

To investigate the economic impact of the Irish film industry with particular emphasis on the tourism sector.

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The aim of this research study is to investigate the economic impact of the Irish film industry with particular emphasis on the tourism sector. The specific economic impacts that will be focused on in this research study are those which arise from the activities of companies and/or individuals employed in the different stages of film production in Ireland and distribution and/or exhibition of Irish made films. This research will examine the impact of film on tourism locations featured in popular Irish films and/or television series. It will investigate the characteristics of film tourism, as there is a need for a comprehensive investigation of this phenomenon within the Irish context (O'Connor, 2011). It is well established that visits to film(s) and/or television series(s) locations around the world is an emerging phenomenon and there is a growing body of tourism research which seeks to investigate the close relationships between tourism and the popular media (see O'Connor, Flanagan and Gilbert, 2010; O'Connor and Bolan, 2008; O'Connor and Kim, 2013; O'Connor & Macionis, 2011).

Due to a lack of literature on the topic, a two phased approach will be adopted; the first will involve gathering and analysing quantitative data regarding the economic impact of the Irish film industry with particular emphasis on the tourism sector, while the second phase will consist of tourist surveys and semi-structured interviews with the key tourism and film stakeholders behind the Irish film industry; These approaches will supplement one another and each will be successful in attaining the necessary information to satisfy the proposed research objective of identifying the economic impact of the Irish film industry with particular emphasis on the tourism sector. For the purpose of this conference paper, only the first phase will be included in the results. There are different ways which film can impact tourism the most direct being trips to specific sites where films have been shot, and also films are used for promotion (marketing tool). As there are no national figures directly related to film tourism numbers in Ireland, this study will utilise a case study approach to highlight the impact of Irish film and/or television on tourism.

Films can increase visitor numbers and support investment in refurbishing and expansion at specific attractions. Film tourism has been widely discussed in academic literature as mentioned previously. While the growth of research relating to film tourism is widely accepted, film tourism for destination managers is often developed in an ad-hoc, unplanned and opportunistic way without fully understanding the phenomenon. This often, results in difficulty in managing the longer-term sustained film interests and benefiting from film tourism associated activity in destinations.

Keywords: Film, Tourism, Ireland, Economic Impacts.

OBJECTIVES

The aim of this research study is to investigate the economic impact of the Irish film industry with particular emphasis on the tourism sector. The specific economic impacts that will be focused on in this research study are those which arise from the activities of companies and/or individuals employed in the different stages of film production in Ireland (including pre and post production)

and distribution and/or exhibition of Irish made films. The key point to note here concerns the economic activity associated with the distribution and exhibition of non-Irish qualifying films is not included in the definition of the core Irish film industry. This research will only include activity in the distribution and exhibition sectors related to Irish qualifying films. The reason for making this distinction is to focus on the benefits that follow on from having an Irish based film infrastructure industry. This research will examine the impact of film on tourism locations featured in popular Irish films and/or television series. It will investigate the characteristics of film tourism, as there is a need for a comprehensive investigation of this phenomenon within the Irish context (O'Connor, 2011).

It is well established that visits to film(s) and/or television series(s) locations around the world is an emerging phenomenon and there is a growing body of tourism research which seeks to investigate the close relationships between tourism and the popular media (see O'Connor, Flanagan and Gilbert, 2010; O'Connor and Bolan, 2008; O'Connor and Kim, 2013; O'Connor and Macionis, 2011). While the growth of research relating to film tourism is widely accepted, film tourism for destination managers is often developed in an ad-hoc, unplanned and opportunistic way without fully understanding the phenomenon. This often, results in difficulty in managing the longer-term sustained film interests and benefiting from film tourism associated activity in destinations.

The general approach which will be used in the study is, firstly, to present the economic impact associated with activity related to Irish films only (i.e after making suitable adjustments to remove the activity associated with the distribution/exhibition of films made abroad) and then, secondly, to present the figures for the overall activity from the film industry in Ireland. In conducting the study, we have to be mindful of the different elements in the value chain of the film industry. In particular, we use a definition of the film industry which has been commonly used in other studies, surveys and literature, disaggregating the industry into the following three segments;

1. Production Rights; Planning, writing, direction and casting; Cast (e.g. costume, makeup, props sales/rental) ; Location (e.g. stage and studio rental and equipment; location management and catering; set production, electrical skills) ; Film and sound (e.g. equipment rental and sales, camera operations, sound recording and mixing, animation, visual effects) ; Post production including editing, music, sound, and postproduction Computer Generated Imagery (CGI).
2. Distribution: Film duplication; Secondary distribution of Irish made films (video, DVD, TV sales, online etc).
3. Exhibition: cinema projection of Irish made films.

As well as the direct contribution of the core Irish film industry to the economy, there are indirect impacts on employment and output through its procurement and induced impacts from those directly and indirectly employed in the core Irish film industry using their earnings to buy other goods and services. The multiplier impacts also depend on the symbiotic relationship between the film industry and other creative industries and those linkages are examined in this research.

METHODS

Due to a lack of literature on the topic, a two phased approach will be adopted; the first will involve gathering and analysing quantitative data regarding the economic impact of the Irish film industry with particular emphasis on the tourism sector through the use of the study of books, journal articles

and best practice case studies relating to the three main research topics which are as follows; economic impacts, the Irish film industry and the tourism sector, while the second phase will consist of tourist surveys and semi-structured interviews with the key tourism and film stakeholders behind the Irish film industry. The choice of semi-structured interviews was a simple one as it allows for the opportunity to ask particular questions while also allowing participants to talk about what they feel is relevant. These approaches will supplement one another and each will be successful in attaining the necessary information to satisfy the proposed research objective of identifying the economic impact of the Irish film industry with particular emphasis on the tourism sector. There are many channels through which the core Irish film industry makes a contribution to the Irish economy. These contributions include direct (employment and activity in the core Irish film industry), indirect (employment activities supported by the Irish film industry's supply chain, for example jobs supported by the manufacturing of film production equipment, the spending of film crews at hotels) and induced (represents new earning opportunities in the economy and wages are re-spent, which create new income opportunities) economic impacts. It must be pointed out that there are additional economic catalytic impacts which have resulted from the wider role of film such as tourism. Tourism is one of the major contributors to Ireland's gross national product (GDP) (Fáilte Ireland, 2014) and if a destination can profit from tourist activities than it is in the locale's best interest to maximise these benefits.

The Irish film industry indirectly enhances the Irish tourism industry by encouraging international tourists to visit Ireland, and the visitors spend in turn supports a substantial number of jobs in Ireland. The economic value of the direct, indirect and induced effects are related to the total revenues of the Irish film industry while the catalytic accrue benefits to other industries such as tourism. Hence, this study will include secondary and primary research and utilise a mixed method approach.

Masadeh (2012; 135) argues that a mixed method research design holds enormous promise as an antidote to paradigm wars. Using a mixed method research design provides the possibility to tailor the research design specifically to the research question(s). In mixed method research, both quantitative and qualitative research is coalesced within the research design. This combination can occur in various ways which range from simple convergent forms to complicated integrated forms.

For the purpose of this conference paper, only the first phase (quantitative data) will be included in the results. Extensive desk research will be undertaken to quantify the total number of films produced annually (has this number increased/decreased in the last five years). Secondary data requires the researcher to consult with sources that are already available. Kolin (2012; 353) maintains that secondary research involves gathering documents and readings, summarising and incorporating information. Secondary data can include raw data and published data which when analysed can provide additional knowledge (Bulmer, Sturgis and Allum, 2009). To assess the direct impacts of the core Irish film industry, there will be a particular emphasis on employment and gross domestic product or GDP. The amount of money related to Irish made films and earnings in the Irish box office will be assessed. Furthermore there will be an analysis of the number of people employed in the Irish film industry and how much this has contributed to the GDP. The standard method for calculating the direct contribution of an industry is to measure the gross value added, this is the difference between pre revenue and bought in costs. Direct investment in the industry will also be examined, to see if there are any large scale capital investment projects or schemes. Multipliers and linkages with other creative industries will be assessed by discussing the multiplier impacts of the Irish film industry and quantifying the results (applying a multiplier to the extrapolated direct impacts from the desk research). Hence, these figures will represent the direct/indirect/induced

impacts associated with the Irish film industry including employment and GDP. The linkages between the core Irish film industry and other creative industries will be examined, this multi sector involvements means that fixed costs of infrastructure are shared, desk research will be used and also primary research in the form of semi-structured interviews with key shareholders involved in the Irish film industry and tourist surveys will be conducted. There are different ways which film can impact tourism the most direct being trips to specific sites where films have been shot, and also films are used for promotion (marketing tool). As there are no national figures directly related to film tourism numbers in Ireland, this study will utilise a case study approach to highlight the impact of Irish film and/or television on tourism.

LITERATURE REVIEW

While there is a marked lack of literature of the topic of the economic impacts of the Irish film industry with particular emphasis on the tourism sector that is not to say that there is none. The purpose of this section is to share some of the literature that has been examined on the research question; to investigate the economic impacts of the core Irish film industry with particular emphasis on the tourism sector. A large part of the literature that has been looked at so far has been focused on defining the core Irish film industry, to outline exactly what the film industry is, how it effects the Irish economy and to accurately comprehend what film-induced tourism is and its position in the tourism industry of Ireland.

As previously stated the film industry is traditionally broken down into three distinct sections; production rights, distribution and exhibition. The purpose of this research is to examine the economic impacts, both positive and negative, at each stage and then to study the overall impact of the film industry on the tourism sector.

The three main tourism impacts are as follows; economic, socio-cultural and environmental. The focus of this research projects is on economic impacts which are commonly defined as being related to employment, outflow, investments, imports and revenue and is generally further broken down into three categories; direct, indirect and induced (Archer, 1977).

Direct economic impacts of the Irish film industry are those which are immediately related to the film/TV show being filmed in the area e.g. the cast and crew spending money in the area or the hiring of extras from the locale.

Indirect impacts, as previously stated, include the employment activities supported by the Irish film industry's supply chain, for example jobs supported by the manufacturing of film production equipment.

The final economic impact being looked at in the research project are induced impacts. Induced impacts represent new earning opportunities in the economy created by the film industry. Wages of film crew and cast are re-spent, which create new income opportunities.

Economic impacts can be further broken down into whether they are positive for the economy or negative. Examples of positive economic impacts can include; job opportunities, investment in facilities for the area and can help entice investment in the locale (Jamal and Robinson; 2009). While

negative impacts can be seen in inflation in the cost of living, housing and land prices increasing and in terms of tourism, the creation of seasonal jobs (Hall, Roberts and Mitchell ; 2004).

Film tourism or film-induced tourism is the term given to on-site tourism that usually follows the success of a film or show made in or supposedly about a particular area (Beeton, 2005; 9). The advantage of the term “film-induced” tourism is that it covers not only movies but also TV shows, short videos and any number of other popular film terms. In more recent years film and filming has become a highly popular method of showcasing an area with short clips being the most accessible to the public as they do not require much more than a camera. Film-induced tourism is still a fairly recent occurrence and the lasting effects of this particular branch of tourism are not yet known (O’Connor, 2011). It is the hope of this research project to explore some of the possible economic impacts of the Irish film industry and the resulting tourism sensation.

Film tourism has also been described as “the business of attracting visitors through the portrayal of the place or a place’s storylines in film, video and television” (Scottish Tourist Board, 1997; 1) and for the purpose of this research project on the economic impacts of the core Irish film industry this is, perhaps, the definition that will be used as it alludes to film tourism being an economic area that can be exploited and developed further. The appearance of mass tourism in the 1970s along with the development of the blockbuster movie helped with the creation of film-induced tourism (Roesch, 2009). However, Ireland’s film history began much earlier than that.

Ireland has an extraordinary reputation for filmmaking (Volta.ie, 2012). The Irish film going audience is among the highest in the world and for such a small nation we have succeeded in producing vast numbers of world renowned actors, directors, designers and many others (Volta.ie, 2012). As far back as the silent film era of the late 1800’s and early 1900’s Ireland has been a platform of filmmaking and had a cinema culture with the first public showing of films beginning on April 20th 1896 in what is now known as the Olympia Theatre (Tracy, 2007). While the Irish film industry’s history has not always been a smooth one it can be broken down into the following three categories (Tracy, 2007);

- Early cinema (1910- 1975): Films are mostly made by foreign directors working alongside Irish producers.
- Indigenous filmmaking (Late 1970s – 1990): Seeing the rise of films by Irish directors.
- Contemporary cinema (Late 1980s – present): The beginning of Irish Oscar success and the return of the Irish Film Board.

At this stage a link must be made between the film industry and its economic contribution and the importance of film production to a destination. It is quite common for governments to entice film production to an area with the use of tax breaks and other economic incentives as the positives for the destination will outweigh the financial breaks given to the film industry (Glen Croy, 2011). The production, distribution, promotion etc. of the film/TV show costs an area very little but does come with considerable benefits.

However, for a destination to increase its chances of promoting film production in its area it is in its best interests to examine how, with proper planning, a locale can best sustain film production and, with proper strategies in place, said destination can best manage and sustain the resulting film-induced tourism (O’Connor, 2011).

RESULTS

The final stage of the market research will be the presentation of the overall research findings in relation to the research objectives which are as previously mentioned, to investigate the economic impacts of the core Irish film industry with particular emphasis on the tourism sector. It will provide the following;

- Information in response to this research study's objective outlined;
- A comprehensive description of the research methodology, sample selection and size;
- Detailed overview of the market demographics and characteristics;
- Valid, reliable and generalizable results;
- Graphical illustrations of results as well as a detailed explanation of results, in particular those not expected from the market, in the form of a fully comprehensive research report.

This research is ongoing.

CONCLUSIONS

Films can increase visitor numbers and support investment in refurbishing and expansion at specific attractions. Film tourism has been widely discussed in academic literature as mentioned previously. While the growth of research relating to film tourism is widely accepted, film tourism for destination managers is often developed in an ad-hoc, unplanned and opportunistic way without fully understanding the phenomenon. This often, results in difficulty in managing the longer-term sustained film interests and benefiting from film tourism associated activity in destinations. The growing role of the destination image in film much be emphasised as this can clearly be seen to effect the tourist demands on an area (Glen Croy, 2011). It is thought that with proper planning and sustainable marketing strategies the economic impacts of the Irish film industry and its resulting tourism can be maximised to full capacity for both the film industry and the destination. It is the aim of this research project to provide tangible, economic evidence that will help to support the necessity of the creation of marketing strategies so that Ireland, as a whole, can benefit from the film industry. This research also intends to identify the demographics and characteristics of the Irish film market and this will aid to the marketing strategies.

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