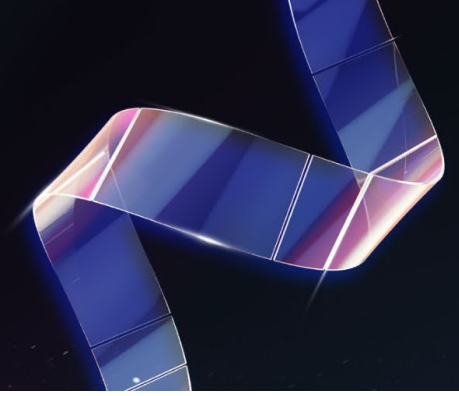




Fís Éireann
Screen Ireland

Submission to the Joint Committee on Tourism, Culture, Arts, Sport and Media on Rural Tourism - 17th October 2022



Screen Ireland

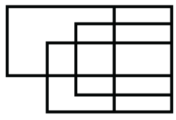
As the national agency for the Irish film, television drama, animation and documentary industry, Fís Éireann/Screen Ireland is the creative partner to the sector, investing in talent, creativity and enterprise. We are responsible for the expression of Irish culture on screen and are inspired by original storytelling that will emotionally move audiences at home and abroad. Through a wide range of practical funding supports across development, production, distribution, promotion and skills development, Screen Ireland supports the sector at every stage. We support filmmakers in their creative pursuit to share valuable artistic, cultural and commercial stories onscreen.

Screen Tourism – Significant Opportunities

Screen Tourism provides huge scope and opportunities to promote Ireland as a tourism location and to showcase the regions of Ireland to a broad audience, raising awareness for the island of Ireland. Major studios put significant marketing spend behind their content, so partnering with them enables Tourism Ireland to extend and get more impact from their own marketing spend. Evidence from other destinations shows that screen content can motivate interest in a country and that fans, as a specific target audience, can spend more and often become repeat visitors. (SPI Olsberg Creative England study 2015).

The characteristics of screen production which can influence visitors are iconic locations showing Ireland for Ireland, world-building and international exposure via cinema, TV and streaming platforms. Consumption and 'cult-status' is extremely important in driving visitor numbers and Film and TV shows that are highly successful often have a curious and dedicated fanbase.

It is often not possible to predict what film and TV shows will breakthrough for audiences and so there is an inherent risk that success, even if international distribution is attached, will not automatically lead to higher visitor numbers. TV production also tends to build longevity with audiences, so tourism generated from TV can be greater than feature film and locations and world-building is absolutely central. Unfortunately, there is a lack of hard data for Ireland on induced screen tourism visitor numbers and this is something that needs to be addressed into the future.



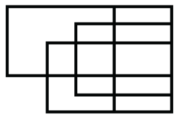
Regional / Rural Film and Television Production

Screen Ireland's policy is to showcase the whole of Ireland and to enable a balance of production between urban and rural settings. Regional production does bring additional costs in the form of crew and cast accommodation and transport. The building of regional crew hubs is important and on-going with crew hubs in Galway, Limerick and Wicklow.

Section 481 of the Taxes Consolidated Act 1997 is the Film and Television tax incentive for production. The Finance Act (2018) provided for the introduction of a tapered film development uplift ('regional uplift') commencing at 5% of films made in an area designated as an assisted region under the State Aid regional guidelines. The tapering of the aid was extended by one year because of the shut-down in production due to the pandemic and is now currently at 3% and will reduce further in 2023 to 2%.

'The objective of the regional uplift is a cultural one. It is designed to provide additional support to incentivise the development of new pools of talent in the film sector in areas outside the current main production hubs, by supporting productions that locate in areas without existing talent pools and that incur additional costs in training local talent. This will help support the geographic spread of the audio-visual sector to ensure a spread of production activity beyond the current traditional production hubs.' (Guidance note for application to Minister for Tourism, Culture, Arts, Gaeltacht, Sports and Media under Section 481 Taxes Consolidation Act 1997)

The introduction of the regional uplift has had a considerable regional impact. The location of productions in the Troy studios in Limerick availed of the uplift and such projects *'Nightflyers'* and *'Foundation'* have helped to start building a sustainable crew base in the regions. The regional uplift has helped also to incentivise production out of the metro-centric Dublin/Wicklow area and the regions have benefited, in particular Clare with *'Smoother'* Series 1, 2 and 3, Limerick with *'Foundation'* Series 1 and 2, *'Hidden Assets'*, Galway *'North Sea Connection'*, Donegal *'God's Creatures'*. The benefits are of course production spend in the regions while production is happening but also the possibility of exposing parts of Ireland to an increase in screen induced tourism.



The policy of moving production out of Dublin/Wicklow and spreading it around the country is important and equitable. The Regional Uplift helped align national policy goals of decentralisation within the audiovisual industry. The policy objectives are sound but there has been difficulty in achieving them over a short period of time and the tapering effect has proved challenging. It takes time, resources and precision focus to build clusters and crews locally. It is also evident that where there is no continuity of production it is very difficult to build out a production base. Studio facilities in Limerick had two large productions but was not a working studio for part of that time and result is that the gains in terms of new entrants and upskilling are compromised.

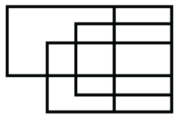
Since the introduction of the Regional Uplift in 2019 to the end of 2021 over 40 companies availed of the Regional Uplift. Since the tapering off from 5% to 3%, we have seen a dramatic decline in regional production and it is clear that production has retreated to the main production centre of Dublin / Wicklow.

In 2023 alongside the tapering of the Regional Uplift, Screen Ireland will ringfence €3.5 million to encourage productions to shoot in the regions. This will be aimed at the incremental costs of moving outside the Dublin/Wicklow area which in all cases is hugely burdensome financially. Therefore, we want to draw a policy line between regional production and regional tourism because without production taking place in the regions there is no potential benefit or upside from tourism.

Building International Relationships

Screen Ireland works closely with Tourism Ireland, ensuring that the tourism agency plays a key role as part of our international trade missions, particularly when there are major projects that have tourism potential. Tourism Ireland has built successful partnerships with major distributors and producers on film and TV projects which were filmed on location on the Island of Ireland from *'Derry Girls'* to *'Normal People'*, *'Star Wars'* and *'Game of Thrones'*.

Given the success of Ireland as a film and television location in recent years, Tourism Ireland has increased the volume of activity in this area over the last decade. They have specifically invested in building up successful partnerships with the major international distributors and producers on film and TV projects which were filmed on location here, including Disney, HBO, Netflix, BBC, Channel 4, Hulu, Apple TV, Lionsgate & Bleeker Street.



International Campaigns

Screen Ireland partners with Tourism Ireland to support investment in developing assets using behind-the-scenes footage aimed at reaching audiences of TV shows and films to highlight the island of Ireland locations featured. There will often be a PR, social and paid (where budget is available) campaign plan with the distributors which Tourism Ireland then launches around release dates.

Recent high-profile examples are listed below and just this week Tourism Ireland is rolling out a new campaign around '*Banshees of Inisherin*', starring Brendan Gleeson and Colin Farrell. The project filmed on location in Achill Island last year, with the benefit of the regional uplift for Section 481. It is important to note that all of these projects would have benefited from the Irish tax incentive for film and television, Section 481 or the equivalent incentive in Northern Ireland.

'*Bad Sisters*' was filmed on location in County Dublin and Belfast. The Forty Foot, at the Southern tip of Dublin bay in Sandycove, as well as the surrounding Irish sea, play an essential role in the series. In the globally successful TV series, '*Normal People*' Knockmore House, Co. Wicklow, was used as Marianne's family house until her move to Trinity College. Brennan's Pub in Tubbercurry was one of the locations picked in County Sligo, as well as a local church and Streedagh strand.

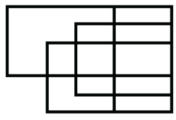
In '*Star Wars: The Last Jedi*', a UNESCO World Heritage Site, the main Irish location is the island of Skellig Michael, about 8 miles off the coast in County Kerry. As the main characters in '*Conversations with Friends*' are students in Trinity College, most of the series is set in Dublin, from the central Temple Bar area to the coast in Monkstown. Part of the series was also shot in County Antrim, as parts of Queen's University and Campbell College occasionally stood in for the Dublin college, and characters took walks alongside the Causeway Coast.

Campaigns

View Bad Sisters campaign [here](#)

View Normal People campaign [here](#)

View Conversations With Friends campaign [here](#)



Case Study: Kilkenny City – Tourism impact from Cartoon Saloon

Cartoon Saloon is an internationally renowned animation company. Cartoon Saloon is an indelible part of the Kilkenny landscape. The popularity of Cartoon Saloon's award-winning films and series has connected Kilkenny with Irish animation and become a driver for domestic and international visitors.

Exhibitions have been held at Kilkenny's Butler Gallery for three Cartoon Saloon films, '*Song of the Sea*', '*Breadwinner*' and '*Wolfwalkers*'. The exhibitions typically attract at least 40,000 domestic and international visitors and footfall for the Song of the Sea exhibition between July and October was measured at 50,000. The gallery would typically see over 60,000 in an entire year. (The Cultural Dividend Generated by Ireland's Section 481 Film and Television Incentive – Olsberg SPI 2022).

Conclusion

Film and Television production in the regions is an important policy priority for Screen Ireland. In 2023 the agency has ringfenced €3.5 million to incentivise production to move into the regions to assist with the incremental cost increases. This should have the effect of exposing more of Ireland to screen induced tourism. As the current Regional Uplift tapers off Screen Ireland will work with industry and Government to make the case for a new Regional Uplift that takes in all of Ireland – including Cork.

It is important to draw the policy line between regional production and rural tourism – as Screen Ireland's view is that one will not happen without the other.