

# County Wicklow Screen Sector Development Strategy 2022 – 2026



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IRELAND



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# Executive summary

County Wicklow has developed a reputation in countries such as the US, Canada and the UK, as an excellent location to base film and television productions. Building on a legacy of Stanley Kubrick's *Barry Lyndon* (1975), *My Left Foot* (1989) and *Braveheart* (1995), the list of recent notable films and television, such as Disney's *Disenchanted*, 20<sup>th</sup> Century Fox's *The Last Duel* and Amazon Prime Video's *Vikings*, has expanded significantly. There is an internationally recognised screen industry cluster based around two of Ireland's major soundstage studios (Ardmore Studios and Ashford Studios), the skilled crew and talent living in the area, and the landscape and built period heritage assets that attract location filmmaking.

According to Screen Ireland, despite the COVID-19 disruption, the Irish film and television industry is likely to have broken its record in 2021 for production activity. This follows a decade, pre-pandemic, where the screen industry doubled in size and a future where the major Hollywood studios and global streamers will continue to commission more screen content. Ireland is, as the culture minister has said, 'well-positioned to realise our ambition to be a global hub for content production' and Screen Ireland's newly launched strategy, *Building for a Creative Future 2024*, seeks to realise this aim. As part of this positioning Ireland offers the Section 481 tax credit as an incentive for film and TV, animation and creative documentary production to locate in the Republic. A recent report published by PwC noted that 16,952 Full Time Equivalents (FTEs) are employed by Section 481-supported screen industry productions.

In the context of County Wicklow's screen past and the competitive position Ireland has established in the global screen market, the Mid-East Regional Enterprise Plan (REP), the County Development Plan (CDP), and Wicklow's Local Economic and Community Plan (LECP), acting collectively, recognised the sector's past success, set the strategic objective for the Mid-East region to be a screen content creation hub centred on County Wicklow, identified the screen industry as a key priority for future economic development, which in turn could lead to increased screen tourism, thus contributing to a second key sector identified – tourism and recreation.

**The following County Wicklow Screen Sector Development Strategy 2022 – 2026 sets out the recommendations for the county's objectives and actions supporting the growth of its local film and television production cluster over the next five years.**

## Content Creation Enterprise Hub

One of the two central pillars to the proposed screen strategy proposed is a Content Creation Enterprise Hub (CCEH). The Wicklow County Campus, as an already designated *Centre of Excellence in Enterprise, Education and Innovation*, will be the location for the CCEH. Funding has been secured from the Regional Enterprise Development Fund (matched by Wicklow County Council) for the attractive, Georgian, heritage asset, Clermont House (with its courtyard buildings and chapel) to be renovated and refurbished and a two-story extension to be added. Together they will host a 10,000 sq. ft. hub. Wicklow Film Office is already located on the campus, as are the Local Enterprise Office and the Institute of Technology Carlow Lifelong Learning Centre.

The CCEH will need to actively attract professionals with a mix of skillsets to create a stimulating, creative and entrepreneurial environment. In addition to hosting creative professionals such as producers, writers, directors, cinematographers, editors and graphic designers, the CCEH would also benefit from some industry-facing business professionals with legal, finance and administrative expertise. The sought-after culture of the CCEH could be buttressed by persuading a significant creative anchor tenant, such as an animation studio, to re-locate to the CCEH. The operation will need to ensure that it is affordable and flexible, as much of the supporting screen industry ecosystem comprises micro-organisations that are cost-sensitive, especially if they are not currently involved in an ongoing production.



Key practical considerations will also need to be met: very high speed, reliable internet connectivity; secure storage space for creative professional equipment; affordable meeting room space; break-out / communal space and quality kitchen/canteen; and shared resources, such as reception, IT support and maintained printing facilities. The viability of higher value facilities should also be considered, such as space for limited shoots (e.g. for interviews, products or photography) or basic post-production and live stream facilities (e.g. editing suites, ADR recording facilities, screening room and a podcast studio).

### **Screen Wicklow**

The second central pillar to the screen development strategy 2022-2026 is the rebranding and upgrading of the Wicklow Film Office to Screen Wicklow. Rebranding would recognise the convergence between film and HETV in terms of budgets, crew skills and working practices. Upgrading would help meet the desire for a 'one-stop shop' for permits, information and troubleshooting wanted by inbound producers that they experience with other local screen offices. Together, these would help meet the aspirations set out in the REP, CDP and LECF.

The central offering needed would consist of an attractive, user-friendly website with online location, crew and facilities databases, and supporting material that promotes screen content production in County Wicklow, whether studio- or location-based.

The strategy recommends that Screen Wicklow be based within the CCEH in order to encourage synergies, knowledge sharing and complementarities. Indeed, the proximity of a successful Screen Wicklow operation may in itself be an attractive force for potential CCEH tenants. The formal and informal networks that may be engendered would be of value for the ecosystem and for the performance of Screen Wicklow.

Looking to the longer term, once Screen Wicklow has established its core offering and demonstrated its value, it should expand to work with inbound productions, not only for the benefit of the screen sector support ecosystem, but also to promote the industry to residents and the wider community, engendering greater understanding of the screen industry and its economic and cultural value and a sense of place and pride in County Wicklow.

### **Skills Development and domestic screen content creation**

Taking the two central pillars of this strategy together – harnessing the CCEH with Screen Wicklow – there are two major areas of dependency that can be developed and advanced to enhance County Wicklow as a screen content hub – skills development of the workforce and bolstering domestic screen content production.

Research by Screen Skills Ireland already indicates a wide range of skills shortages present nationally, and as increased demand for content creation is expected in the near future, any existing shortages are likely to be exacerbated. Moreover, the increased demand may stretch other skills capacities, thus adding additional shortages. Furthermore, the digital convergence being experienced between the screen industry and video games in the area of game engine technology and digital skills (e.g. the rapid growth of real-time, on-set visual effects in virtual production) requires the upskilling of the current workforce to develop these new set skillsets and work processes. Therefore, this strategy seeks to address these needs in a number of ways.

The strategy recommends that the CCEH and Screen Wicklow take a lead in better coordinating the delivery of film policy, information sharing and promotion of the importance and potential of screen at the county level. This would include assessing the skills needs of the local screen sector, assessing the training needs of local crew and creatives, signposting to training opportunities, developing a programme of CPD (e.g. masterclasses, residencies), and providing support and signposting to the various funding streams that are currently available for the domestic film industry. A bespoke programme should be developed in response to local need but it should also seek to host information sessions, roundtable events and training workshops already developed by organisations such as Screen Ireland and Screen Producers Ireland.

Inbound productions have a direct and immediate economic impact but they also bring in experience and knowledge that, through on-the-job training and peer-to-peer learning, can be imparted to the locally recruited crew. However, to amplify the economic opportunity in the longer term and the wider upskilling of the workforce, this strategy recommends that the CCEH and Screen Wicklow work together to establish partnerships with both Ardmore Studios and Ashford Studios. This would be intended to leverage the knowledge of internationally experienced industry business professionals, heads of departments, cast and crew working on productions located at the studios by intercalating it into the programme of CPD hosted at CCEH through, for example, masterclasses and networking events. Screen Wicklow should also try to leverage the knowledge and experience of any inbound location screen production.

In regard to the training of new entrants into the screen industry, the strategy recommends that Screen Wicklow consider working with IT Carlow, the Kildare and Wicklow Education and Training Board, and Screen Ireland to develop a local social media presence to promote the screen sector to school children and the local community. In addition, the strategy recommends engaging with further and higher education institutions, including IT Carlow, which is co-located at the Wicklow County Campus, in order identify evening classes that can be hosted at CCEH that would benefit the hub tenants.

More specifically, Screen Ireland has announced that it intends to set up a Talent Development Academy for Animation led by Animation Ireland, and the strategy recommends engaging with Animation Ireland in order to seek to locate the academy at the CCEH.

### **Foreign Direct Investment**

Ireland has an attractive environment for foreign direct investment in film and television production with its Section 481 tax credit, the quality crews, an ecosystem of soundstages and services, and the use of the English language. As has been mentioned future demand is expected to grow

According to data published by Screen Ireland in 2019, Irish films, television and animation productions produced in Ireland had combined budgets of over €760 million and spent over €357 million on local employment and local goods and services. The 2019 figure represents an annual increase of 162% on 2018 spend and an increase of 256% since 2007.

In 2019, there were 38 feature films, 21 TV dramas, 39 animation shows and 26 creative documentaries certified for tax incentive funding in Ireland. As has already been discussed the bounce back from the COVID-19 pandemic has been strong with 2021 looking to break previous productions records.

Although, Wicklow County Council does not have the levers to set the national agenda but as the screen sector grows, Wicklow can seek to increase its capacity to service inbound screen production and seek to take a greater share of the bigger 'pie'. The development of the Greystones Media Campus, which will include a state of the art studio and has received planning permission, presents a significant opportunity for County Wicklow to increase its capacity to host more international film and television productions providing a competitive edge over other jurisdictions nationally and capitalising on the global demand.

### **Screen tourism**

In recent years, many countries and regions are now looking in more detail at how they can capitalise on the impact of the screen industry and the potential for film tourism. This follows on the success of the *Lord of the Rings* films for New Zealand (Tourism New Zealand reported in 2012, a 50% increase in arrivals since the first film was released in 2001), the *Harry Potter* films for the Warner Bros. Studio Tour (revenue of £133k in 2019), and *Game of Thrones* for Northern Ireland (Tourism NI estimated that in 2016, 120,000 visitors to Northern Ireland were influenced to visit by *Game of Thrones*).

Wicklow's own Tourism Strategy and Marketing Plan recognised the strong influence of film and TV for travel to Ireland and the Visit Wicklow website has details of three 'Wicklow Film Drives' covering three trails for the films *Braveheart*, *Excalibur* and *Michal Collins*. There is also a notable current property, the historical fantasy, *Vikings* and the forthcoming *Vikings: Valhalla* that used both Ashford Studios and the landscapes of the Wicklow Mountains for filming. However, there is no formal relationship between the film office and the tourism authorities. Therefore, there is an opportunity to increase the economic impact of screen tourism.

This strategy recommends that Screen Wicklow establish a formal communication channel with Wicklow County Tourism to identify films and TV with the most potential and suitability for screen tourism, to coordinate activity for mutual benefit, and to develop a marketing or promotion plan for County Wicklow.

Specific interventions identified include the use of QR codes to access digital information at specific locations related to productions, the development of local and regional itineraries to join up screen locations, and the development of visitor activities to encourage longer or more engaged visits (e.g. organised tours, entertainment, physical activities, food and drink offers or themed goods).

### **Screen Sector Development Strategy**

To conclude, the central pillars of the strategy are:

- i. the establishment of the **Content Creation Enterprise Centre** with its office space for creative entrepreneurs and SMEs geared to supporting the screen content production industry. This would provide a physical hub for the sector in Wicklow, where training, networking and meetings can be conducted.
- ii. a **Screen Wicklow** office providing a 'one-stop shop' of support for inbound productions, including an effective web presence. This would be a key mediator in identifying and leveraging screen sector opportunities presented by the inbound screen productions for local development.

Through these pillars, the skills needs of the sector would be identified, training and upskilling would be provided, and a network of filmmakers, creative workers and supporting businesses established, with the ultimate goal of producing a local workforce that meets the needs of inbound screen productions and develops a talent pool that can create domestic screen content.

With the development of studio infrastructure at the Greystones Media Campus, Wicklow will not only be able to increase the quantum of content creation being made in the county but also aim at capturing a larger share of the content 'pie' being commissioned by the big studios and global streamers. Off the back of the increased and more coordinated activity as a result of this strategy, screen tourism can be the focus of concerted action to increase the impact of tourism across the county. Ultimately, this strategy will result in more secure, higher value, screen sector employment and greater economic activity in the sector itself and in the wider economy in the county.

# 1. Introduction

## 1.1 Background on Film and TV production in County Wicklow

County Wicklow has a rich history of film and television productions. County Wicklow established its reputation as a prime location for filmmaking early on with films such as *My Left Foot* starring Daniel Day-Lewis (1989), *Braveheart* starring Mel Gibson (1995) and the 1975 film *Barry Lyndon* directed by Stanley Kubrick (1975). The list of popular films made in County Wicklow expanded significantly since then and includes recent notable films such as 20<sup>th</sup> Century Fox's *The Last Duel* and Disney's *Disenchanted*, filmed in County Wicklow.

County Wicklow has a fantastic reputation internationally in countries such as the US, Canada and the UK as an excellent location to base film and television productions, as detailed in this report.

Within the Mid-East Region, Wicklow and the East Coast has an established screen creation sector with an existing internationally recognised screen industry cluster, a long tradition of content creation for the film and television industry, the presence of two of the major sound studios in Ireland, a large number of skilled crew and talent living in the area, and an attractive connected location. The screen creation cluster in Wicklow represents a strong best practice model.

Data published by Screen Ireland in 2019 indicates that films, television programmes and animation productions made in Ireland had combined budgets of over €760 million and spent over €357 million on local employment and local goods and services. The 2019 figure represents an annual increase of 162% on 2018 spend and an increase of 256% since 2007.

In 2019, there were 38 feature films, 21 TV dramas, 39 animation shows and 26 creative documentaries certified for tax incentive funding in Ireland.<sup>1</sup>

Although the outbreak of the Covid-19 pandemic caused disruption to the production of film and television projects in 2020, demand for content has increased significantly and the film and television industry in Ireland is booming. Similarly, this has been the case in the UK and North America.

Screen Ireland reports that the film and television industry is set to break production activity records in 2021<sup>2 3</sup>, despite the disruption of Covid-19. Early estimates suggest that already in 2021 an economic contribution of €289m from the sector has been recorded from 37 Irish and international productions being made in Ireland and that if this trend continues, it will be on track to surpass the previous production contribution record of €358m, reached before the pandemic in 2019.

Minister of Tourism, Culture, Arts, Gaeltacht, Sport and Media, Catherine Martin, TD, was quoted as saying: "The sector has doubled in size in the last 10 years, and with additional production infrastructure planned, together with the continued work of Screen Ireland to grow the skills base, we are well-positioned to realise our ambition to be a global hub for content production"<sup>4</sup>.

As elaborated on in the SWOT analysis section of this report, County Wicklow is very well placed to exploit the opportunities presented by the large growth experienced in the Irish screen sector<sup>5</sup>. County Wicklow has a skilled workforce, two big film studios (with a third being developed) and exterior scenery ideal for a wide range of film and television genres. Two major projects that were recently filmed in Ireland, 20<sup>th</sup> Century Fox's *The Last Duel* directed by Ridley Scott and Disney's *Disenchanted*, were both filmed in County Wicklow, with more than 1,000 people being employed on

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<sup>1</sup> Research, Data and Publications (Screen Ireland)

<sup>2</sup> Irish film production records could be broken this year (RTÉ), 15 July 2021

<sup>3</sup> Campaign for Hollywood studios to film in Ireland and boost 'screen tourism' (irishexaminer.com), 16 March 2021

<sup>4</sup> Campaign for Hollywood studios to film in Ireland and boost 'screen tourism' (Irish Examiner), 16 March 2021

<sup>5</sup> Why Ireland's production sector is soaring (screendaily.com), 10 July 2021

*Disenchanted*. A recent report published by PwC noted that 16,952 Full Time Equivalents (FTEs) are employed by Section 481-supported screen industry productions.<sup>6</sup>

Based on the latest data released by the Revenue Commissioners, 432 film and television projects were beneficiaries of tax relief under the Section 481 Film Relief Scheme between 2016 to 26 April 2021. Summarised data per year and region can be found below.<sup>7</sup>

**Table 1 Number of projects receiving Section 481 Film Tax Relief Scheme, by region**

Year	Dublin Region	Border Midland West	South West	Southern and Eastern	ESE	Total
2016	48	9	2	15	0	<b>74</b>
2017	55	11	0	9	0	<b>75</b>
2018	58	13	0	15	0	<b>86</b>
2019	76	15	0	10	1	<b>102</b>
2020	70	9	1	15	0	<b>95</b>
2021*	30	7	1	10	0	<b>48</b>
<b>Total</b>	<b>337</b>	<b>64</b>	<b>4</b>	<b>74</b>	<b>1</b>	<b>480</b>

Source: Revenue Commissioners

\* As at 26 April 2021

## 1.2 Remit and outline of study

Wicklow County Council engaged Saffery Champness Ireland and Nordicity to conduct research and provide a Screen Sector Development Strategy for County Wicklow for 2022-2026, including delivering the following key elements:

- a) Collation of baseline economic data that measures financial investment, infrastructural investments, employment, direct and indirect spending and the overall economy contribution of the film sector in County Wicklow.
- b) Preparation of a comprehensive overview for the film sector in County Wicklow incorporating both qualitative and quantitative data.
- c) Engagement with the film industry on the development of the CCEH (Content Creation Enterprise Hub) at Clermont, Wicklow County Campus, Rathnew, County Wicklow – a capital film infrastructure project being led by Wicklow County Council. In particular:
  1. Conduct a survey with potential tenants of the CCEH;
  2. Engage with the film industry to ascertain the feasibility of the CCEH;
  3. Seek input from the film industry in relation to the development and strategy of the CCEH.
- d) Recommendations for the period 2022-2026 on a number of key strategic areas for Wicklow Film Commission<sup>8 9</sup>:
  1. Attracting Foreign Direct Investment (Marketing and Promotion)
  2. Development of screen induced tourism for County Wicklow
  3. Supporting growth of indigenous screen content creation and the provision of creative developmental supports for local screen creators.

<sup>6</sup> Irish AV sector contributes half a billion euro to Irish economy | (Screen Producers Ireland), 29 April 2021

<sup>7</sup> Film Relief (section 481 film tax credit) (Revenue)

<sup>8</sup> wicklowfilmcommission.com

<sup>9</sup> wicklow.ie



## 1.3 Approach and methodology

To prepare the strategy, Saffery Champness Ireland and Nordicity took the following key steps.

- Developed an online survey for stakeholders, industry practitioners and creatives that are part of or support Wicklow County's screen sector. Please refer to Appendix D for a summary of the results of our survey.
- Virtual interviews with a wide range of stakeholders and practitioners that are part of or support the Wicklow screen sector. Please refer to Appendix E for a list of interviewees, which included Screen Skills Ireland, Screen Ireland, Animation Ireland, Screen Producers Ireland, the IDA, Fáilte Ireland, educational institutions, producers of factual and fictional films and series, animation producers and Ashford Studios.
- The stakeholder consultation was complemented by secondary research of international best practices and a benchmarking analysis of Wicklow County Council to its peers.
- Desk research including reports and publications on the Irish film and television industry to complement the primary research conducted through this project.
- Examined case studies of action taken to promote and grow other countries' and regions' film and television sectors.

The following report summarises the evidence gathered through our consultation and research and sets out recommendations for a new 2022-2026 strategy.

The strategy will help to co-ordinate work by different agencies and ultimately maximise the economic, social and cultural benefits of the screen sector in County Wicklow.

## 1.4 SWOT analysis

The following SWOT analysis identifies the strengths, weaknesses, threats and opportunities specific to County Wicklow and where relevant to Ireland more generally.

### Strengths

- **Studio space:** Lack of sound stages is a problem both globally and in Ireland; however, County Wicklow has two major film studios – Ashford Studios and Ardmore Studios. Expansion of the existing studio space is underway, with construction due to commence at Ashford Studios on four additional film studios of 40,000 square feet each, a TV studio and support space. Ardmore Studios, Bray is currently constructing 22,000 square feet of additional stage space. Wicklow County Council has also recently granted planning permission to Greystones Media Campus Ltd for the development of a film studio and media campus in Greystones, County Wicklow. The availability of studio space in County Wicklow provides it with a very strong competitive advantage in Ireland and internationally to produce big budget feature films and high-end television series.
- **Section 481 tax credit:** Ireland has a well-established and very competitive tax system, which makes Ireland and Wicklow an attractive destination for international film and television projects. The Irish film tax incentive can be up to 32% of the Irish eligible expenditure spent on a film or television project, with the option for an additional 5% of tax credit if the project is predominantly produced in certain regions. There are certain regions within South and West Wicklow that qualify as a regional development uplift area.
- **Proximity to Dublin:** County Wicklow is located south of County Dublin, in which Ireland's capital, Dublin city, is located. County Wicklow's proximity to Dublin provides County Wicklow with several advantages:
  - **Lower induced costs:** Productions located in Ashford Studios or Ardmore Studios, Bray reduced costs by savings in mileage, per diems and accommodation allowances when travelling to Dublin. These savings could be significant for productions with many cast and crew members.

- **Dublin Airport:** the airport can be accessed quickly and easily from County Wicklow. Ardmore Studios and Ashford Studios are approximately 35 minutes and 45 minutes, respectively, from Dublin Airport by car.
- **Lifestyle offering:** Some high-level cast and crew consider the proximity to Dublin that offers convenient connectivity to other major European cities advantageous, which makes Wicklow an attractive destination in comparison to other, more remote locations internationally.
- **County Wicklow's accommodation and facilities:** an abundance of 3-, 4- and 5-star hotels in the county and a range of bed & breakfast facilities, and proximity to facilities in Dublin.
- **Clermont House:** a heritage asset, formerly a school, this building has a range of facilities which includes offices, conference rooms, training facilities and a third-level college campus.
- **English language:** advantageous for foreign productions, especially producers from the US, UK, Canada and Australia.
- **Experienced cast and crew:** County Wicklow has a well-established film and television industry and the available cast and crew members are experienced in the sector.
- **Range of unique interesting exterior scenery:** County Wicklow has fields, forests, lakes, railways, sea, beaches and coastline etc. It is ideal for medieval dramas and County Wicklow can also stand in for other international locations.
- **Covid-19 safety:** Ireland is considered one of the market leaders in terms of production during Covid-19.
- **Equipment availability:** This could be a significant strength, as UK television producers face equipment shortages.<sup>10</sup>
- **Reputation:** County Wicklow has a reputation as one of the leading counties in Ireland in the film and television industry.
- **Existing relationship with international studios:** County Wicklow has an established relationship with major studios in the USA.
- **Wicklow Screen Office:** acts as the one-stop shop for productions in County Wicklow.
- **Wicklow County Councils Enterprise Team:** provides accessible high quality supports for business ideas.
- **East Coast cluster:** County Wicklow and the Mid-East Coast of Ireland is an established and internationally recognised content creation cluster.

## Weaknesses

- **Section 481 uplift:** A large portion of County Wicklow does not qualify for the additional regional development uplift for the Section 481 tax credit. This makes County Wicklow less competitive for productions that are located outside of economic hubs in Ireland.
- **Animation talent:** There is an ongoing challenge with the recruitment and retention of talent in the animation sector in Ireland.
- **Industry readiness:** Animation college graduates are often not industry ready. This makes Ireland, including County Wicklow, less competitive internationally for animation productions.
- **County incentives:** There are not enough county specific incentives for producers producing content in the county, which would attract productions to County Wicklow.
- **Tax credit cap:** The amount on which the Section 481 tax credit per production is based on is currently capped at €70million per production. This is restrictive for very large international productions and therefore makes Ireland less competitive. If this cap were not in place County Wicklow might be able to attract large franchise films or television series to use the region as

<sup>10</sup> No lights, no camera: UK TV producers face equipment shortage (The Guardian), 13 June 2021

a production location, which could lead to significant tourism interest and opportunities for County Wicklow.

- **Studio space shortage:** Studios in Wicklow are booked out in advance for long periods leading to a limitation in capacity for productions. This situation reflects a global shortage, which is particularly acute in the UK.<sup>11</sup> The fact that the available studio space in County Wicklow is booked in advance somewhat restricts its ability to compete internationally for productions that require studio space.
- **Limited post-production capability:** facilities are limited at the studios in County Wicklow.
- **Accommodation:** County Wicklow has limited accommodation available for cast and crew.
- **Professional networks:** There are insufficient networking opportunities available for crew located in County Wicklow.
- **Coordination:** Various organisations exist in the film and television sector, each with individual strategies, however, there is often a lack of a shared, overarching plan/strategy.
- **Continuing Professional Development (CPD):** Access to suitable training is limited, for example, specialised training such as advance Steadicam courses need to be attended elsewhere such as the US.
- **Potential skills shortages:** The availability of local crew may not be sufficient to meet the demand to fill the additional studio space in development.

## Opportunities

- **Global Demand:** There is massive global demand for large-budget feature films and high-end television.<sup>12</sup>
- **Greystones Media Campus:** This development has been given planning permission and presents a significant opportunity for County Wicklow to increase its capacity to host more international film and television productions providing a competitive edge over other jurisdictions and capitalising on the global demand.<sup>13</sup>
- **Displacement:** More productions may choose to come to Ireland because of the UK's exit from the EU combined with the lack of studio space in the UK.
- **Talent Development Academy for Animation:** The opportunity exists to engage with Animation Ireland, who are leading this Screen Ireland initiative, to locate it at the CCEH.<sup>14</sup>
- **Screen tourism:** Recent television and film projects filmed in County Wicklow created high levels of tourism interest. This interest creates a significant opportunity for tourism in County Wicklow.
- **Natural beauty:** Many documentaries exist that showcase the beauty of Ireland, which could potentially be used to promote tourism, leading to cross promotion between tourism in County Wicklow and local documentary filmmakers.
- **Extension of Section 481 uplift:** A relatively small area of County Wicklow qualifies for regional development uplift, which could lead to additional Section 481 tax credit for film and television productions.
- **AV Media Services Directive:** This directive might allow Ireland to put a levy on anything that is broadcast into Ireland. There might be an opportunity to create an additional fund to finance production.

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<sup>11</sup> Lights, camera, studio space? Lack of production capacity hits UK film industry (The Guardian), 10 July 2021

<sup>12</sup> Some film crews are leaving L.A. Blame the 'space race' (Los Angeles Times), 7 February 2021

<sup>13</sup> Lights! Camera! Action! For €150m State-backed Greystones movie-studio plan (The Irish Times), 5 January 2021

<sup>14</sup> Screen Ireland's Talent Development Academy for Animation will be led by Animation Ireland (Animation Ireland), 9 April 2021

- The opportunity exists that small production companies that might be interested in a physical building hub for projects spanning over a short to medium term and then decide to stay long term.
- Developing intellectual property in isolation is challenging. This creates demand for co-locating at a content creation hub.
- **Marketing:** Wicklow County Town and Wicklow Screen Office.
- **Studio space development:** There are a number of new studios under development in the areas surrounding County Wicklow, including Ashbourne Studios, Grangecastle TV and Film Studios and Tara Studios. This will increase the studio space within the East Coast content cluster and will increase the number of global productions the region can attract.

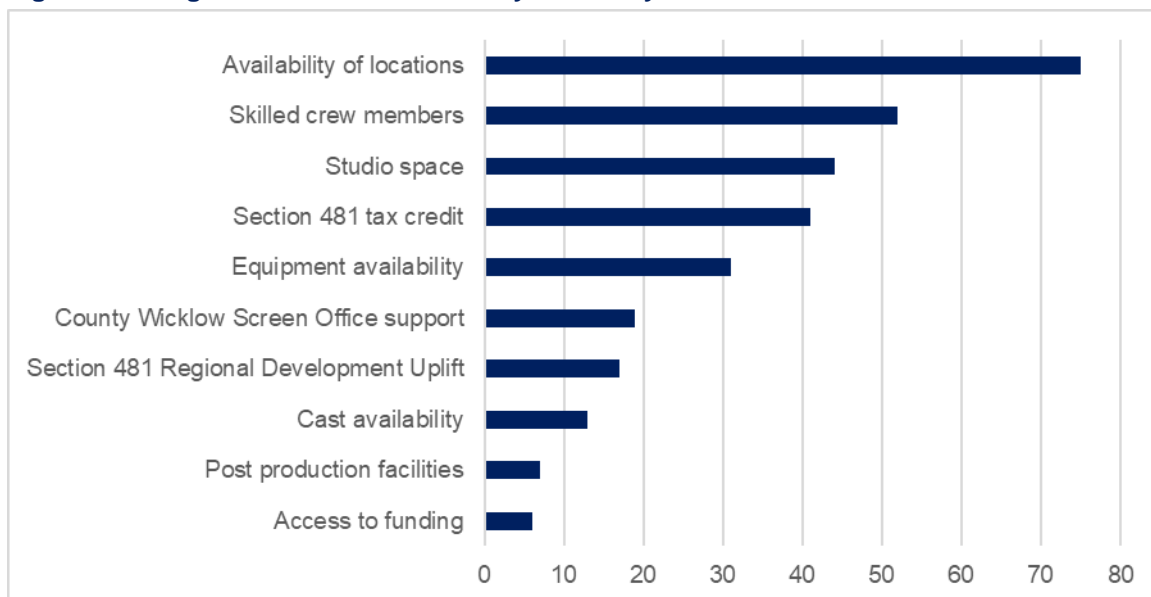
## Threats

- **New studio space in other jurisdictions:** The international demand for studio space is fuelling studio development within Ireland and internationally, and as they become available, those jurisdictions will potentially become competitors to County Wicklow. For example, the green light was recently given to develop the former Galway Airport into a film and television production studio.<sup>15</sup>
- **Remote working:** Some Irish animation studios and some local fledgling businesses might continue to work remotely post Covid-19 rather than base themselves at the CCEH and take advantage of the networked hub for cost efficiency reasons
- **Film serving culture:** Service work such as post production, VFX, and animation might not feel a strong need for co-location with other creative businesses within a hub. Post-production already occurs predominantly remotely and might continue to operate remotely after the Covid-19 pandemic.
- The formula used to determine the Section 481 tax credit that a film or television project can receive often encourages productions to do post production of projects filmed in Ireland in another jurisdiction. As the Section 481 tax credit is calculated as 32% of the lower of Irish eligible spend, 80% of global cost of production and €70m, productions might find it beneficial to locate post-production in another jurisdiction to avail of another jurisdiction's film tax credit. This creates a threat to the availability of post-production work on international projects for local post production studios.
- **Irish price competitiveness**
  - Attractiveness of S481 tax credit compared to tax incentives in other emerging jurisdictions
  - The continuation of the S481 tax credit.
  - The continuation of government backing for the sector.

<sup>15</sup> Galway Airport to be transformed into TV, film studio (RTÉ), 4 August 2021



**Figure 1 Strengths of the screen industry in County Wicklow**



Source: Stakeholder survey 2020

**Figure 2 Challenges facing participants in the screen industry in County Wicklow**



Source: Stakeholder survey 2020

# 2. Content Creation Enterprise Hub

## 2.1 Background

The **film industry** is the first of six key sectors specifically cited in the County Development Plan (CDP) 2016 - 2022 and identified for economic development. The CDP included a recognition that this, in turn, could lead to film tourism, which is a constituent element of the sixth key sector for economic growth – **tourism and recreation**. Objectives were set to

- develop Clermont House and the surrounding Wicklow County Campus as a centre of excellence for enterprise development, education, training, research and development; and
- facilitate and support the film industry in the County, including the development of production facilities at appropriate locations and the use of the County for film locations

The CDP clearly saw the importance of the screen sector and the potential of the Wicklow County Campus for catalysing the sector's economic impact for County Wicklow.<sup>16</sup>

The Wicklow Local Economic & Community Plan (LECP) 2016 – 2022 recognised that the 'established film industry sector' was one of the county's strengths and so set an objective to '*capitalise on the immediate and future economic opportunity in the Film and Television Industry and support the expansion of the sector in the County*'. To meet this objective, the Plan identified the '*development of a film industry hub*' as an opportunity to capitalise on that strength and set an action to examine the feasibility of such a proposition with industry and education partners. In addition, the Plan also recognised the need to continue to support and promote enterprise development and expansion, specifically in the context of the film sector.<sup>17</sup>

In line with both objectives contained in the mid-east REP and the LECP, Wicklow County Council has secured funding to develop a CCEH (Content Creation Enterprise Hub) at the Wicklow County Campus centred around Clermont House. The proposed Hub will provide 10,000 square feet of private and co-working space in order to boost job creation in the screen sector and ancillary services supporting the screen industry.

The Hub will offer:

- collaborative social space;
- a podcast and screening facility;
- business supports/ training;
- networking opportunities; and
- a conference centre.

In addition, there will be access to a range of existing meeting rooms and training facilities on the larger campus.

Wicklow County Council's mission for the Wicklow County Campus is for the site to develop as a '*Centre of Excellence in Enterprise, Education and Innovation in Co. Wicklow and to act as a catalyst for economic development in the county*'. Therefore, the location of a CCEH here is very much in keeping with this mission.

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<sup>16</sup> Chapter 6 | Wicklow County Development Plan 2016-2022 (Wicklow County Council), 11 December 2016

<sup>17</sup> Wicklow Local Economic & Community Plan (LECP) 2016 – 2022 (Wicklow Local Community Development Committee), 2016

The project will encompass the courtyard buildings of Clermont House, the second floor of the existing campus building and the chapel, all of which will be refurbished and renovated. It will also include a newly built two-floor extension to the courtyard buildings.

Wicklow County Campus consisting of 55 acres was acquired by Wicklow County Council in 2006. The area accommodates a variety of uses including Carlow Institute of Technology outreach college, offices, agricultural lands as well as disused sports facilities in the shape of a hockey pitch, tennis courts and swimming pool. There are a number of tenants on the Campus including the Local Enterprise Office. The lands retain the character of a landed estate with a country house at its centre surrounded by a landscaped demesne. The house is an early Georgian structure (c.1730) that was extended (c.1900) with two wings to either side. An additional chapel and school block were added c.1950 when the main buildings were converted to school use at that time. The rear of the house features a distinctive landscape feature consisting of an avenue of trees leading to a former pond as a focal point. There is also an Orchard on the grounds to the rear of the lands.

The project has been secured by a €1.43 million grant under the Government's Regional Enterprise Development Fund, through Enterprise Ireland. The remainder of the project cost will be met by Wicklow County Council.<sup>18</sup>

## 2.2 Wicklow County Campus

The Wicklow County Campus was acquired by Wicklow County Council in 2006 and comprises a 55-acre site with a large stately house, Clermont House. The campus currently already hosts a number of operations:

- **Wicklow Film Office** – a one-stop shop to help filmmakers with all their location filming needs.
- **Institute of Technology Carlow Lifelong Learning Centre** – offers a wide variety of part-time Level 3 courses (including postgraduate Masters) for adults in the areas of Humanities, Business and Accounting, Engineering, and PR & Media, as well as postgraduate courses;
- **Local Enterprise Office Wicklow** – provides an extensive range of support for local business including business advice, business skills training and financial grants;
- **Teagasc** – a local office of the Agriculture and Food Development Authority; and
- **Conference facilities** – there is a large well-equipped venue on-site suitable for conferences, seminars and music events.

Since the site was acquired by the council both the offices and classrooms have since been fully refurbished. Clermont House has three floors of office space and meeting, whereas the main teaching building has state-of-the-art tiered classrooms, a library, IT rooms and canteen facilities.

Lastly, close to the campus, there are two major studios that host international HETV and feature film productions:

- **Ashford Studios**, Ballyhenry; and
- **Ardmore Studios**, Bray.

Ashford Studios are a mere 10-minute drive north of Clermont House and Ardmore studios only an additional 15 minutes further north.

## 2.3 Identified needs

A needs analysis for the CCEH was carried out through a survey completed by various participants and stakeholders in the screen sector in County Wicklow as well as one-on-one interviews with screen industry participants.

The CCEH could satisfy the following strategic needs identified in this survey.

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<sup>18</sup> Sod Turned on €3M Content Creation Hub at Clermont (Local Enterprise Office)

- The single greatest challenge identified by the consultation was the lack of sufficient opportunities for networking and where the industry and creative practitioners can meet whether deliberately or serendipitously. A physical hub hosting curated creative businesses, creative entrepreneurs and content creators with attractive and casual social space would provide that space.
- There is an expectation that after Covid-19, hybrid working will continue to be very popular in the screen industry, i.e. a mix of working from home and from an office or co-working space. This could lead to increased interest in being located at the CCEH. However, certain animation studios and other fledgling businesses might continue to work remotely post Covid-19 rather than base themselves at the CCEH. Similarly, service work such as post production, VFX and animation might not feel a strong need for hub culture.
- According to feedback from individual interviews with a range of industry participants, there is a genuine need for screen sector-oriented creative hubs. The Creative Hub established in the Galway-Mayo Institute of Technology is an example of a similar hub, and there is a need for more creative hubs in the screen sector.<sup>19</sup>
- Physical co-location is a significant need for true and rich collaboration, especially during the development of content and intellectual property. There is also a need for physical space for writer rooms. Although video conferencing calls are a good alternative, it is not as beneficial, productive and collaborative as physical co-location.
- A mixed milieu with organisations across the ecosystem is ideal. This would allow an organic increase in supply and demand of various services offered and used by industry participants.
- Skills and career development for indigenous creative entrepreneurs, producers and writers is very important. The presence of major feature film and HETV productions should be exploited and harnessed to the continuing professional development of indigenous talent.
- Consideration should be given to engaging an anchor tenant to generate enough revenue for the CCEH to enable it to offer an affordable membership rate for smaller organisations as well as self-employed individuals. Larger organisations can benefit from the fertilisation of ideas resulting from the ingenuity, entrepreneurship and risk-taking of creative micro-organisations.
- The Irish animation industry is growing exponentially and already represents a significant portion of the Irish screen sector and is estimated to contribute more than €85 million (USD100 million) a year for the local economy.<sup>20</sup> Local animation businesses have seen enormous success in regional areas such as Leitrim and Galway as local animators prefer to be based outside of the major cities due to the lower cost of living, this should be seen as a competitive advantage that County Wicklow holds in the sector due to the lower cost of rent in the region in comparison to Dublin. A key challenge for the sector has been attracting talent to meet the industry's growing demands for skilled workers. As much of the current animation workforce is sourced externally from the EU, the training and development of local talent is an area that requires focus to ensure a steady flow of talent is established to meet the long term demands of the industry. The Wicklow Screen Office should look to establish an animation training centre at the CCEH to create a base of skilled animators in region and attract an animation studio to set up in County Wicklow.<sup>21</sup>

## 2.4 Recommendations

The development of the CCEH provides a range of significant opportunities. The appointment of an experienced Hub Manager would be critical to the success and sustainability of the CCEH. The potential roles and responsibilities of the Hub Manager are included in the Screen Wicklow section in this report. In addition to the appointment of a Hub Manager, other measures will be needed to maximise the potential benefits of the Hub.

<sup>19</sup> Creative Hub Established GMIT's Centre for the Creative Arts & Media (Galway-Mayo Institute of Technology), 10 April 2017

<sup>20</sup> Why Ireland's Animation Industry is Booming (The Hollywood Reporter), 19 October 2017

<sup>21</sup> 33 Players Leading Ireland's Animation Industry (Think Business), 27 July 2020



By working more closely with local studios, it should be possible to leverage productions to create wider benefits. For example, experienced industry professionals, heads of departments, cast and crew working on productions located at studios could be invited to host masterclass events at the CCEH.

**Recommendation 1:** Partnerships with the studios based in County Wicklow should be strengthened in order to develop a programme of CPD, with existing educational institutions, and community engagement. Productions located at studios could be leveraged. For example, experienced industry professionals, heads of departments, cast and crew working on productions located at studios could be invited to host masterclass events at the CCEH.

In order to create a mixed milieu ecosystem in the CCEH, it will be important to attract professionals with various skillsets to locate at the CCEH. In addition to creative professionals such as writers, directors, cinematographers, editors and graphic designers, the Hub would also benefit from business professionals with legal, finance and administrative. A potential anchor tenant such as a large animation studio could also be approached to locate at the CCEH.

**Recommendation 2:** Professionals with various skillsets, including an anchor tenant, should be approached to locate at the CCEH.

**Recommendation 3:** Workspace needs to be affordable: the organisations interested in locating at the CCEH are primarily micro-organisations, so overheads may be difficult to accommodate when these companies do not have projects in production.

**Recommendation 4:** Ensure that the CCEH has very high speed, reliable internet connectivity.

**Recommendation 5:** Consider developing a dedicated website and social media pages for the CCEH.

**Recommendation 6:** Ensure enough storage space is available for creative professionals' equipment.

**Recommendation 7:** Consider having sufficient meeting room space available to use for meetings and writer and producer rooms.

**Recommendation 8:** Communal spaces such as breakout rooms and good canteen facilities need to be prioritised.

**Recommendation 9:** Consider making shared resources such as reception, administrative resources, IT support and shared and maintained printing facilities available to professionals located at the CCEH.

**Recommendation 10:** Consider allocating some space to use as studio space for small shoots such as interviews or product shoots.

**Recommendation 11:** Consider including basic post-production and live stream facilities such as editing suites, a podcast studio and ADR recording facilities at the CCEH.

**Recommendation 12:** Consider engaging with Animation Ireland in order to seek to locate Screen Ireland's Talent Development Academy for Animation at the CCEH.

# 3. Screen Wicklow

## 3.1 The role of screen agencies and film offices

Screen agencies and film offices in many countries generally provide production and location services that can be divided into two categories:

- Inward production attraction; and
- Location services.

*Inward production attraction*, typically these would be predominantly publicly funded and include activities like ‘fam’ trips (inbound familiarisation trips for producers and creatives for non-UK productions), outbound missions, and a presence at important markets (e.g. Cannes Film Festival, BFI London Film Festival, AFCI Locations Show). These activities are often undertaken at a national level by a national screen commission or agency.

*Location services* include a variety of services provided by public or private organisations to either help consolidate inward production enquiries or facilitate the filming of these productions within an area. A list of the most common location services provided by film offices is in Table 2 below.

**Table 22 List of location services**

Location Services	
Crew database	Locations catalogue/database
Facilities/Suppliers database	Location enquiries
Filming permits	Location recces
Permit filming on local authority property	Parking facilitation / traffic management
Local authority liaison services	Parking permits
Local authority support/partnerships	Garda liaison services
Troubleshooting	Residents’ liaison services
Government relations <sup>1</sup>	

<sup>1</sup> Including representing the local screen industry and advocating for changes to legislation or regulations.

The location services help inward productions to identify and select filming locations, and then provide the necessary means for filming to occur on public or private property. These services vary from very direct and ‘on-the-ground’ services, such as obtaining parking permits, to more indirect services, such as advocacy with central and local governments, designed to help create a more ‘film-friendly’ environment for location filming, with a third set of services in between about facilitating the provision of talent and facilities, for example, creating and maintaining databases for crew, locations, studio space or other facilities and services.

## 3.2 Screen agencies and film offices in Ireland

Screen Ireland is the national development agency for the Irish film, television and animation industry. It provides funds for the development, production and distribution of feature films, feature documentaries, short films, TV animation series and TV drama series. Screen Ireland is funded by the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media and the annual budget for 2021 is €26.2 million.

Screen Ireland's mission is to support and promote Irish film, television and animation through fostering Irish artistic vision and its diverse community of creative and production talent; growing audiences; and attracting filmmakers and investment into Ireland.

Screen Ireland takes the lead in attracting inward production to Ireland and has a presence at a number of international festivals and markets. Its exhibition stands promote and support the Irish film

and animation industry, and they also send delegates to represent the industry at Sundance, Toronto International Film Festival and other events.

There is a network of film offices in Ireland at a county level that offer a range of services, providing information, advice and support to filmmakers and offering local knowledge, location advice and assistance. These local film offices meet regularly to share advice and discuss issues of common concern. Screen Ireland co-ordinates these local film offices and provides links on its website to 29 local film offices, including four in Dublin. Of these, eleven counties have dedicated websites with information and guidance for filmmakers. In addition, three counties (Sligo, Leitrim and Roscommon) have created a new partnership known as the SLR Film Project to grow and develop the local film sector and operate a joint website. Six counties are not listed on the Screen Ireland website.

The Table at Appendix F has details of these film offices and the services offered on their websites. Almost all of the websites of these film offices with an online presence include an online locations database or gallery of images. Most have databases of crew and facilities/suppliers. Some of these are available online and others refer to a contact in the particular county who holds the database. Most film offices offer help or advice on permissions and permits but do not issue permits themselves. Three film offices run or partner with organisations to run short courses and website and three offer funding in the form of small awards or prizes.

### 3.3 Wicklow Film Office

Wicklow Film Office was one of the first film commissions in Ireland, having been established in 1992. However, its resources and funding have stepped back in recent years. It is currently staffed by a part-time role and its services are advertised on a single page on the County Wicklow website, which does not include databases of locations, crew or other facilities/services. The Film Officer advises productions on permits and approvals for four municipal districts, though Bray handles its own permits.

Both the County Development Plan 2016 – 2022 and Wicklow Local Economic & Community Plan 2016 – 2022 recognise the importance of the screen sector to County Wicklow, and the opportunity the sector provided to capitalise on increased economic impact. Indeed, as has been laid out in this report, this opportunity has grown with continued growth of the global sector and its strong bounce-back following the covid-19 pandemic.

### 3.4 Personnel roles and responsibilities

In order to maximise the success of Screen Wicklow (and indeed the CCEH) in order to support increasing the economic impact of film and television production, to develop local creative talent and to upskill local crew, it will be crucial to appoint staff who:

- Understand the screen industry,
- Have experience of managing creative office environments,
- Have the people skills to look after tenants' needs, and
- Have the leadership skills to take Screen Wicklow and the CCEH forward into the decade.

There are two clear areas of activity that should be the focus:

- **Film and tv industry focused activity** – supporting inbound screen productions and leveraging their expertise to upskill and enrich local workers and talent; and
- **Hub activity** – curating a diverse pool of complementary tenants in order to create a creative and stimulatory environment, where sector practitioners and businesses, can share services and develop personal and commercial skills to ensure their long-term viability and growth.

One model for delivering this would be to have two roles: a Screen Officer, focusing on the former; and a Hub Manager, focusing on the latter. However, the efforts of both would be enhanced and supported by the two working closely together. In Appendix H, we outline some of the considerations and responsibilities that could be encompassed by these two roles based upon our consultations, survey results and current Wicklow County Campus activities.

## 3.5 Recommendations

There is a clear opportunity for a 'beefed up' film office to make early and significant impacts to meet the strategic objectives for the county. Therefore, we recommend the following to Wicklow County Council.

**Recommendation 13:** Wicklow County Council should consider rebranding the Film Office as Screen Wicklow to reflect a wider range of screen activities and that of the national Screen Ireland.

**Recommendation 14:** To provide a dedicated, attractive and user-friendly website for Screen Wicklow.

**Recommendation 15:** An online database of locations, crew and facilities should be developed as a priority.

**Recommendation 16:** To consider appointing a full time Screen Officer to take a more proactive role in growing the screen sector in the area.

**Recommendation 17:** To consider locating Screen Wicklow in the proposed CCEH.

**Recommendation 18:** Wicklow County Council should explore the potential for combining the roles of the Screen Officer and the Hub Manager to create synergies across the sector.

**Recommendation 19:** Once established, Screen Wicklow should feed into developing the training and development offer in the county, possibly in co-ordination with the CCEH.



# 4. Skills Development and Training

## 4.1 Analysis of current crew and training situation

According to Screen Skills Ireland's Skills Needs Analysis Report for the Screen Sector in Ireland 2019-2020, their online survey indicated that there seems to be a shortage of talent available with 88% of producers, heads of department (HODs) and employers reporting difficulties in sourcing suitable qualified staff and crew. It further notes that more than 87% of respondents to their survey valued on-the-job training, while 76% would value opportunities for mentoring and shadowing. The freelancers who responded to Screen Skills Ireland's survey showed a strong preference for short term full or part-time courses.<sup>22</sup>

## 4.2 Skills development needs

During interviews conducted with key industry stakeholders, we identified the following key skills gaps present in the County Wicklow screen sector:

- Production accounting;
- Knowledge on how to apply for various sources of funding;
- VFX skills;
- Marketing and PR;
- Leadership and negotiating;
- Research;
- Production management;
- Camera department.

## 4.3 Recommendations

Many opportunities exist for Wicklow County Council to develop skills in the screen industry in order to upskill local crew and become more competitive when competing for local and international productions to be located in County Wicklow.

As many large scale international productions are produced in County Wicklow each year, this provides an ideal opportunity for local crew members to be involved in high-quality international productions while receiving on the job training and opportunities for mentoring and shadowing.

Based on the needs and opportunities in relation to skills development and training in the screen industry, we recommend the following:

**Recommendation 20:** The CCEH should be used as a key strength in attracting existing organisations to provide training and networking related events to local crew in County Wicklow.

**Recommendation 21:** The Hub Manager should maintain close contact with Screen Producers Ireland and Screen Ireland to plan the hosting of information sessions and roundtable events in the CCEH. Screen Producers Ireland and Screen Ireland have wide networks of contacts in the film and television industry and regularly hosts information sessions, roundtable events and training sessions. These resources that are already in place should be utilised as much as possible on a local level.

**Recommendation 22:** Skills needs will increase as more studios are established in Ireland; therefore, it is important to maintain close contact with production facilities and production companies within the region to assess their skills needs on a continuous basis.

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<sup>22</sup> Skills needs Analysis Report for the Screen Sector in Ireland 2019-2020 (Screen Skills Ireland), 2020

**Recommendation 23:** Consider approaching HODs working on productions based in the region to host information and roundtable sessions at the CCEH.

**Recommendation 24:** As further and higher education institutions are open to engaging in relation to practical training and collaborating with the CCEH, consider hosting evening classes at the CCEH, in order to attract students to the Wicklow County Campus and to provide tenants of the CCEH opportunities to advance their knowledge and skills through evening and other classes. As IT Carlow is located at the Wicklow County Campus, consider collaborating with IT Carlow to host short courses and/or evening classes at the CCEH.

**Recommendation 25:** Discuss the potential siting of the Animation Skills Academy at the CCEH. Animation Ireland has shown interest in locating its talent and innovation academy at the CCEH. This could be very beneficial for the advancement of animation skills in County Wicklow.<sup>23</sup>

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<sup>23</sup> Screen Ireland's Talent Development Academy for Animation will be led by Animation Ireland (Animation Ireland), 9 April 2021

# 5. Domestic Screen Content Creation

## 5.1 Analysis of current local domestic industry

Ireland has become an increasingly important centre for film making in recent years, due both to the promotion of the sector by Screen Ireland and the attractive Section 481 tax incentive (please refer to section 4 of this report for relevant data). The industry is supported by talented writers, directors, producers, cast and crew. Ireland is home to many established production companies and can draw on a range of facilities, including film studios, post-production services and VFX suites. In addition, Ireland is experienced in co-production with many countries in Europe and worldwide.

County Wicklow, with its range of beautiful scenery, attractive period buildings, and world-class studios has become a major screen cluster in Ireland with a long catalogue of major films and TV programmes filmed in the area over many years. Appendix C includes a list of films shot in County Wicklow for illustrative purposes.

## 5.2 Supporting the growth of a film ecosystem

Despite its history as a location for filmmaking, much of the film industry in Wicklow is based on servicing inbound productions. The local domestic film industry is still at a relatively early stage of development and there is little high-quality local TV or film production.

There is an important symbiotic relationship that can exist between inward investment and local domestic production. The health and strength of one has a direct impact on the vitality of the other. For example, the skills and talent which are utilised by independent local productions also help to underpin an area's competitiveness as a base for inward investment, while high-budget productions can help to spawn a studio and post-production infrastructure which directly benefits lower-budget local productions.

Therefore, to achieve its aim of developing the local film industry, as well as promoting County Wicklow as a filming location, it will also be important to support the growth of the local domestic film industry. A strong local film industry creates opportunities for employment and economic growth and provides a platform to promote creativity, diversity and a vibrant cultural life.

Wicklow County Council will need to work with many stakeholders – such as Government agencies, the workforce, the general public and young people – to promote the importance and potential of film in the county. The combination of the new CCEH and a new and proactive prospective 'Screen Wicklow' should take a lead in better coordinating the delivery of film policy at the local level. This would include assessing the needs of the local sector, assessing the training needs of local crew and creatives, signposting to training opportunities, developing a programme of CPD (e.g. masterclasses, residencies), and providing support and signposting to the various funding streams that are currently available for the domestic film industry.

## 5.3 Recommendations

**Recommendation 26:** Screen Wicklow and the CCEH should create an audience development programme to promote film culture to the local community and young people.

**Recommendation 27:** Screen Wicklow should consider working with IT Carlow, the Kildare and Wicklow Education and Training Board, and Screen Ireland to develop a local social media presence to promote the screen sector to local communities and to school children to generate interest in working in the screen industry.

**Recommendation 28:** Screen Wicklow and the CCEH could work together with Screen Ireland and training providers to develop a programme of CPD that takes advantage of the location film work within County Wicklow and neighbouring counties, including County Dublin, and productions filmed in the nearby studios.

An important aspect of raising the profile of the local film industry will be to create greater film literacy and appreciation, including the promotion of a 'film culture' to young people. In many places, film offices work with local schools on a film-related programme of activities. Work with young people, at both an early age and through to secondary level education, can raise awareness of the opportunities available in the film and TV industry. By involving children from an early age, they can see the full range of employment opportunities involved in the screen industry and imagine that a career in film or TV is a possibility.

**Recommendation 29:** Screen Wicklow should consider working with productions located in County Wicklow to develop a local social media presence to promote the screen sector to local communities and to school children to generate interest in working in the screen industry.

Film Festivals can also be an important way to bring together the public and the industry in celebrating the value of film. Wicklow Film Festival was last held in 2019 at the Mermaid Arts Centre and included a weekend of screenings and discussions. This community film festival had grown over the previous four years, engaging local people in the selection of films that explore the transformative effect of cinema. Although put on hold due to Covid-19, there is potential to develop the festival in future years to promote local filmmaking and to foster film appreciation and awareness among the general public about the local industry. Again, this is an area where the CCEH and a prospective Screen Wicklow could work with local stakeholders to develop the local film industry and promote awareness of its potential the local population.

Festivals often include a film competition with a prize or award. This is often undertaken in co-ordination with the arts office and can be an effective way to encourage new filmmakers to present their work to an audience and promote emerging talent. For example, Dún Laoghaire-Rathdown County Council funds the First Frames Scheme, which supports emerging filmmakers looking to develop ambitious and creative short films based in Dún Laoghaire-Rathdown. The Dún Laoghaire-Rathdown County Council works closely with the National Film School at IADT on this programme. Funding is available through the scheme to support two short films with awards of up to €12,000 each. Mentoring support is provided by the National Film School, IADT with additional equipment and facilities from IADT.

**Recommendation 30:** Screen Wicklow and the CCEH should further develop the Wicklow Film Festival, including considering the potential for a film production award. Different venues such as the Wicklow Goal, Tramway Blessington and Baltinglass courthouse could be used as potential venues.

**Recommendation 31:** To consider the funding opportunities which may arise from the potential levy on streaming providers and how the levy can be utilised to promote domestic screen content creation within County Wicklow.



# 6. Foreign Direct Investment

## 6.1 Analysis of current film servicing industry

According to data published by Screen Ireland in 2019, Irish films, television and animation productions produced in Ireland had combined budgets of over €760 million and spent over €357 million on local employment and local goods and services. The 2019 figure represents an annual increase of 162% on 2018 spend and an increase of 256% since 2007.

In 2019, there were 38 feature films, 21 TV dramas, 39 animation shows and 26 creative documentaries certified for tax incentive funding in Ireland.<sup>24</sup>

The Irish Section 481 tax credit is very advantageous and effective in attracting foreign direct investment to Ireland and to Wicklow. However, as discussed in the SWOT analysis section of this report, the €70 million cap for the Section 481 tax credit is restrictive for very large international series and film franchises. When the cap was increased in 2015, this was sufficient; however, since then, changing expectations mean one season of a TV series can now cost up to €200m.<sup>25 26</sup>

As discussed previously in this report, the key consideration for large scale foreign productions in deciding where to base its production is the availability of studio space. The Covid-19 pandemic has created a huge demand for television series and TV companies and streaming services are struggling to keep up with demand, especially since many productions were temporarily paused at the start of the pandemic. The combination of these factors led to an unprecedented boom in the increase for studio space.<sup>27</sup>

The strong demand for studio space internationally poses a big opportunity for attracting foreign direct investment (FDI) in the Irish film industry, as the UK – a major FDI beneficiary in close proximity to Ireland – cannot keep up with the increasing demand for studio space. However, studios in Wicklow are booked up well in advance, which makes it very challenging to exploit this opportunity. The development of the Greystones Media Campus<sup>28</sup> which will include a state of the art studio would be very advantageous to Ireland, and specifically County Wicklow, in attracting foreign direct investment into the Irish film and television sector.

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<sup>24</sup> Research, Data and Publications (Screen Ireland)

<sup>25</sup> Why Irelands Production Sector is Soaring (Screen Daily), 10 July 2021

<sup>26</sup> Film Relief (section 481 film tax credit) (Revenue)

<sup>27</sup> Lights, camera, studio space? Lack of production capacity hits UK film industry (The Guardian), 10 July 2021

<sup>28</sup> Lights! Camera! Action! For €150m State-backed Greystones movie-studio plan (The Irish Times), 5 January 2021

### Box 1 Assessing the economic impact of screen production in Wicklow

According to the data and analysis found in *Economic Analysis of the Audiovisual Sector in the Republic of Ireland* (published in 2017), in 2016 every €1 million spent on live action film and TV production in Ireland generated approximately 17.7 full-time equivalents (FTEs) of employment and €710,000 in gross value added for the Irish economy.<sup>29</sup> These impact multipliers included cast and crew employment (11.9 FTEs), employment at supplier businesses located in Ireland (4.4 FTEs) and induced impact employment (1.4 FTEs) across the wider Irish economy.

Animation production generated a total of 16.2 FTEs of employment and €780,000 in GVA for every €1 million of production expenditures in 2016. This included 11.4 FTEs of employment at animation studios. In the post-production and VFX sub-sector, €1 million in expenditures generated 19.4 FTEs of employment and €920,000 in GVA, including 15.5 FTEs directly at post-production and VFX studios.

#### Economic impact multipliers, Ireland, 2016 (impact per €1m of expenditures)

	Live action		Animation		Post-production/VFX	
	Employment (FTEs)	GVA (€m)	Employment (FTEs)	GVA (€m)	Employment (FTEs)	GVA (€m)
Direct	11.9	0.25	11.4	0.37	15.5	0.60
Indirect	4.4	0.31	3.4	0.27	2.6	0.20
Induced	1.4	0.14	1.4	0.14	1.3	0.13
<b>Total</b>	<b>17.7</b>	<b>0.71</b>	<b>16.2</b>	<b>0.78</b>	<b>19.4</b>	<b>0.92</b>

Source: Saffery Champness / Nordicity calculations based on data from Olsberg-SPI (2017)

According to the survey research (see Appendix D), approximately 50% of the personnel engaged in the film and TV production sector in Wicklow reside within the county. Based on this, it is reasonable to assume that approximately 50% of production expenditures within Wicklow are likely to leak out from the local economy to Dublin or the other adjacent counties. We adapted the economic multiplier results from *Economic Analysis of the Audiovisual Sector in the Republic of Ireland* to account for this leakage. The adjusted economic multipliers are found in the table below<sup>30</sup>.

The results indicate that, after taking account of economic leakage, €1 million of live action film and TV production expenditures are likely to generate 8.6 FTEs of employment and €360,000 in GVA for the Wicklow economy. In the animation sub-sector, €1 million of production expenditures are likely to generate 7.9 FTEs of employment and €400,000 in GVA for the Wicklow economy. In the post-production and VFX sub-sector, €1 million in expenditures are likely to generate 9.3 FTEs of employment and €470,000 in GVA.

#### Economic impact multipliers, Wicklow County, 2021 (impact per €1m of expenditures)

	Live action		Animation		Post-production/VFX	
	Employment (FTEs)	GVA (€m)	Employment (FTEs)	GVA (€m)	Employment (FTEs)	GVA (€m)
Direct	5.7	0.13	5.5	0.19	7.5	0.30
Indirect	2.2	0.16	1.8	0.15	1.2	0.11
Induced	0.7	0.07	0.6	0.07	0.6	0.06
<b>Total</b>	<b>8.6</b>	<b>0.36</b>	<b>7.9</b>	<b>0.40</b>	<b>9.3</b>	<b>0.47</b>

Source: Saffery Champness / Nordicity calculations based on data from Olsberg-SPI (2017)

<sup>29</sup> Economic Analysis of the Audiovisual Sector in the Republic of Ireland. Prepared for the Department of Culture, Heritage & the Gaeltacht. (Olsberg-SPI), 2017

<sup>30</sup> The employment multipliers have also been adjusted to account for consumer price index inflation of 4.0% between 2016 and July 2021.

## 6.2 Attracting more inbound production

The growth in the Irish film industry is dependent on the symbiotic relationship between international film and television productions, often with very large budgets, filmed in Ireland and the development of high quality local film and television projects and intellectual property. It is therefore critical that County Wicklow and Ireland are marketed internationally as a great location for productions to be filmed. This will provide more opportunities for local crew to develop their skills to a very high standard, which will in turn lead to skilled crew working on the production of high quality domestic screen content.

For County Wicklow to exploit the opportunity created by the huge demand for content globally, it needs to rely on and present its unique strengths. Key strengths that County Wicklow has that might attract foreign productions to locate their productions in County Wicklow include:

- Language is no longer a barrier, which makes it seamless for USA, Canadian, UK and Australian productions to locate in Ireland and work with local crew.
- The influx of high budget international films and television series located in Wicklow has provided many crew members based in County Wicklow with the opportunity to upskill and be familiar with working on large budget projects. This has led to a highly skilled and experienced workforce.
- County Wicklow, and by extension Dublin as a result of its proximity to County Wicklow, provides a good offering of housing, transport and quality of living for high level cast and crew to be temporarily located in Ireland.
- County Wicklow's proximity to Dublin airport makes it very accessible to other European countries, which is often appealing to high-level cast and crew. Ireland's proximity to the UK also make co-productions between the UK and Ireland relatively easy.
- A unique range of interesting and diverse scenery is available in County Wicklow: forests, lakes, mountains, waterfalls etc. This offers the ideal exterior scenery for period dramas such as *The Vikings*, and can easily be double as North America, which was done in the *Jurassic World* short film filmed in Ireland in 2019.<sup>31</sup>
- Ireland is considered a market leader in terms of production during Covid-19 with good on-set health and safety guidelines and procedures in place.<sup>32</sup>
- No mileage, per diems and accommodation required for productions based in Ashford and Ardmore due to proximity to Dublin – this could lead to significant savings.
- The Section 481 tax credit is very competitive and attractive internationally and a key reason for productions to locate in Ireland and County Wicklow.
- Ireland has many highly skilled and experienced local producers and advisors who are very familiar with the Section 481 tax credit. This makes it is easy for foreign producers to navigate Section 481 related processes, specific to the Irish film industry.
- The development of the Greystones Media Campus will be very appealing to foreign producers looking for studio space to locate their productions.

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<sup>31</sup> A secret Jurassic World short film was shot in Ireland (RTÉ), 13 September 2019

<sup>32</sup> Return to Production Guidelines for the Creative Screen industry (Screen Producers Ireland), 5 October 2021

## 6.3 Recommendations

For County Wicklow to exploit the opportunity created by the huge demand for content globally, its key strengths need to be well presented and marketed to international producers and production companies. We therefore recommend the following.

**Recommendation 32:** Create an explanatory video to present the key strengths of County Wicklow as a preferred location for global productions, as detailed in this section of the report, to be located online on the County Wicklow website. This could coincide with the rebranding to Screen Wicklow referred to in Section 3 of this report.

**Recommendation 33:** Maintain close contact with local Irish producers and studios based in County Wicklow to support them in their efforts to attract foreign direct investment to County Wicklow.

# 7. Screen tourism

## 7.1 History of filming in County Wicklow

County Wicklow has a rich history of filmmaking and over the years many films and TV programmes have been filmed in the area. These include classic films such as *Braveheart*, *The Count of Monte Cristo*, *Haywire*, *Frank and King Arthur*. More recent productions include series five and six of *Vikings*, *Into the Badlands*, the RTÉ production *Striking Out with Amy Huberman*, *The Rhythm Section* with Blake Lively and Jude Law, and *Dancing with the Stars*, which is filmed at Ardmore Studios. Appendix C includes a list of films shot in County Wicklow.

## 7.2 Current screen tourism marketing

The Tourism Ireland website has a page on Ireland on Screen, with a downloadable PDF map detailing 18 famous filming locations.<sup>33</sup> This includes *Becoming Jane*, *P.S. I Love You*, *Brooklyn* and *Braveheart*, all of which have locations in County Wicklow.

The Wicklow Tourism Strategy and Marketing Plan (2018)<sup>34</sup> recognises that film and TV are strong influencers for travel to Ireland and developing on this potential can significantly impact visitor numbers. One of its objectives is to develop and promote dedicated themed tourism trails to include urban trails and heritage assets, film, food and spiritual trails.

Wicklow County Tourism has identified four key themes for tourism development:

- Outdoors
- Heritage
- Food
- Screen

The fourth theme reflects the strong history of filmmaking, and the growth of the screen industry locally. In addition, screen tourism is closely linked to the first two themes – with the landscape and heritage of County Wicklow often featuring in films. There is therefore great potential for these themes to be reinforcing – generating publicity for films shot in County Wicklow and then creating tourism opportunities after films are released.

The Visit Wicklow website has details of three ‘Wicklow Film Drives’ covering three trails for the films *Braveheart*, *Excalibur* and *Michal Collins*.<sup>35</sup> These were guided car journeys of 68 to 80km covering some of the main locations for each film. However, the trails are now outdated and the website needs to be redeveloped.

Currently there are no formal links between Wicklow County Tourism and Wicklow Film Office or mechanisms to share information and develop screen tourism. Because of this, Wicklow County Tourism is often not aware of filming in the county until a later stage, often not until the film or TV programme has been released. This lack of co-ordination and planning means that opportunities to develop screen tourism at an early stage are not maximised. In an ideal world, tourism representatives should be aware of filming in advance so that they can exploit from any potential publicity opportunities during filming. With this advance knowledge, once filming has taken place, they can then assess the potential for screen tourism and plan in advance so that initiatives are in place once the film or TV programme is released.

<sup>33</sup> Ireland on Screen (Ireland), 1 December 2020

<sup>34</sup> Wicklow Tourism Strategy and Marketing Plan (Visit Wicklow)

<sup>35</sup> Wicklow Films Drives (Visit Wicklow)



## 7.3 Vikings

Based on Norse legends, the TV series *Vikings* has been a hit on both sides of the Atlantic. *Vikings* is a historical fantasy, created and written for the History channel. It premiered in 2013 on the History Channel in Canada and the US and was then released on RTE 2 in Ireland. A total of six seasons were broadcast from 2013 to 2021 and have also been broadcast in the UK, Germany, Austria, Australia and Russia.

One of the main draws of the show has been its outstanding filming locations. It is filmed primarily in the Wicklow Mountains, and makes use of Ireland's raging waterfalls, winding rivers and impenetrable forests to bring 13th-century Scandinavia to life. Tourism Ireland created an online video campaign to inspire fans to visit locations from the series, including Powerscourt Demesne, where one of *Vikings'* iconic raid scenes was shot.

A sequel series, *Vikings: Valhalla*, has been in development for Netflix. The series started filming in early October 2020 at Ashford Studios in Wicklow and is expected to stream on Netflix in 2021.

The success of *Vikings* over many years and the soon to air *Vikings: Valhalla*, make this series an obvious early target to focus on when developing screen tourism in County Wicklow.

## 7.4 Benefits of screen tourism

In recent years, many countries and regions have identified the potential for film tourism. Many are now looking in more detail at how they can capitalise on the impact of the screen industry. A study into screen tourism in England (outside of London) estimated that in 2014 it was worth between £100 million and £140 million. In 2016 Tourism NI estimated that 120,000 visitors to Northern Ireland were influenced by *Game of Thrones*, bringing an estimated £30 million to the local economy. In 2012, Tourism New Zealand reported that there had been a 50% increase in arrivals to New Zealand since *Lord of the Rings* was first released in 2001. Although only 1% of visitors said that *Lord of the Rings* was the principal reason they came, 6% cited *Lord of the Rings* as one of the major reasons they came (equalling around 120,000 to 150,000 people). This shows that screen tourism can be an important contributory factor in planning a trip.

The portrayal of a location on film or TV can help support tourism in many different ways.

Screen tourism can:

- Attract visitors who specifically come to an area to visit the location of a film or TV show;
- Provide a screen tourism experience to visitors who visit a film or TV location as part of a more general visit to the area;
- Raise awareness and branding of an area or location through its representation on screen, thereby encouraging more visits to the area (although not necessarily to the specific screen location).

Screen tourism presents a range of potential benefits to locations. As well as increasing the number of visits, screen tourism can bring additional benefits including:

- Increasing the spend per visit, thereby generating additional income for local businesses;
- Attracting visits to new locations, thereby spreading the benefits more widely;
- Encouraging visits out of season, thereby lengthening the tourism season.

## 7.5 Screen tourism drivers

Different types of films and TV shows have varying potential to attract screen tourism. The Creative England and Visit England Film Toolkit found the following drivers of screen tourism<sup>36</sup>:

1. Naturally, popular and long-running productions drew the highest proportion of core screen tourists, including the Harry Potter film franchise and Downton Abbey.
2. Period drama proved to be a strong draw – but productions associated with other genres also attracted visitors. This includes family fare, fantasy and sci-fi. Productions with darker themes were also able to attract screen tourists.
3. Several of the top-performing sites featured clearly recognisable – even iconic – locations such as Castle Howard, which featured in *Brideshead Revisited* and Alnwick Castle, which had featured as Hogwarts School of Witchcraft and Wizardry in the first two Harry Potter films.
4. Other sites attracted high levels of screen tourism with a number of locations. West Bay and Bampton, for example, both included a number of buildings and locations that had been featured on screen in *Broadchurch* and *Downton Abbey*.
5. Heritage buildings proved to be popular, particularly if they had been showcased prominently on screen.
6. Natural landscapes also drive screen tourists. A number of respondents singled out the cliffs at West Bay, which had been featured prominently in *Broadchurch*, as a particular attraction.
7. Locations do not necessarily have to ‘play’ themselves on screen to attract visitors. Alnwick, Bampton, Castle Howard, Lyme Park and West Bay were all ‘actors’ – and all attracted screen tourists despite doubling for other places.
8. Popular locations also tended to be within regions or locales that have existing appeal to international visitors, e.g. Bampton in the Cotswolds.
9. Some screen tourists do not even need to have seen a film or television drama before travelling there. Some respondents were drawn to Puzzlewood by *Star Wars: Episode VII – The Force Awakens*, while the film was still in production. Screen tourism effects can be seen very rapidly, dependent on the draw of the production.
10. The age of the associated screen product is not necessarily a barrier. With digital distribution, the life of productions – and therefore their potential to induce tourism – can be open-ended.

When analysing films that might be suitable for encouraging screen tourism it will be important to bear in mind these drivers in assessing which productions have the greatest potential to attract screen tourism.

## 7.6 Maximising the potential of screen tourism

By working together, those involved in screen tourism can help to maximise its potential value. Some of the measures that can be taken to support and develop screen tourism include:

- Closer links at local level between local authorities, destination organisations and screen organisations can help to help attract more productions to local areas and boost screen tourism opportunities.
- Screen and tourism agencies have high levels of market knowledge and can benefit from sharing of their insights and exchanging information at an early stage so that they can alert productions to new and relevant locations, and locations to any new filming opportunities.

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<sup>36</sup> Film Tourism: What is it, and how can you maximise the benefits? (Visit England)

- Screen organisations should work in partnership with locations, local destination organisations or tourist boards to develop a strategy to maximise the potential value that a screen production can bring to the local economy.
- Locations should incorporate film and television exposure into their marketing and PR campaigns from an early stage.
- Locations should consider whether it is possible for productions to allow visitors to watch filming, as long as it is well managed and does not disrupt filming.
- Locations should work with the production's location manager to get an idea of when the film or TV drama is to be released or broadcast and to create joint press releases.
- It is important to gain an understanding of the profile of different screen visitors to target opportunities effectively.
- Screen tourism can be encouraged at the most basic level by providing information about specific locations and the production itself, including guides, maps or trails in different formats (including digital).
- To enhance this information, sectors should work together to create screen tourism materials that are tailored to relevant tourist demographics and widely distributed to visitors.
- Many productions use multiple locations and a co-ordinated approach between different sectors can help join-up the screen and wider tourism offer across many locations and encourage visitors to experience more of what is on offer. For example, it may be possible to create materials that build local or regional itineraries, including a range of accessible screen locations.
- Wider incentives can be provided to encourage screen visitors to stay longer and spend more. This might involve organised tours, entertainment, activities or themed goods.

## 7.7 Challenges

The potential financial benefits of screen tourism are clear but challenges can also arise that need to be addressed. For example, in early 2021, the BBC announced that the exact location of their new drama *Bloodlands* will not be disclosed to fans, amid concerns that the small island in Northern Ireland where it was filmed could be overwhelmed by tourists.<sup>37</sup> In 2021, Filming of *Disenchanted* in the 'Disney Village' in Enniskerry attracted large numbers of people to the village, particularly at weekends. The Gardaí put in place extra parking to deal with the thousands of visitors amid concerns over the sheer numbers of day trippers and sightseers.<sup>38</sup>

As well as maximising the potential benefits, locations therefore also need to give early consideration to potential challenges:

- It is important to manage expectations. Not every TV show or film production has the potential to generate the same levels of interest as *Game of Thrones* or *Lord of the Rings*, particularly with international audiences and visitors. It is important to understand the potential audience for the show to help develop the realistic potential for film tourism.
- Some locations may not be well positioned to maximise the benefits of screen tourism. For example, it may not be possible (or desirable) to charge entry, develop a shop or café, or install additional facilities or activities.
- Screen tourism, particularly for very popular productions, can raise infrastructure issues, such as public transport, car parking and overcrowding. Local authorities need to be involved in planning for these challenges to ensure sustainability, deliver a good visitor experiences and maximise the potential for screen tourism.

<sup>37</sup> Bloodlands: location of BBC drama kept secret to avoid tourist influx (The Guardian), 20 February 2021

<sup>38</sup> Filming in the 'Disney Village' of Enniskerry is to resume this week (Roscommon Herald), 4 July 2021

## 7.8 Developing a Screen Tourism Strategy for County Wicklow

Developing screen tourism involves many different organisations across the film and tourism sectors. Some of the key stakeholders are Tourism Ireland, Wicklow County Tourism, Screen Ireland, Wicklow Film Office, Wicklow County Council, local Municipal Districts and individual locations. To maximise the potential for screen tourism in County Wicklow will involve these stakeholders working together to develop and deliver a shared strategy. In particular, there is a need for better communication to share information at an early stage.

It is recommended that a group of these key tourism and film stakeholders should come together to agree how to take forward the following recommendations.

**Recommendation 34:** Co-ordination should be improved between the screen and tourism sectors. Screen Wicklow and Wicklow County Tourism should work together to identify the films with the greatest potential for screen tourism.

A more formal communication channel should be established to ensure that Wicklow County Tourism is aware of forthcoming filming in the area and opportunities for the two sectors to work together is maximised.

Identifying films with the greatest potential for screen tourism would involve the following process:

- Identifying past film or TV productions with ongoing potential to continue to draw screen-based tourism. This should be realistic and take account of identified screen tourism drivers (See section 6.5 above).
- Identifying current or forthcoming productions with potential for screen tourism (including *Vikings: Valhalla*).
- Assessing these productions in more depth, looking at their suitability for promotion, including the profile of the production and the potential of the locations associated with it.
- Agreeing on a list of target productions and locations to focus on for screen tourism.

**Recommendation 35:** Screen Wicklow and Wicklow County Tourism should work together to develop a screen tourism marketing plan.

Once this analysis of films with marketing potential has been completed, tourism and film stakeholders should:

- Analyse the markets for the target productions (including by country, age and sex etc). Any screen tourism materials can then be tailored to the relevant tourist demographics.
- Explore the potential of the locations associated with these target productions, including assessment of the accessibility of sites and facilities available. This should also consider any possible constraints that may limit the screen tourism potential.
- Consider the potential for joint marketing of linked sites. Many productions use multiple locations and a co-ordinated approach can help join-up the screen and wider tourism offer across many locations and encourage visitors to experience more of what is on offer.

The marketing plan should then be used to identify specific actions for partners to take and the resources that will be created. These actions should include:

- Marketing and promotion, including PR and advertising and creating website content to attract screen tourism to locations in County Wicklow.
- Providing information about specific locations and productions, including guides, maps or trails in different formats (including digital resources, such as the use of QR codes).
- Considering the potential for collaboration with other sectors in County Wicklow such as the crafts sector to collaborate and develop trails that might incorporate elements of film and crafts, as detailed in

the Craft Strategy for County Wicklow. The company *All Shapes All Makes*, for example specialises in crafts for the film and television industry and could be incorporated in screen and crafts trails<sup>39</sup>

- Building and promoting local or regional itineraries, including a range of accessible screen locations to help join-up the screen and wider tourism offer across many locations.
- Considering ways to encourage screen visitors to stay longer and spend more. This might involve organised tours, entertainment, activities, food and drink offers or themed goods at individual sites.

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<sup>39</sup> [www.allshapesallmakes.ie/film-tv-stage.html](http://www.allshapesallmakes.ie/film-tv-stage.html)



# Appendix A: Research and guidance on screen tourism

As filming in the UK has increased in recent years, so has the potential for film tourism, with more and more locations benefitting from the impact of the screen industry. In 2015, Creative England and Visit England commissioned Olsberg SPI to produce a report *Quantifying Film and Television Tourism in England* to identify the value of film and television tourism to England and explore how local areas can capitalise on this growing phenomenon.<sup>40</sup>

The report surveyed visitors at eight locations: Alnwick Castle (Harry Potter's Hogwarts), Bampton (Downton Abbey), West Bay (Broadchurch), Castle Howard (Brideshead Revisited, Death Comes to Pemberley), Holkham (Shakespeare in Love, The Duchess), Lyme Park (Pride and Prejudice, The Awakening), Puzzlewood (Merlin, Doctor Who) and Wollaton Hall (The Dark Knight Rises).

## A1 Key Findings

- International core screen tourism in England (outside of London) was worth between £100 million-£140 million in 2014.
- All eight locations at which surveys were carried were found to be attracting international or domestic visitors who said they would not have travelled there if they had not seen the associated film or television drama.
- 36.1% of all international tourists and 11.6% of all domestic tourists surveyed on site at the eight locations can be defined as core screen tourists – i.e. a film or TV production was the primary motivator for their visit.
- The value of these visits is significant, with the best-performing sites attracting day-spend value from international visitors of up to £1.6 million a year. Combined with the day-visit value of domestic core screen tourists, the best performing site (Alnwick Castle) saw £4.3 million total screen tourism spend annually.
- Screen tourism is relevant for many types of content, from period drama to dark, contemporary stories, family fare to fantasy and sci-fi.
- The eight locations included different areas of England, different types of location and different types of screen production. Screen tourists were detected at all eight sites, although volume varied significantly.
- Screen tourism can include both domestic and international visitors, although the study focused on inbound spend by international visitors.
- There was a wide spread of ages of visitors, which varied according to location, for example Bampton (Downton Abbey) attracted more over-45s and Alnwick Castle (Harry Potter) attracted a higher proportion of younger visitors.
- Sites with the most significant impact from screen tourism were those with iconic locations that featured prominently in the production, whether buildings or landscape features.

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<sup>40</sup> Quantifying Film and Television Tourism in England (Olsberg-SPI) 4 March 2015

- Some locations developed activities to satisfy visitors who came because of the film or TV connection, such as a broomsticks activity at Alnwick Castle and Edwardian dressing up Lyme Park.

## A2 Film Tourism Toolkit

Following on from this research, Creative England and Visit England produced a Film Toolkit. The toolkit, *Film Tourism: What is it, and how can you maximise the benefits?* provides guidance and case studies for potential film locations on how to maximise the potential of film tourism<sup>41</sup>. The Toolkit considers the following issues:

- Screen tourism drivers
- How to maximise screen tourism
- What screen tourists want
- What locations need to bear in mind
- Managing expectations
- Benefits of close links between screen and tourism bodies

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<sup>41</sup> Film Tourism: What is it, and how can you maximise the benefits? (Visit England)

# Appendix B: Screen Tourism Case Studies

## B1 Croatia

Croatia already has experience of the impact that location filming can have on screen Tourism. Game of Thrones (GOT) was shot at more than 15 locations in Dubrovnic, as well as other locations in Croatia. A page of the Croatia tourism website is specifically related to Games of Thrones inspired tourism – titled ‘Croatia with GOT you’.<sup>42</sup>

Since the filming of GOT, The Croatian Audiovisual Centre and the Croatian Ministry of Culture commissioned Olsberg to explore the feasibility of a new film and television studio in Croatia. The Study was published in July 2020 and identified the potential economic and other public benefits that could be generated from the creation of a new studio in Croatia.

The report outlined the beneficial impact that screen production has on tourism globally and pointed to screen production as a major tourism motivator, aligned with wider trends such as experiential travel and the influence of social media on tourism. It also highlighted the potential ‘soft power’ benefits of screen tourism, such as enhancing national branding, connecting global audiences to locations, stories, way of life and character in a way that can be both powerful and authentic. The report suggested that screen tourism can often generate positive impacts with citizens and residents who experience a stronger “bonding” to their nation or region as a result of their enjoyment of the screen content.<sup>43</sup>

## B2 Northern Ireland

Northern Ireland has also benefitted significantly from the Game of Thrones (GOT) effect. GOT was filmed at Titanic studios in Belfast and at locations across Northern Ireland. It grew in popularity over eight seasons to become one of the biggest TV shows in world.

In 2016 Tourism NI estimated that 120,000 visitors to Northern Ireland were influenced by GOT. This had an estimated value of £30 million to the local economy. By 2019, figures showed that one in six out-of-state visitors were inspired to travel to the North in 2018, with estimates that the total number of overseas Game of Thrones fans who travelled to the North hit an annual high of 350,000 visitors. These visitors spent an unprecedented £50 million in NI.<sup>44</sup>

There are 26 locations that feature in GOT which are publicly accessible, and tourists can visit. There are a number of Game of Thrones legacy initiatives, led by Tourism Ireland, Screen NI and HBO, which aim to promote the region and present a long-term attraction for visitors.<sup>45</sup> These include:

- **Doors of Thrones** - Ten ornate wooden doors, each of these doors representing different aspects of the show have been placed at pubs near filming locations throughout Northern Ireland. Fans are encouraged to travel around the region, visiting each door.
- **Visitor information** - Key filming locations throughout Northern Ireland include visitor signs and information. Tourism NI have produced a filming location map.
- **Game of Thrones webpage** - Discover Northern Ireland offers a range of information about locations, tours and experiences for visitors.

<sup>42</sup> Croatia will GOT you (Croatian National Tourist Board)

<sup>43</sup> Feasibility Study for a New Studio in Croatia (Olsberg-SPI), 18 June 2020

<sup>44</sup> Game of Thrones tourists spent €58m in North last year (Irish Times), 22 April 2019

<sup>45</sup> Game of Thrones tourism in Northern Ireland (nibusinessinfo.co.uk)

- Game of Thrones App - This app allows visitors to find filming locations and information about each.

### B3 New Zealand

New Zealand has built an impressive film tourism industry, based on the success of prominent feature films shot on location, particularly the Lord of the Rings series. Local tourism boards have used film representations of the country's natural beauty to sell New Zealand as a premier travel destination. Sets have been preserved and tours are available to visit the original Hobbiton Movie Set from the Lord of the Rings (LOTR) movie trilogy and The Hobbit films.

In 2012, Tourism New Zealand reported that there had been a 50% increase in arrivals to New Zealand since LOTR was first released in 2001. Although only 1% of visitors said that LOTR was the principal reason they came, 6% cited Lord of the Rings as one of the major reasons they came (around 120,000 to 150,000 people). But Tourism New Zealand said that the really important thing is that upwards of 80% of their target audience understands that LOTR was filmed in New Zealand.<sup>46</sup>

In 2012, an estimated 63,200 visitors participated in a LOTR activity while in New Zealand. These LOTR visitors included:

- Around 10,000 international tourists who did a group tour for LOTR fans.
- 20,250 international tourists who did an organised tour that included a LOTR site.
- 30,000 international tourists who visited a LOTR site independently.
- Since 2004, an average 47,000 international visitors each year have visited a film location.
- Since the first film's release, about 266,000 people have visited Hobbiton, with a majority from abroad.

### B4 Cornwall

Cornwall is a film location paradise, with sandy beaches, quaint fishing villages and rugged coastline. The county has been used by hundreds of productions over the years, with long-running TV series like ITV's *Doc Martin*, running from 2004 to the present day, showcasing the Cornish coastline and countryside.

The BBC's period drama *Poldark*, set in late 18th century Cornwall, helped boost film tourism in the region. A total of five series were filmed from 2015 to 2019, based at the Bottle Yard Studios in Bristol, which is now the biggest production facility of its kind in the west of England. In the summer of 2015, 25% of people visiting the south-western county were inspired to do so partly by the TV series, according to a report from Visit Cornwall.<sup>47</sup>

"These results illustrate how the power of screen can drive viewer desire to experience the fact behind the fiction," said Malcolm Bell, chief executive of Visit Cornwall, in comments to Press Association.

"At Visit Cornwall we're seeing the effect in real-time with visitors to our website, visitcornwall.com, spiralling during and after an episode of *Poldark*.

"People are now watching shows with mobiles or tablets in their hands and acting on what they see on screen. Luckily for us they like what they see and it is having multiple positive impacts on Cornwall."

Andrew Kemp, regional director for the South West of England for Lloyds Bank Commercial Banking, has suggested that businesses in Cornwall need to take advantage of the county's popularity with film and TV show makers.<sup>48</sup>

<sup>46</sup> The Impact (Economic and Otherwise) of Lord of the Rings/The Hobbit on New Zealand (Forbes), 14 December 2012

<sup>47</sup> BBC period drama Poldark helps boost film tourism in Cornwall (The Location Guide) 12 October 2015

<sup>48</sup> What Cornwall can learn from the Peaky Blinders effect (Cornwall Live), 28 July 2018

Mr Kemp said: "Poldark has provided an unlikely boom to businesses in the county and is one of the best examples of so-called 'screen tourism' that we have seen.

"The return of the Cornwall-set TV series has created buzz among fans, providing companies in the area with the chance to benefit from an increase in tourists keen to visit locations featured in the programme.

"Now is therefore a good time for businesses to ensure they are prepared to capitalise on this opportunity. The anticipated influx of fans visiting Cornwall has the potential to create increased demand for goods and services, particularly in the hospitality, leisure and heritage sectors."

He stressed the need to plan ahead in order to make the most of screen tourism.

"Poldark attractions and activities are popping up across the county. Yet even more businesses can use the series to drive sales, whether they are a café in one of the locations where the series is filmed or a merchandise manufacturer producing souvenirs."

"A business hosting Poldark-themed events or tours may need to take on more staff to meet increased demand. It could put in place an invoice finance facility to unlock the cash tied up in colleague wages. This is an effective way of managing working capital but it requires some planning.

"To make the most of this seasonal opportunity, management teams should ensure they deploy the most cost-effective strategies for their businesses to take advantage of Cornwall's screen tourism boom, particularly as we enter the peak holiday season."

However, the experience in Cornwall also demonstrates the potential problems of a rapid increase in tourism if capacity is not well managed. In the summer of 2018, Cornwall's tourist board said that the county was "struggling to cope" with a sudden influx of holiday makers and announced that it had decided to stop promoting two of its most popular beaches. This was particularly attributed to Poldark, which was filmed at one of the beaches.<sup>49</sup>

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<sup>49</sup> Sudden influx of UK tourists leaves Cornwall unable to cope (inews.co.uk), 17 August 2018



## Appendix C: List of film and TV filmed in County Wicklow

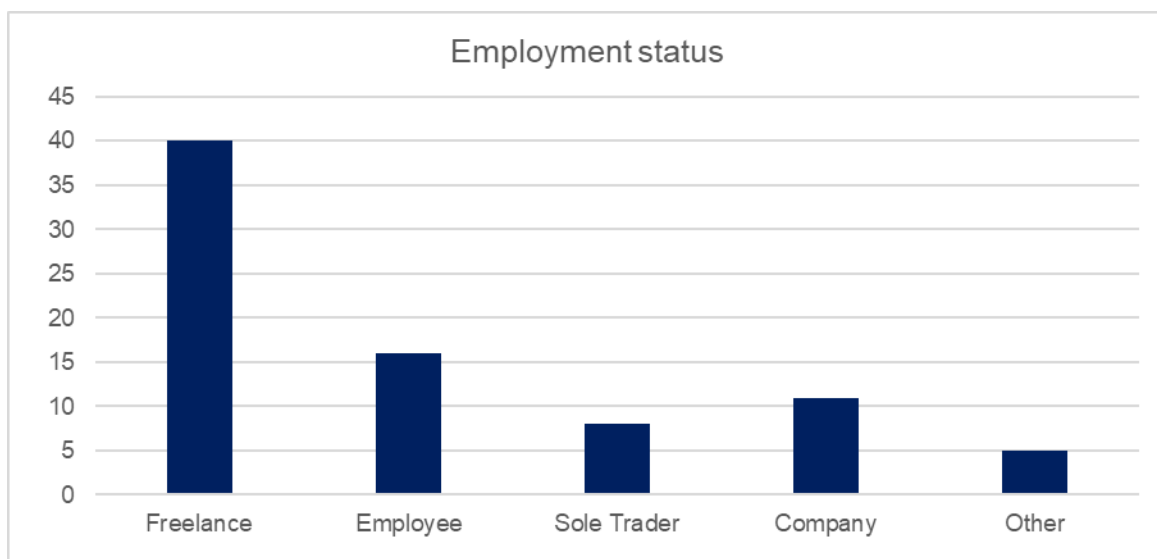
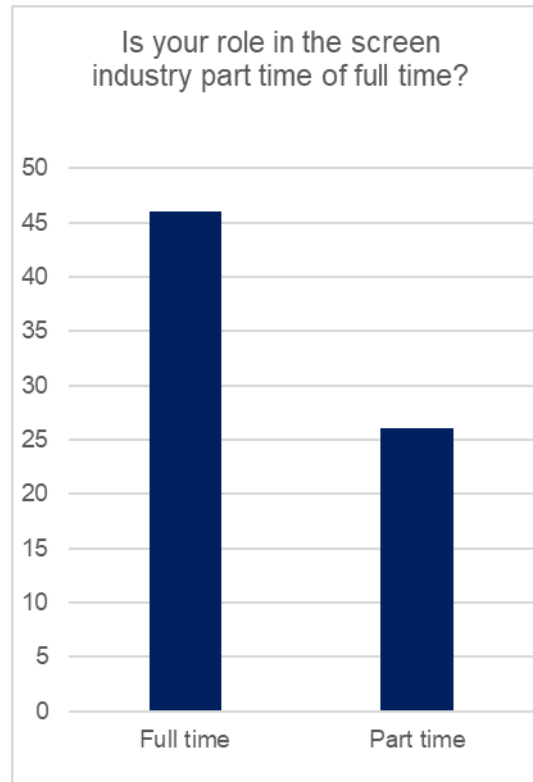
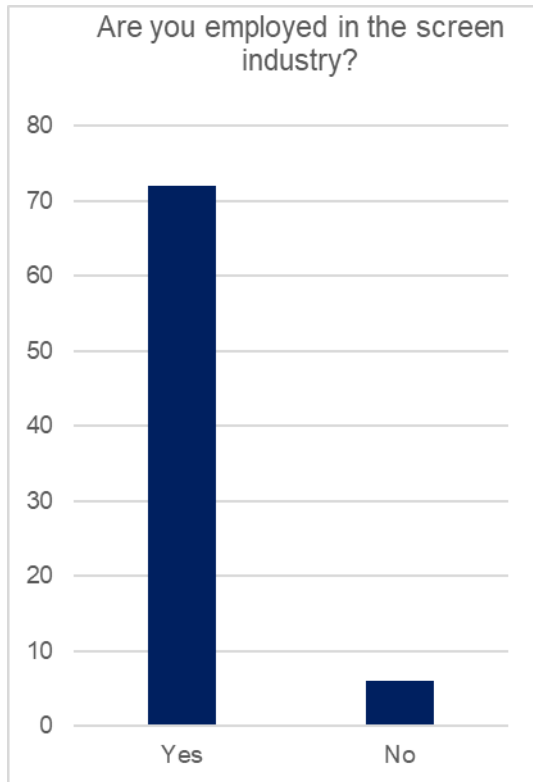
Year	Production	Location
2021	<i>Disenchanted</i>	<i>Enniskerry, Newcastle, Moneystown</i>
	<i>Golf's Greatest Holes</i>	<i>Druids Glen, Kilcoole</i>
	<i>KIN</i>	<i>Brittas Bay, Sally Gap</i>
	<i>Winks Saga</i>	<i>Laragh</i>
	<i>Provision</i>	<i>Ashford, Clermont House Rathnew</i>
	<i>Vikings Valhalla</i>	<i>Ashford Studios, Wicklow Town, Lough Dan</i>
	<i>Eurovision Entry Music Video</i>	<i>Lough Tay</i>
	<i>I am a Forest</i>	<i>Bray Head</i>
	<i>The Dog Who Lost His Bark</i>	<i>Brittas Bay</i>
	<i>Tourism Ireland</i>	<i>Wicklow &amp; Sally Gaps, Lough Tay, Lough Dan, Old Military Road</i>
	<i>RTE Arms Crisis in Ireland</i>	<i>Baltinglass Courthouse</i>
	<i>John Torode's Ireland Series</i>	<i>Laragh</i>
	<i>RTE – Keep It Up</i>	<i>Greystones</i>
	<i>World's Most Evil Killers</i>	<i>Brittas Bay</i>
	<i>The Wonder</i>	<i>Redcross</i>
	<i>RTE – Open for Business</i>	<i>Greystones</i>
	<i>The Hitman</i>	<i>Wicklow Town</i>
	<i>EPIC</i>	<i>Ardmore Studios</i>
	<i>The Silence of Mercy</i>	<i>Bray &amp; Wicklow</i>
	<i>Modern Love</i>	<i>Bray &amp; Wicklow</i>
	<i>Witness No 3</i>	<i>Ardmore Studios</i>
	<i>Great Coastal Railway Journeys</i>	<i>Bray</i>
	<i>Treaty 22</i>	<i>Wicklow Town</i>
	<i>Emerald</i>	<i>Luggalla, Sallygap &amp; Bray</i>
	<i>Nationwide</i>	<i>Powerscourt &amp; Wicklow County Campus</i>
	<i>Tabhartas</i>	<i>Tomnafinnoge woods</i>
<i>RTE Crimes &amp; Confessions</i>	<i>Baltinglass Courthouse</i>	
2020	<i>The Rhythm Section</i>	
	<i>House Hunters Ireland</i>	<i>Sugarloaf</i>
	<i>Joan Verra</i>	<i>Black Castle, Wicklow Town</i>

	<i>Holy Island</i>	<i>Arklow Town, Wicklow Town</i>
	<i>RTE Baz Ashmahy &amp; Nancy</i>	<i>Glendalough</i>
	<i>The Man who built America</i>	<i>Wicklow Town</i>
	<i>Sisters</i>	<i>Clermont House Rathnew</i>
	<i>Innocent 2</i>	<i>Bray &amp; Dublin</i>
	<i>The Drowning</i>	<i>Enniskerry</i>
	<i>The Men Who Saved America</i>	<i>Wicklow &amp; Dublin</i>
	<i>The Last Duel</i>	<i>Wicklow, Tipperary &amp; Meath</i>
	<i>Let the Wrong One In</i>	<i>Wicklow &amp; Dublin</i>
	<i>Redback (Red Election)</i>	<i>Wicklow &amp; Dublin</i>
<b>2017-20</b>	<i>Dancing with the Stars</i>	<i>Ardmore Studios</i>
<b>2017</b>	<i>Striking Out with Amy Huberman</i>	
<b>2015-19</b>	<i>Into the Badlands</i>	
<b>2013-20</b>	<i>Vikings</i>	
<b>2014</b>	<i>Penny Dreadful</i>	
<b>2014</b>	<i>Frank</i>	
<b>2011</b>	<i>Haywire</i>	<i>Russborough House, Blessington</i>
<b>2010</b>	<i>Primeval</i>	<i>Wicklow Head</i>
	<i>The Final Furlong</i>	<i>Clermont College, Rathnew</i>
	<i>Camelot</i>	<i>Killruddery, Powerscourt, Luggalla Estate, Sally Gap, Brittas Bay</i>
	<i>Neverland</i>	<i>Blessington Lakes</i>
	<i>Stella Days</i>	<i>Powerscourt Waterfall, Newcastle</i>
<b>2009</b>	<i>Leap Year</i>	<i>Luggalla Estate near Roundwood, Enniskerry, Ardmore Studios, Laragh, Upper Lake at Glendalough and Glen of Imaal</i>
	<i>The Tudors IV</i>	<i>Powerscourt House and Gardens, Killruddery House and Gardens, Luggalla Estate</i>
<b>2008</b>	<i>The Tudors III</i>	<i>Killruddery House, Humewood Castle, Luggalla</i>
	<i>Cracks</i>	<i>Redcross, Roundwood</i>
	<i>Raw</i>	<i>Ardmore Studios, Harbour Bar, Bray</i>
<b>2007</b>	<i>The Tudors II</i>	<i>Killruddery, The Grange, Brennanstown, Ardmore Studios</i>
	<i>Dorothy Mills</i>	<i>Bray, Blessington Lakes, Wicklow Gap, Sally Gap, Ardmore Studios</i>
	<i>My Boy Jack</i>	<i>Clermont House Rathnew, Ashford, Cabinteely House</i>
	<i>The Whistleblower</i>	<i>Clermont House Rathnew, Bray</i>
	<i>The Old Curiosity Shop</i>	<i>Ardmore Studios</i>
	<i>George Gently II &amp; III</i>	<i>Greystones, Kilcoole</i>
<b>2006</b>	<i>Becoming Jane</i>	<i>Wicklow Courthouse, Killruddery House and Gardens, Hollybrook House, Cloghleagh Bridge</i>
	<i>The Tiger's Tale</i>	<i>Brittas Bay, Wicklow Mountains</i>

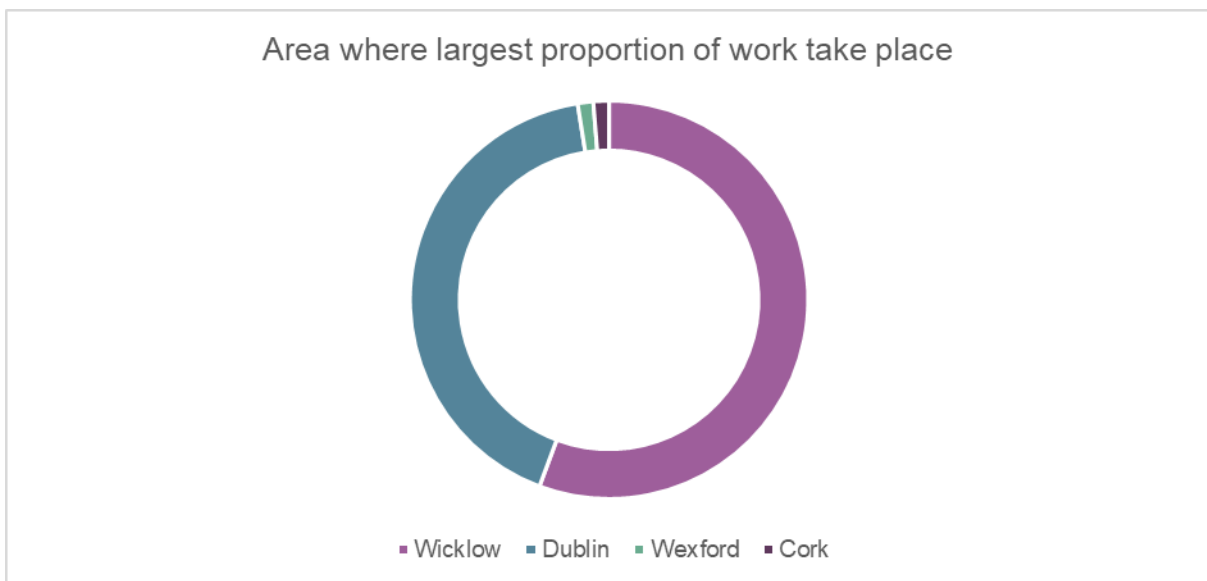
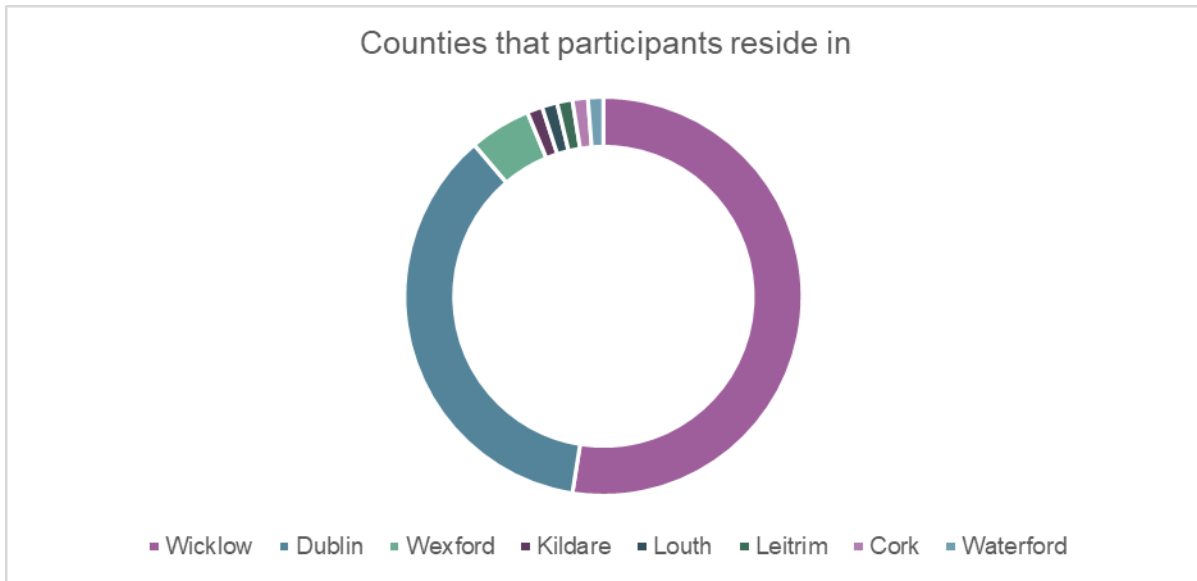
	<i>Northanger Abbey</i>	Glendalough, Luggala
	<i>PS, I Love You</i>	Blessington, Sally Gap
	<i>How About You?</i>	Mount Usher
	<i>George Gently's Last Case</i>	Brittas Bay, Newcastle, Greystones
	<i>The Tudors I</i>	Ardmore Studios, Luggala, Brennanstown Riding School, Glendalough Lakes
<b>2005</b>	<i>Lassie</i>	Killruddery House in Bray, Wicklow Mountains
<b>2004</b>	<i>Breakfast on Pluto</i>	Wicklow Railway Station, Bray Head Hotel, Ardmore Studios
	<i>The League of Gentlemen: The Apocalypse</i>	Avoca Anglican Church, Wicklow Railway Station, Sally Gap, Powerscourt
<b>2003</b>	<i>King Arthur</i>	Ballymore Eustace, Powerscourt, Luggala, Hollywood, Glenmalure, Turlough Hill
	<i>Laws of Attraction</i>	Roundwood, Sally Gap, Humewood Castle
<b>2002</b>	<i>The Roman Spring of Mrs Stone</i>	Ardmore Studios
	<i>Veronica Guerin</i>	Newtownmountkennedy, N11, Ashford
	<i>Ella Enchanted</i>	Ardmore Studios, Humewood, Powerscourt, Killruddery House
	<i>The Count of Monte Cristo</i>	
<b>2001</b>	<i>Reign Of Fire</i>	Wicklow Gap, Black Castle, Wicklow Town
	<i>The Abduction Club</i>	Blessington, West Wicklow
<b>2000</b>	<i>The Count of Monte Cristo</i>	Ardmore Studios, Silver Strand, Brittas Bay, Killruddery House, Blainroe Beach
	<i>How Harry Became a Tree</i>	Sally Gap to Blessington, Military Road to Laragh
	<i>Michael Collins</i>	Rathdrum, Hollywood
<b>1994</b>	<i>Braveheart</i>	Sally Gap, Kippure Estate, Turlough Hill
	<i>Into The West</i>	Brittas Bay, Wicklow Mountains
<b>1992</b>	<i>Far and Away</i>	Killruddery House, Bray
<b>1989</b>	<i>My Left Foot</i>	Bray Head, Bray, Ardmore Studios
<b>1981</b>	<i>Excalibur</i>	Childer's Woods, Roundwood, Lough Tay, Powerscourt Waterfall, Annemoe
<b>1975</b>	<i>Barry Lyndon</i>	Powerscourt House

# Appendix D: Survey Results

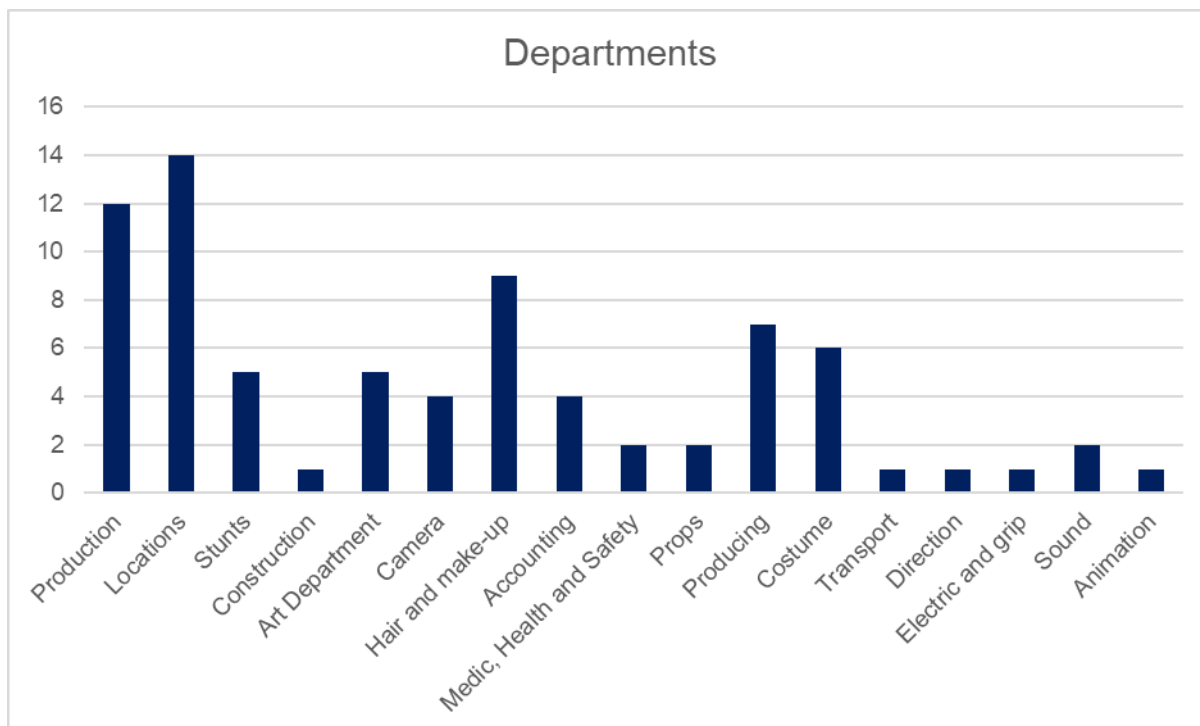
## Employment information



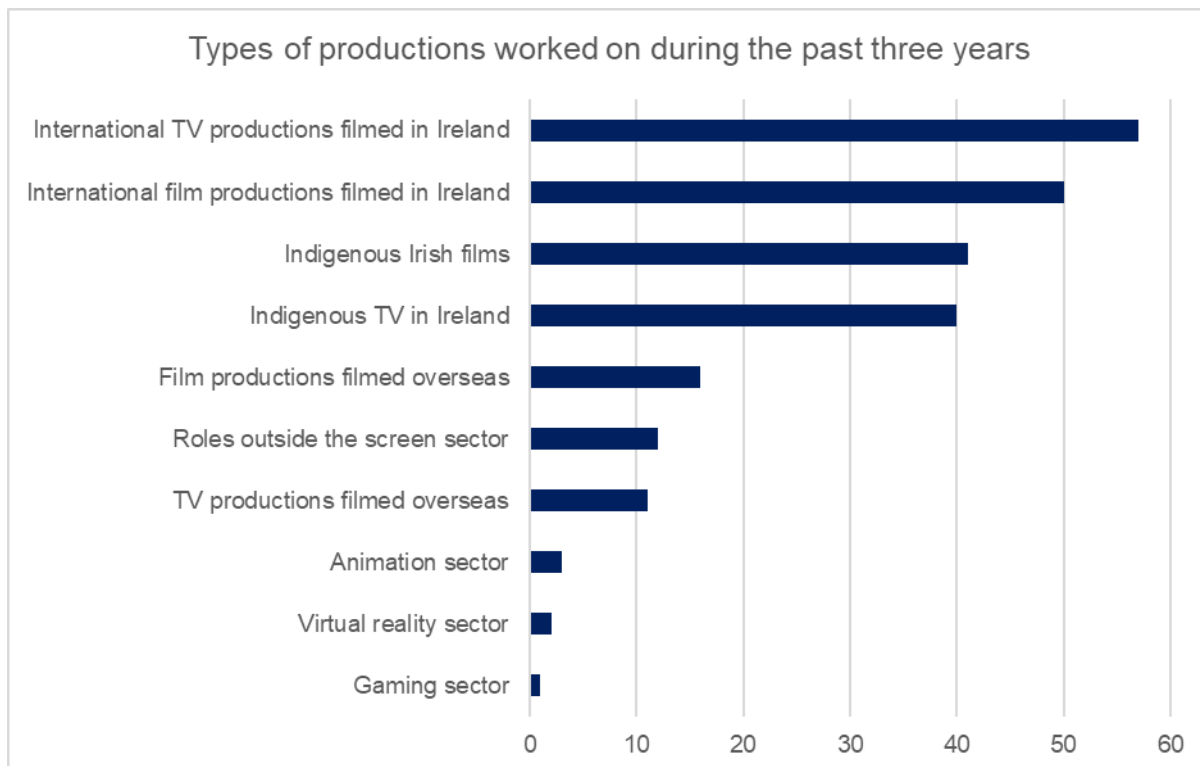
## Location information



## Film departments represented within workforce

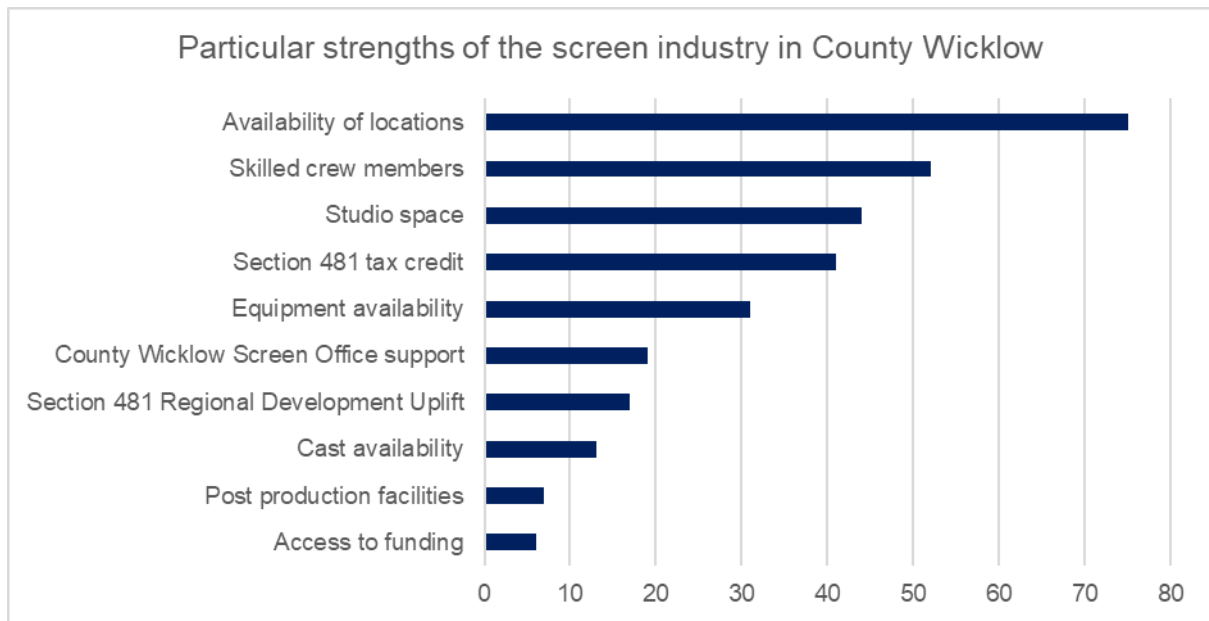


## Types of productions





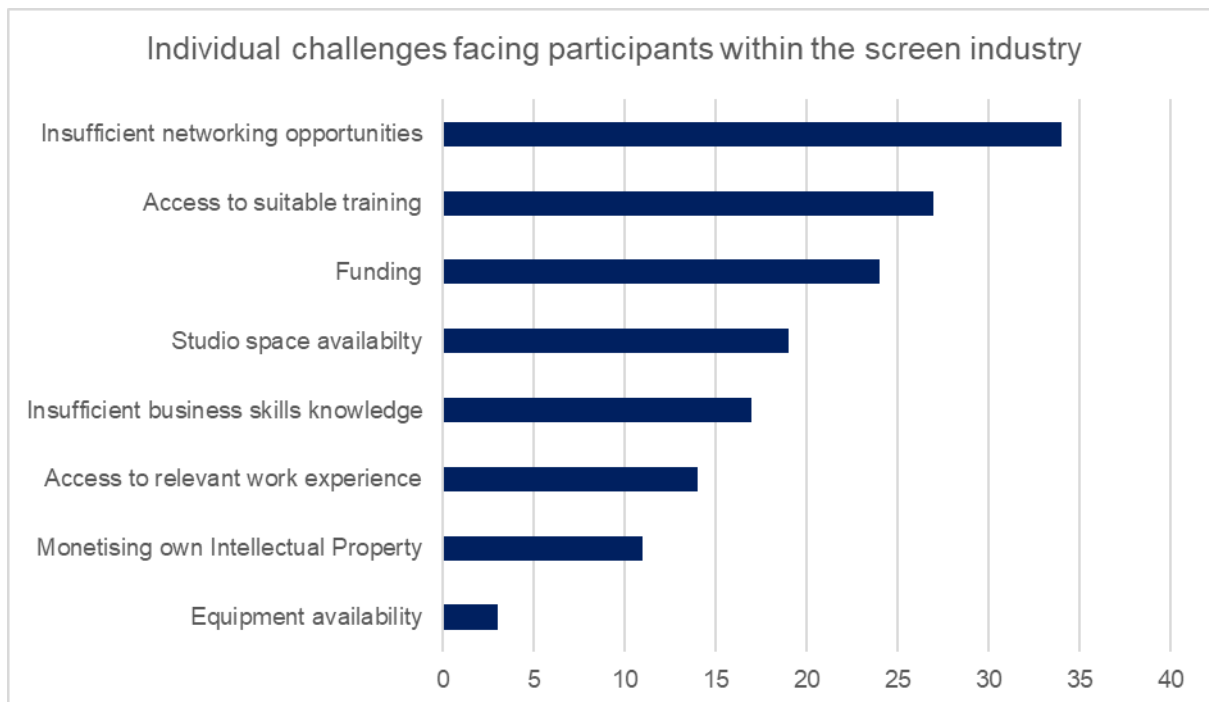
## Strengths of County Wicklow Screen Industry



Other strengths identified

- Proximity to Dublin Airport
- Adjacent to a European Capital

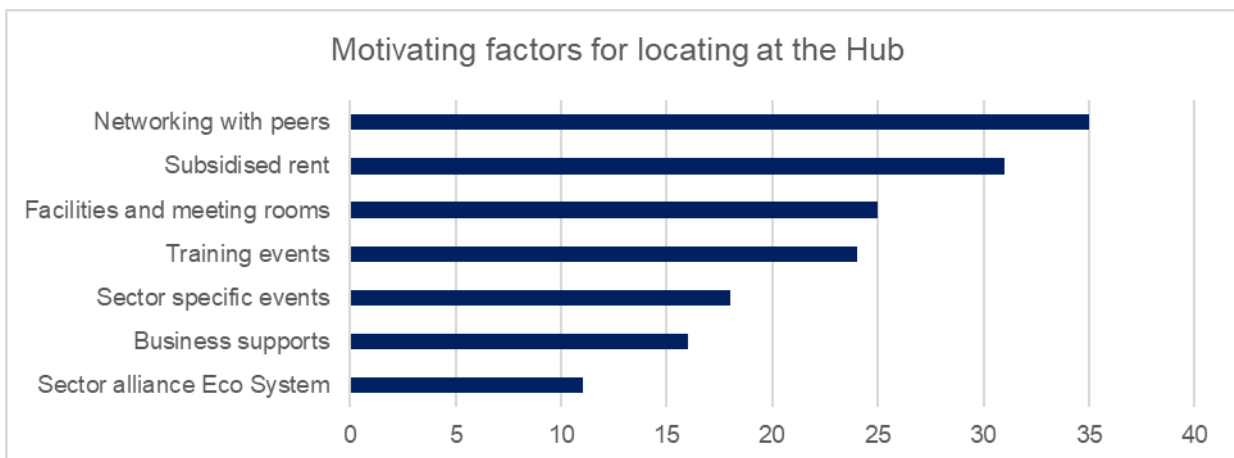
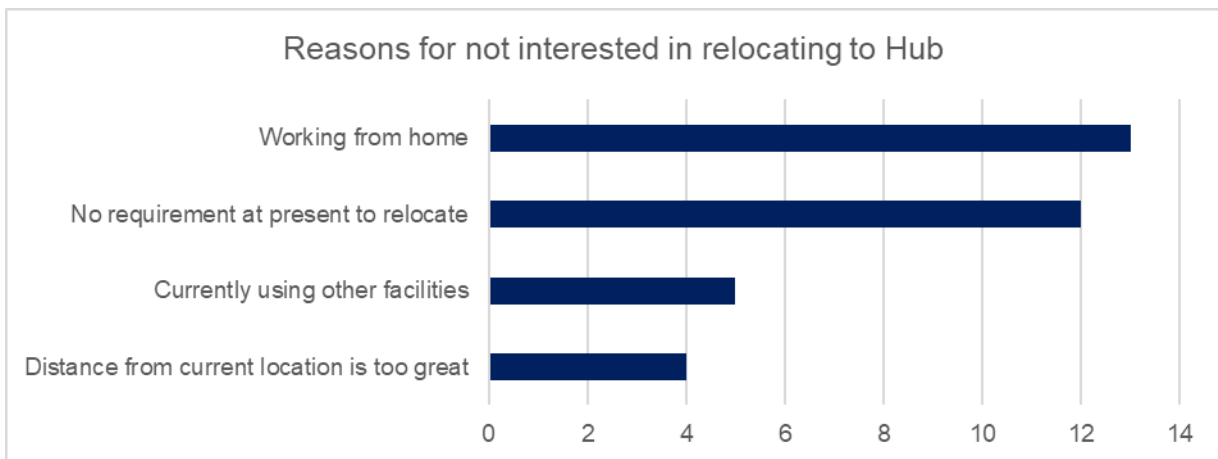
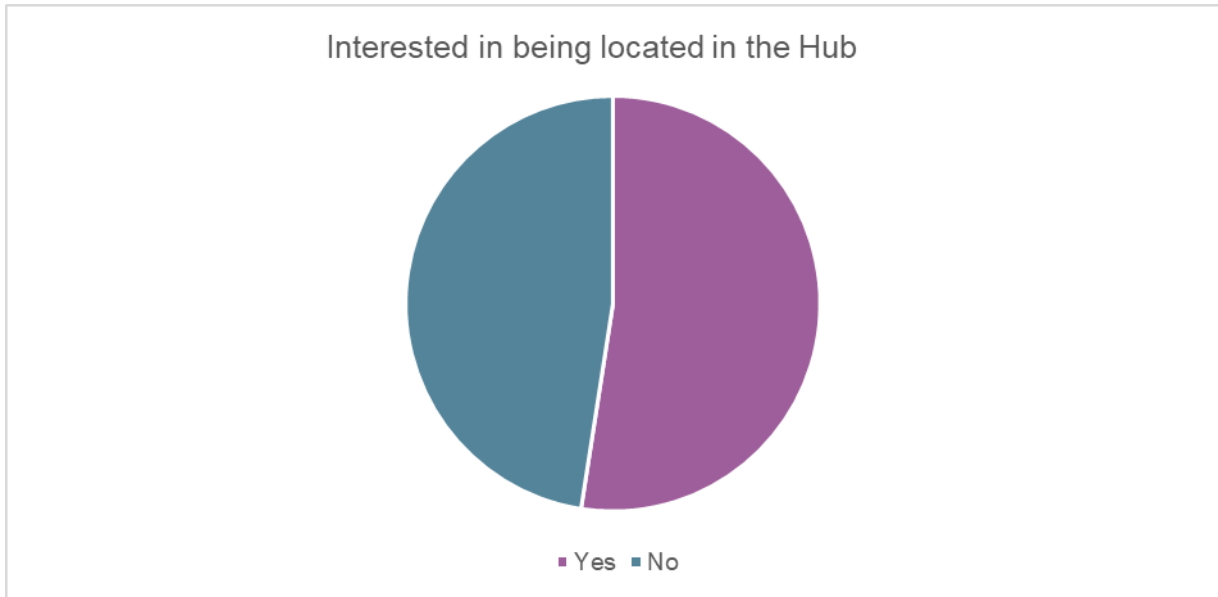
## Challenges

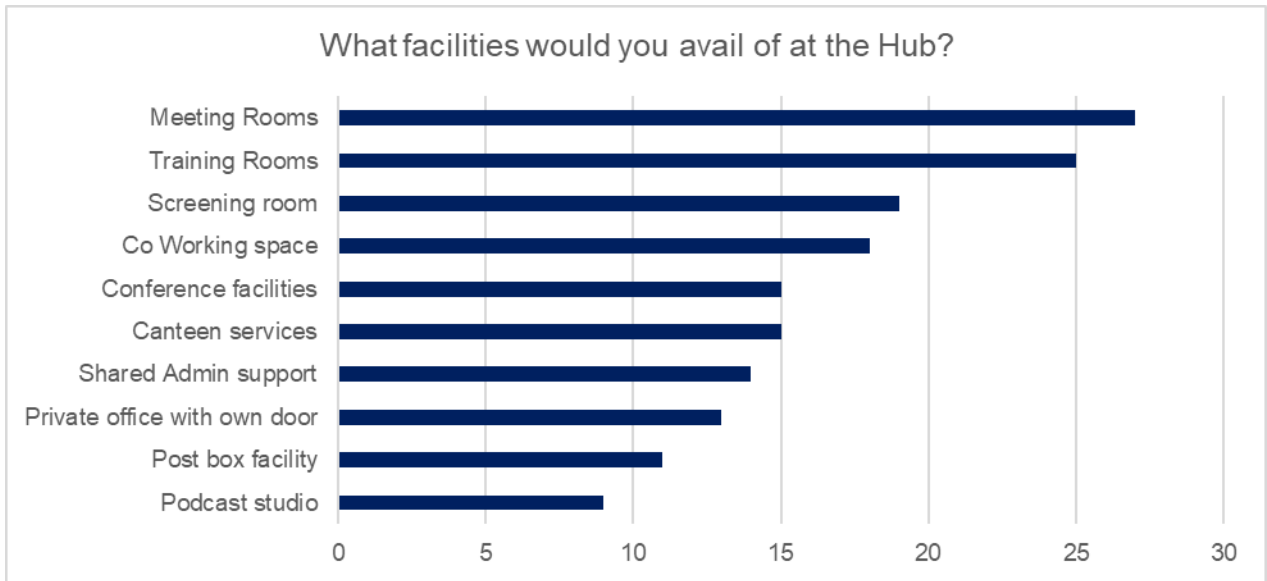


Other challenges identified

- Lack of major investment in attracting top writers to mentor talent in the county and thereby also attracting other international talent and productions
- Large scale studio space
- Lack in offering competitive skilled post production solutions in County Wicklow
- Consistency of work

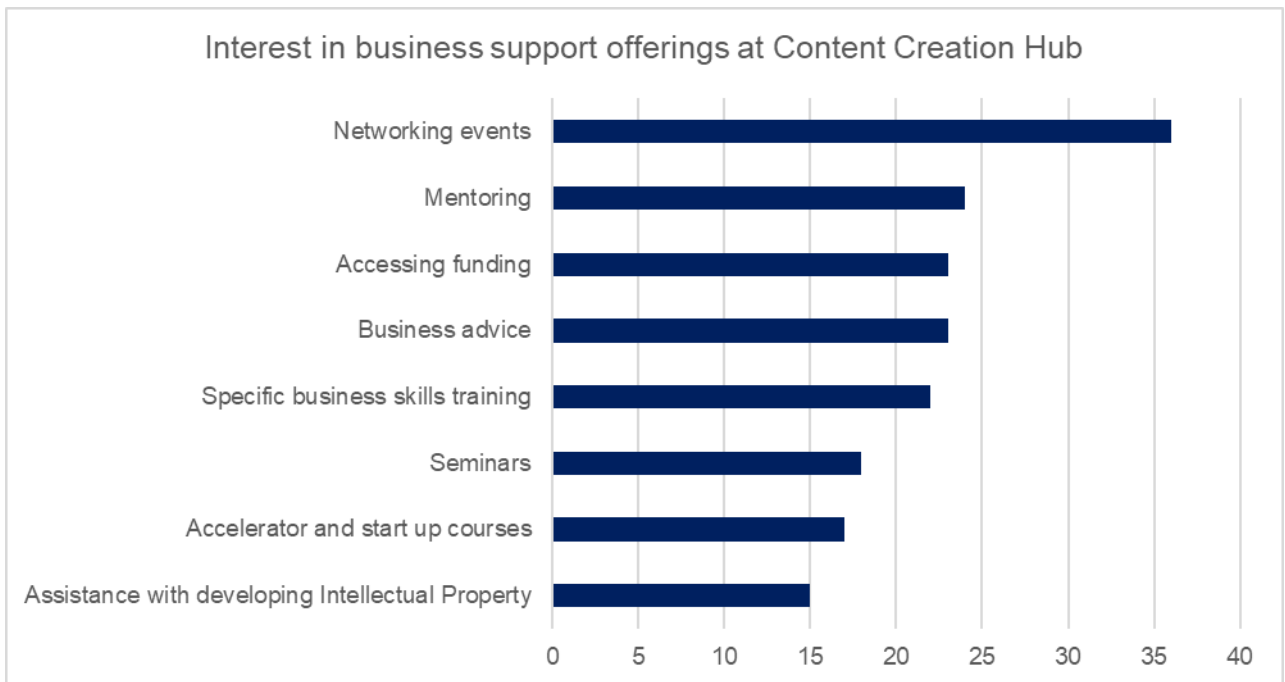
## Content Creation Hub





Other recommended facilities:

- Stunt related facilities
- Studio space
- Streaming operations
- ADR



# Appendix E: Survey participants

## Individuals interviewed:

1. James Flynn: Metropolitan Films
2. Mura O'Byrne: Screen Scene
3. Stephen Rooke: Tile Films
4. Siobhan Ward: CTL Films
5. Brian Willis: Igloo Productions
6. Nicky Gogan: The Piranha Bar
7. Shelley Hargadon: Ashford Studios
8. Catherine Tiernan: Metropolitan Films
9. Maria O'Connor: Supervising Location Manager *Disenchanted*
10. Gareth Lee: Screen Ireland
11. Ronan McCabe: Animation Ireland
12. Teresa McGrane: Screen Ireland
13. Susan Kirby and Anthony Muldown: Screen Producers Ireland
14. Joseph Collins: IT Carlow
15. Conor Simpson: IDA
16. Rónán Ó'Muirthile: IADT
17. Jessica Nolan: Fáilte Ireland
18. Fred Verdier: Wicklow County Council Tourism Officer
19. Jenny Sherwin: Wicklow County Council Arts Officer
20. Jess Drum: Screen Guilds Ireland
21. Brian O'Regan: Arts Leaders Associates

# Appendix F: Ireland Film Offices

Film Office	Locations	Crew and supplier information	Training	Permits	Funding
<p><b>Cork</b></p> <p>Film In Cork provides Production and Location support services to those working in film, television, and animation. It also serves to promote and market the Cork region locally, nationally and internationally as a wonderful place to work.</p>	Online locations database	Information and advice on film crews, facilities and accommodation options, to permits and permissions, casting and sourcing extras.			Short Film Award of €8,000 towards the cost of production, along with support in terms of locations, production in the Cork region.
<p><b>Donegal</b></p> <p>The Film Office acts as the main resource for filmmakers in Donegal and those who wish to film in Donegal from all over the world. Established by Donegal County Council in 2003 to promote the region and to help develop the profile of the county. Working in cooperation with Fís Éireann (Screen Ireland) the Film Office helps filmmakers to find locations, cast and crew, technical services and local service providers. The Film Office has extensive experience with visual production and we are more than happy to deal with your enquiry, however big or small the production is.</p>	Online locations database	Extensive database of cast, crew, production resources and production companies that work and live in the area and local service providers e.g. Hoteliers, car hire etc. with preferential rates for the film industry.		Database of information services and facilities available in the county including local authority and government agencies.	

Film Office	Locations	Crew and supplier information	Training	Permits	Funding
<p><b>Dublin City Council</b></p> <p>One stop service that aims to increase the number of productions shooting in Dublin, by supporting the audio-visual industries in the Dublin Region and acting as a coordinator between production companies and various government departments, in order to provide a seamless transition between script to on-location filming.</p>				<p>Dublin City Council manages the city's public domain and handles permits for over 4,000 on-street locations, many bridges, beaches and parks. They advise on a range of City Council services such as parking, road closures, traffic control, street furniture, waste management, Health and safety requirements, environmental and local issues surrounding your location; as well as other general film-related queries, such as public transportation and whether your production will be affected by utility works or other events in the city. Links to permits on website.</p>	
<p><b>Galway</b></p> <p><i>Screenwest</i> has been created to facilitate the production of audio-visual content in the West of Ireland.</p>	Online locations database	Online databases of production companies, crew and facilities		Lists of contacts and basic advice covering permissions and clearances required.	Information about funding
<p><b>Kerry</b></p> <p><i>Screen Kerry</i> is a one-stop shop. They provide comprehensive support to Film, TV &amp; Animation productions locating in the county, including information about locations, crew, facilities or financial incentives</p>	Online locations database	Up to date regional crew list and advice on crew currently based locally. Production support database with information about facilities and equipment hire and links to location scouts and managers with knowledge of locations throughout the county. Links to service providers to give access to a wide range of accommodation, transport & catering services.	Links to training courses within Kerry, including training for new entrants to the industry and opportunities to up-skill for experienced crew.	We provide information on permissions, including permits for drone filming and can organise road closures & traffic management through the relevant local authorities	



Film Office	Locations	Crew and supplier information	Training	Permits	Funding
<b>Kilkenny</b> <i>Film Kilkenny</i> is the local point of contact for support and assistance.	Library of locations for filming	Database of Crew, Facilities, Service Providers and Suppliers.		We can also assist with local agencies and permission that you may require during your production.	
<b>Limerick</b> <i>Film in Limerick</i> works to give film makers access to information services and facilities.	Online locations database	Full database of cast and crew as well as production resources and companies in the region.		Film in Limerick do not issue permits and licenses for filming, but can put you in contact with the right department in Limerick City & County Council to do so	
<b>Mayo</b> <i>Film Mayo</i> promotes filmmaking in the beautiful County of Mayo in the West of Ireland. We are here to help, we know Film and we know Mayo.	Online locations database	Cast and crew directory. Local facilities directory.		Film Mayo is here to help you with your queries regarding permission and permits and to help speed up the process.	
<b>Offaly</b> <i>Offaly Film Commission</i> is a project of Offaly County Council aimed at increasing film activity.	Online locations database	Crew database.	Professional Development Workshops on Working in Film and Writing for Screen Industries.		Annual Offaly Film Fund award of €10,000 toward the making of a short film.
<b>Sligo, Leitrim and Roscommon</b> <i>SLR Film Project</i> is a new partnership. Sligo, Leitrim and Roscommon County Councils have come together with filmmakers from the three counties with a view to enabling the film sector in the region to grow and develop. The aim is to recognise the value of film as an artform and the contribution that film can make to the region – socially, culturally and economically.	Online locations database	Creative Frame manages the profiles of regional creative talent on their behalf. Online list of production companies.	Partnered with Creative Frame to deliver bespoke training to filmmakers and artists working with film.	Primary goal is to make filming in the three counties a simple and hassle-free experience for both established production companies and emerging filmmakers. One point of contact for each county who will assist as liaison with the other two counties.	Film Completion Award and Film Collaboration Awards to support the professional development of those working in the sector.
<b>Wexford</b> Want to support location managers to get on with their job and support film making in Wexford.	Online locations database	A wide range of contacts within local communities and local film industry contacts		Help with permission to use a wide range of public buildings and locations, roads, health and safety.	

# Appendix G: Potential specification criteria for the Content Creation Enterprise Hub

The consultation with stakeholder and the survey results identified specific infrastructure needs and desired business and entrepreneurial supports. These are outlined below.

## Infrastructure needs:

- High speed and reliable internet connectivity for uploading and downloading was viewed as essential for secure and stable working with the streaming giants and big budget feature films.
- Secure storage space for equipment – IT and physical access security is key for editors and VFX artists working with confidential footage from the streaming giants and big budget feature films.
- Editing suites and post-production facilities, including Automated Dialogue Replacement (ADR) and other sound post-production facilities.
- Writer and producer rooms – meeting rooms are critical for smaller scale producers who do not have their own offices in order to have meetings with potential financiers and distributors, both domestic and international.
- Live streaming facilities.
- Physical space for simple shoots such as shooting interviews.
- Stylish and quality interior design is important for creative professionals in the screen sector.
- Break-out room and communal space to allow social mixing, relaxing and networking, as well as informal business conversations.
- Canteen facilities.

## Business and entrepreneurial support needs:

- Shared resources: IT support, reception, administrative resource, printing and cleaning and IT support.
- Access to business support and administrative services such as support with cash flow management, business planning, tax filings, accounting, legal and IP issues.
- Networking events, such as events hosted by Screen Producers Ireland aimed at smaller production companies.
- Support to smaller production companies to assist them with accessing funding such as Section 481 and Creative Europe funding.
- Health and Safety risk assurance service in line with Covid-19 related guidelines for productions.
- Financial and other support in the development of projects.

# Appendix H: Outline of remit for Screen Wicklow and Content Creation Enterprise Hub staff

Below are recommended role specifications for both the Screen Officer and the Hub Manager:

## Screen Officer

### Management/leadership responsibilities

#### Leadership and advocacy

- Advocacy and liaison with government over legislation or regulations affecting the screen sector
- Liaison with local authorities over local services
- Networking with other film organisations, including Screen Ireland, Screen Skills Ireland and other local film offices
- Co-ordination with Tourism Wicklow, Tourism Ireland, film studios and individual productions to promote screen tourism
- Working with local companies and individuals in the screen sector to represent their interests and develop the sector

#### Support for potential productions

- Facilitating partnerships between productions and local authorities
- Providing information and advice in response to location enquiries
- Arranging and supporting location recces

### Administration/operational responsibilities

### **Promotion/database management**

- Promoting County Wicklow as a filming destination
- Creating and maintaining a Screen Wicklow website, including:
  - a crew database
  - a facilities/suppliers database
  - a locations database and image bank

### **Production support**

- Supporting and advising productions on:
  - obtaining filming permits
  - parking facilitation / traffic management
  - permits for filming on local authority property
- Liaising with the police and emergency services
- Liaising with local residents
- Troubleshooting for productions

## Hub Manager

### Management/leadership responsibilities

#### Supporting and promoting the Hub

- Promoting the Hub to maintain full occupancy of creative work/offices spaces and establish it as a centre for the local screen industry.
- Building and growing a membership for co-working spaces (if the Hub follows this model).
- Marketing and telling the story of the Hub, and the successful screen creatives and small enterprises working both in the Hub and the local area.

#### Leadership and advocacy for the screen sector

- Promoting the interests of the screen industry in County Wicklow and being a vocal advocate for local screen sector companies and freelancers.
- Creating a collaborative environment amongst members of the Hub and the wider screen sector through networking events.
- Creating a programme of training, masterclasses and other events to help support and develop the needs of the screen sector.
- Building and maintaining relationships with a wide range of stakeholders, including local authorities, screen organisations, and studios, to develop opportunities for the screen sector to work together in County Wicklow.
- Engaging with the wider community by developing initiatives designed to create connections between young people, the local community and the screen sector.

### Administration/operational responsibilities

#### Managing the Hub

- Managing the relationship with the Hub's tenants, including organising letting agreements and other forms of membership.
- Managing all aspects of the Hub's day to day operations, including finances, administrative and legal requirements.
- Ensuring that offices and workspaces in the Hub are fully operational and all facilities are operating well.
- Organising and delivering events at the Hub, including training networking and community events.

# Appendix I: Existing and planned studio space

A shortage of studio space has been recognised as a factor limiting the growth of Irish film and TV production. There is currently 238,000 sq. ft. of studio stage space (12 stages) in Ireland that is suitable for film and TV production (i.e. excluding alternate “pop up” facilities), with 60% being in Wicklow.

There are plans for a further 40 stages and 1.12 million sq. ft. of floorspace, of which 100% will be in Wicklow or along the Eastern (M1&M11) corridor from Ashbourne in County Meath to Gorey in north County Wexford. Given the concentration of filming in the East, the need for existing production currently located in alternate spaces to ideally migrate to purpose-built facilities could increase demand further.

Of the seven facilities mentioned in the table below, Tory, Ardmore, Ashford and Tara Studios each have additional land where further phases of development are possible. The other facilities do not currently have capacity beyond the land currently occupied.

Studio	Existing	Planned	Total
Greystones Media Campus	-	360,000	360,000
Troy Studios	103,000	-	103,000
Ardmore Studios	55,000	20,000	75,000
Ashford Studios	80,000	170,000	250,000
Tara Studios	-	150,000	150,000
Ashbourne Studios	-	100,000	100,000
Grangecastle Studios	-	320,000	320,000
<b>Totals</b>	238,000	1,120,000	1,358,000



# Appendix J: Reaching target market for foreign direct investment

The Wicklow Screen Office has a number of routes which they could choose to take to access the international screen market and attract international productions into County Wicklow. These options are outlined below.

## Option 1:

The Wicklow Screen Office could choose to independently travel to international film festivals and studios in the US to promote County Wicklow as a production location for major film and television. To attract key members of the international screen industry to visit the region the Screen Office could offer a tour of the Content Creation Enterprise Hub, from which representatives would visit the studios in County Wicklow and from there move on to see the major locations and scenery that County Wicklow has to offer.

## Option 2:

The Wicklow Screen Office could choose to seek to collaborate with other members of the Irish Screen Industry such as independent production companies. As the independent production companies already have a number of connections internationally which they use to attract the international studios to base their productions in Ireland the Wicklow Screen Office could benefit from the introductions that could be made with major international players in the industry.

## Option 3:

Screen Ireland is another industry member with a number of initiatives to attract international productions to choose Ireland as their location. Screen Ireland already has a US office headed by Steven Davenport with a focus on building relationships with industry executives and promoting Ireland as a production location. As County Wicklow is a concentrated offering of the Irish offering the Wicklow Screen Office could choose to build a relationship with Screen Ireland to utilise their established connections. Screen Ireland could promote the screen tour of County Wicklow to attract the executives to come see the region's offering and enable the Wicklow Screen Office to establish their own relationships.

# Appendix K: Recommendations

## Ranking of Wicklow County Report Recommendations

No.	Detail	Section	Importance	Timeframe	Responsible Party / Stakeholder
1	Partnerships with the studios based in County Wicklow should be strengthened in order to develop a programme of Continuing Professional Development (CPD) and community engagement. Productions located at studios could be leveraged, for example, experienced industry professionals, heads of departments, cast and crew working on productions located at studios could be invited to host masterclass events at the CCEH.	<b>Content Creation Enterprise Hub</b>	High	Short	Hub Manager
2	Professionals with various skillsets, including an anchor tenant, should be approached to locate at the CCEH.	<b>Content Creation Enterprise Hub</b>	High	Short	Hub Manager
3	Workspace needs to be affordable: the organisations interested in locating at the CCEH are primarily micro-organisations, so overheads may be difficult to accommodate when these companies do not have projects in production.	<b>Content Creation Enterprise Hub</b>	High	Short	Hub Manager
4	Ensure that the CCEH has very high speed, reliable internet connectivity.	<b>Content Creation Enterprise Hub</b>	High	Short	Hub Manager / Project team
5	Consider developing a dedicated website and social media pages for the CCEH.	<b>Content Creation Enterprise Hub</b>	High	Short	Hub Manager / Project team
6	Ensure enough storage space is available for creative professional's equipment.	<b>Content Creation Enterprise Hub</b>	High	Short	Hub Manager / Project team
7	Consider having sufficient meeting room space available to use for meetings and writer and producer rooms.	<b>Content Creation Enterprise Hub</b>	High	Short	Hub Manager / Project team
8	Communal spaces such as break-out rooms and good canteen facilities need to be prioritised.	<b>Content Creation Enterprise Hub</b>	High	Short	Hub Manager / Project team
9	Consider making shared resources such as reception, administrative resources, IT support and shared and maintained printing facilities available to professionals located at the CCEH.	<b>Content Creation Enterprise Hub</b>	High	Short	Hub Manager / Project team

10	Consider allocating some space to use as studio space for small shoots such as interviews or product shoots.	<b>Content Creation Enterprise Hub</b>	Medium	Medium	Hub Manager / Project team
11	Consider including basic post-production and live stream facilities such as editing suites, a podcast studio and ADR recording facilities at the CCEH.	<b>Content Creation Enterprise Hub</b>	High	Short	Hub Manager / Project team
12	Consider engaging with Animation Ireland in order to seek to locate Screen Ireland's Talent Development Academy for Animation at the CCEH.	<b>Content Creation Enterprise Hub</b>	High	Short	Hub Manager / Training Coordinator / Animation Ireland
13	Wicklow County Council should consider rebranding the Film Office as Screen Wicklow to reflect a wider range of screen activities and reflect the national Screen Ireland brand.	<b>Screen Wicklow</b>	High	Medium	Screen Officer
14	To provide an online database of locations, crew and facilities/services as a matter of urgent priority.	<b>Screen Wicklow</b>	High	Short	Hub Manager / Screen Officer
15	To provide an online database of locations, crew and facilities should be developed as a priority.	<b>Screen Wicklow</b>	Medium	Short	Hub Manager / Screen Officer
16	To consider appointing a full time Screen Officer to take a more proactive role in growing the film sector in the area.	<b>Screen Wicklow</b>	High	Short	Screen Officer
17	To consider locating Screen Wicklow in the new CCEH.	<b>Screen Wicklow</b>	High	Short	Screen Officer
18	Wicklow County Council should explore the potential for combining the roles of the Screen Officer and the Hub Manager to create synergies across the sector.	<b>Screen Wicklow</b>	High	Short	Hub Manager / Screen Officer / WCC
19	Once established, Screen Wicklow should take a more proactive role in areas such as training and development, possibly in co-ordination with the CCEH.	<b>Screen Wicklow</b>	High	Short	Training Coordinator / Screen Ireland / Educational Bodies
20	Create an explanatory video to present the key strengths of County Wicklow as a preferred location for global productions, as detailed in this section of the report, to be located online on the County Wicklow website. This could coincide with the rebranding to Screen Wicklow referred to in Section 3 of this report.	<b>Foreign Direct Investment</b>	Medium	Medium	Screen Office / Economic Development Team / Screen Ireland
21	Maintain close contact with local Irish producers and studios based in County Wicklow to support them in their efforts to attract foreign direct investment to County Wicklow.	<b>Foreign Direct Investment</b>	High	Medium	Screen Office / Economic Development Team / Independent Producers
22	Screen Wicklow and the CCEH should create an audience development programme to promote film culture to the local community and young people.	<b>Domestic Screen Content Creation</b>	High	Medium	Screen Office / Economic Development Team / Arts Office
23	Screen Wicklow should consider working with IT Carlow, Kildare and Wicklow Education and Training Board and Screen Ireland to develop a local social media presence to promote the screen sector to local communities and to school students to generate interest in working in the screen industry.	<b>Domestic Screen Content Creation</b>	High	Short	Screen Office / Economic Development Team / Arts Office / Training Coordinator

24	Screen Wicklow and the CCEH could work together with Screen Ireland and training providers to develop a programme of Continuous Professional Development (CPD) that takes advantage of the location film work within County Wicklow and neighbouring counties, including County Dublin, and productions filmed in the nearby studios.	<b>Domestic Screen Content Creation</b>	High	Short	Training Coordinator / Screen Ireland / Educational Bodies
25	Screen Wicklow should consider working with productions located in County Wicklow to develop a local social media presence to promote the screen sector to local communities and to school children to generate interest in working in the screen industry.	<b>Domestic Screen Content Creation</b>	High	Short	Screen Office / Economic Development Team / Arts Office / Training Coordinator
26	Screen Wicklow and Content Creation Hub should further develop the Wicklow Film Festival, including the considering the potential for a film production award. Different venues such as the Wicklow Goal, Tramway Blessington and Baltinglass courthouse could be used as potential venues	<b>Domestic Screen Content Creation</b>	Medium	Medium	Screen Office / Arts Office
27	To consider the opportunities which may arise from the potential levy on streaming providers and how the levy can be utilised to promote domestic screen content creation within County Wicklow.	<b>Domestic Screen Content Creation</b>	High	Short	Hub Manager / Screen Office
28	Co-ordination should be improved between the screen and tourism sectors. Screen Wicklow and Wicklow County Tourism should work together to identify the films with the greatest potential for screen tourism.	<b>Screen Tourism</b>	Medium	Medium	Screen Commissioner / Tourism Office
29	Screen Wicklow and Wicklow County Tourism should work together to develop a screen tourism marketing plan. They should then create an action plan and develop resources to promote screen tourism.	<b>Screen Tourism</b>	High	Short	Screen Commissioner / Tourism Office
30	The CCEH should be used as a key strength in attracting existing organisations to provide training and networking related events to local crew in County Wicklow.	<b>Skills Development and Training</b>	High	Short	Hub Manager / Training Coordinator
31	The Hub Manager should maintain close contact with Screen Producers Ireland and Screen Ireland to plan the hosting of information sessions and roundtable events in the CCEH. Screen Producers Ireland and Screen Ireland have wide networks of contacts in the film and television industry and regularly hosts information sessions, roundtable events and training sessions. These resources that are already in place should be utilised as much as possible on a local level.	<b>Skills Development and Training</b>	High	Short	Hub Manager / Training Coordinator / Screen Ireland / Screen Producers Ireland
32	Skills needs will increase as more studios are established in Ireland, therefore, it is important to maintain close contact with production facilities and production companies within the region to assess their skills needs on a continuous basis.	<b>Skills Development and Training</b>	High	Short	Hub Manager / Screen Officer / Training Coordinator
33	Consider approaching heads of department (HODs) working on productions based in Wicklow to jointly host information and roundtable sessions at the CCEH.	<b>Skills Development and Training</b>	High	Short	Hub Manager / Screen Officer / Training Coordinator

34	As higher and further education institutions are open to engaging in relation to practical training and collaborating with the CCEH, consider hosting evening classes at the CCEH, in order to attract students to the CCEH and to provide tenants of the CCEH opportunity to advance their knowledge and skills through evening and other classes. As IT Carlow is located at the Wicklow County Campus, consider collaborating with IT Carlow to host short courses and/or evening classes at the CCEH.	<b>Skills Development and Training</b>	High	Short	Hub manager / Training Coordinator / Enterprise Team / Educational Bodies
35	It is recommend discussing the potential location of the Animation Skills Academy at the CCEH.	<b>Skills Development and Training</b>	High	Short	Hub Manager / Training Coordinator / Animation Ireland