACT
- INDIRECT IMPACT
- INDUCED IMPACT

Source: Olsberg · SPI/Nordicity estimates based on data from RTÉ, BAI, CRAOL, Irish Times, Core Media, IFB, Imirt, industry surveys, company accounts, ONS, Indecon and CSO.



Employment (2/3)

Figure 6: Employment impact of the audiovisual and radio sectors in Ireland, 2016 (FTEs)

	FILM, TELEVISION & ANIMATION			
	Direct Impact	**Indirect Impact**	**Induced Impact**	**Economic Impact**
Live Action Production				
Independent/Inward Production	3,260*	1,210	390	4,860
In-house Production	680	750	190	1,620
Digital Production				
Post-production/ VFX	480*	80	40	600
Animation Production	740*	220	90	1,050
Distribution				
Distribution	50	50	20	120
Transmission				
Cinema Exhibition	960*	390	170	1,520
TV Broadcast	890	1040	250	2,180
VOD	10	0	0	10
TOTAL:	**7,070**	**3,740**	**1,150**	**11,960**

Source: Olsberg · SPI/Nordicity estimates based on data from RTÉ, BAI, CRAOL, Irish Times, Core Media, IFB, Imirt, industry surveys, company accounts, ONS, Indecon and CSO. *Total number of workers/employees: Live action independent/inward production, 6,300; post-production/VFX, 822; animation, 940; cinema exhibition, 1,600. NB: Numbers may not sum due to rounding.

Employment (3/3)

Figure 7: Labour compensation impact of the audiovisual and radio sectors in Ireland, 2016

	FILM, TELEVISION & ANIMATION			
	Direct Impact	**Indirect Impact**	**Induced Impact**	**Economic Impact**
Live Action Production				
Independent/Inward Production	149.8	44.3	17.7	211.7
In-house Production	53.8	27.9	8.4	90.1
Digital Production				
Post-production/ VFX	21	3	1.7	25.7
Animation Production	36.8	8.6	3.9	48.8
Distribution				
Distribution	3.1	2.6	0.7	6.3
Transmission				
Cinema Exhibition	25*	15.9	7.5	48.4
TV Broadcast	62.7	39.7	11.5	113.9
VOD	0.6	0	0	0.6
TOTAL:	**352.3**	**142.0**	**51.4**	**545.5**

Source: Olsberg · SPI/Nordicity estimates based on data from RTÉ, BAI, CRAOL, Irish Times, Core Media, IFB, Imirt, industry surveys, company accounts, ONS, Indecon and CSO. *Total number of workers/employees: Live action independent/inward production, 6,300; post-production/VFX, 822; animation, 940; cinema exhibition, 1,600. NB: Numbers may not sum due to rounding.

Fiscal Impact (1/2)

Figure 8: Tax Impact by Sub-Sector, 2016

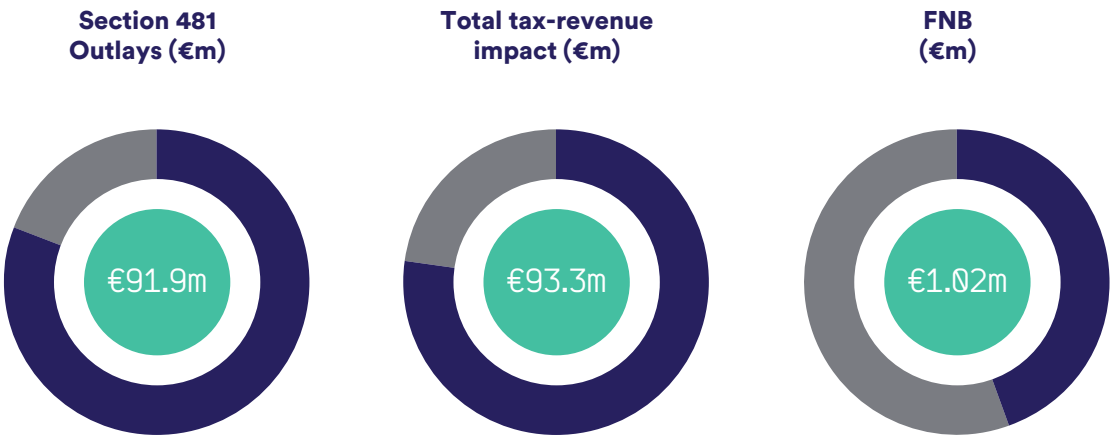
	TAX IMPACT BY SUB-SECTOR				
	Live Action Production	**Digital Production**	**Distribution**	**Transmission**	**Total**
Film, TV and Animation	115.1 (326.1)	25.8 (79.2)	3.4 (10.4)	90.1 (276.3)	234.4 (692.0)
Commercial Advertising	3.8 (13.8)	2.4 (7.5)	—	—	6.3 (21.2)
Video Games	—	1.6 (4.8)	45.3 (138.9)	—	46.8 (82.9)
Radio	33.5 (102.8)	—	—	29.4 (90.2)	62.9 (193.0)
TOTAL:	152.5 (442.7)	29.8 (91.4)	48.7 (149.3)	119.5 (366.5)	350.4 (1,049.9)

(GVA) **Source:** Olsberg · SPI/Nordicity estimates based on data from RTÉ, BAI, CRAOL, Irish Times, Core Media, IFB, Imirt, industry surveys, company accounts, ONS, Indecon and CSO. *Total number of workers/employees: Live action independent/inward production, 6,300; post-production/VFX, 822; animation, 940; cinema exhibition, 1,600. NB: Numbers may not sum due to rounding.

Figure 9: Fiscal Net benefit of S481, 2016

- LIVE ACTION PRODUCTION
- DIGITAL PRODUCTION

Source: Olsberg · SPI/Nordicity estimates based on data from RTÉ, BAI, CRAOL, Irish Times, Core Media, IFB, Imirt, industry surveys, company accounts, ONS, Indecon and CSO.



In 2016, every euro of Section 481 outlays returned €1.02 in tax revenue to the Irish government. This result was arrived at before taking into account the tax revenues generated by screen tourism and other spillover effects, and therefore, should be viewed as a conservative estimate.

Fiscal Impact (2/2)

Figure 10: Economic net benefit of S481, 2016

- LIVE ACTION PRODUCTION
- DIGITAL PRODUCTION

Source: Olsberg · SPI/Nordicity estimates based on data from RTÉ, BAI, CRAOL, Irish Times, Core Media, IFB, Imirt, industry surveys, company accounts, ONS, Indecon and CSO.

In 2016, every euro of Section 481 outlays generated, on average, €2.82 in economic net benefit for the Irish economy. Economic net benefit is a more comprehensive measurement than fiscal net benefit as it recognises that governments do not invest to benefit their treasuries, but rather on behalf of all citizens as a means to raise standards of living.

Contact

For further information or
assets please contact:
—
teresa.mcgrane@screenireland.ie
+353 1 645 1532

Definitions

Gross value Added
Gross value Added (GVA) is a productivity metric that measures the contribution of the Audiovisual sector to the Irish economy.

Direct Impact
The direct impact refers to the employment, labour compensation and GVA generated directly within the industry by companies operating directly within the audiovisual sector.

Indirect Impact
The indirect impact refers to the employment, labour compensation and GVA generated by companies within the supply chain of the audiovisaul sector i.e those industries which supply goods and services to the sector.

Induced Impact
The induced impact refers to the additional economic activity and associated employment, labour compensation and GVA when workers at the 'direct' and 'indirect' re-spend their earning within the Irish economy.

Economic Impact
The economic impact is the sum of the direct, indirect and induced impacts.

Fiscal Net benefit
The fiscal net benefit is the tax revenue yielded by incremental economic activity generated from the public investment.

Economic Net Benefit
The economic net benefit is the total economic impact of public investment to the actual public investment outlays.

info@screenireland.ie
www.screenireland.ie
+353 91 561398

Geata na Banríiona,
23 Bóthar na nDuganna
Gaillimh, Éire
—
Queensgate,
23 Dock Road
Galway, Ireland