



Production and Infrastructure Capacity Audit (PICA) Study of Greater São Paulo

Key Findings

February 2022

Contents

- **The PICA Study**
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- Gauges for Key PICA Elements' Current Capacity

In May 2021, Spcine commissioned Olsberg•SPI (“SPI”) to undertake an assessment of Greater São Paulo’s capacity to support increased levels of national and international audiovisual production.

This report provides key findings from SPI’s Production Infrastructure and Capacity Audit (PICA) Study of Greater São Paulo.

SPI have profiled **key strengths and weaknesses** of Greater São Paulo in terms of production infrastructure and “below-the-line” technical crew capacity, as well as identifying **key recommendations**. We see these as the most significant pillars for developing the region’s capacity to support national and international content production.

In the closing slides, gauges on current capacity for specific key elements are provided. Each element is assessed both on current capacity and fit for international production (i.e., productions coming from outside Brazil).

Scoring is based on a combination of data collected from an industry survey, consultations with key industry stakeholders, including trade association representatives and public officials, secondary research, as well as SPI’s knowledge of the region.

In the accompanying full report, **60+** gauges based on current capacity are provided along with further detailed analysis.

Geographical Scope

Greater São Paulo within this study is defined as the following six municipalities: Barueri, Carapicuíba, Cotia, Osasco, São Bernardo do Campo, and the City of São Paulo.

The geographical scope of the study was determined based on Spcine’s indication of existing notable infrastructure within each of the six municipalities.

The vast majority of survey responses (92%) were based within the City of São Paulo, which represents the main hub of activity across Greater São Paulo.

The consultees were more equally spread across Greater São Paulo.



Greater São Paulo
Barueri
Carapicuíba
Cotia
Osasco
São Bernardo do Campo
São Paulo

The Focus and Approach

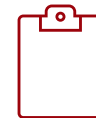
To assess the competitiveness of Greater São Paulo within the global market, this study mapped the capacity and fit for international production of the following key elements:

1. **Physical production infrastructure**, including sound stages, production and post-production facilities and equipment
2. **Below-the-line (BTL) workforce capacity**
3. **Skills gaps** found in the current screen workforce.

To undertake this audit, SPI undertook...



Wide Range of primary and secondary research



Industry Survey of 113 filmmakers working across Greater São Paulo



20+

Confidential Consultations with key industry and governmental stakeholders

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Why PICA was developed

- **SPI's PICA study was developed in response to a global trend of expanded audiovisual content production activity, coupled with a shortage of studios and crew to service growing demand.**



While COVID-19 related disruption impacted audiovisual content production globally, we're already seeing a bounce back to the same or higher levels than 2019 figures.

SPI anticipate continued industrial growth of at least 5-10% per annum over a five-year period starting in 2022, as audiovisual content production is a strategic priority in strong markets for driving economic recovery.

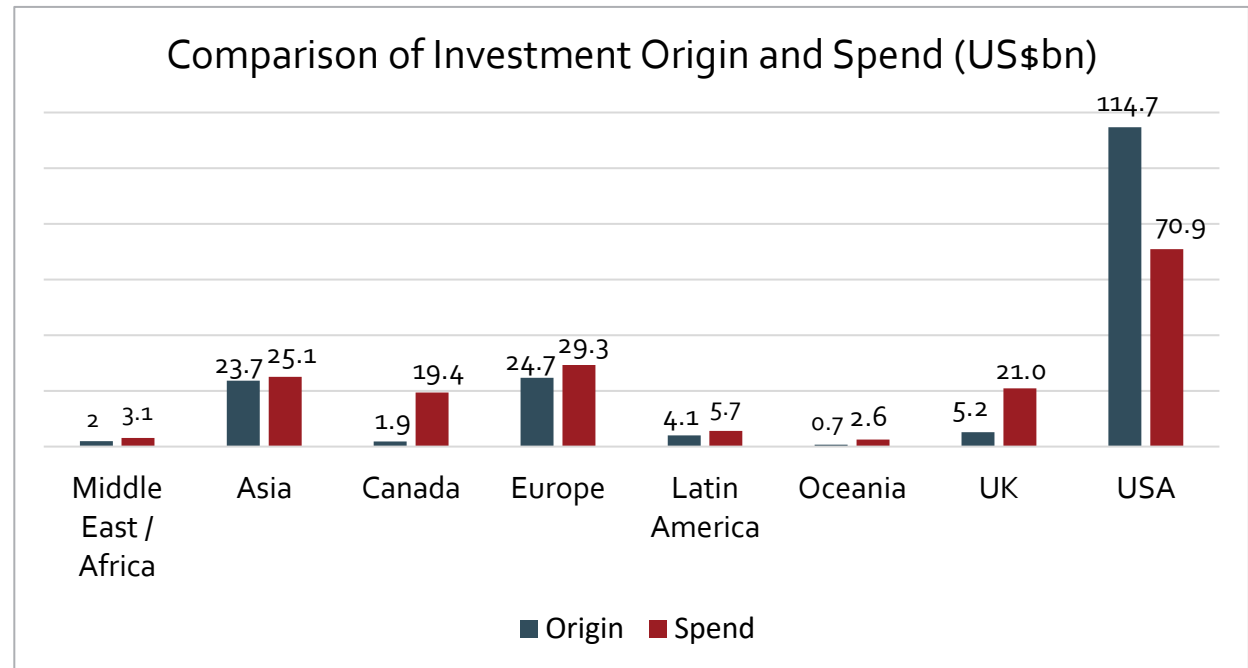
Unprecedented global spend on audiovisual content



The growth in audiovisual content production levels globally is stimulated by major Hollywood studios' and streamers' ambitious investment strategies and rapidly expanding business models.



In Latin America, an estimated **US\$5.7 billion** were invested in audiovisual content production throughout 2019, creating **over 1.6 million direct and indirect jobs**. Of this value, around US\$1.6 billion in production spend originated outside of Latin America.



Unprecedented
global spend on
audiovisual
content



After seeing unprecedented subscriber growth in 2020-21, US media companies have announced plans to invest at least US\$115 billion in audiovisual content production in 2022 to maintain this growth.

Disney is likely to invest around US\$23 billion in new content in 2022. This value represents a 65% increase in investment since 2020.

Netflix is likely to spend more than US\$17 billion on content in 2022, representing a 57% increase compared to 2020 figures.



The rising content costs associated with the “streaming wars” create a need for investment into infrastructure and workforce development.

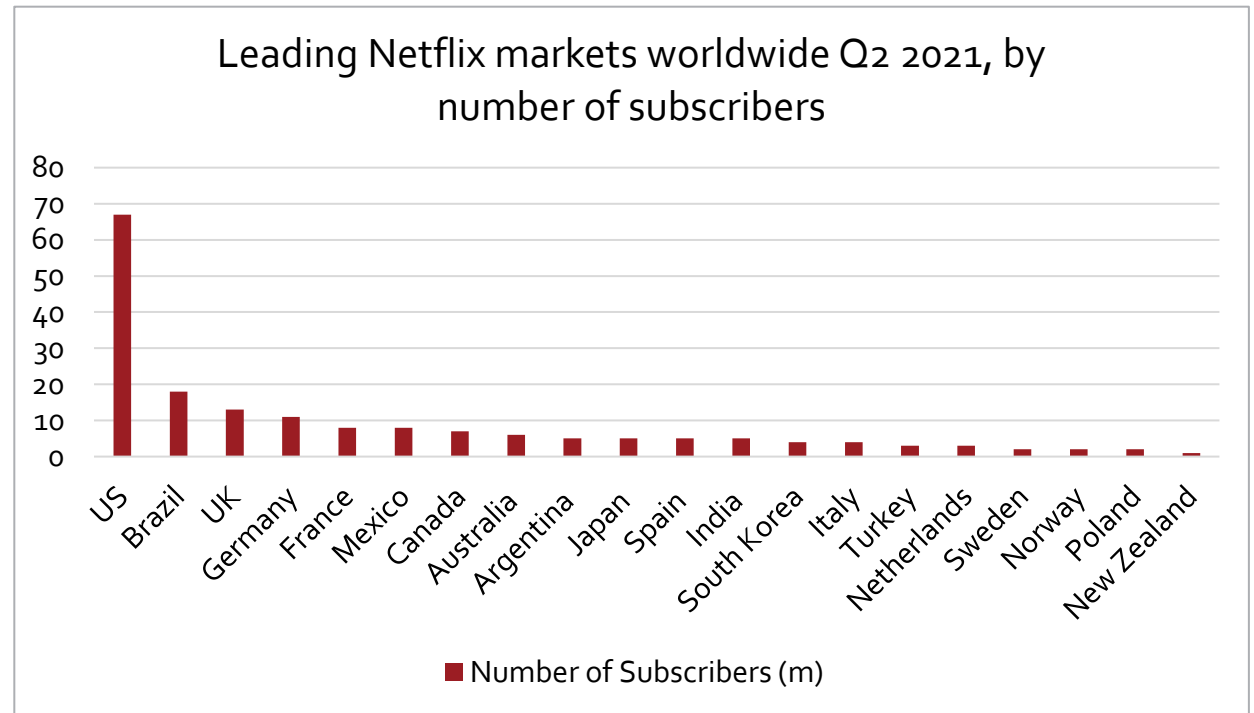
Private equity groups Blackstone and TPG have both recently invested around US\$2 billion, combined, in sound stage spaces in the US, UK and Canada.

A significant opportunity for Brazil



The demand for audiovisual content steadily increased throughout the pandemic, driving investments by streaming services into the LATAM region.

Brazil, the largest Portuguese-speaking country in the world, is in a unique position to take advantage of the global audiovisual content production deluge. The country's vast domestic market of at least 210 million inhabitants quickly adopted the streaming service model.



Context for this Study

A significant opportunity for Brazil

Netflix

- Confirmed its commitment to production in **Brazil** in 2022 with a plan to invest in the development of **40 new titles** in a variety of formats including **feature films, series, documentaries, and reality shows.**

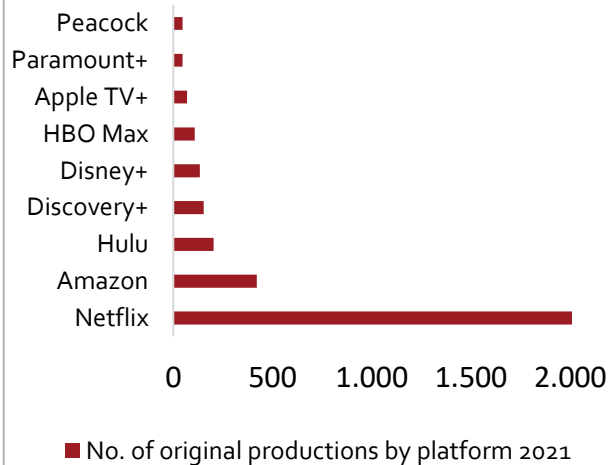
Amazon

- Announced it would produce a minimum of **three original series in Brazil.**

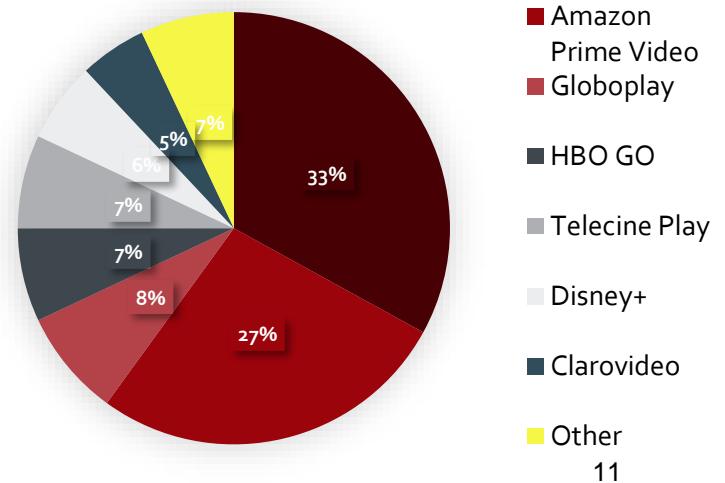
Disney

- Bruno Bluwol, Head of Film Production at The Walt Disney Company Brazil, described 2020-21 as the **"biggest year for new projects and contracts in Brazil."**

No. of original productions by platform 2021, globally



Interest in SVOD services in Brazil Q4 2020



A significant opportunity for Brazil



This context of global production deluge creates new opportunities and challenges for both mature and emerging markets.

Producers around the world face challenges to meet ambitious output targets due to a general shortage of dedicated shooting spaces (sound stages), curtailed availability of key workers and skills gaps amongst below-the-line crew.

Where a regional **incentive system** such as that recently launched by Spcine in July 2021 is already in place, a highly qualified and deep workforce and strong infrastructure base become of primary importance for a **“holistic” competitive offer and healthy audiovisual production sector** to be sustained.

The Benefits of a Healthy Screen Sector



A significant opportunity for Brazil

The Screen Sector is a **key strategic priority** for many governments, especially for **COVID-19 recovery**, because it has been proven to:



Boost Economic Activity Measured by GVA or GDP
Creates substantial net inward investment and money flows



Create Highly Skilled and Productive Employment
Jobs that are less threatened by AI and focus transferable skills



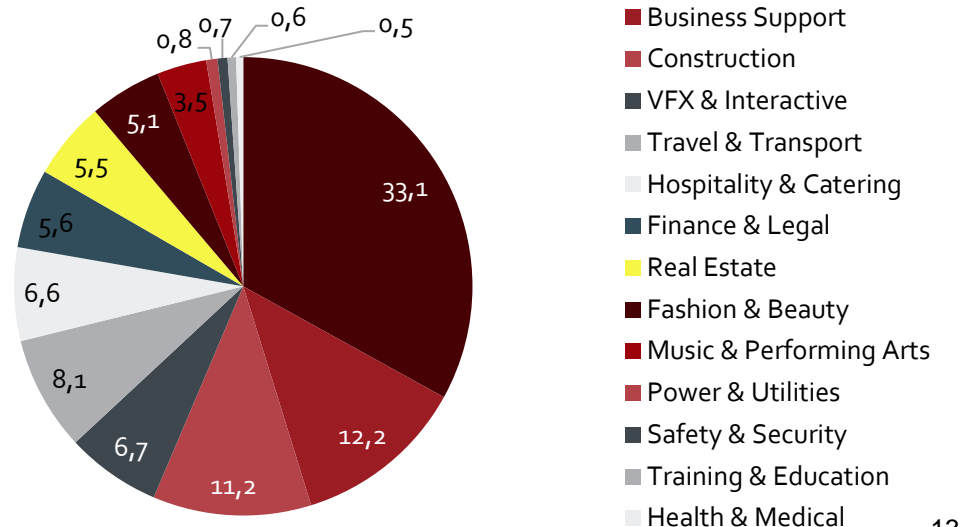
Drive Cultural Diplomacy and Screen Tourism
Extending positive national branding and "Soft Power"



Drive Capital Investment in Supply Chain Infrastructure
The Ripple Effect – generates economic activity in other industries

On average 2/3 of production spend is in non-screen production specific sectors

Average Proportion of Production Spend in Other Business Sectors (%)



A significant opportunity for Brazil



Greater São Paulo has a long tradition of audiovisual content production, offers unique features as a cosmopolitan melting pot of nationalities, as well as the largest economy by GDP in Latin America.

However, the forementioned globalisation of audiovisual content production, along with the emergence of new markets and technologies have **left the Brazilian industry outdated.**



São Paulo has failed to modernise and expand its infrastructure to keep pace with the rapid worldwide growth in demand for production capacity.

Despite this, with key interventions to build on identified strengths and target weaknesses, Greater São Paulo should be able to grow and develop in line with global trends.

The findings and recommendations from the study will inform Spcine's strategy to overcome gaps and enhance the competitiveness of Greater São Paulo.

Role and success of Spcine



Spcine has been tackling the challenges faced by the Brazilian film industry at the federal level.

The absence of new lines for project development, the freezing of resources, the dismantling of the cultural sector as a whole and censorship threats have negatively affected the Brazilian film industry. Through coherent public policies put in place by Spcine, the City of São Paulo has resisted decline.

These coherent public policies, that counterbalance negative trends and demonstrate leadership, include affirmative and inclusive policies, the strengthening of co-productions, expansion of the municipal exhibition circuit, streamlining the film commission and the creation of a cash rebate mechanism.



R\$ 20

Economic Return on Investment

For every R\$1 invested through Spcine programmes



R\$ 5 billion

Indirect Economic Impact

Generated by the São Paulo audiovisual sector



100,000

Jobs Created by the 5,000 audiovisual projects supported through SPFilm



20 Screens

The Spcine Exhibition Circuit
Over 1.7 million spectators attracted at no charge



R\$ 6 billion

Direct Economic Output

Generated by the São Paulo audiovisual sector



Festivals, Screenings, Conferences and Markets

Sponsored annually by Spcine

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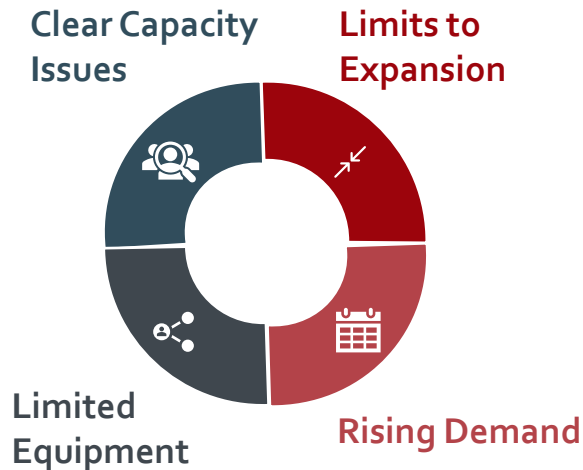
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- **Key Findings**
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- Gauges for Key PICA Elements' Current Capacity



The mapping of the capacity and international fit of the existing workforce and infrastructure elements in Greater São Paulo show clear strengths, especially around the new Cash Rebate, Production Service Companies and specific production departments. However, there are also notable weaknesses, which demand supportive action in order to expand and strengthen the workforce pool and infrastructure base and ensure the region remains competitive nationally and internationally

Physical Production Infrastructure
Sound stages, production and post-production facilities and equipment

Below-the-line Workforce Capacity & Skills gaps found in the current screen workforce



Strengths

Cash Rebate

- Spcine's Cash Rebate, Brazil's first and only incentive for audiovisual content production, has **real potential in attracting significant inward production and investment** when combined with simultaneous investment in the area's production infrastructure and workforce capacity.

Production Service Companies (PSCs)

- An abundance of local PSCs offers a **significant competitive advantage** for Greater São Paulo over other jurisdictions in Brazil and LATAM.
- PSCs serve as **effective brokers for inward productions** on local laws, contacts, and dealing with authorities, as well as where to source experienced local crew, equipment, recommend locations and obtain competitive rates on accommodation and vehicles.

Substantial Immediate Capacity in Certain Elements

- Specific roles and infrastructure identified as having notable or substantial immediate capacity available are **sound recording and dubbing facilities, hotels, first assistant director, script supervisor, director of photography, production designer, art director, gaffer, camera operator, grip, location manager and sound designer**.
- These are also seen as having relatively strong international fit (i.e., having experience and/or capabilities to work with inward productions).

Strengths

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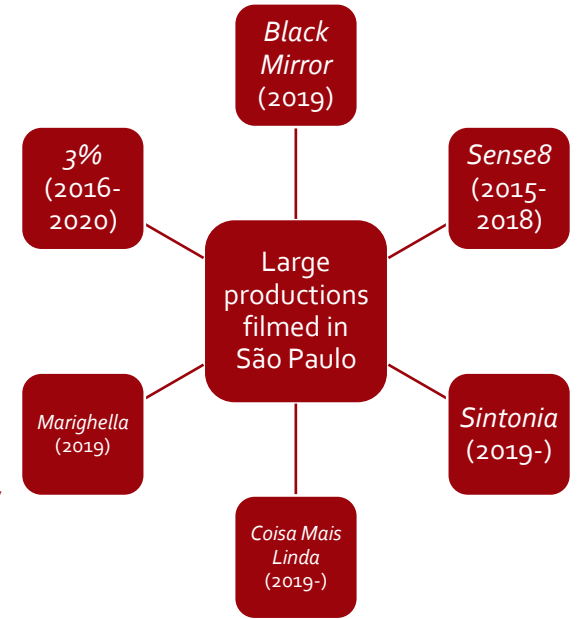
Spcine Cash Rebate – First & only Audiovisual content production incentive programme in Brazil
Consolidates São Paulo as a regional & global hub for film production



Annual Budget of R\$ 8.5 million expected to increase every year
There’s no cap for international productions



Pioneer in sustainability and inclusivity
Incorporates carbon credits to mitigate CO2 emissions and incentivises diversity



The city of São Paulo is such a cinematic city. Because of the architecture, the city itself, the cultural diversity. The city that we’ve been seeing just speaks to cinema and storytelling. – Keanu Reeves, São Paulo 2019

Strengths

Production Service Companies (PSCs)

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An abundance of Production Service Companies (PSCs)

Is a significant competitive advantage over other jurisdictions

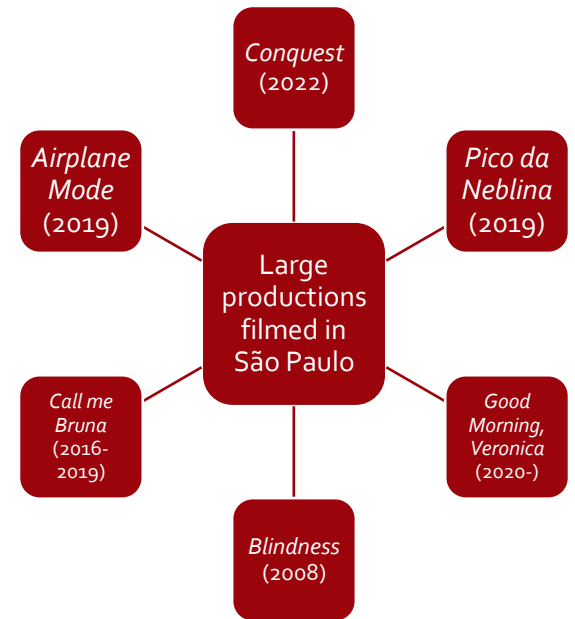


PSCs are Trustworthy Brokers for inward productions

Contributing to the overall film-friendliness of São Paulo



São Paulo PSCs are experienced and prepared to work with international productions

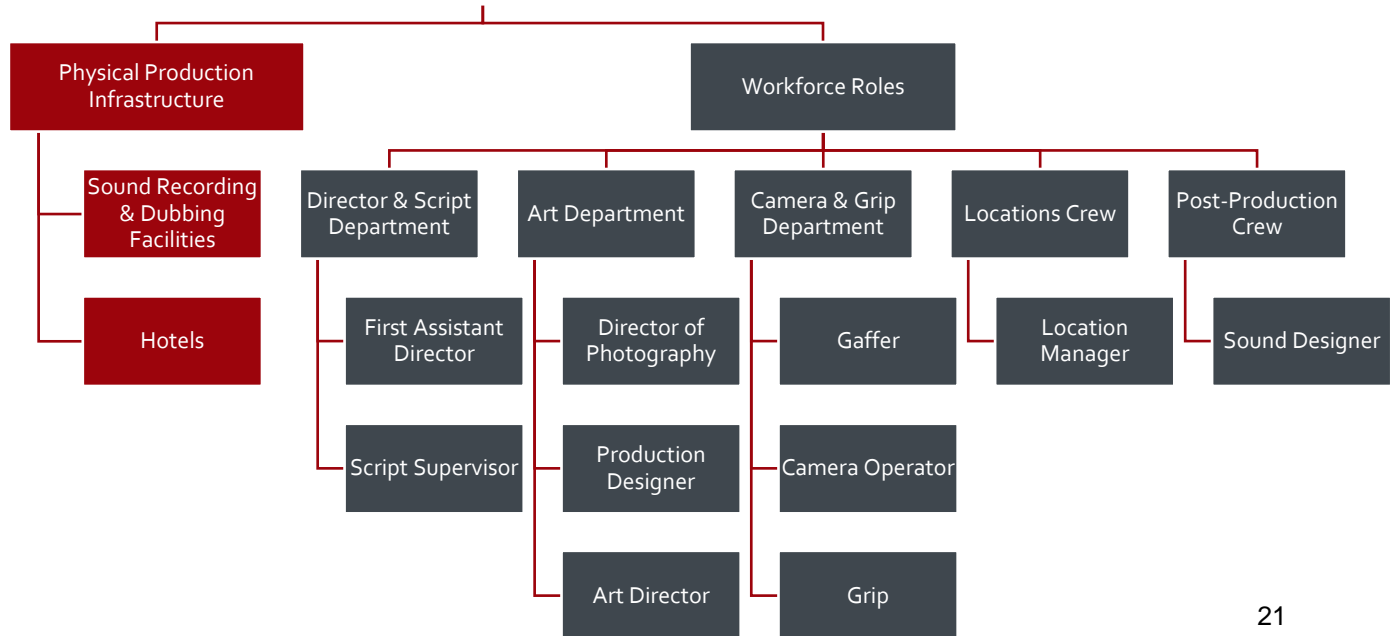


Executive producers and scriptwriters who are trained or have experience to work at the international level are also hard to find; putting together a team for production is not straightforward

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Areas of substantial immediate capacity & strong international fit



Strengths

Strengths

Cash Rebate

1

Spicine Cash Rebate – First & only Audiovisual content production incentive programme in Brazil

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Contributing to the overall film-friendliness of São Paulo



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Substantial Immediate Capacity in Certain Elements

Physical Production Infrastructure



Sound Recording & Dubbing Facilities



Hotels

Workforce Roles



First Assistant Director



Script Supervisor



Production Designer



Director of Photography



Location Manager



Art Director



Gaffer



Sound Designer



Grip



Camera Operator

Weaknesses

Workforce Training Programmes

- Training programmes were found to be **insufficient and inconsistent**, which can result in **low level skills, limited growth**, and **safety risks**.
- Informal training pathways also pose a barrier towards achieving greater diversity within the industry.

Workforce Capacity

- The BTL professionals who display a higher skill level are said to not have the capacity to meet growing demand, a situation that has made **production in São Paulo more costly**.
- Productions are also reported to be employing relatively unskilled labour in key executive roles, affecting **perceived professionalism**.
- The general **lack of English-speaking crew** is also seen as a negative hindering factor.

Production Facilities

- The impact of digital technologies for virtual production and special effects are now common features of content and may be prerequisites for determining physical production decisions.
- Greater São Paulo isn't currently able to adequately serve this demand, **scoring low on the current capacity and international fit of special effects coordinators and technicians**. Investment in the necessary skilled crew, production facilities and equipment are needed.

Weaknesses

Workforce Training Programmes



Training programmes were found to be **insufficient and inconsistent**, which can result in **low level skills, limited growth, and safety risks**



Informal training pathways also pose a **barrier towards achieving greater diversity** within the industry.

Workforce Capacity



The BTL professionals who display a higher skill level are said to not have the capacity to meet growing demand, instead **having to employ lower and unskilled labour**, affecting **perceived professionalism**.

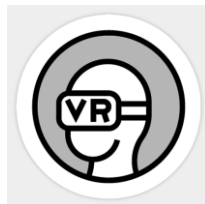


The general **lack of English-speaking crew** is also seen as a negative hindering factor.

Production Facilities



New digital technologies for virtual production and special effects are defining audiovisual production, and are the prerequisites for determining physical production decisions.



Greater São Paulo isn't currently able to adequately serve this demand, **scoring low on the current capacity and international fit of special effects coordinators and technicians**. Investment in the necessary skilled crew, production facilities and equipment are needed.

Incentive System

- The Cash Rebate, that includes sophisticated criteria for sustainability and inclusion, is a prerequisite to attract international investment, such as a world-class production studio, and thus a highly-effective tool for building a healthy production sector.
- It must be **consistently leveraged and championed**.

Skills Development and Training

- Formal training programmes need to ensure **opportunities for upskilling** and for **young professionals** and / or film school graduates.
- Targeted workforce development programmes are needed in **key areas such as special effects, stunts, and safety supervisors**.

Physical Infrastructure

- There are serious **concerns regarding both studio capacity and post-production facilities** in Greater São Paulo, these are key factor to the attractiveness of a market.
- Factors point to an **opportunity to develop a new major studio facility**. A feasibility study into a high-spec studio would be appropriate in order to take advantage of the Cash Rebate and the new pipeline of projects requiring studio facilities.

International Image

- Sector stakeholders generally emphasized specific limiting factors challenging their work in Greater São Paulo: a **perceived lack of security**, a **negative political image**, **bureaucracy**, **heavy import duties on equipment**, **tax burden on remittances**, **obsolete public policies at the federal, state and municipal levels**, and a **lack of English fluency among BTL workforce**. These factors are not limited to Greater São Paulo, these are national-level issues that affect production in Brazil.
- These issues should be addressed efficiently, as they limit the industry's potential to grow.

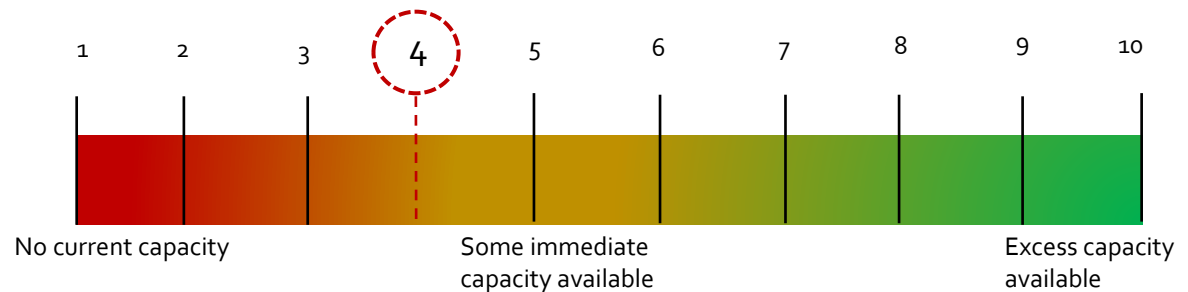
International Marketing

- It would be opportune to **develop and implement a comprehensive marketing campaign** aimed at engaging international players.
- Such a campaign would highlight strengths such as the cash rebate, efficient film commission, desirable locations, qualified PSCs and target key production centres such as Los Angeles, London, Berlin and Beijing.

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Purpose Built Sound Stages



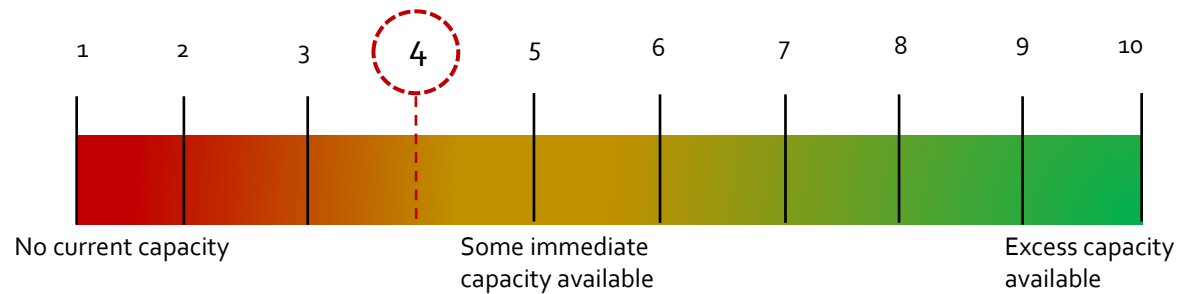
While there are production spaces in Greater São Paulo, there is **little current capacity in purpose built sound stages**, with the spaces regularly booked out on long-term projects.

This availability issue is **compounded by the quality of facilities on offer**. This is a common challenge in long established but technologically outdated industries, where the assets are not suitable to contemporary production.

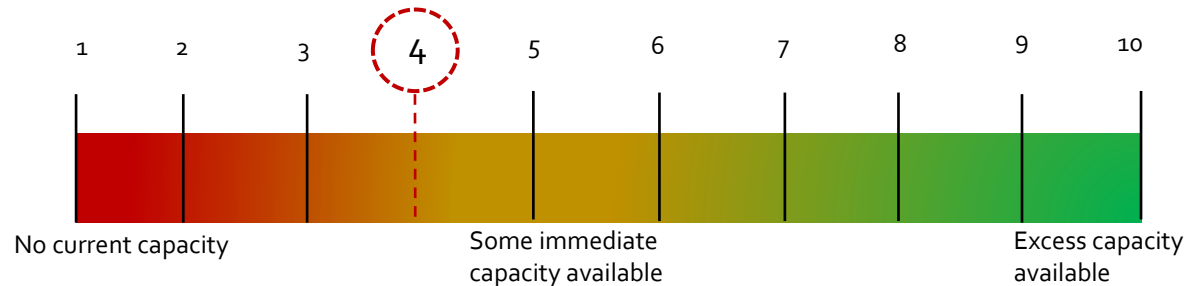
Without suitable technology and facilities, a lack of available world-class sound stages will act as a major constraint inhibiting São Paulo's ability to capture the growth that is possible in this sector, especially for inward productions; **57% of survey respondents reported that the current fit for international productions was medium or low.**

“Studios are an issue, especially if you need very large spaces, which allow the assembly of various scenarios and which still have good support and acoustic sealing.”

Purpose Built Sound Stages



“ Studios are an issue, especially if you need very large spaces, which allow the assembly of various scenarios and which still have good support and acoustic sealing.



Linked to the issue of outdated production facilities and equipment, there is **little current capacity in virtual production facilities.**

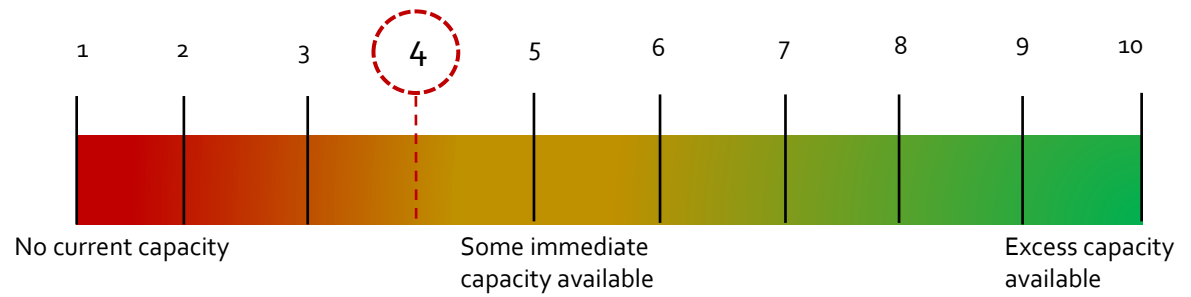
The current offer is also viewed as not fit for international production, with **over half (55%) of survey respondents reporting the fit as low or very low.**

An increasingly in-demand tool used by international streamers, an investment in this technology will enable the region to provide a Unique Selling Point that other parts of Brazil and LATAM are not currently offering.

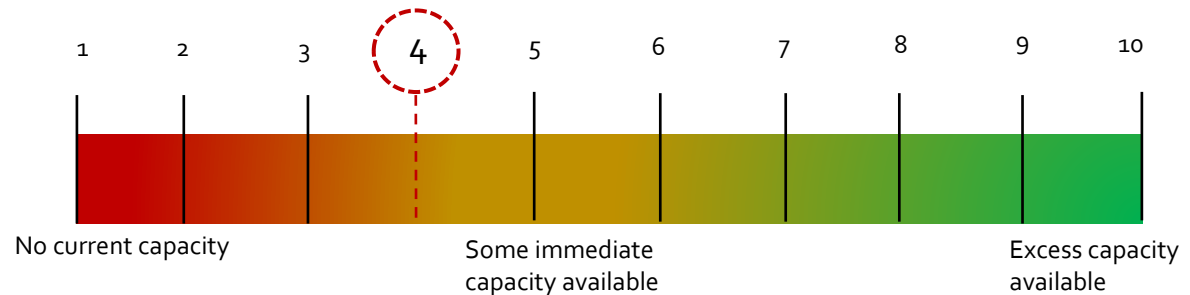
During the COVID-19 pandemic when production shut down globally for several months, virtual production was identified as an increasingly viable alternative to traditional production, benefits also include a reduced environmental impact and the removal of geographical restrictions to talent. However, this will demand the relevant crew training to operate such technology.

Production Facilities and Equipment

Virtual Production Facilities



Special Effects and Specialist Equipment

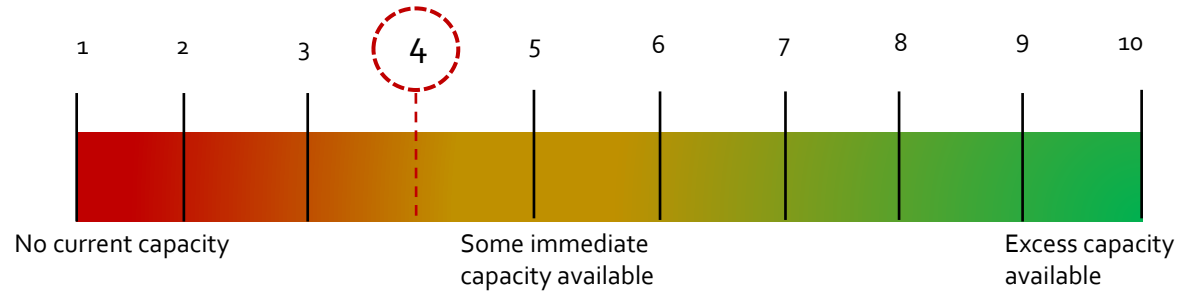


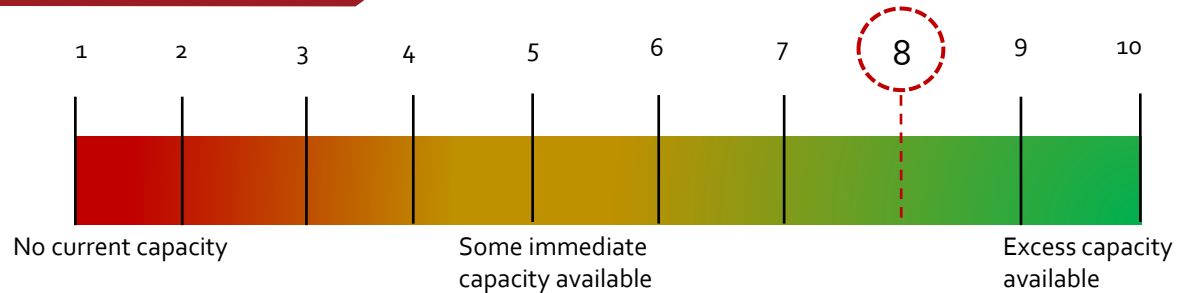
Linked to the issue of outdated production facilities and equipment, there **little current capacity in special effects and specialist equipment**. Special effects equipment includes a wide range of technical items, such as wind machines, motorised turntables, confetti cannons, smoke machines, CO₂ jets, and flame systems.

The current offer is also viewed as not fit for international production, with two in three (**63%**) of survey respondents reporting the fit as **medium or low**.

Consistent with the low capacity described above, the increased demand for VFX and specialised equipment for production by streamers, major studios and independents is clearly documented in a recent IDB report*, which ranked VFX skills 4th in the top 10 roles in current demand and 2nd in projected demand in 2024 for the AV production sector in LATAM and Caribbean. Note, however, that current lack of appropriate high-technology equipment and exorbitant customs duties on importation of such equipment may be an obstacle.

Special Effects and Specialist Equipment





There is currently **notable immediate capacity available in Production Service Companies (PSCs)**.

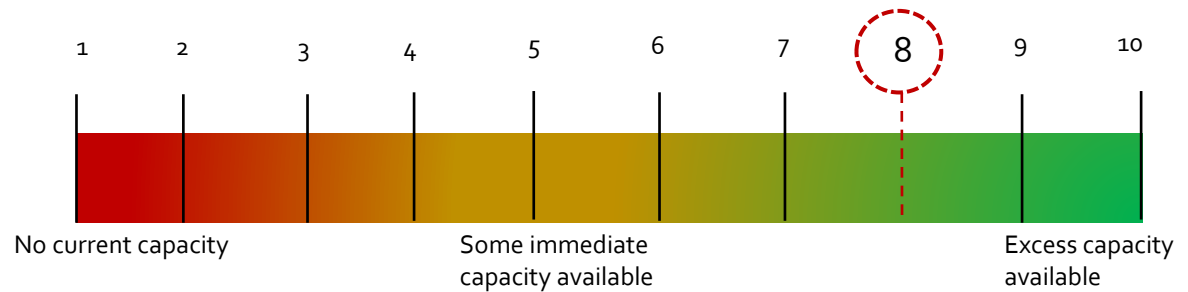
An abundance of local PSCs offers a significant competitive advantage for Greater São Paulo over other jurisdictions, which can act as brokers for inward productions on local laws, contacts, and dealing with authorities, as well as where to source experienced local crew, equipment, recommend locations, and obtain competitive rates on accommodation and vehicles. However, the general lack of English-speaking crew and the continued perception of security issues may be seen as negative factors.

The current offer is seen as fit for international production, with **two-thirds (69%) of survey respondents reported the fit as medium or high.**



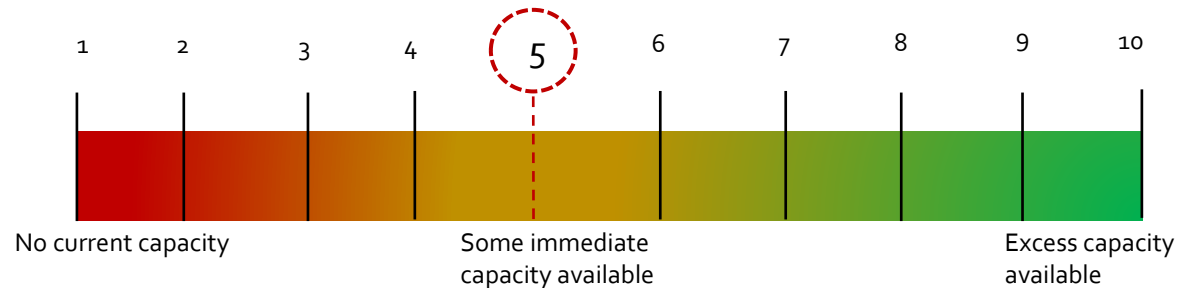
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Production Service Companies



“

Executive producers and scriptwriters who are trained or have experience to work at the international level are also hard to find; putting together a team for production is not straightforward

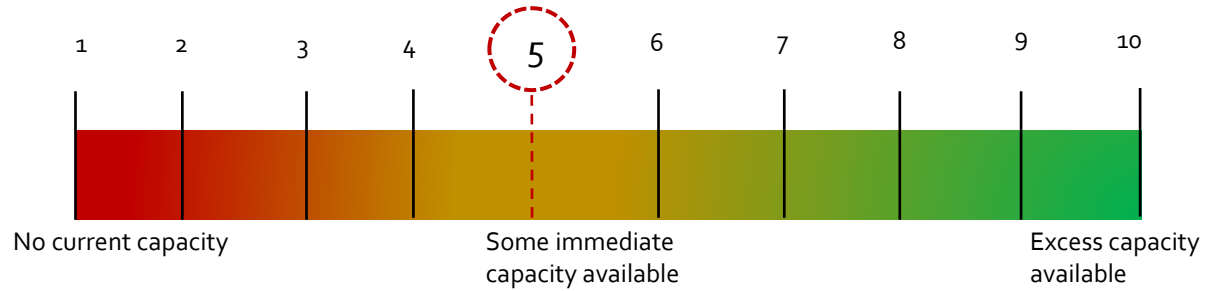


There is currently **some immediate capacity available for accounting and auditing production services.**

This is a critical function in great demand worldwide. Production accounting and auditing services track costs and budgets throughout principal photography and post-production for all formats of audio-visual content.

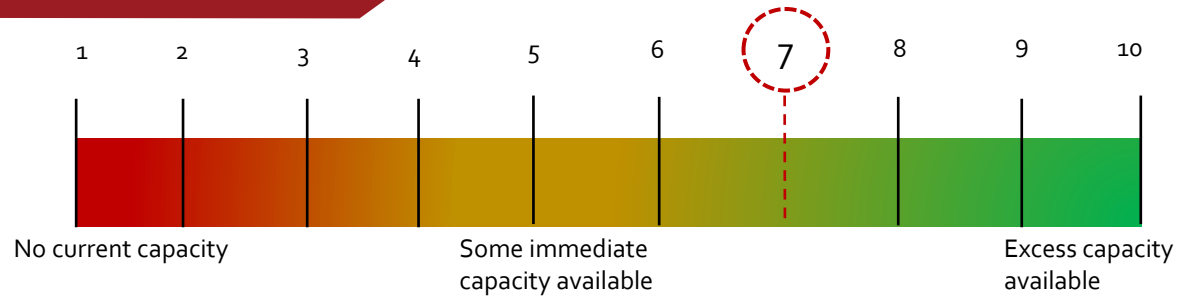
It is particularly critical in Brazil due to the generalised heavy tax burden (33% tax-to-GDP ratio), and has particular importance to international producers who must navigate the complex tax incidence regime for production, distribution and exhibition, as well as remittances. It is even more relevant in the context of Greater São Paulo, given the varying ISS rates in different municipalities. Having effective financial forecasting and control reassures inward production companies.

The current offer is seen as having some fit for international production, with **two-thirds (56%) of survey respondents reported the fit as medium or high.**



Below The Line Workforce Capacity

Production Designer



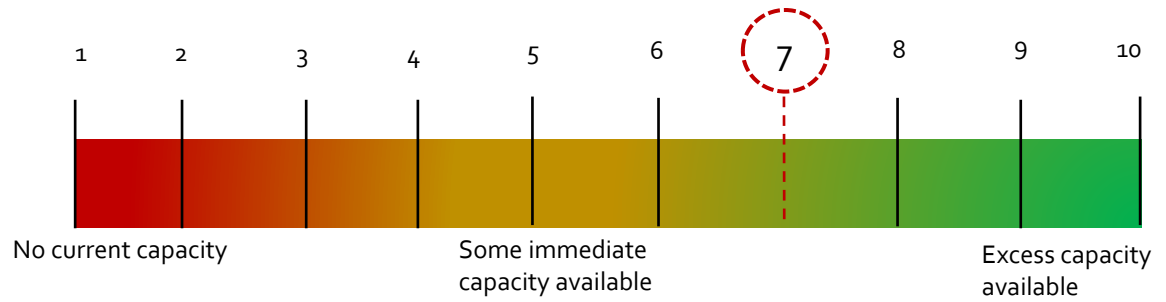
There is currently **some notable immediate capacity available for Production Designers**. Production designers are responsible for the visual concept of a film, series or any other audiovisual format production. They identify a design style for sets, locations, graphics, props, lighting, camera angles and costumes, while working closely with the director and producer.

This is a critical function in great demand in Brazil and around the world, as consumers globally are constantly provided with ever-increasing visually stimulating content. Note that the the IDB report ranked Production Designers as number 1 among the top 10 roles currently in greatest demand and number 1 in projected demand in 2024.

The current offer is seen as fit for international production, with **two-thirds (67%) of survey respondents reported the fit as medium or high**. However, it's critical that São Paulo productions and crew prepare for continued high demand for sophisticated production design capabilities.

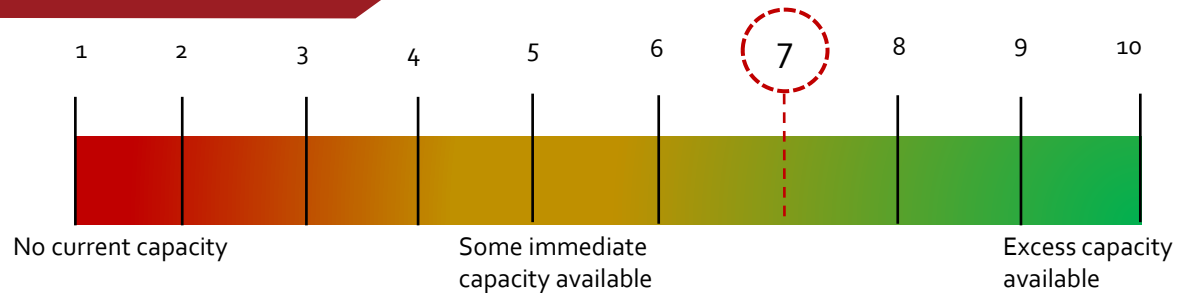
Below The Line Workforce Capacity

Production
Designer



Below The Line Workforce Capacity

Director of Photography



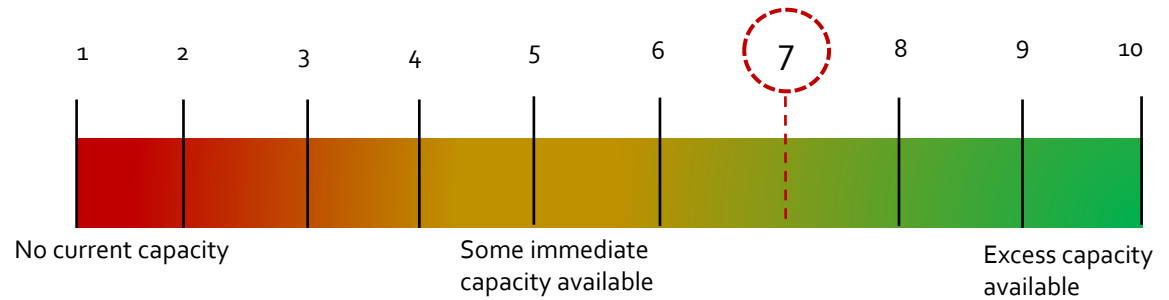
There is currently **notable immediate capacity available in Directors of Photography**. The director of photography, also known as the DP or cinematographer, is ultimately responsible for creating the “look” of a film. It is one of the key roles in any project, and Brazil is well-known for its competent DPs, such as Lula Carvalho, Cesar Charlone, Affonso Beato and Adriano Goldman.

Based on SPI consultations and research, Greater São Paulo does offer significant Director of Photography resources, and several Brazilian Directors of Photography have worked on notable international foreign productions with major studios.

However, consultees noted that while there may be spare capacity, they were still regularly working with personnel who have **limited experience in that role, as there was little or no time to train them**. This perception may reflect concerns about qualified Directors of Photography support staff, such as gaffers and grips, indicating a need for programmes for upskilling in those areas to maintain a fully internationally competitive crew base.

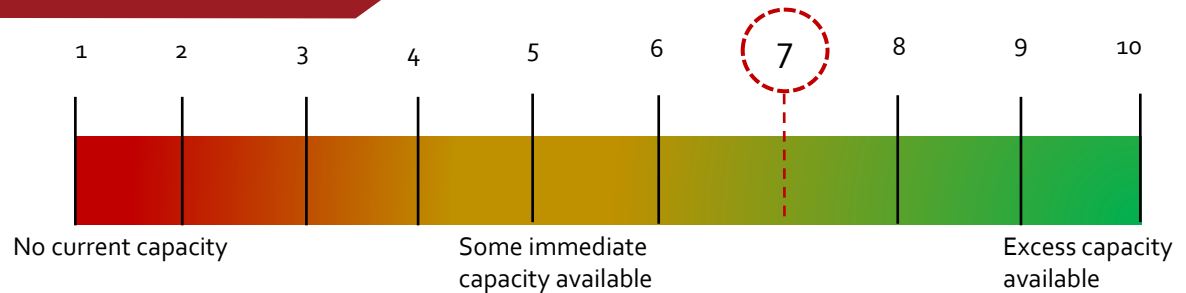
Below The Line Workforce Capacity

Director of
Photography



Below The Line Workforce Capacity

Camera Operator



There is currently **some notable immediate capacity available for Camera Operators**. Camera operators are responsible for operating a variety of technical equipment including single and multiple portable cameras, remote-control and electronic cameras, cranes and mobile mountings.

Consistent with the previous slide, qualified Camera Operators are an integral part of the Director of Photography support staff and may require upskilling to ensure a fully internationally competitive crew base.

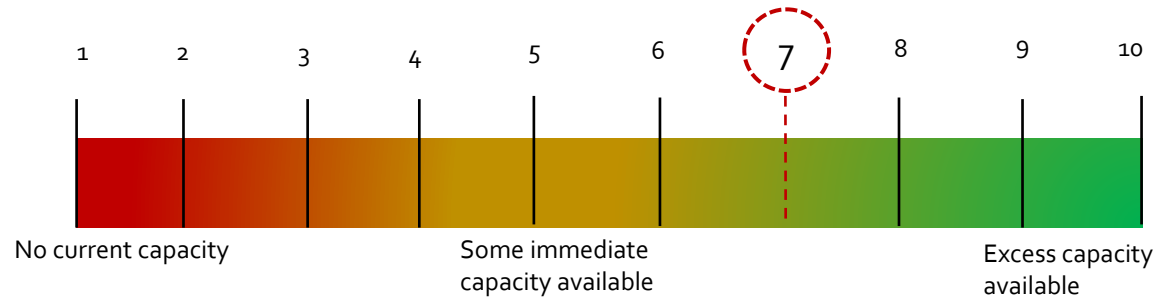
The current offer is seen as fit for international production, with **60% of survey respondents reported the fit as medium or high.**



The equipment that requires more technological knowledge creates a gap between generations. Older professionals aren't necessarily up to date with new equipment, there's been an entry of professionals fired from broadcast TV... [who] went to knock on the door of producers... there's no renovation in these roles.

Below The Line Workforce Capacity

Camera Operator

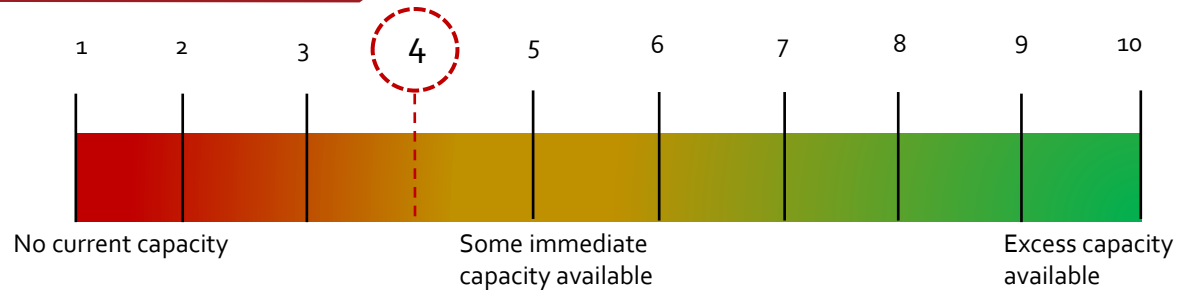


“

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Below The Line Workforce Capacity

Safety Supervisor



There is **little current capacity available for Safety Supervisors.**

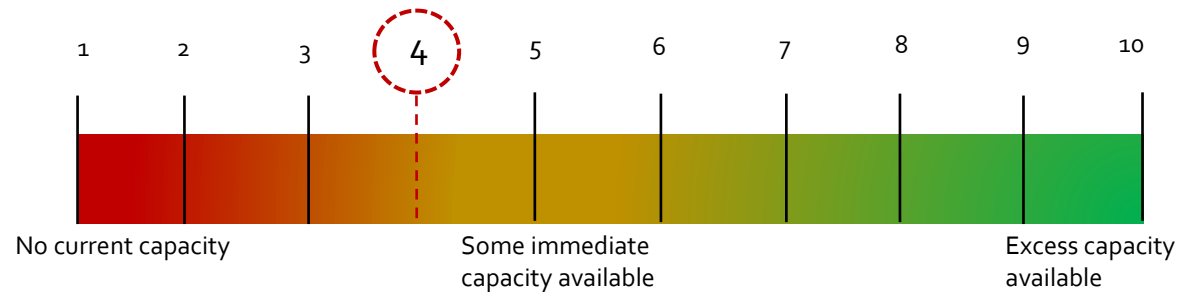
In part driven and emphasised by COVID-19 restrictions (e.g., social distancing, PPE and rapid testing), the health and safety of production sites has become increasingly important to producers and relevant authorities. A highly technical function, relevant and up to date training in this area will be hugely attractive to inward productions who may be less familiar with local laws and restrictions.

The current offer is seen as having reasonable fit for international production, with **50% of survey respondents reported the fit as medium or high.** “

We have a very bad image problem, we worked on this over the last two decades and then reversed ten years [worth of progress] in the last three years, co-productions with Brazil are being discriminated against... for projects that involve star power, the security issue and having to hire insurance companies creates difficulty

Production Facilities and Equipment

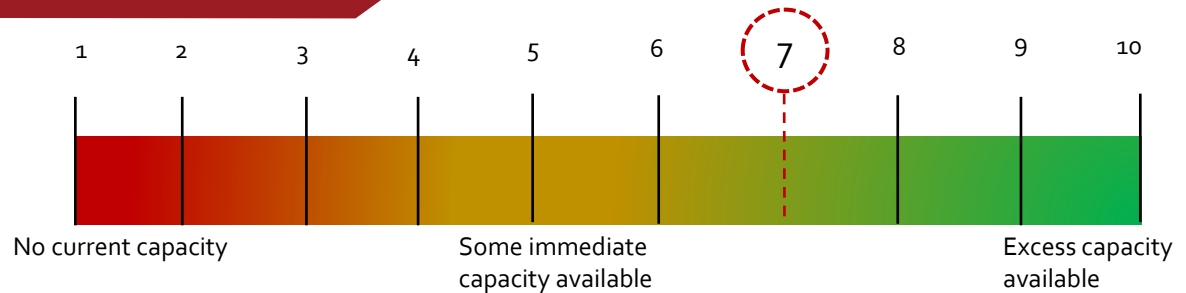
Safety
Supervisor



We have a very bad image problem, we worked on this over the last two decades and then reversed ten years [worth of progress] in the last three years, co-productions with Brazil are being discriminated against... for projects that involve star power, the security issue and having to hire insurance companies creates difficulty

Below The Line Workforce Capacity

Location Manager



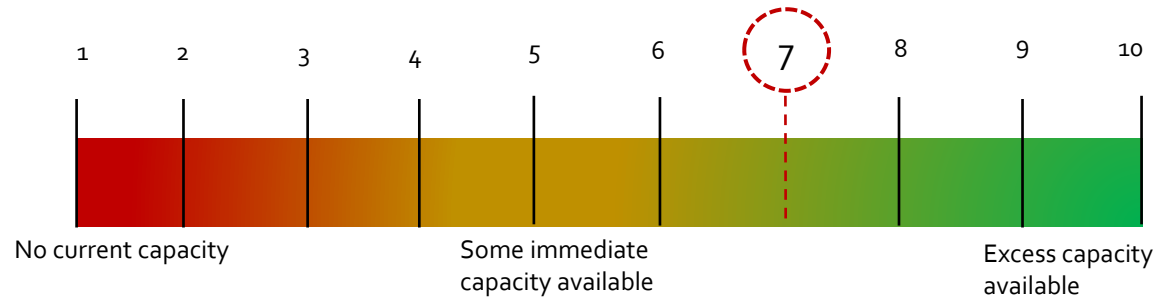
The location in which a film is set has a huge impact on its look, feel and story. It's the job of location managers to find that place in the physical world and make sure it's accessible, safe, and not too expensive to hire. There is **notable immediate capacity available for Location Managers** in Greater São Paulo.

This is a key role for inward productions, as an effective Location Scout will be able to determine appropriate locations based on desired aesthetic, distance from crew, permissions, cost, and suitable environments. Investment in this role will enable the production sector to spread further across Greater São Paulo and generate wider economic and social impact to other parts of the region.

The current offer is seen as having reasonable fit for international production, as **66% of survey respondents reported the fit as medium or high.**

Below The Line Workforce Capacity

Location
Manager





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Olsberg-SPI (“SPI”) are an international creative industries consultancy based in London, specialising in the global audiovisual sector.



Their international client base includes government ministries, public agencies and institutions, and commercial entities, specialising in the worlds of film, television, video games and digital media.

Their expert services help their clients to plan, design and deliver sustainable growth, evidence impact and evolve and expand in a highly-competitive and fast-moving industry.