



ECONOMIC IMPACT OF *RETURN TO LAS SABINAS* IN SPAIN

**A REPORT FOR THE MOTION
PICTURE ASSOCIATION**

AUGUST 2024



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EXECUTIVE SUMMARY

Return to Las Sabinas is a show about two sisters who return to their hometown of Manterana after many years apart, summoned by their father's health problems. The show is made up of 70 episodes, released daily on Disney+.

The filming and production of the show generated considerable economic activity across Spain, as business spending occurred all across the country, with the highest concentration in Catalonia. The show's production also supported activity in a wide range of industries through its procurement, and through local spending of Spanish residents employed by the production and its supply chain.

This study, commissioned by the Motion Picture Association (MPA), focuses on the production of the show and analyzes its total economic impact in Spain in 2023 and 2024.¹ The study also considers the wider impact on boosting the Spanish economy, such as increasing film-induced tourism. Similar production budgets and spending patterns across Spain are likely to produce similar economic impact results as those presented in this study.

During 2023–2024, the **production of *Return to Las Sabinas* resulted in total spending in Spain of approximately €12.2 million**. Around €6.5 million (53%) was spent on wages and salaries paid to local production crew and other labor. The production spent the remaining €5.7 million (47%) with around 1,000 local businesses supplying goods and services.

Oxford Economics estimates that the ***Return to Las Sabinas* production expenditures stimulated a €17.1 million contribution to Spain's GDP in 2023–2024**. We find that for every €1 million that the production's own activities contributed to the economy, it supported a further €1.6 million along its supply chain and through the payment of wages.

We find that the expenditure undertaken by **the show's production stimulated a total of 530 full-time and part-time jobs across Spain in 2023–2024**. For every 100 people the production directly employed, its expenditure stimulated another 37 jobs across the country.

Finally, the production of the show is estimated to have benefitted from just under €3.0 million in tax incentives according to Disney. This translates to €5.8 in GDP for every €1 of tax incentives received by the production.

€17.1m

Total contribution to Spain's GDP supported by *Return to Las Sabinas*

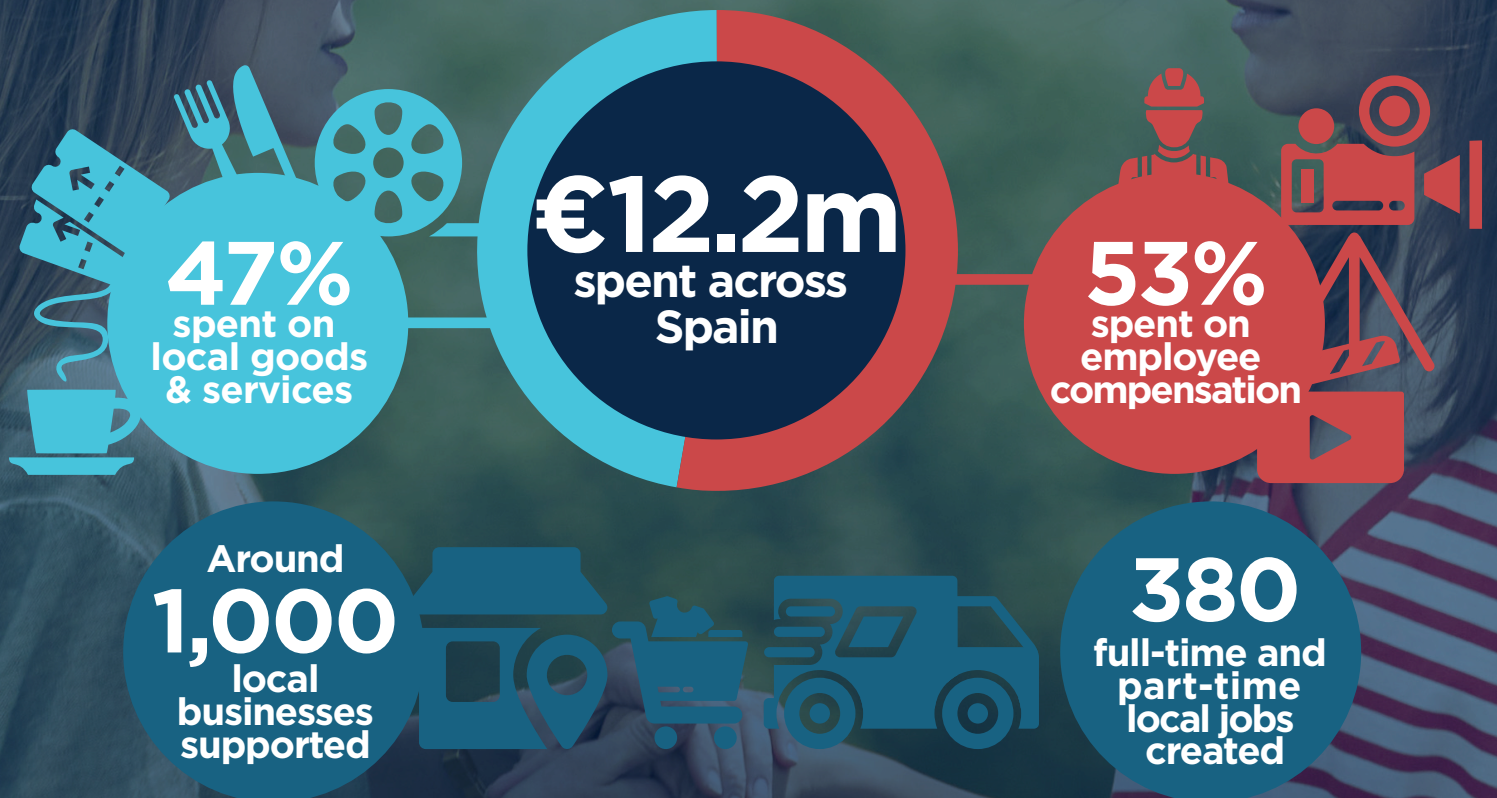
530

Total full-time and part-time jobs supported across Spain as a result of *Return to Las Sabinas*

¹ Throughout the report, the economic impacts are presented in 2023 prices. Filming took place from April through October 2023, while postproduction is expected to finish in August 2024.

THE ECONOMIC IMPACT OF RETURN TO LAS SABINAS IN SPAIN

DIRECT IMPACT OF PRODUCTION



TOTAL IMPACT OF PRODUCTION



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1. INTRODUCTION

Return to Las Sabinas is a 70-episode show commissioned by Disney+ in collaboration with Diagonal TV. In *Return to Las Sabinas*, after many years apart, the Molina sisters receive a call that makes them return to their hometown, Manterana, to attend to their father's unexpected health problems.

The show's filming occurred across Spain from April through October 2023, and at the time of writing this report, the post-production phase was still ongoing. The TV series is expected to be ready for an October 2024 premiere on Disney+.

The Motion Picture Association commissioned Oxford Economics to conduct an independent economic impact assessment of the production of *Return to Las Sabinas* on Spain's economy during the production period. For the study, Oxford Economics used spending data provided by Disney to estimate the economic impacts arising from the production of the show.

Similar production budgets and spending patterns across Spain are likely to produce similar economic impact results as those presented in this study.



2. PRODUCTION SPENDING

Local TV series productions create jobs, revenue, and related infrastructure development. The physical productions provide an immediate boost to the local economy, fostering job creation and economic activity in other industries across the production supply chain. In 2023–2024, *Return to Las Sabinas*’ production **spent approximately €12.2 million across Spain.**

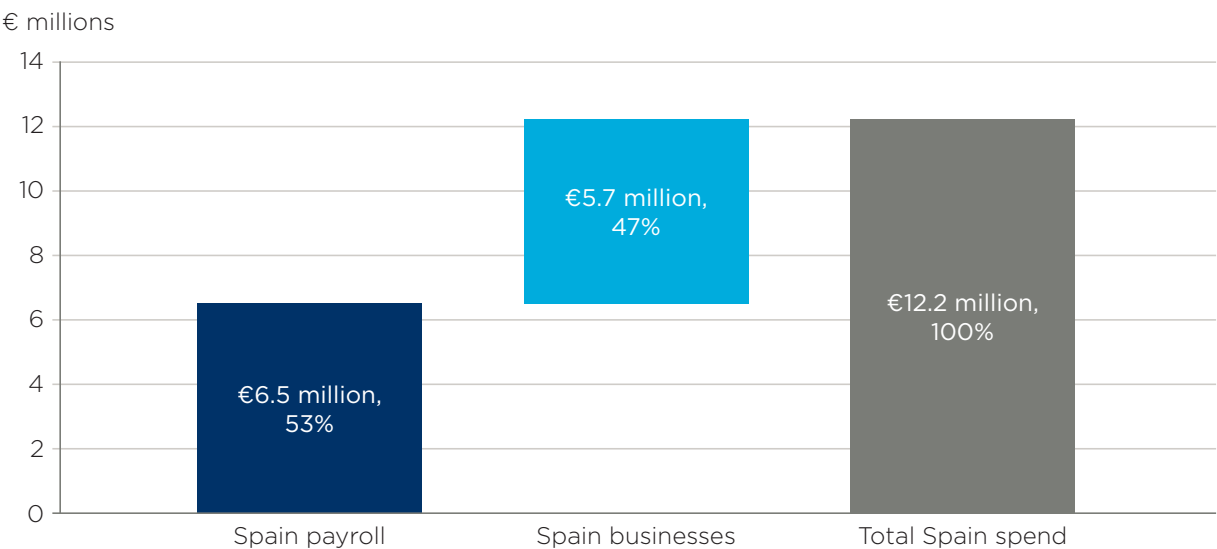
Wage and salary compensation for local production crew and other labor made up 53% of the total expenditure at €6.5 million (see Fig. 1). Spending with local vendors of goods and services made up the remaining 47%, or €5.7 million.

€12.2m

Total production expenditure in Spain

Spending on production crew and qualifying labor was €6.5 million, while spending with local vendors on goods and services was €5.7 million.

Fig. 1: Production spending of *Return to Las Sabinas* in Spain, by type



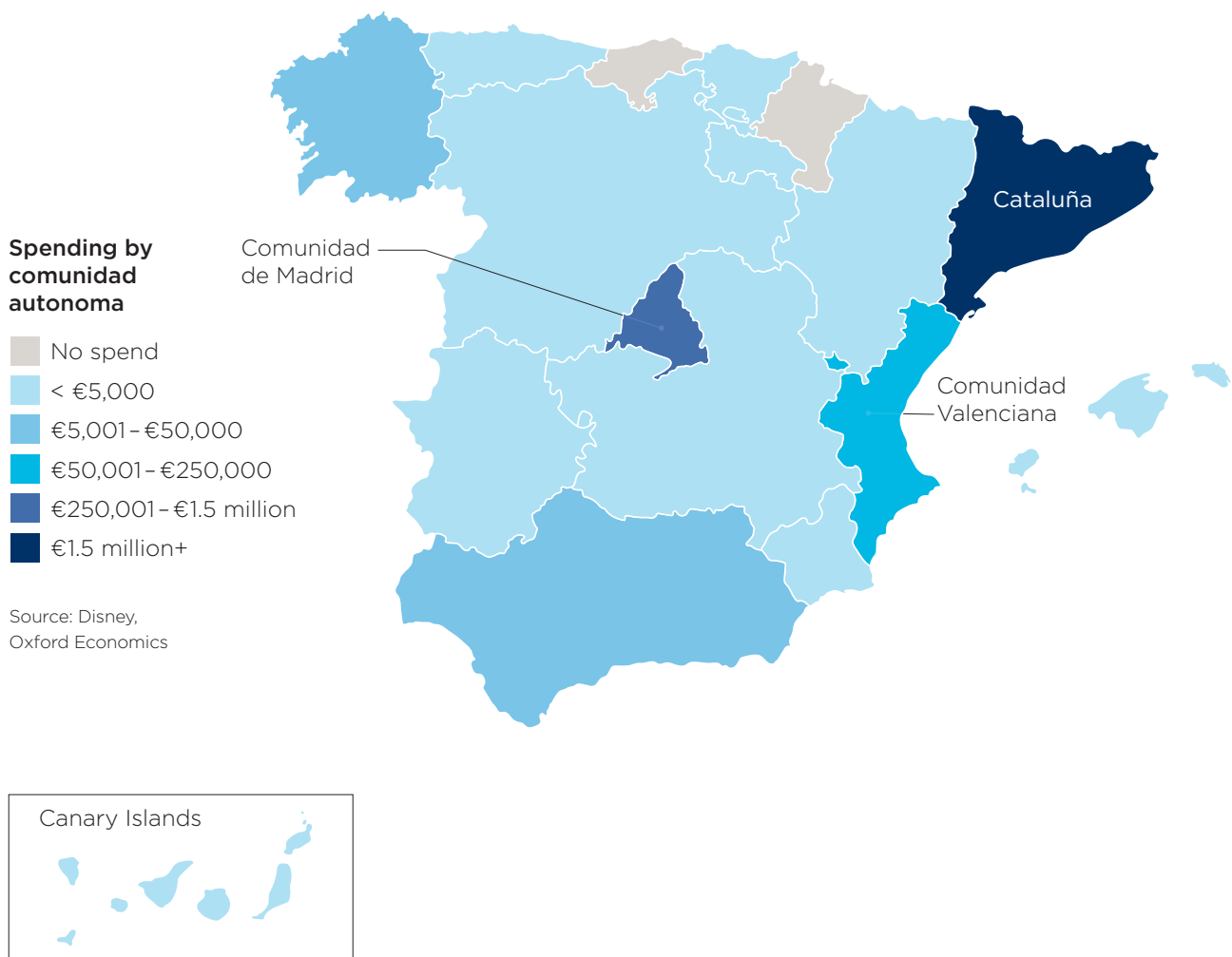
Source: Disney, Oxford Economics

2.1 BUSINESS SPENDING

Production spending engaged around 1,000 businesses across the country. Business spending occurred across nearly all of the autonomous

regions in Spain, predominantly along the east coast. The highest concentration was in Catalonia, with €4.1 million in spending. Fig. 2 below shows the distribution of business spending across the country.

Fig. 2: Map of spending with Spanish businesses by region

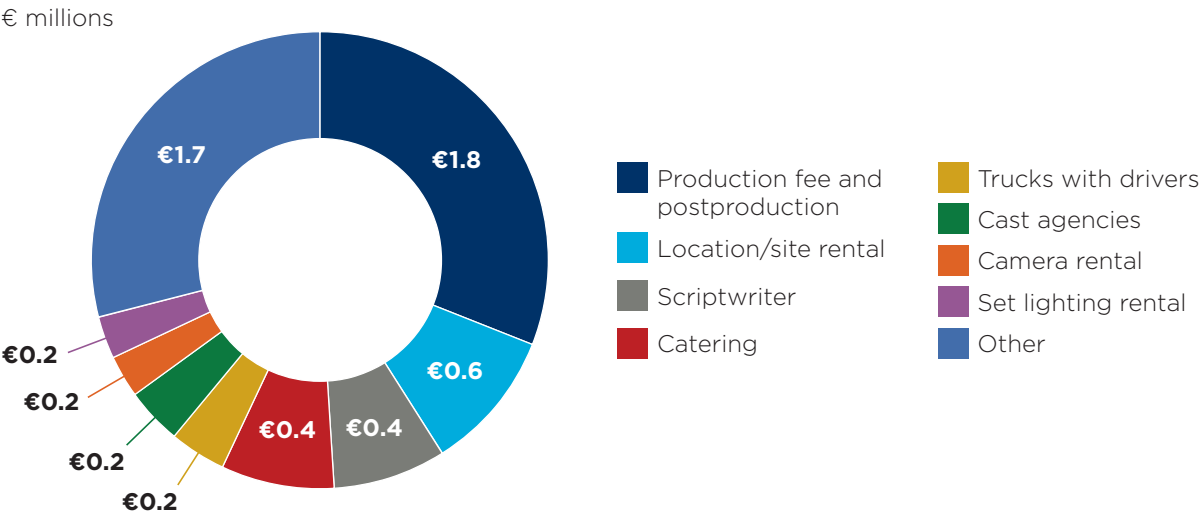


TV show productions typically rely on a wide range of goods and services, engaging multiple local businesses across numerous industries (see Fig. 3). The production fee and postproduction expenses comprised the

largest category of spending for *Return to Las Sabinas*—representing 31% of the budget. The second largest category of spending, with €0.6 million, was spent towards location costs and site rental. Some €0.4 million

went towards scriptwriters and €0.4 million towards catering. Other categories of spending included renting trucks with drivers, cast agencies, camera rental, and set lighting rental.

Fig. 3: Spending on goods and services in Spain, by item



Source: Disney

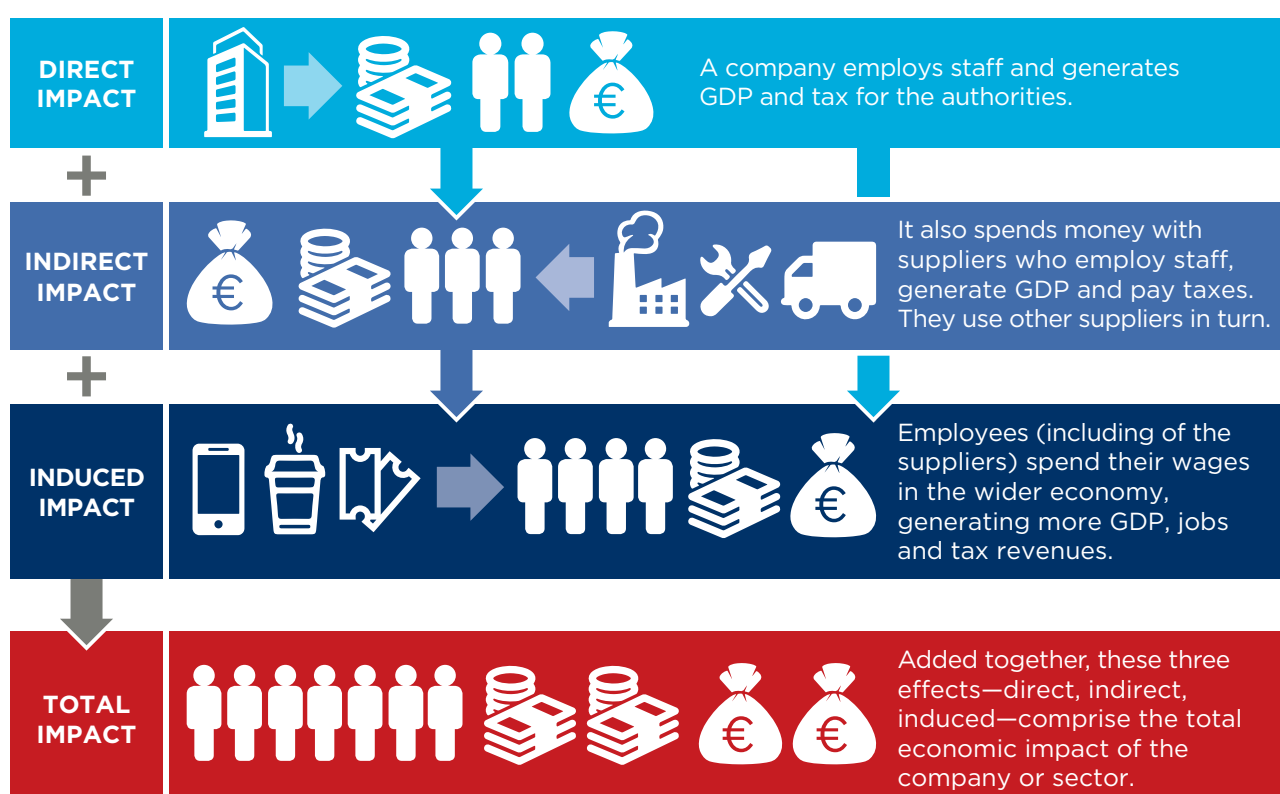


3. ECONOMIC IMPACTS

3.1 CHANNELS OF IMPACT

The impact of filming the *Return to Las Sabinas* on Spain's economy is calculated using an economic impact

assessment. This involves quantifying the production's economic contribution across three channels of expenditure, where the total impact is the sum of the three channels.



Source: Oxford Economics

3.2 TOTAL IMPACT

Combining all channels of impact, we find that *Return to Las Sabinas* supported €17.1 million towards Spain's GDP during the production period. Approximately

€6.5 million, or 38%, of this was generated by the production itself (direct). The local spending on goods and services supported another €5.0 million along the supply chain (indirect), which represented 29% of the

total.² The spending of wages of local residents stimulated a €5.6 million contribution to GDP (induced), or 33% (Fig. 4).

For *Return to Las Sabinas*, for every €1 million in direct

² While production spending with Spain based vendors totals approximately €5.7 million, these local vendors may spend some part of this with companies outside of the country, resulting in an estimated impact of €5.0 million.

€17.1m

Total contribution to
Spain's GDP supported by
Return to Las Sabinas

GDP generated by the production's own activities, it supported a further €1.6 million across Spain.³

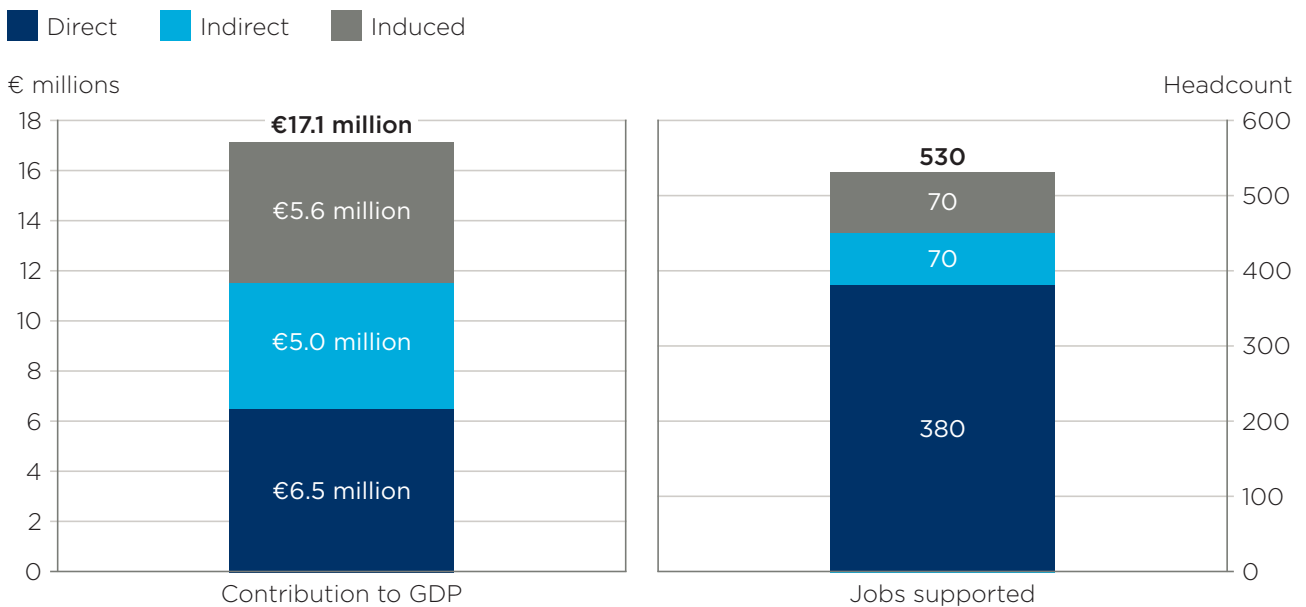
The production also had a significant impact on employment in the country. In 2023–2024, *Return to Las Sabinas* supported 530 full-time and part-time workers across Spain. The TV series production directly employed 380 full-time and part-time Spain-based workers, or 73% of the total. Local spending on goods and services supported another 70 jobs along the supply chain, or 14% of the total. Spending

of wages across the country by local production crews and by employees of the show's suppliers supported a further 70 jobs, or 13% of the total.

For every 100 people the production directly employed, a further 37 jobs were supported across the country through secondary effects.⁴

According to Disney estimates, *Return to Las Sabinas* benefitted from just under €3.0 million in tax incentives. This translates to €5.8 in GDP for every €1 of tax incentives received by the production.

Fig. 4: GDP and employment contribution supported by *Return to Las Sabinas* in Spain by channel of impact



Totals may not sum due to rounding.

Source: Oxford Economics

³ This GDP multiplier effect is calculated by dividing the total impact (€17.1 million) by the direct impact (€6.5 million) and subtracting 1.

⁴ This employment multiplier effect is calculated by dividing the total employment impact (530) by the direct employment impact (380) and subtracting 1. While the employment figures presented in this report are rounded, all calculations are based on the actual figures.

The remainder of this section describes the three channels of impact in more detail.

3.3 DIRECT IMPACT

During the production period, *Return to Las Sabinas* directly employed around 380 full-time and part-time Spain-based workers across the country. The vast majority of these workers

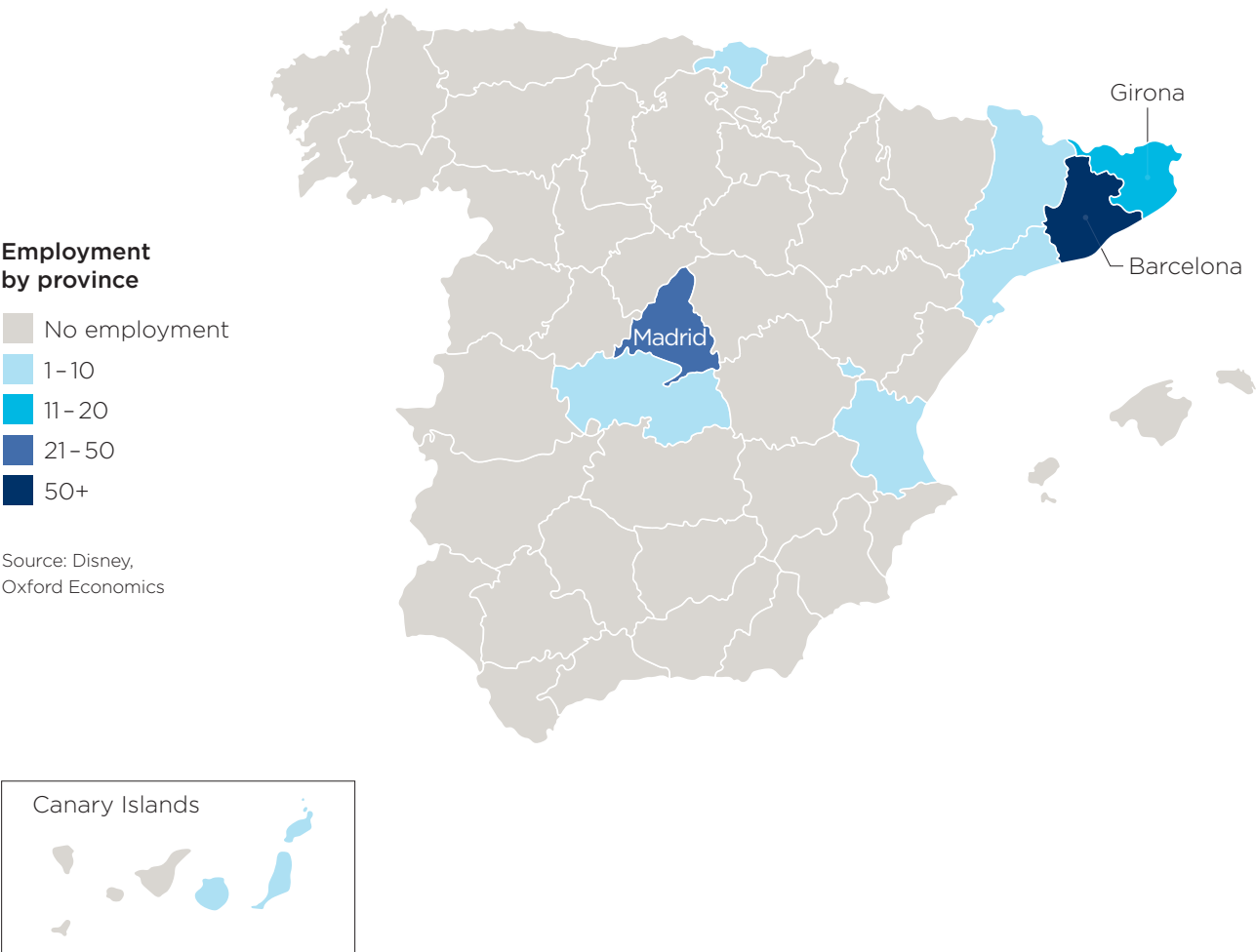
lived in Catalonia, especially in Barcelona. Madrid-based workers also made up a large share of the total.

We estimate that the production of *Return to Las Sabinas* made a €6.5 million direct contribution to the country's GDP in 2023–2024, which came from the payment of employee compensation to locally based staff.⁵

530

Full-time and part-time jobs supported across Spain as a result of *Return to Las Sabinas*

Fig. 5: Map of production workers by residence in Spain



⁵ The contribution to GDP generated by a company or a project can be calculated as the sum of its surplus (profits) and employee compensation. This approach, known as the income approach, is consistent with the principles of national accounting. For the purposes of this study, we take a conservative approach to this calculation and focus on the employee compensation of local workers, excluding the profits associated with the production in our calculation of direct contribution to Spain's GDP.

3.4 INDIRECT IMPACT

The production's positive contribution to the country's economy, however, extends past the contribution it makes directly through its own operations. This is related to the purchases of goods and services made from other firms in order to produce the show. This spending stimulates additional economic activity along the supply chain. This is referred to as the *indirect* impact.

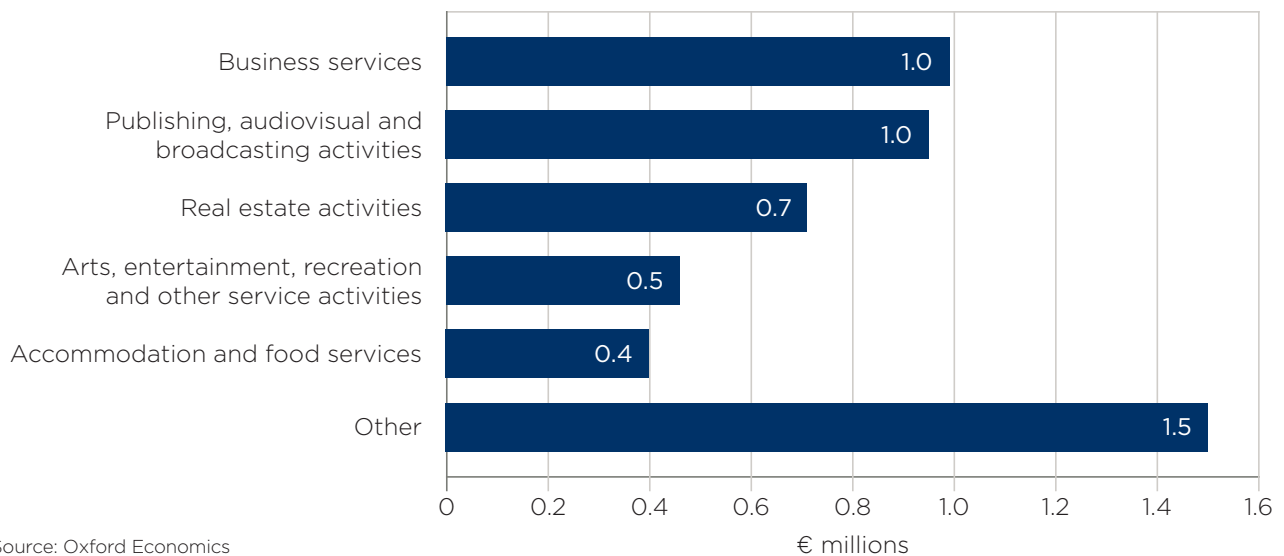
We estimate that the procurement associated with *Return to Las Sabinas* stimulated a €5.0 million contribution to Spain's GDP along the domestic supply chain.

Business services, which includes rental services such as camera, set lighting, and generator rentals, received nearly 20% of the indirect impact. Publishing, audiovisual and broadcasting services constituted around 19% of

the indirect impact, reflecting the large amounts spent on production fees and picture postproduction. Real estate activities made up 14% of this impact, primarily as a result of location and site rental.

The show's expenditure on inputs of goods and services from locally based suppliers stimulated 70 full-time and part-time jobs across Spain.

Fig. 6: GDP contribution stimulated by the procurement of goods and services from local suppliers, by industry



Source: Oxford Economics

3.5 INDUCED IMPACT

During the production period, local labor received €6.5 million in employee compensation. In addition to this, the people whose jobs are stimulated by local spending on goods and services also received additional wages and salaries.

Production crews, and workers employed throughout the supply chain spend a

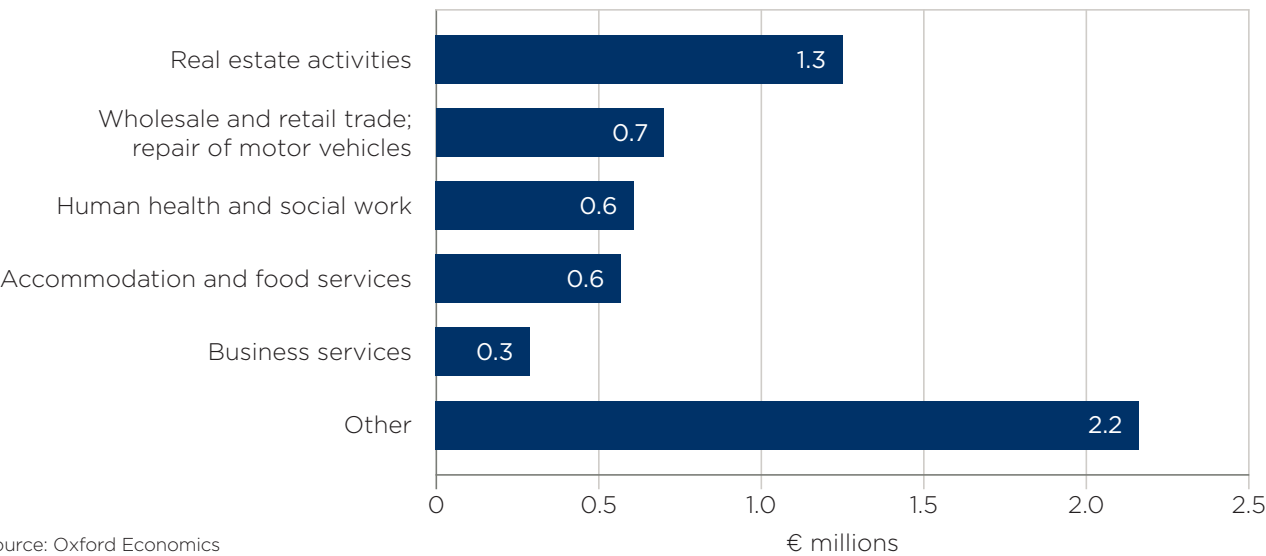
proportion of their wages at retail, leisure, and other outlets across the country. This stimulates economic activity and employment at these firms, but also along their supply chains. This is referred to as the show's *induced* impact.

We estimate the wage-financed spending of local production crews and workers at locally based suppliers stimulated €5.6 million toward Spain's

GDP during the production period. Many of the businesses that benefited from the induced channel of impact were part of the real estate, retail, and healthcare industries (Fig. 7).

We estimate the wage financed consumer spending of local production crews and workers within the show's supply chain supported 70 full-time and part-time jobs across Spain in 2023-2024.

Fig. 7: GDP contribution stimulated by the payment of wages to locally based workers, by industry



Source: Oxford Economics



4. WIDER IMPACTS

In addition to the economic impacts that arise through production spending, television series such as *Return to Las Sabinas* can produce impacts that extend beyond the jobs and GDP they support.

As it is often the case when localities are used as filming locations, the villages in Catalonia that were used as backdrop for the show may start attracting visitors and fans of the show as a result of the filming. Film induced tourism is a well-known phenomenon and it has increasingly been viewed as an important component of tourism marketing.⁶

While Spain enjoys a long tradition of attracting international productions, local policymakers have been facilitating the growth of the industry through investments and tax credits. Spain offers tax incentives for international shoots in the form of a tax rebate of up to 30%.⁷

The attraction of large-scale projects such as *Return to Las Sabinas* helps to

further develop the already growing film industry in the country. Thanks to these projects, local filmmakers, actors, and other industry workers find themselves with opportunities to work alongside experienced professionals, while investment in the industry also encourages further advancement opportunities for local talent. Catalan locations have been chosen as filming locations by many streaming platform productions, like *Bird Box Barcelona*, *Awareness*, and *The Crown*.

While we have not measured the wider impacts of the production of *Return to Las Sabinas* in this study, it is worth observing that film and TV productions can also create additional economic, community, and social benefits. These may comprise the creation of job openings for apprentices or students, the development of business ventures, the formation of spin-off firms, and contributions to community and culture.

⁶ See for example, Jeeyeon Hahm & Youcheng Wang (2011) Film-Induced Tourism as a Vehicle For Destination Marketing: Is it Worth the Efforts?, *Journal of Travel & Tourism Marketing*, 28:2, 165-179 or Beeton, Sue. "Understanding film-induced tourism." *Tourism analysis* 11, no. 3 (2006): 181-188.

⁷ In the Canary Islands tax credit is 50%, and Navarre offers 35% via tax credit.



APPENDIX: METHODOLOGY

The impact of the filming of *Return to Las Sabinas* on Spain's economy is calculated using an economic impact assessment. This involves quantifying the production's economic contribution to the country across three channels of expenditure. The channels of impact are:

- **Direct impact** relates to the employment and economic activity generated at the filming locations across Spain.
- **Indirect impact** captures the economic activity stimulated by the procurement of inputs of goods and services from the locally based supply chain.
- **Induced impact** comprises the wider economic benefits that arise from the payment of wages by the television series, and the firms in its local supply chains, to staff who spend a proportion of this income in local retail, leisure, and other outlets.

The total impact is the sum of the three channels. This enables us to build a picture of the series' overall contribution to the country across two key metrics:

- The gross value-added contribution to Spain's GDP.⁸
- Employment, measured on a headcount basis.

The results are presented on a gross basis, ignoring any displacement of activity from other firms or activities. The results do not consider what the resources currently used by the show's production, or stimulated by its expenditure, could alternatively produce in their second most productive usage. Additionally, the results also exclude economic activity generated outside Spain, employment of non-resident workers, and spending with suppliers located outside the country.

Data on the direct impact of *Return to Las Sabinas*—including the show's contribution to GDP and jobs created—were provided directly by Disney. Direct GDP contribution in the country is taken to be equal to local employee compensation.

To estimate the indirect and induced GDP impacts of the show, Oxford Economics used Spain's input-output table as included in the OECD's Inter-Country Input-Output tables, which forms the basis of Oxford Economics' proprietary Global Economic Impact Model.⁹ A basic domestic input-output table gives a snapshot of an economy at a given point in time. The model shows the major spending flows from "final demand" (i.e., consumer spending, government spending, investment, and exports to the rest of the world); intermediate spending patterns (i.e., what each sector buys from every other sector—the supply chain in other words); how much of that spending stays within the domestic/provincial economy; and the distribution of income between employment income and other income (mainly profits). In essence, an input-output table shows who buys what from whom in the economy.

As input for the analysis, we used the amount spent by type of goods and services purchased from Spain-based businesses over the course of the production period. In order to calculate the induced impact, we took the figures for wages paid to workers, as provided by Disney, and allocated those to the sectors where they would have spent those wages in line with the proportions in the Spanish input-output table. We then used those figures to show how many euros of GDP the show's production supported in the Spanish economy for every €1 of direct GDP contribution; and how many jobs were stimulated across the country for each 100 people directly employed on the production.

⁸ Where GDP is the main indicator of economic activity in the country. It is used to measure the rate of growth or decline of the economy, and when it enters a recession.

⁹ OECD, [Inter-Country Input-Output tables](#).

ABOUT OXFORD ECONOMICS

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August 2024

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