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Avid's Tim Claman on the tech driving change in post

Post sector on the rise

UK facilities report a bumper year as production gets back on track following the pandemic pause



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Boom time for post sector

UK post houses are thriving as production revs up following the pandemic, with facilities expanding and greater use of the cloud and AI. **Jake Bickerton** reports

Post houses that weathered the Covid storm have been in an excellent position post-lockdown thanks to a 'traffic jam' of productions fuelling increased demand for post-production services.

Furthermore, clients are likely to be high-spending streamers requiring high-end finishing, including 4K HDR and immersive audio, which has shifted the emphasis from the sector servicing bread-and-butter TV to more lucrative work.

So how are the UK's leading post houses finding business, and what do they think are the key challenges and opportunities facing the sector in the coming year?

Eburne Bengoa, director of post production at ITN, sums up the state of the sector: "It has been a bumper year for so many reasons. A lot of parked-up productions were picked up again, plus there was a huge increase in work from streamers and UK broadcasters alike, which meant it was incredibly busy across the sector."

It's a similar situation at Clear Cut Group, reports group managing director Rowan Bray. She says the past year has been "buoyant and optimistic – a real uplift

after 2021 had been characterised by Covid restrictions. There has been an influx of quality productions both generated within the UK and from abroad."

Simon Cull, managing director at Glasgow's Serious Facilities, puts it more succinctly: "It's been absolutely mental, I've never seen a year like it."

Likewise, in Leeds, True North Post manager Andrew Lurcuck says: "Looking regionally, the industry is thriving. We're busier than we've ever been."

Back in London, Envy Post chief executive Dave Cadle agrees that the sector is buoyant. "We are extremely busy," he says. "What may have previously been seen as a post-Covid bump to make up for quieter times in 2020/2021 has continued. We see a very strong 2023 ahead."

Over in Cardiff, Gorilla TV managing director Rich Moss is also optimistic about business in 2023, while acknowledging that there has been "lots of disruption, which brings challenges and opportunities".

Cara Sheppard, global president, Picture Shop, Streamland Media, sums up by saying: "There's an ever-increasing demand for post-production and VFX capacity in the >>



"The past year has been buoyant and optimistic – a real uplift after 2021"

ROWAN BRAY
Managing director
Clear Cut Group

Above: BBC1 series *Industry* is post-produced at Gorilla TV

UK, which has resulted in new post houses springing up and movement of both management and creative talent between facilities. It's an exciting time where the landscape is evolving very quickly."

The ever-changing nature of post, where tech continually drives innovation and efficiencies, is both a challenge and an opportunity. Resting on your laurels is not an option if facilities want to keep up with the rest of the market, which means investment in, and expansion of, products and services, buildings and talent.

Serious Facilities' Cull says: "We have expanded considerably in 2022 and have added to our remote offering."

Meanwhile, ITN's Bengoa explains that her company's focus has been gearing up for HDR. "We have ventured into HDR work for the first time this year, so have invested heavily in our facility," she says.

It's also been a busy year of investments, reconfigurations and adaptations for Clear Cut, says Bray: "This year we built an Atmos suite, doubled our storage for offline suites, delivered a purpose-built remote facility and reconfigured our buildings to focus more on remote services."

For Lurcuck at True North Post, it's been less about making significant changes and more about steadily growing different aspects of the business. "We've increased the number of remote suites, introduced Avid Media Composer to non-editors and seen four of our junior editors come through our Avid Learning Partnership training scheme."

Meanwhile, there's been some consolidation in the post sector too, with Envy taking on VFX house Absolute and animation sister company Blind Pig. "It allowed us to offer full end-to-end post-production from on-set capture to full VFX through to full post-production and delivery," explains Cadle.

Another post house that's been on the acquisitions trail over the past few years is Streamland Media (which acquired The Farm Group in 2019 and Technicolor Post in 2021). Sheppard says this has brought its own difficulties: "With multiple acquisitions of large market players globally, our biggest



challenge is trying to ensure business continuity to some of the largest productions in the world, while integrating and streamlining our services across both scripted and unscripted content."

Scaling up

This ability to scale up, either through acquisition or new ways of working, has been one of the biggest transformations in the industry. Clients can now choose whether their post work is carried out at the facility, fully remotely, or via a hybrid approach.

"We have taken advantage of the hybrid model of working and have been able to scale up our remote offerings to accommodate the increase in workload," says Bengoa.

Cull also points to the flexibility of remote working in enabling him to win business. "The ability to scale up on demand and being able to take on large orders of multi-episodic

work from national and international projects" has been one of the biggest opportunities for Serious Facilities over the past 12 months, he says.

This point is echoed by Bray, who says: "As remote services have become embedded into production company's processes, we have seen an increase in global production collaboration – offline editors and operators across the globe working together seamlessly from our facilities hub."

For Sheppard, scaling up is a direct result of Streamland's acquisitions. She says: "The multiple acquisitions we have made, while challenging, have also meant we can use an amazing roster of creative talent across global locations, as well as our wealth of technology solutions and network, which means we can offer a unique service."

Lurcuck is another to highlight the advantages of remote working capabilities



Left: ITN's *Sex, Lies And The College Cult* for Netflix
Above: ENVY worked on *The Cleaner* for BBC1

in being able to secure new business. He says: "We now have the capacity and technology to work with new clients and production companies from all over the country."

While the post industry re-establishes what is 'normal' post-pandemic working practice, it has also had to grapple with the shifting demands of its client base, with HETV requiring the feature film-style finishing of meticulous grading, immersive audio and showcase VFX. What clients now look for in a post house is very different to what they might have been looking for just a few years ago.

Gorilla TV's Ross says clients are looking at what kind of assistance post houses can offer during the different stages of production. "A lot of clients are not afraid to say they need help and support," he says "They are also looking for the usual efficiencies and

cost savings. A workflow manager/advisor is essential to ensure cost-effectiveness, but good post-producers are key to the success of a post house just as much as finishing talent. The ability to provide remote suites and edit/producer integration with them is key to most productions. Supporting this service and providing for out-of-hours support is essential."

ENVY's Cadle agrees: "Clients are increasingly looking for facilities to be involved earlier in the process. This can be workflow design and camera testing, but also a presence on set. As far as offline is concerned, it's very clear clients want a fully hybrid solution."

The need for flexibility of working environment for clients, combined with pressure to be cost-conscious, is reported by all post houses. True North Post's Lurcuck says: "Most of the production companies >>



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Director of post-production
ITN



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DAVE CADLE
Chief executive
ENVY Post



“We will use cloud services as and when the business need arises”

RICH MOSS
Managing director
Gorilla TV



“We all need to be responsible for training the next generation of talent”

CARA SHEPPARD
Global president
Picture Shop



we’re working with are looking for the capability to work remotely and with cost-effective finishing to meet challenging production budgets.”

“Clients are looking for flexibility in accommodating the hybrid model of in-house and remote work practices, accompanied with a tiered cost model. But as we know, remote facilities are not necessarily always cheaper,” warns Bengoa.

Meanwhile, Clear Cut’s Bray lists a range of specific criteria she finds her clients are looking to fulfil. Her list includes the post house satisfying the client’s nations and regions requirements; offering services and support for all major editing platforms; providing remote edit suites with the flexibility to transition to an on-prem suite service in an instant; and project support.

While the uptake of working in the cloud was speeded up due to the Covid lockdowns, for some, the move was a temporary one. “We have very little in the way of cloud base outside of MAM,” says Serious Facilities’

Cull, while True North Post’s Lurcuck reports: “Nearly all our post services are server based on premises – cloud is an area we are still researching.”

Similarly, Bray says: “We provide fringe services in the cloud, like [video management and collaboration software] Media Silo, but our core services are provided on our dedicated, fully bespoke, in-house solutions, based at our premises.”

Cloud uptake

However, Streamland Media has more fully embraced a longer-term move to the cloud. Sheppard explains: “Several elements of our business already utilised some cloud services pre-pandemic, but then this was accelerated through necessity to ensure business continuity to our clients. While much of this work has returned to the facility, we have seen a permanent change in the way clients expect to work, which has increased the appetite for more remote accessibility to content and remote working.”



Left: Clear Cut post produces *Amanda & Alan's Italian Job* for BBC1
Above: True North Post worked on BBC1's *Yorkshire Firefighters*

Bengoa is planning to further explore the possibilities of cloud working this year. She says: "We don't use cloud for editing, but do for peripherals in post like archiving, transferring data and review and approval. We have plans to proof-of-concept cloud-based computing and other SaaS offerings."

Gorilla's Moss says: "We had cloud services pre-Covid, and will use and expand them as and when the business need or opportunity arises."

ENVY, meanwhile, has created an app to make it easy for clients to go down the remote editing route. Technical operations director Jai Cave explains: "Back in 2020, we started developing a suite of tools to make editing remotely seamless. To offer a true hybrid editing and collaboration solution, we have essentially become the cloud for our clients."

AI is another hot technology, used to automate, streamline and speed up repetitive tasks, and while many have turned to AI to a limited degree, there's a lot more that could be done.

"We use AI for transcription and video tagging and metadata," says Cull.

Bengoa adds: "We do some AI for transcription, and undoubtedly this is an area of growth for us."

Likewise, Cave says: "We have built specific tools that make use of AI/ML [machine learning] in the cloud and see this as a continued focus. We definitely see a future where AI/ML will have a larger role to play."

However, Bray, Lurcuck and Moss aren't so sold on the benefits of AI just yet. Bray says it's "not really appropriate in a creative context", while Moss says Gorilla TV uses it "in a small way". Lurcuck notes: "We are always looking at new and effective ways to streamline our workflows - but value the importance of people and their career development in the process."

With the increased demand for post services and the resulting expansion of the sector to accommodate demand, an ongoing problem is finding experienced talent to fill vacant positions.

"There is a serious talent shortage and unlike in production, there is no funding model to support the training that post houses undertake," says Clear Cut's Bray

Lurcuck adds: "Experienced talent is in short supply regionally - True North Post is an Avid Learning Partner, and we look to develop talent in-house, although that takes time. But we do believe it's an important area of our staffing development,".

Gorilla TV also looks to train up existing staff: "We are training and upskilling more and more junior staff and offering opportunities to others to move upwards," says Moss. "We do have difficulty finding experienced talent. We have no shortage of keen and diverse new talent but are struggling to train and mentor them."

Cave agrees that finding new talent is a challenge but Envy's in-house training programme has been successful at creating a pool of talent to draw upon.

Streamland Media's Sheppard says: "With new facilities opening almost monthly, this has put more pressure on an already thinly spread talent pool. We, as facilities, all need to be responsible for training the next generation of talent."

Another aspect of recruitment, beyond training up new talent, is trying to create a more diverse workforce. It's an area where, historically, post-production has struggled, both in terms of gender and racial diversity.

"The fact that we have to train our own staff is an advantage, as prior learning and opportunity is less important," says Bray. "We look for aptitude, communication skills and personality. The result is that we employ many people from diverse backgrounds and with special needs, and are able to support and enable their success in the business."

ITN's Bengoa adds: "The lack of available skilled talent to hire has been a constant throughout the year. The two-year gap with Covid meant that all the juniors/runners coming into the business stopped. The impact of a lack of staff has been huge. We are slowly catching up with it, and I expect 2023 to be 'almost' back to normal. But it's crucial we constantly push the boundaries in recruiting staff from the most diverse talent pool." ●

Avid tech helps ENVY stay ahead of the curve

The facility has long been at the forefront of post innovation and is now leading the way in offering clients the flexibility to work on-prem or remote

ENVY Post has stood on the cutting edge of innovation since opening its doors in 2006. Today the company operates five facilities around London, all using next-generation technology to satisfy the creative and technical requirements of leading content creators. The long-time Avid customer recently acquired visual effects studio Absolute and its sister animation studio Blind Pig, adding even more firepower to its arsenal of end-to-end post-production services.

ENVY technical operations director Jai Cave knows that keeping pace with the technical curve demands that the company stays abreast of developing trends. His sights are focused on the ability to provide customers with a complete menu of traditional and cloud-based services, from on-set video capture through editing to visual effects creation and distribution.

“Clients want true hybrid,” says Cave. “That’s the message we’re getting loud and clear, and I think that’s where we’re all heading. The future is about the flexibility to work any way a client wants, whether locally or remotely, whenever they want, without restriction. That’s become the expectation.”

ENVY recently purchased all-new Avid NEXIS F-series storage engines to support its ability to offer on-prem and remote services, a direction the company had embarked on before Covid. Customers can now seamlessly access ENVY’s existing array of Avid Media Composer non-linear editing systems in a facility suite or from their home or office.

With its deployment flexibility, Avid NEXIS F-series storage plays a crucial role

in ENVY’s current plans. “As projects get ever more complex, having that reliability and agility is really important,” says Cave. “It’s helped us a lot, both on the offline side and the finishing side.”

The opportunity to work from remote locations is changing more than post-production workflows. Post houses like ENVY are expanding their role to include the entire content lifecycle, from on-set production right through to delivery. “On-set capture is something that post rarely got involved with, but that’s now changing,” Cave explains.

Efficient workflows

From a visual effects perspective, having on-set supervision from a post house pays significant dividends. “Small mistakes on set, like not lighting something correctly or not putting markers where they should be, can have huge time implications in post,” Cave says. “So we’re now able to take the idea of ‘let’s fix it in post’ and turn it on its head, because if you’re responsible for both the capture and the edit, you can push these two things together seamlessly. That ability opens up things creatively for the client and helps them turn around projects quicker.”

Ultimately, what content creators desire is greater efficiency throughout production and post. ENVY has invested heavily in on-set services through its Capture division, as well as with its recent acquisition of Absolute and Blind Pig, to bring real measurable efficiency and flexibility to clients’ projects.

Cave concludes that Avid will continue to play a crucial role for ENVY as the industry marches forward. Customers trust the Avid



“The future is about the flexibility to work any way a client wants”

JAI CAVE

Technical operations director
ENVY Post

ENVY Post: the post house’s Avid Media Composer systems can be accessed by clients from the home or office

name, and the company’s innovative products are reliable and deliver on their promises – essential qualities in the professional video market.

“It’s great to be involved with Avid, because they listen to customers really well,” Cave says. “In the ever-changing post industry, that level of communication among innovators can’t be underestimated.” ●



What's on the horizon for post?

Avid general manager and SVP Tim Claman talks to **Max Miller** about how the sector is faring, the challenges it is facing and the key tech driving change

Where do you see the industry right now? What are the key technologies?

The industry is in the throes of an unprecedented transformation. Increased demand for content, driven by competition for subscribers, fueled by the transition to D2C business models, is creating shortages in talent and pressure on budgets. Content producers need to create higher-quality material more efficiently than ever before.

To help close the capacity gap, the Avid customers I talk to are looking for technology solutions that boost efficiency. They want to virtualise everything – their workforce, their tooling, their data, their infrastructure. Technologies that enable collaboration, work from anywhere, data virtualisation and workflow automation are all top of mind.

What do you think is the biggest issue – and what can be done to overcome it?

The sheer amount of content that needs to be created, and the pressure that's putting on the operational working models and the technology stack, but also on the people.

Of course, technology can help increase productivity, which can enable fewer people to get more done. And recent advances in remote working are making it easier for content producers to tap into the global workforce. But technology is not enough. We also need more people – more creative talent and more technical talent. There just aren't

enough well-trained workers flowing into the industry. We need to engage people when they're early in their development and thinking about their careers, providing them with the tools and training they need to be productive when they enter the workforce.

At Avid, we're working on programmes that will make our video creative tools more accessible to students, essentially making them available for free, along with training and support. It's going to take a couple of years of focused effort from the industry to build an adequate pipeline of new talent.

Where do you see the industry going? And what technology could be important in that change?

One trend we can already see is that media organisations are getting more sophisticated in the commissioning process, recognising that they are better off greenlighting 10 modestly budgeted shows, rather than sinking a gigantic amount of resource into one big-budget project. So I predict that we'll see even more demand for post services.

Another market driver is localisation. As content providers expand their reach to more regions, they are doing more content customisation. It's no longer acceptable to simply add captions because audiences have become more sophisticated and demanding. This trend also points to higher demand for post services, especially audio.



Tim Claman

“What you’ll see on our side is an emphasis on enabling agility, efficiency and creativity: more cloud enablement, more deployment flexibility and more elastic provisioning”

What you'll see on our side is an emphasis on enabling agility, efficiency and creativity. You'll see more cloud enablement, more deployment flexibility, more elastic provisioning, and a continued shift to provide the kind of operational flexibility our customers need. That inherently means more consumption-business models, including subscription and SaaS.

You'll see more AI and ML [machine learning] from us over the next 18 months. We are seeing huge potential for AI/ML to automate or, better yet, eliminate mundane tasks while accelerating creative choices. ●
Tim Claman is general manager and SVP, video & media solutions, at Avid



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