

January 2026. Sector snapshot

The audiovisual sector in Catalonia

The audiovisual industry in Catalonia

ACCIÓ
Government of Catalonia



The contents of this document are subject to a Creative Commons license. Unless otherwise indicated, reproduction, distribution and public communication are permitted as long as the author is cited, no commercial use is made and derivative works are not distributed. A summary of the license terms and conditions can be found at:

<https://creativecommons.org/licenses/by-nc-nd/4.0/>.

The use of brands and logos in this report is merely informative. The above-mentioned brands and logos belong to their respective owners and are not owned by ACCIÓ in any way. This is a partial illustrative representation of the companies, organizations and entities that form part of the audiovisual ecosystem. There may be companies, organizations, and entities that have not been included within the study.

Carried out by

Strategy and Competitive Intelligence Unit of ACCIÓ

Collaboration

Audiovisual Cluster of Catalonia

Catalan Institute of Cultural Enterprises

Barcelona, January 2026

Table of contents

1. Executive summary

2. Overview of the audiovisual sector

3. The audiovisual sector in Catalonia

3.1. Key data from the audiovisual sector in Catalonia

3.2. A leading hub for audiovisual production

3.3. Catalonia, an international benchmark in talent and creativity

3.4. International reach of the Catalan audiovisual sector

4. The 10 technological trends in the audiovisual sector



The audiovisual sector in Catalonia

1. Executive summary

The audiovisual sector, an expanding market undergoing technological transformation

5

Foreign investment and advertising initiatives consolidate a global market of \$3 trillion

- Global turnover reached **\$3 trillion** in 2024, with a **significant share of advertising spending**, itself growing at 6.1% annually. AI is a major influencing factor.
- The **USA** is the leading market in the sector, followed by **China. India, Indonesia and Saudi Arabia** are the countries with the fastest growth.
- Between 2021 and 2025, the **FDI in audiovisual** has created more than 4,300 projects, €57 billion in investment and 320,000 jobs. The USA is the main investor and target country.

Digital formats and virtual reality lead growth in the face of the consolidation of cinema and radio

- The **video game industry** is the segment with the highest turnover and fastest growth. It is consolidating ahead of cinema and music, with a turnover that will reach \$300 billion in 2029.
- The **video, TV and streaming** market will reach a global business volume of \$319 billion in 2029.
- **Cinema box offices** have definitively overcome the pandemic slump and will generate total revenue of \$48.4 billion worldwide.
- **Virtual reality** is at the head of the percent growth in the sector, at 10.3%. It will reach \$4.1 billion of turnover in 2028.
- The **podcast** format is bolstering the sector with sustained annual growth of 5.6%, which compensates for the stagnation of radio.

The 10 technology trends of 2026 arranged in 4 key pillars

- Audiovisual is being transformed by new technologies, while maintaining the focus on sustainability.
- The rise of the experience economy comes alongside a proliferation of immersive and interactive installations.
- The applications of audiovisual solutions will move beyond broadcast and will even reach smart spaces.
- Digital signage will evolve with new technologies, such as AI and IoT, towards an era of more active participation.

Note: FDI "Foreign Direct Investment" hereinafter. Source: ACCIÓ, based on PwC's "Global Entertainment and Media Outlook 2025-2029", ISE website and press

Catalonia has established itself as a high-value hub of growth in the audiovisual sector



A sector with a consolidated history and a strong presence in Catalonia

- There are **4,457 companies** in the audiovisual sector in Catalonia, with a **turnover of €9.120 billion (2.9% of GDP)** and **44,986 employees**.
- There have been **significant annual increases** in the number of companies (↑7.1%), business volume (↑5.6%) and employment (↑7.5%).
- Value generation is mainly concentrated in **audiovisual development and production**, which are the source of more than half of the sector's total turnover.
- The sector is showing growing dynamism in emerging subsectors such as video games and immersive experiences.
- The **presence of large audiovisual companies** strengthens Catalonia as a benchmark across Spain and Europe more broadly.
- The **province of Barcelona** is the audiovisual hub of Catalonia, home to 87% of companies.

A strategic location that stays in the spotlight of global audiovisual investment

- With **76 FDI projects in the audiovisual sector, €383 million invested and 3,895 jobs created** in the 2021-2025 five-year period, Catalonia offers a solid and competitive base for international investors.
- In the five-year period between 2021-2025, Catalonia has been the **world's 8th largest destination region for FDI in audiovisual** (by number of projects).
- Likewise, Catalonia is the **EU's 2nd largest region** in terms of jobs created from audiovisual FDI and 3rd in number of projects.
- Leading companies such as **Scopely, IO Interactive** and **Giant Animation** have made investments in Catalonia in the 2021-2025 period.

An established ecosystem and an environment where talent flourishes: key assets for the sector in Catalonia

A robust and innovative ecosystem that drives the growth of the sector in Catalonia

- The **Audiovisual Cluster**, plus other business associations and public entities such as the **ICEC**, the Parc Audiovisual de Catalunya and Barcelona XRLAB are the backbone of the sector in Catalonia.
- Catalonia has an **outstanding network of technology transfer agents** that support the audiovisual sector.
- **Big technology companies** like Dolby, Amazon and Apple have research teams in Catalonia.
- The audiovisual industry gathers annually in Barcelona for ISE, **Europe's most important fair in the sector. Between 2021 and 2024, audiovisual companies in Catalonia have had turnover of €4,273 million more than expected, partly thanks to the entry of ISE**
- Catalunya Media City cements Catalonia as an internationally renowned **audiovisual, digital and video game hub**.

A hub of local and international talent that flourishes in a highly creative environment

- Catalonia has historically been a **cradle of talent** and has been the home of prominent names in the world of cinema, television and music.
- Barcelona is the **11th city in the EU for creative and knowledge-based jobs**, according to the European Commission.
- During the 2024-2025 academic year, **Catalonia welcomed 21% of students enrolled in audiovisual master's and bachelor's degrees** in Spain.
- There are **65 schools associated with the audiovisual sector** in Catalonia, including ESCAC and FX Barcelona Film School.
- Talent is a **key asset for international companies** who choose Barcelona as the destination for their investments.

“Barcelona is a city with a strong artistic atmosphere and an excellent set of design talent, which offers ideal conditions for the development of the video game sector”. Ou Ya Head of Strategy and Investment, Lilith Games.

“Our new European centre will open the doors to multicultural learning in one of the most creative cities in Europe”. Claude Marchand, President and CEO, LCI Education.

The audiovisual sector in Catalonia

2. Overview of the audiovisual sector



The audiovisual sector in the world (I)

The Audiovisual sector is the communicative medium that combines images and sounds to convey information, emotions, or narratives. It includes all types of content that use both visual elements (still or moving images) and sound (voice, music, sound effects), with the aim of informing, educating, entertaining, or expressing an artistic form.

With digital maturity and the integration of generative AI, the industry is entering a new phase of sustained growth and is expected to exceed \$3.5 trillion by 2029. The current great transformation, however, is the change in economic engine: the model is moving away from sole dependence on subscriptions.

According to the latest global projections, advertising has become the main driver in the sector and is growing at a rate of 6.1% per year—three times faster than direct consumer spending. This change is propelling new business models based on streaming and social media, where mass personalization and digital formats will capture 80% of advertising revenues, while in-person experiences remain the stronghold of added value.

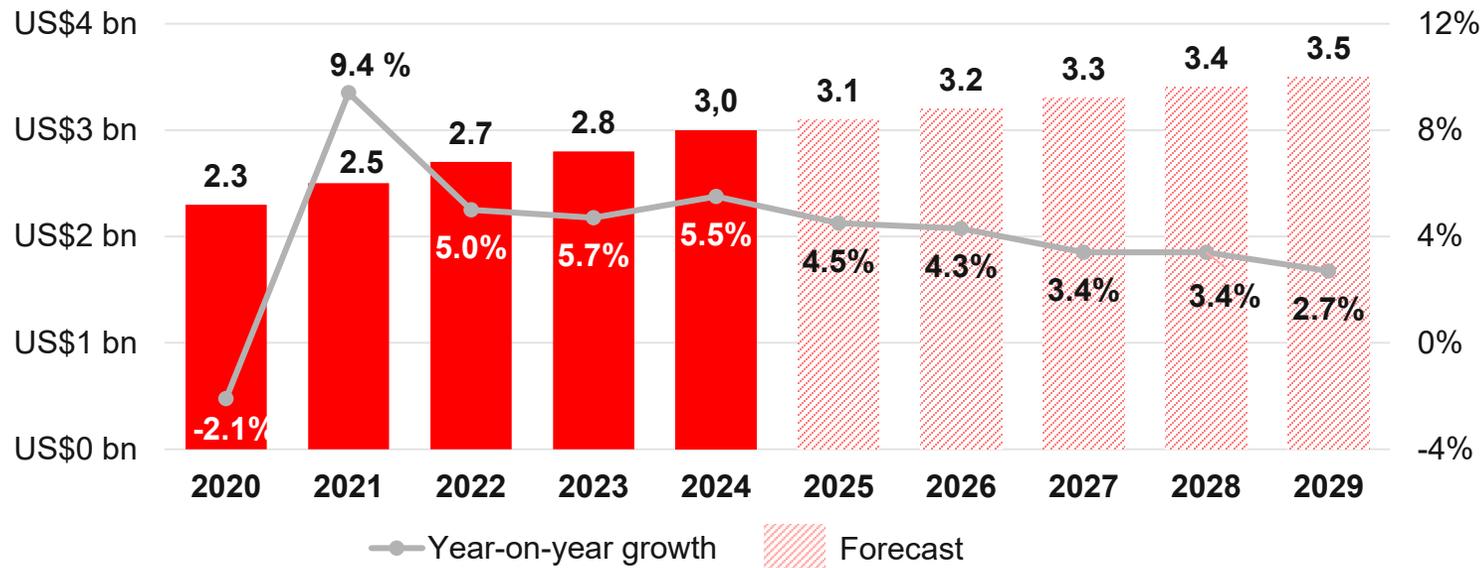


Source: ACCIÓ, based on the report “Global Entertainment and Media Outlook 2025-2029” by PwC

The audiovisual sector in the world (II)

- In 2024, the audiovisual industry had a turnover of **\$3 trillion** (↑5.5% compared to 2023) and is expected to reach \$3.1 trillion by the end of 2025 (↑4.5% compared to 2024).
- The industry is expected to grow at a more moderate average annual rate (CAGR* of 3.7%) over the next five years, reaching \$3.5 trillion by 2029.

Global revenues of the audiovisual sector, 2020-2029
(trillions of U.S. dollars)



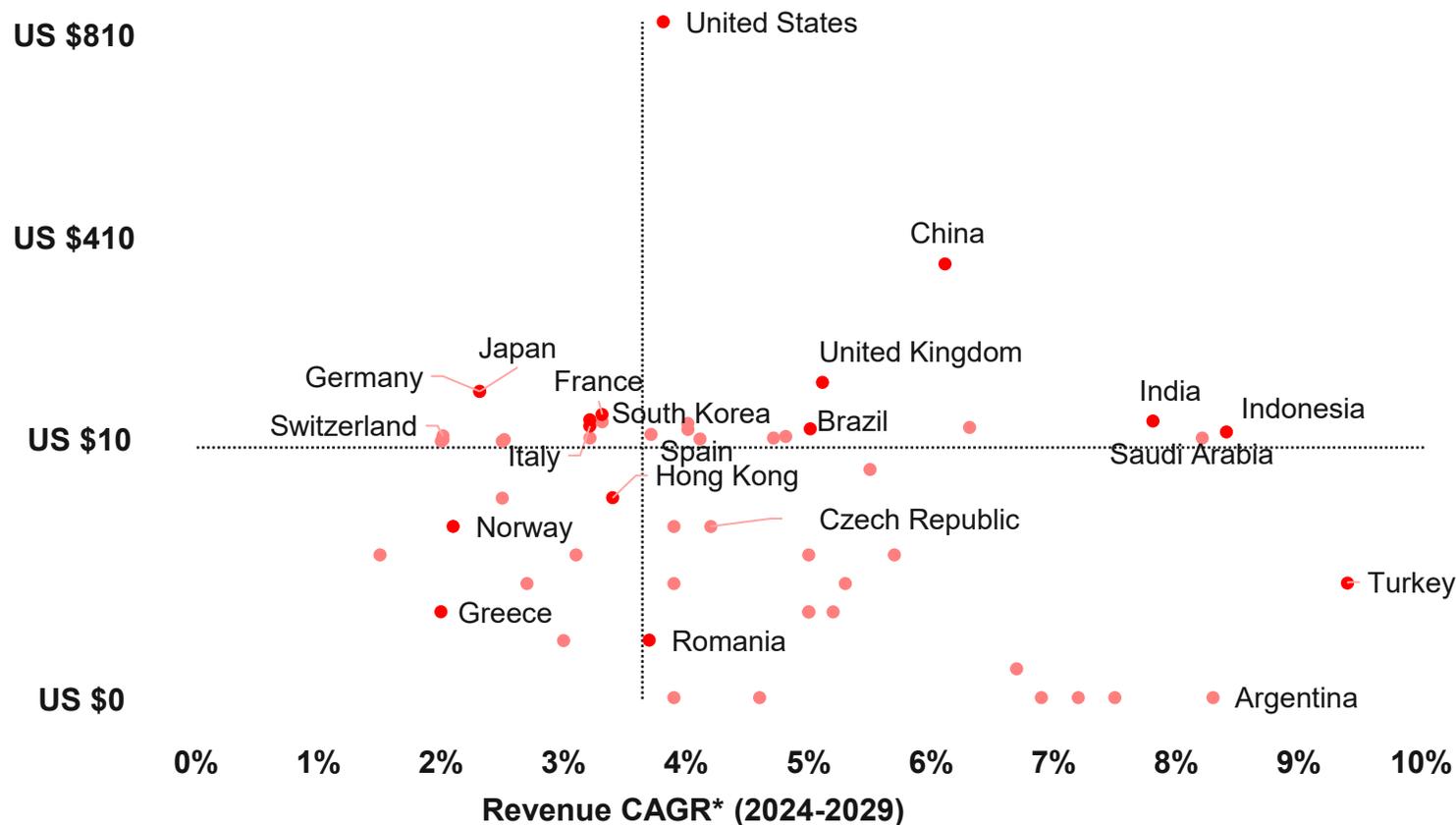
Note ()*: CAGR (compound annual growth rate) indicates the annual average growth rate of a variable during a certain period of time.

Source: ACCIÓ, based on the report “Global Entertainment and Media Outlook 2025-2029” by PwC (includes magazines and newspapers) and Orbis (Activity codes: 4743, 4763, 5821, 5911, 5913, 5914, 5915, 5916, 5917, 5918, 5929, 6010, 6020, 6391, 7311, 7312, 7420 and 7722)

The US leads the market, while the countries with the highest expected growth are in Asia

- The **United States** is the comfortably leading market in the sector and, excluding connectivity revenue, will grow at a CAGR of 3.8% over the forecast period, below the average of 4.2%.
- **China**, the world's second largest market by size, is consistently closing the gap with the US in terms of market share. It is expected to grow at a CAGR of 6.1%, driven by the country's internet advertising segment.
- **India, Indonesia and Saudi Arabia** are the fastest growing global markets, with growth rates exceeding 7.5%, driven by 5G connectivity and the rise of internet advertising.

Global revenue of the audiovisual sector, 2029 (in billions of dollars)



Note (): CAGR (compound annual growth rate) indicates the annual average growth rate of a variable during a certain period of time. Some country names have been omitted to ensure readability and priority has been given to visualizing the general growth and maturity trends of the sector.*

Source: ACCIÓ, based on the report "Global Entertainment and Media Outlook 2025-2029" by PwC

The audiovisual sector logged more than 4,000 FDI projects in the five-year period 2021-2025

FDI in the audiovisual sector in the world, 2021-2025

4,302
projects

€57,417
billion in investment

322,027
jobs created

Countries of origin by # projects

-  **1** USA | 977 projects
-  **2** United Kingdom | 661 projects
-  **3** France | 241 projects
-  **4** India | 195 projects
-  **5** China | 186 projects

Destination countries by # projects

-  **1** UAE | 485 projects
-  **2** UAE | 484 projects
-  **3** United Kingdom | 327 projects
-  **4** Germany | 242 projects
-  **5** Spain | 185 projects

Main investor companies by # projects, 2020-2024

- | | | | | | |
|----------|---|----------|---|----------|--|
| 1 |  TikTok
30 projects | 2 |  Unity
28 projects | 3 |  Google
26 projects |
| 4 |  NETFLIX
16 projects | 5 |  NABISAR FILMS
16 projects | | |

Catalonia as a recipient of foreign direct investment (FDI) on a global scale



- 8th** region in the world by number of projects
- 3rd** European Union region by number of projects
- 2nd** European Union region in number of jobs created

Notes: The following subsectors were analysed: “Advertising, PR & related”, “Audio & video equipment (Consumer electronics)”, “Audio & video equipment (Electronic components)”, “Cable & other subscription programming”, “Electric lighting equipment”, “Internet publishing & broadcasting & web search”, “Motion picture & sound recording industries”, “Radio & TV broadcasting”, “Sign manufacturing” i “Video games, applications and digital content”. Companies listed by # projects

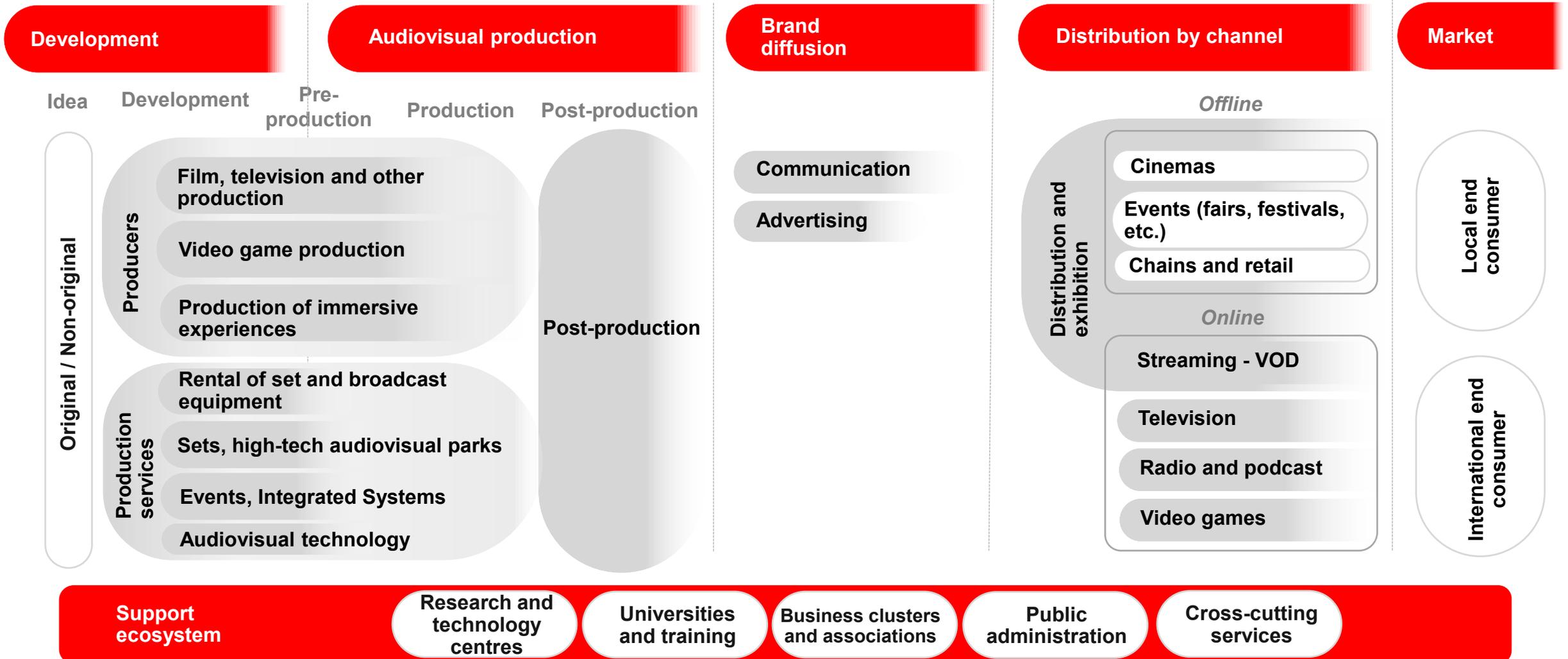
Source: ACCIÓ, from fDi Markets, January 2021-November 2025

The audiovisual sector in Catalonia

3.1. Key data from the audiovisual sector in Catalonia



Audiovisual sector value chain



Note: The categories shaded in gray have been included in the mapping of the audiovisual sector. Source: ACCIÓ

Description of main business segments

Business	Content type	
<p>Producers and post-producers</p> 	<p>Production: film production companies specialising in TV movies, prime time series, TV series, documentaries, television entertainment, photography, music and more.</p>	<p>Post-production: final stage of audiovisual production (sound, graphics, animation, visual effects etc.), as well as participation from additional content producers.</p>
	<p>Immersive experiences: companies that use immersive technologies (virtual, augmented and mixed reality, holography and the metaverse) to build environments that merge the physical and virtual worlds to create a digital reality, allowing users to explore and interact in a new dimension.</p>	<p>Video games: encompasses the entire industry related to the creation, development, publishing, distribution and monetization of video games (video game production, animation, sound and eSports).</p>
<p>Production services</p> 	<p>Sets, technological audiovisual parks: studios of up to 1,200 m² adapted for advertising, TV programmes, cinema and fiction.</p>	<p>Events, Integrated Systems: companies in the Catalan AV sector working in events and related services.</p>
	<p>Rental of staging and broadcast equipment, plus other ancillary services: companies providing services necessary for audiovisual production and for organising events, such as equipment and material rental, audiovisuals and broadcasting, among others.</p>	<p>Audiovisual technology: companies specializing in audiovisual technology (e.g. software, drones, telecommunications, cameras and speakers).</p>
<p>Brand diffusion</p> 	<p>Communication: generate and manage content to inform or persuade the public through various media and platforms. The ultimate aim is for people to talk about the brand, product or service without having to paying third parties.</p>	<p>Advertising: create and implement campaigns to raise awareness of products or services (e.g., spots, digital marketing, branded content and corporate videos) and make investments in publishing adverts on social media.</p>
<p>Distribution by channel</p> 	<p>Distribution and exhibition: the way of making a work reach the public, through audiovisual festivals, cinemas, streaming platforms and direct sales.</p>	<p>Television, radio and podcasts: companies specialising in television, radio or podcast programming and broadcasting activities.</p>

Main figures of the audiovisual sector in Catalonia (I)

4,457
companies

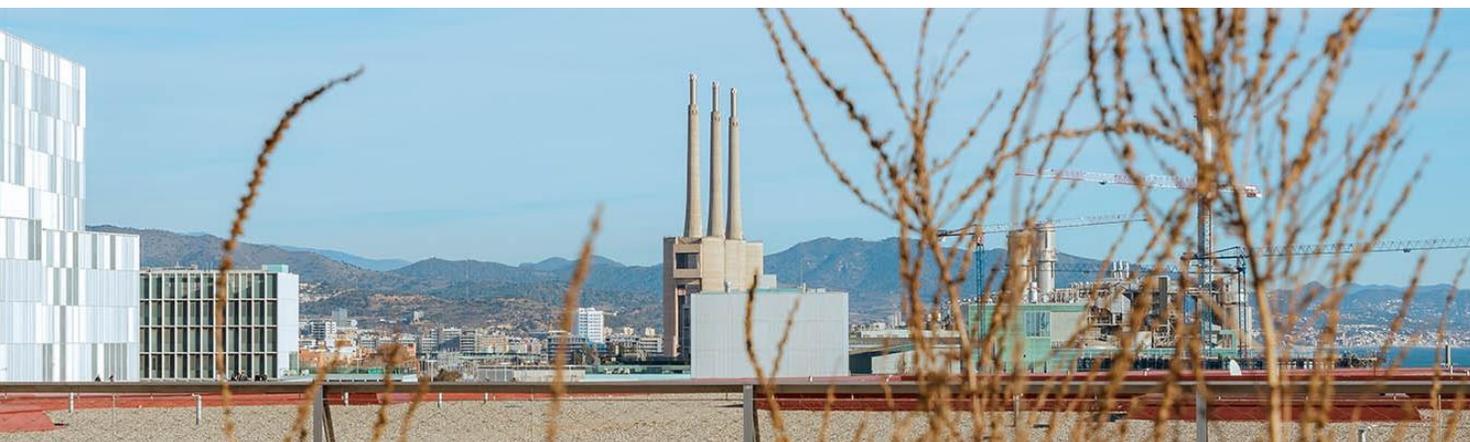
↑7.1% compared to
2024

€9.12
billion
of turnover 2024

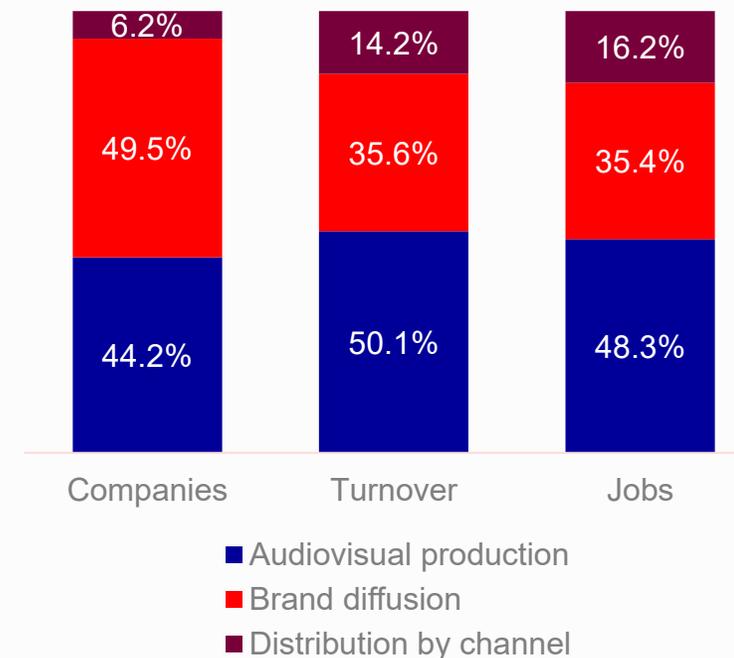
↑5.6% compared to
2023

44,986
jobs 2024

↑7.5% compared to
2023



Distribution by segment



Note: The mapping of the audiovisual sector has been prepared based on companies selected from the following groups of economic activity codes: 4743, 4763, 5821, 5911, 5912, 5913, 5914, 5915, 5916, 5917, 5918, 5920, 6010, 6020, 6312, 6391, 6399, 7311, 7312, 7420 and 7722; also includes companies from the following ACCIÓ reports: music, virtual reality, video games, latest strategic update on the audiovisual sector, ACCIÓ directories, Catalonia Industry Suppliers, members of the Audiovisual Cluster of Catalonia and exhibiting companies at the ISE fair. Companies with more than one classification have been considered only once. **Note:** Economic data from latest available year, mostly 2024. **Source:** ACCIÓ

Main figures of the audiovisual sector in Catalonia (II)



Companies



73.5%

of companies were established more than 10 years ago

8.8%

of companies are regular exporters

4.1%

of companies are foreign subsidiaries

Turnover



2.9%

of Catalonia's GDP in 2024

45.1%

of turnover comes from large companies (1% of companies)

51.3%

of turnover comes from the audiovisual development and production subsector

Employees



83.2%

of employees work in companies more than 10 years old

49.3%

of employees work in micro or small companies (less than 50 workers)

Key data from the value chain of the audiovisual sector in Catalonia

	Number of companies 2024	Number of companies 2025	%Var 23/24	Turnover 2023 (€M)	Turnover 2024 (€M)	%Var 23/24	Jobs 2023	Jobs 2024	%Var 23/24
Audiovisual development and production	1,812 (43.5%)	1,972 (44.2%)	8.8%	4,434 (51.3%)	4,573 (50.1%)	50.1%	21,143 (50.5%)	21,742 (48.3%)	2.8%
Producers	1,359 (32.7%)	1,448 (32.5%)	6.5%	2,554 (29.6%)	2,655 (29.1%)	29.1%	15,789 (37.7%)	16,311 (36.3%)	3.3%
Film, television and other production	1,201	1,233	2.7%	1,864	1,851	20.3%	10,589	10,160	-4.1%
Video games	103	153	48.5%	512	674	7.4%	3,934	4,514	14.7%
Immersive experiences	55	62	12.7%	177	129	1.4%	1,266	1,637	29.3%
Post-production	130 (3.1%)	137 (3.1%)	5.4%	118 (1.4%)	88 (1.0%)	1.0%	1,059 (2.5%)	1,032 (2.3%)	-2.6%
Post-production	130	137	5.4%	118	88	1.0%	1,059	1,032	-2.6%
Production services	323 (7.8%)	387 (8.7%)	19.8%	1,763 (20.4%)	1,830 (20.1%)	20.1%	4,295 (10.2%)	4,399 (9.8%)	2.4%
Rental, broadcast and other	150	161	7.3%	98	106	1.2%	395	418	5.8%
Audiovisual technology	80	118	47.5%	1,345	1,215	-9.6%	2,536	1,978	-22.0%
Integrated Systems	79	94	19.0%	278	490	76.2%	1,047	1,848	76.5%
Sets, audiovisual parks	14	14	0.0%	41	19	0.2%	316	155	-51.1%
Brand diffusion	2,081 (50%)	2,207 (49.5%)	6.1%	3,087 (35.7%)	3,248 (35.6%)	35.6%	13,754 (32.9%)	15,945 (35.4%)	15.9%
Advertising	1,830	1,896	3.6%	2,861	2,876	31.5%	11,972	13,271	10.8%
Communication	251	311	23.9%	226	372	4.1%	1,782	2,674	50.1%
Distribution by channel	268 (6.4%)	278 (6.2%)	3.7%	1,115 (12.9%)	1,299 (14.2%)	14.2%	6,969 (16.6%)	7,299 (16.2%)	4.7%
Distribution and exhibition	169	175	3.6%	413	536	5.9%	2,038	2,316	13.7%
Radio and podcast	53	56	5.7%	42	48	0.5%	390	411	5.4%
Television	46	47	2.2%	659	714	7.8%	4,541	4,572	0.7%
TOTAL	4,161	4,457	7.1%	€8.636 billion	€9.120 billion	5.6%	41,866	€44.986 billion	7.5%

Note: Economic data from latest year available, mostly 2024. Source: ACCIÓ

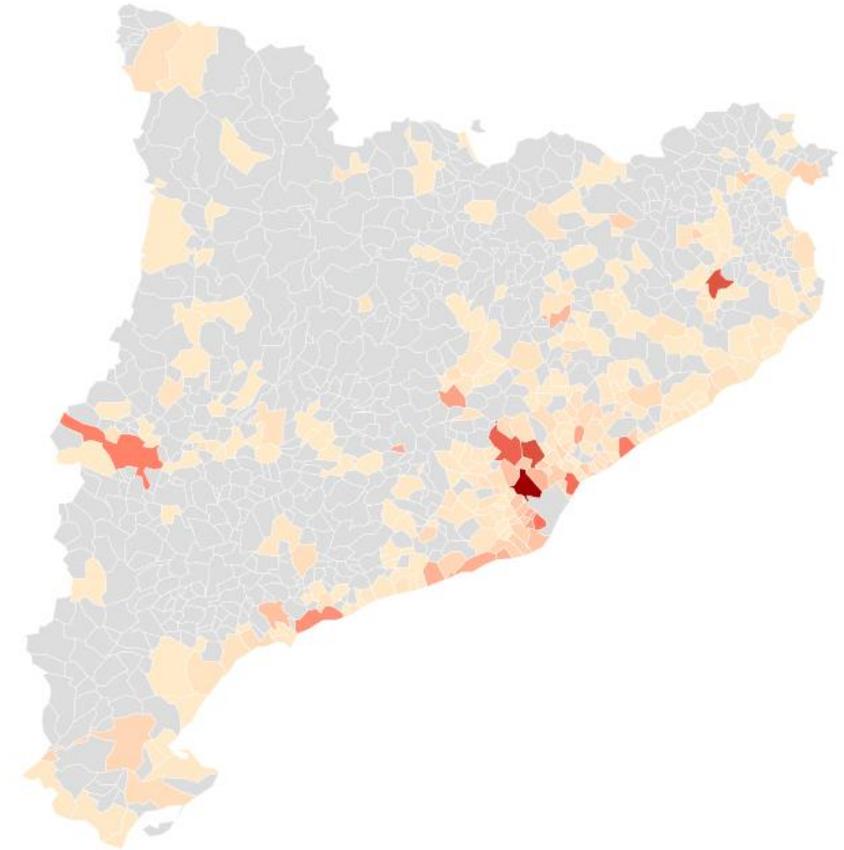
56.2% of companies are located in the city of Barcelona

Territorial distribution

The province of **Barcelona** is the main audiovisual hub of Catalonia, with 87% of the companies

The **Barcelonès (59.2%)**, **Vallès Occidental (8.8%)**, **Baix Llobregat (6.4%)** and **Maresme (3.9%)** counties are the regions with the most companies related to the audiovisual sector.

#	City	No. of companies
1	Barcelona	2,503
2	Sant Cugat del Vallès	111
3	Sabadell	86
4	Girona	82
5	Terrassa	69
6	Badalona	61
7	Hospitalet de Llobregat, L'	56
8	Mataró	53
9	Lleida	51
10	Tarragona	44
11	Manresa	36
12	Cornellà de Llobregat	35
13	Granollers	33
14	Igualada	31
15	Sitges	30
	Others	1,176
	Total	4,457



Main audiovisual companies in Catalonia (I)



Production

Post-production

Video games

Immersive experiences

Sets, high-tech audiovisual parks

Rental of staging, broadcast and other auxiliary services

Events, Integrated Systems

Audiovisual technology

Advertising

Communication

Exhibition and distribution

Television

Radio and podcast

Note: Partial depiction to illustrate the most representative providers in the Catalonia audiovisual sector value chain. Note: Each company has been assigned a main category in the value chain. Source: ACCIÓ

The main hub for startups in the European Union

More than 2,200 startups are located in Catalonia

Barcelona is the 5th best ecosystem in the EU for creating a startup

Global Startup Ecosystem Index
StartupBlink, 2025

Barcelona is renowned as the "best startup ecosystem in Southern Europe"

Startup Ecosystem Awards
StartupBlink, 2025

Startups related to the audiovisual industry

Digital content and media



Adtech



Video games

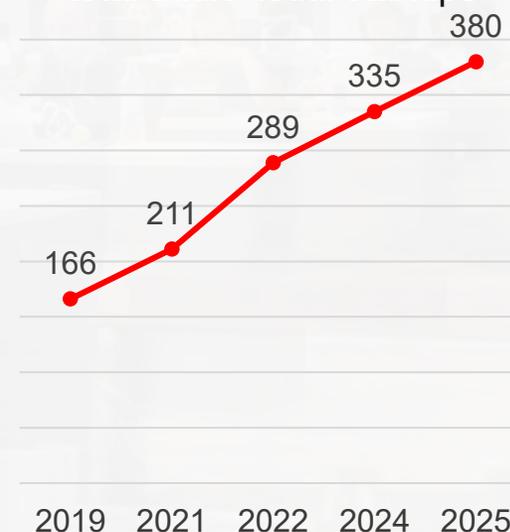


Musictech



380 audiovisual startups in 2025, more than twice the number in 2019

Evolution in the number of total audiovisual startups

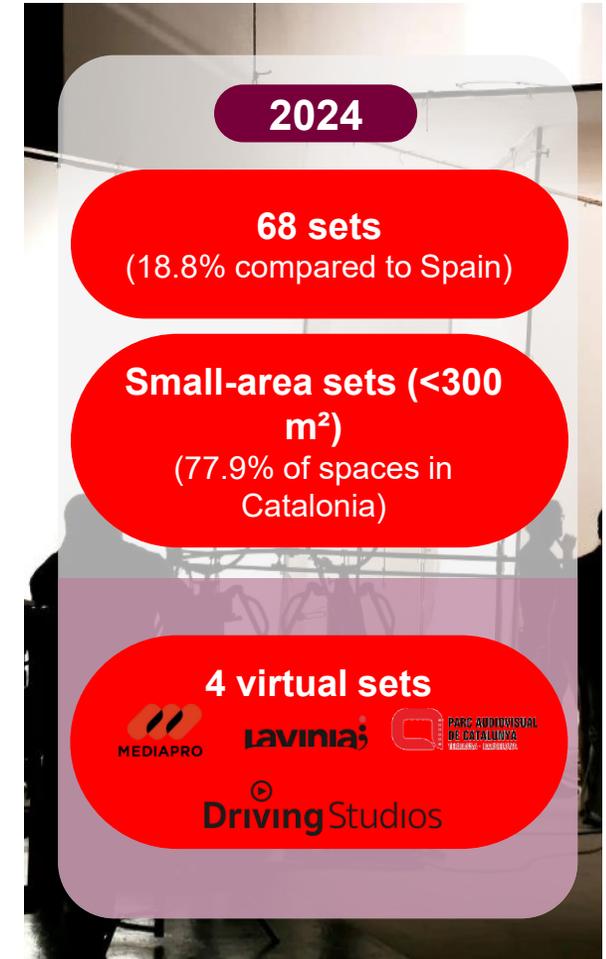
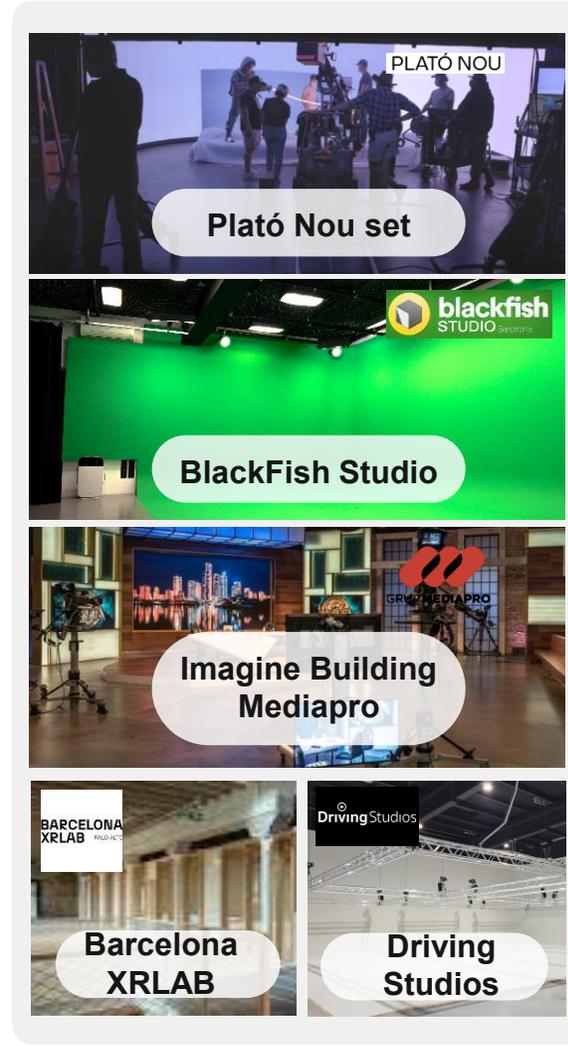
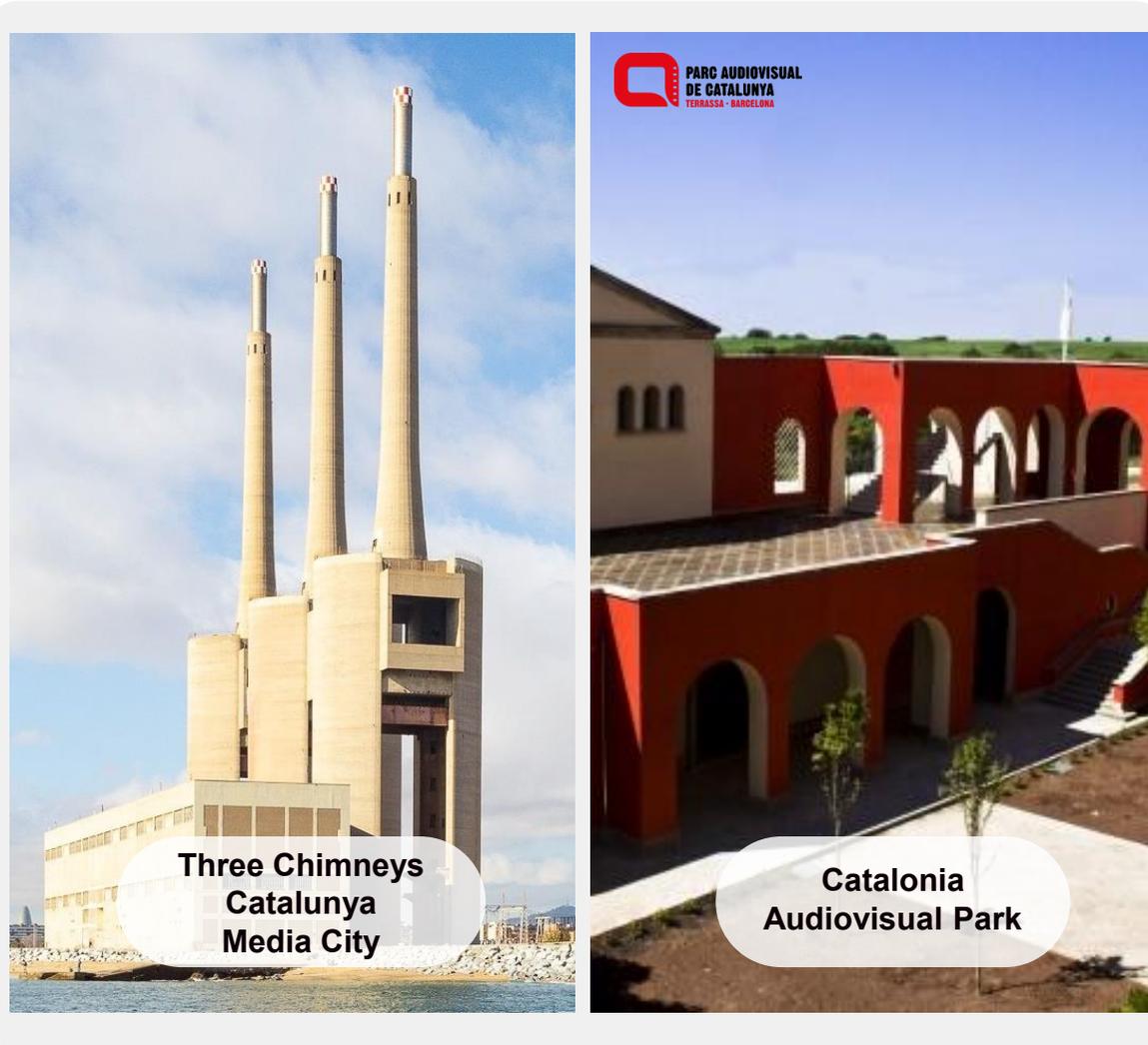


Source: ACCIÓ, based on the Barcelona & Catalonia Startup Hub 2025

The audiovisual sector in Catalonia

3.2. A leading hub for audiovisual production

Catalonia as a leading international audiovisual stage (I)



Catalonia as a leading international audiovisual stage (II)

Catalonia Media City Project



Strategic project promoted by the **Government of Catalonia** to consolidate an **audiovisual, digital and video game hub**. It is not just a set, it's a complete ecosystem that fuses training, industry and exhibition.

- The Besòs Three Chimneys complex will mobilize **32 ha** of total covered area, with a large park of **10 ha (185,000 m²) for housing** and **100,000 m² intended for economic activity**, which will be the site of the audiovisual hub.
- The estimated total investment is **450 million euros**. The Government has activated an initial allocation of **€60 million**, transferred by the State, to launch the key actions at the Three Chimneys audiovisual, digital and video game hub.

- The Audiovisual Park of Catalonia is a fully operational production centre and a leader in southern Europe. It has 4 operational sets, backlots and auxiliary services in a 50,000 m² facility. It hosts international film and advertising shoots, and acts as the main driving force in the industry.
- Investment of **€10 M**, approved by the Government of Catalonia, to build **two new large-scale sets, approximately 2,200 m² and 1,000 m²**, to complement the future offer at the Besòs hub.

Source: ACCIÓ, based on the Department of Culture, 2025

■ With **1,087,293 viewers**, Catalan cinema surpasses the one million mark for the first time in 21 years, achieving the best figure since the record year of 2003.

In 2024, **262 films** have been dubbed or subtitled in Catalan.



■ The Catalan Cinema Guild has 61 operational cinemas and 74% are located in the province of Barcelona.

Cinemas with the highest turnover in Catalonia



Film festivals in Catalonia



Source: ACCIÓ

The television and radio ecosystem in Catalonia

Catalonia has a local audiovisual network made up of **48 television channels** (71% private and 94% local) and an extensive network of **399 radio stations** (54% public and 99% local) that cover the entire region.

Daily radio **listeners** in Catalonia, 2024

3,938 listeners

(↑ 2,4% compared to 2023)



69.2% listening in Catalan



2024

Internet radio

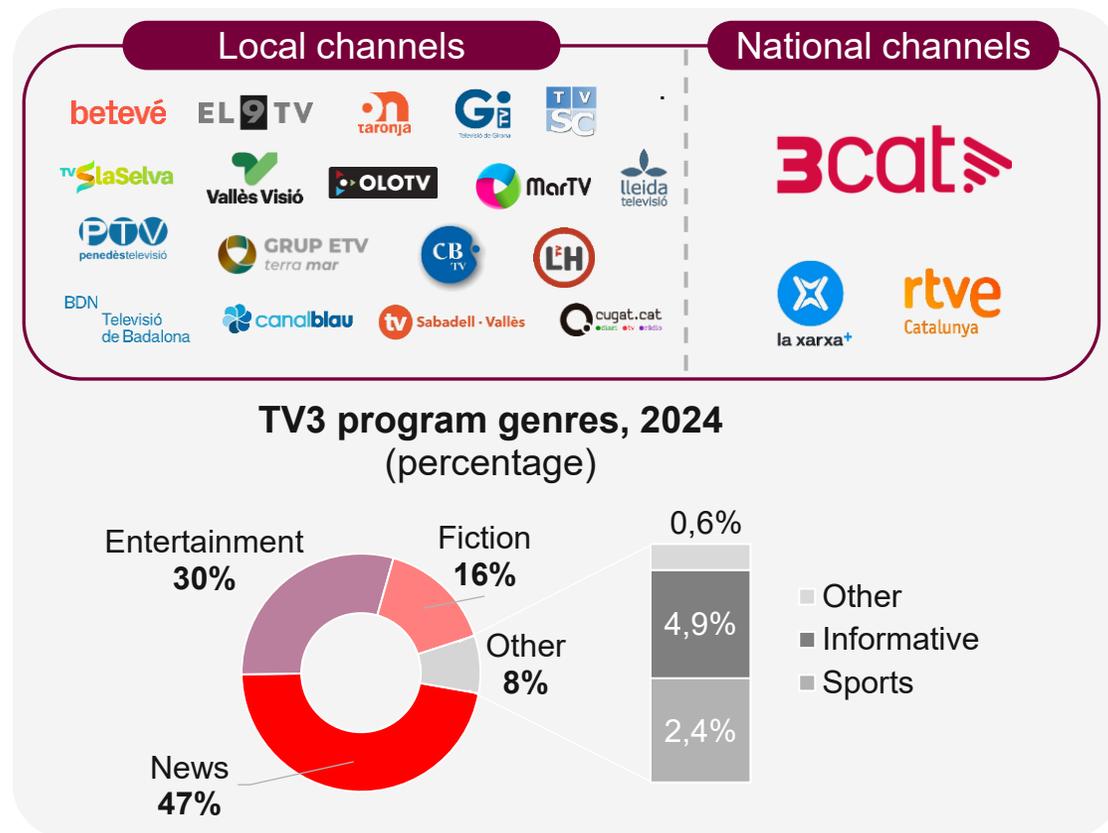
2,041 listeners

(↑ 9.4% compared to 2023)

Radio podcast

1,466 listeners

(↑ 11.4% compared to 2023)



Catalan ecosystem in the audiovisual sector (I)

Public administrations



Business and professional clusters and associations



Training

Universities and other educational institutions



Non-formal education and vocational training



Note: Partial depiction with the aim of illustrating the ecosystem of the audiovisual sector in Catalonia. Source: ACCIÓ

Catalan ecosystem in the audiovisual sector (II)

TECNIO technology transfer agents

Technology and research centres with TECNIO accreditation that support the audiovisual sector



Other technological centres or entities and research groups

Technology and research centres that support the audiovisual sector



Note: Partial depiction to illustrate the ecosystem of the audiovisual sector in Catalonia. Source: ACCIÓ

Audiovisual Cluster of Catalonia

The **Audiovisual Cluster of Catalonia** includes 250 Catalan companies and is currently the **largest audiovisual and media cluster in Europe**. Includes the main companies and institutions, of varying sizes, which make up the entirety of the **value chain** in the audiovisual sector. The Cluster acts as a **central pillar** of the **Catalan audiovisual industry**.

Its **main goal** is to make audiovisual in Catalonia an **industrial, economic and culturally strategic sector**. Everything is done based on different strategic lines such as, for example, **dynamization, internationalization, investments and infrastructure**, among other aspects.

Currently, the cluster organizes as many as 100 annual activities and leads key projects such as strategic participation in the ISE, the Audiovisual Talent Week and the Switch Observatory. In addition, it drives progress towards future milestones such as the integration of AI and the development of the upcoming Audiovisual Hub of Catalonia.



Business
entities and
associations



 [Visit the website](#) of the Audiovisual Cluster of Catalonia.

Events and Integrated Systems in Catalonia

Catalonia has a mature ecosystem in the integrated systems field

Audiovisual integration facilitates the effective transmission of messages and transforms interaction with the user's surroundings

Audiovisual integration brings technologies together (such as audio, video, **AI** and **IoT**) to create **immersive and personalized experiences**. The sector is moving beyond merely setting up equipment and is shifting towards **sustainable** solutions that transform communication and interaction with users.



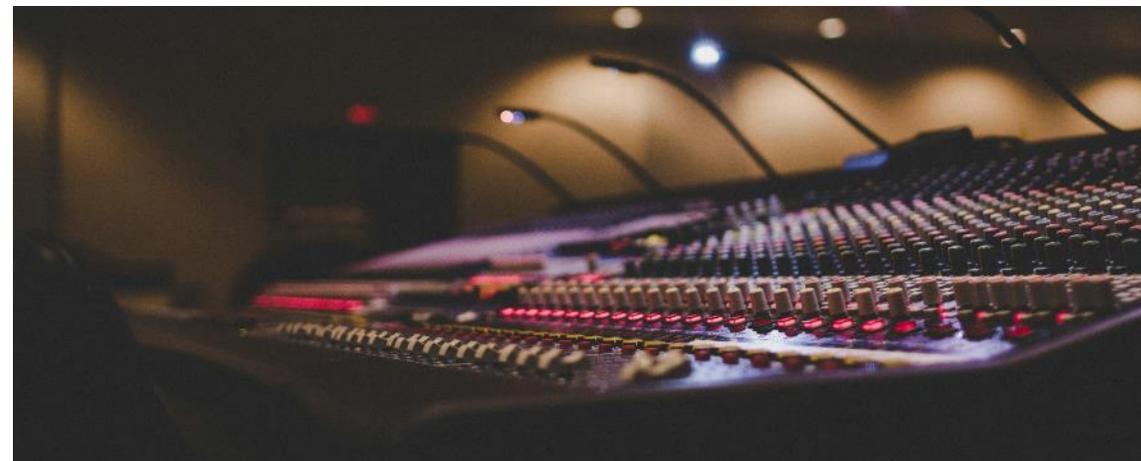
It involves the design, installation and management of audiovisual devices, and **ensures that they operate in coordination and perfect harmony**.



The aim is to provide a smooth user experience in which **technology is a key facilitator of communication**, whether at events, in conference rooms, in educational spaces or in commercial environments.



As the host of ISE, the world's most important event in audiovisual systems and integrated systems, the Catalan capital enjoys an **excellent position to promote the ecosystem**.



Selection of companies providing services in the integration of audiovisual systems:



EPSON

Works with clients all over the world to create **solutions that cover all aspects of the business**, from planning and design to implementation, maintenance and ongoing support.

Catalonia has become the new permanent location of Integrated Systems Europe (ISE), the largest AV and integrated systems fair in Europe.



In 2026, Barcelona will host ISE, the world's largest audiovisual and systems fair, for the sixth consecutive time.



85,351
attendees
(2025)



1,605
exhibitors
(2025)



92,000
m² occupied
(2025)



25% of visitors with an annual audiovisual expenditure of more than €1 million



“ISE is consolidating itself in Barcelona and is willing to remain there for many years.”

Michael Blackman
Managing Director
Integrated Systems Europe (ISE)

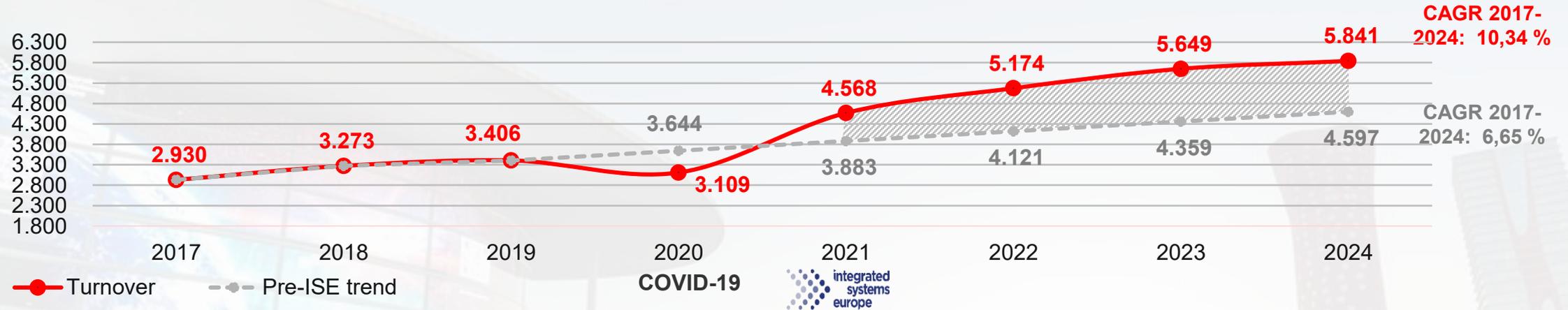


The Department of Business and Employment, along with **ACCIÓ** is supporting the participation of **29 Catalan companies with a stand at ISE in 2026.**



Between 2021 and 2024, audiovisual companies in Catalonia have had turnover of €4,273 million more than expected, partly thanks to the entry of ISE

Audiovisual sector revenue in Catalonia 2017–2024*



The analysis of the actual turnover of companies created before 2017 confirms that ISE has been a key factor in the recovery and acceleration of growth in the sector. After the negative impact of Covid-19 in 2020, turnover in 2021 already exceeded the expected trend. This effect intensified in the following years and placed turnover well above projected growth. Overall, between 2021 and 2024, an increase of €4,273 million over projected turnover was accrued. This demonstrates a structural change in the trajectory of the sector and consolidates the role of ISE as the driving force behind the economic recovery.



[Visit the ISE Barcelona website](#)

Note: Analysis covers companies created before 2017 with data available from 2024.*

Source: ACCIÓ, based on Orbis

The audiovisual sector in Catalonia

3.3. Catalonia, an international benchmark in talent and creativity

Catalonia, an international benchmark in talent and creativity

Catalonia has historically been a cradle of leading talent in the audiovisual sector and has contributed prominent figures in the world of cinema, television, music and other creative disciplines. They have helped increase Catalonia's reach on an international scale thanks to their talent and their commitment to culture.



Here are some of the most prominent Catalan leaders in the sector:

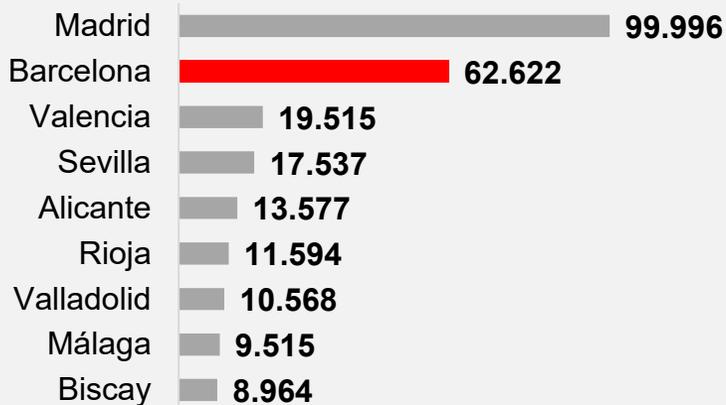
Actors and actresses	Directors and screenwriters	Singers and composers	Dubbers	Television and radio
 <p>Úrsula Corberó</p>	 <p>Juan Antonio Bayona</p>	 <p>Rosalía</p>	 <p>Joan Pera</p>	 <p>Jordi Évole</p>
 <p>Sergi López</p>	 <p>Jaume Collet-Serra</p>	 <p>Aitana</p>	 <p>Jordi Brau</p>	 <p>Carles Porta</p>

Audiovisual training in Catalonia

Catalan university centres that provide training related to the audiovisual sector



Enrolled in master's and bachelor's degrees in the last 5 years (top 10 Spanish regions, 2020-21 to 2024-25 academic years)



Note: Number of students in university courses related to audiovisual. *Source:* Ministry of Science, Innovation and Universities

2024-2025 academic year in Catalonia

Of the total number of students enrolled in master's and bachelor's degrees in the audiovisual sector across Spain, **21%** study in Catalonia. Distribution of **Catalan students** by gender:



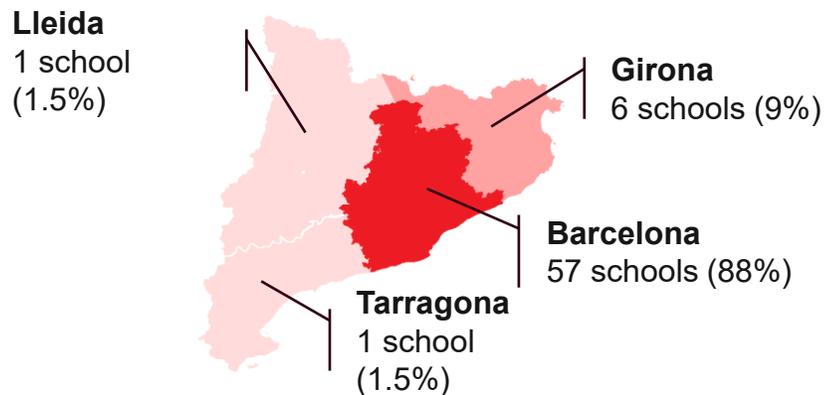
Of the total number of people in Spain enrolled in master's and bachelor's degrees related to the audiovisual sector, **58%** are women.



13,491 people in Catalonia enrolled in masters and bachelor's degrees related to the audiovisual sector, **21% of the total in Spain** (2024-2025 academic year).

Schools related to the audiovisual sector

According to the Catalan Institute of Cultural Enterprises, there are currently **65 schools** linked to the audiovisual sector in Catalonia, of which **89% are located in the province of Barcelona**.



Catalan schools with connections to the audiovisual field



bàp Bande à Part
Barcelona (Barcelona)

Space for multidisciplinary study and debate on cinema and culture, which connects students, teachers and professionals in the sector at an international level.

EA ESCOLA D'ART DE VIC
Vic Art School
Vic (Barcelona)

Arts studies centre that offers education levels that cover most artistic disciplines. Features a pedagogical approach focused on the person, creativity and perception of the environment.

LCI Barcelona
LCI Barcelona
Barcelona (Barcelona)

International school of design and visual arts, a leader among students of design, animation, photography and creative industries management.

Pepe School Land
Barcelona (Barcelona)

3D animation school focused on understanding animated characters, narrative and modelling, focused on future professionals in cinema, advertising, television series and video games.

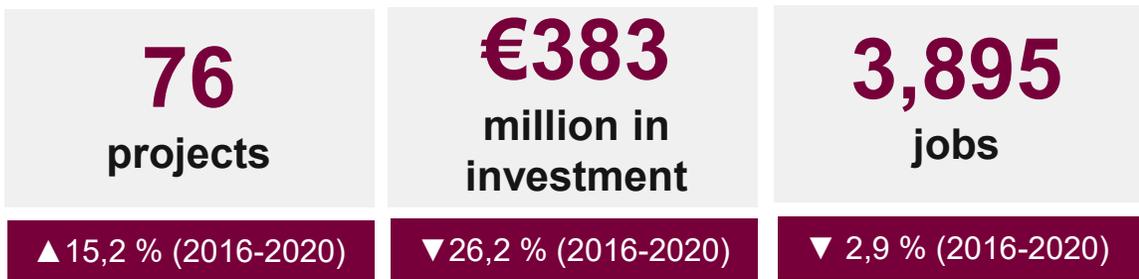
Source: ACCIÓ, based on the Catalan Institute of Cultural Enterprises and school websites.

The audiovisual sector in Catalonia

3.4. International reach of the Catalan audiovisual sector

Between 2021 and 2025, Catalonia registered 15% more FDI projects in the audiovisual sector compared to the previous five-year period

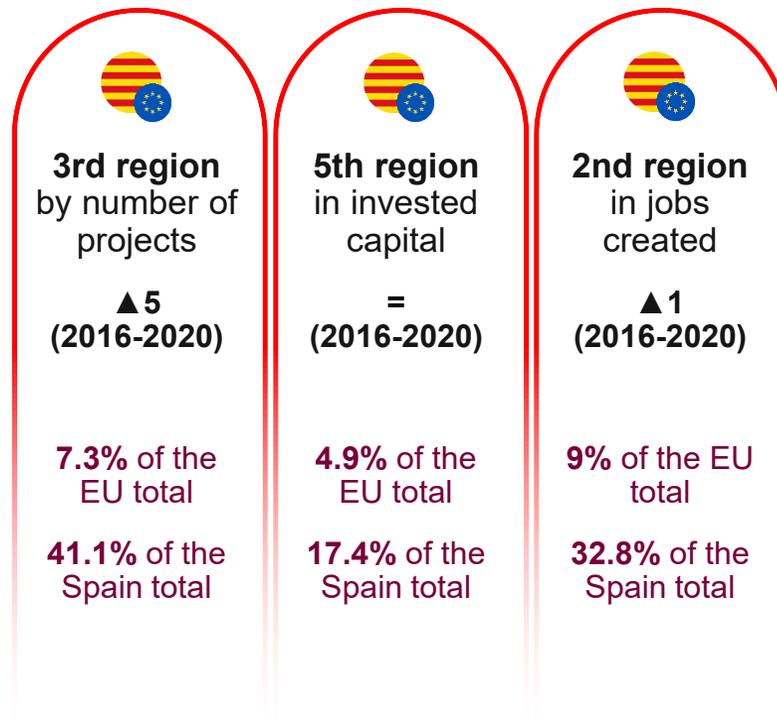
FDI in audiovisual in Catalonia, 2021-2025



Main investor countries by invested capital, 2021-2025



Catalonia in the EU and in Spain, 2021-2025

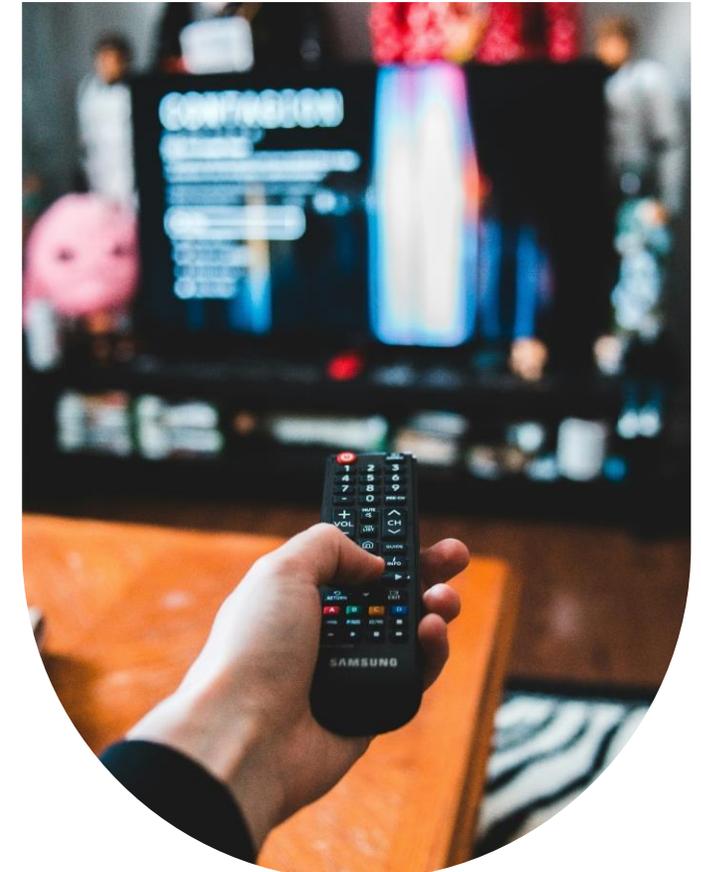


Notes: The following subsectors were analysed: "Advertising, PR & related", "Audio & video equipment (Consumer electronics)", "Audio & video equipment (Electronic components)", "Cable & other subscription programming", "Electric lighting equipment", "Internet publishing & broadcasting & web search", "Motion picture & sound recording industries", "Radio & TV broadcasting", "Sign manufacturing" and "Video games, applications and digital content"

Source: ACCIÓ, from fDi Markets, January 2021-November 2025

Main investor companies in Catalonia by invested capital in the five-year period 2021-2025

 <p>Giant Animation 1 project €28 million 155 jobs</p>	 <p>IO Interactive 2 projects €22 million 180 jobs</p>	 <p>Nevision 1 project €19 million 136 jobs</p>	 <p>Blu Digital Group 1 project €19 million 136 jobs</p>
 <p>Sandsoft Games 2 projects €19 million 88 jobs</p>	 <p>Tripledote Studios 2 projects €15 million 160 jobs</p>	 <p>Scopely 1 project €1 million 50 jobs</p>	 <p>FunPlus 2 projects €13 million 105 jobs</p>
 <p>Embracer Group 1 project €11 million 25 jobs</p>	 <p>Larian Studios 1 project €11 million 89 jobs</p>	 <p>TripAdvisor 2 projects €10 million 75 jobs</p>	 <p>The Knot Worldwide 2 projects €10 million 278 jobs</p>



Notes: The following subsectors were analysed: “Advertising, PR & related”, “Audio & video equipment (Consumer electronics)”, “Audio & video equipment (Electronic components)”, “Cable & other subscription programming”, “Electric lighting equipment”, “Internet publishing & broadcasting & web search”, “Motion picture & sound recording industries”, “Radio & TV broadcasting”, “Sign manufacturing” and “Video games, applications and digital content”. Listed by capital invested

Source: ACCIÓ, from fDi Markets, January 2021-November 2025

International business opportunities for Catalan companies in the audiovisual sector

World



A total of **15 countries** have been identified as having business opportunities for Catalan companies in the audiovisual sector.

Visit the [recommendation tool](#) for international opportunities, provided by ACCIÓ

-  USA
-  Mexico
-  California is the world audiovisual centre
-  Denmark
-  Germany
-  Poland
-  United Kingdom
-  Australia
-  France
-  Belgium
-  Netherlands
-  Austria
-  South Korea
-  Morocco
-  Italy
-  Argentina

Source: ACCIÓ, based on the global map of international business opportunities 2025

The audiovisual sector in Catalonia

4. The 10 technological trends in the audiovisual sector



The 10 technological trends that are redefining the audiovisual sector in 2026 (I)



1

The convergence of audiovisual and ICT

- The confluence of audiovisual and ICT has given rise to a new era of communication characterized by **uninterrupted transmission, real-time data sharing and the creation of interconnected ecosystems** that facilitate scalability, flexibility and security.
- When audiovisual systems become interconnected, their vulnerability to cyber threats increases.



2

Audiovisual and broadcast: a shared future

- The demand for broadcast applications **is growing significantly and is helping blur the traditional boundaries between those markets**. Demand is driven by factors such as technological evolution and changes in media consumption habits.
- Thus, traditional media are clearing the way for these applications to be used in educational, hospitality or business environments, among other settings.



3

The unstoppable rise of the experience economy

- The experience economy continues to grow steadily, **driven and strengthened by cutting-edge audiovisual technologies**.
- These technologies provide the necessary tools to create multi-sensory environments and enrich interactions with consumers. They become an essential driver for transforming simple products into unique experiences.



4

Sustainable practices take on new relevance

- Incorporating sustainable practices in audiovisual production has been consolidated as a key element for manufacturers, integrators and users.
- This represents an **opportunity to develop environmentally friendly technologies, energy-efficient systems and more sustainable production processes** that help reduce the impact of audiovisual products.



5

The expansion of immersive technologies and installations

- There is growing development of immersive technologies and facilities that can **increase public involvement, generate interactive experiences and offer virtual participation options**.
- These audiovisual solutions have applications in various contexts, such as recreational, cultural, exhibition or commercial spaces.

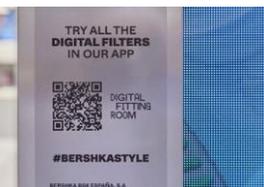
The 10 technological trends that are redefining the audiovisual sector in 2026 (II)



6

The era of AI, VR and AR

- AI is improving content personalization, optimizing commercial strategies, automating workflows and perfecting data analysis to allow better decisions to be made and increase audience engagement.
- VR and AR are also redefining interaction with content and offer immersive experiences through devices such as headsets and apps.



7

The integration of AI and IoT is transforming digital signage in retail

- Digital signage in retail starts intensively incorporating AI and IoT technologies.
- AI analysis makes it possible to personalize content in real time based on audience data obtained through sensors and cameras. At the same time, IoT devices facilitate smooth updates and the interaction between digital signage and other smart equipment.



8

Interactive and immersive digital signage: towards a new era of participation

- The interest in interactive and immersive digital signage solutions, which integrate touch screens, control via gestures, and AR technologies, is constantly growing.
- These technologies capture customer attention, improve product information and reinforce the brand narrative.



9

The robotics revolution in the audiovisual sector

- Audiovisual robotics combines the precision and capabilities of robotics with the potential of audiovisual elements. This includes innovative solutions, such as robotic sets and technical equipment, robotic arms, humanoid robots and drones.
- This technology will make it possible to automate complex tasks, make installations be more precise and dynamic, and offer interactive displays.



10

Audiovisual will unlock the full potential of smart spaces

- Audiovisual solutions will be integrated into smart spaces, homes and buildings to improve comfort, efficiency and sustainability. The most advanced technologies will focus on efficient energy management, AI-based automation, cybersecurity and integrated control systems.
- These solutions include smart office technologies, adaptive learning tools and building designs with sustainability at the forefront.

Thank you!

Passeig de Gràcia, 129
08008 Barcelona

accio.gencat.cat
catalonia.com

 @accio_cat
@Catalonia_TI

 [linkedin.com/company/acciocat/](https://www.linkedin.com/company/acciocat/)
[linkedin.com/company/invest-in-catalonia/](https://www.linkedin.com/company/invest-in-catalonia/)

More information about the sector and related news:

<https://catalonia.com/key-industries-technologies/videogames-digital-media/the-audiovisual-sector-in-catalonia>

