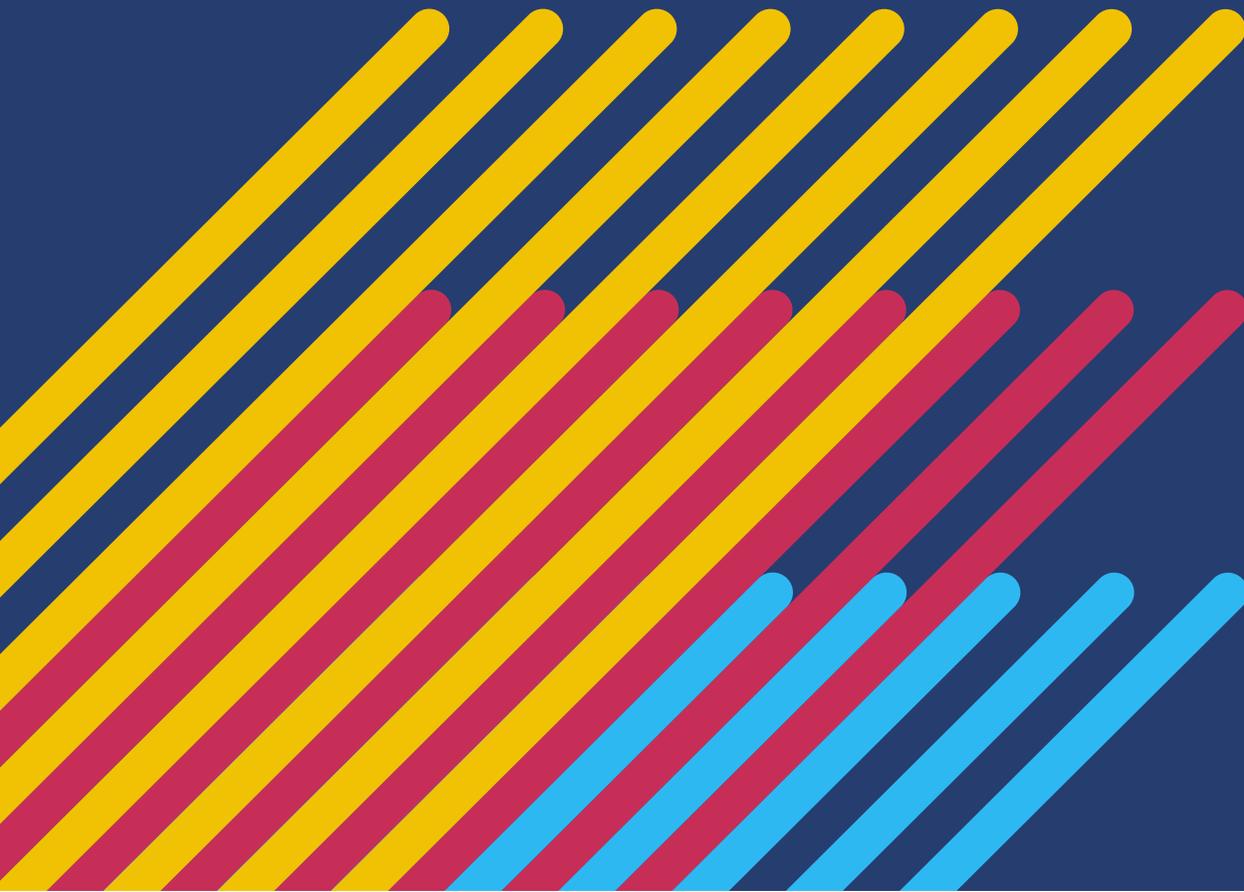




SURVEY REPORT:  
**NEW CONTENT  
CREATORS**



Enabled by





**Be like water making its way through cracks. Do not be assertive, but adjust to the object, and you shall find a way around and through it. If nothing within you stays rigid, outward things will disclose themselves.**

BRUCE LEE

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# The Context

## NON-BROADCAST CONTENT IS NOW KING

There was a time – and it wasn't very long ago – when the creation of audio visual content for any purpose other than Film or TV was considered a second-class activity.

But there is now more content created for non-broadcast distribution than for broadcast – and often with creative and production values that equal or even exceed those of TV.

By 'non-broadcast' we mean content created directly for online distribution, via YouTube, Facebook, Snapchat and other platforms; commercial or branded content; corporate communications materials; educational content; professional applications, such as medical, military, governmental use; consumer experiences, and so on.

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“ I see huge potential for more corporate applications. I see more and more corporate companies who need to structure the workflows of marketing and communications content, and instructional video, HR applications, internal marketing. Did you know that one of the largest retailers in Belgium has an internal production company of 300 staff!

LIMECRAFT

“ Not only is video a magic tool for public facing or customer facing conversations, but also for large, mobile brands with multiple offices, needing to communicate their vision and their messages for staff training, corporate responsibility, economic strategies, mid term plans, short term plans, and all the rest of it. Video is the way you can communicate with emotion, with passion that still images and the written word can't always convey.

CANON

Indeed, it is now difficult to find a walk of life in which video does not play a role. And the way that video is being used in brand communications is changing: it isn't simply about advertising; it's about building relationships.

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“ The biggest changes in the last few years have been in understanding how brands should be talking to consumers and what's acceptable and possible as a brand. You don't have to sell any more, you can talk to your audience. And brands have been developing on their social media channels in that way, as well as in the way they create their videos. It's been a huge transformation: you can just make great stuff, and it can be picked up.

THE O COLLECTIVE

Such are the available audiences for non-broadcast that the very term may already be redundant:

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“Broadcast content today is anything that is broadly cast: it goes out and hits a wide audience. So whether that’s an antennae on a hill or whether it’s through IP; whether it’s consumed on a phone or on television is irrelevant: it’s the size of the audience that it’s hitting – that’s what broadcasting is.

ADOBE

Traditional broadcasters are struggling to make the adjustment:

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“Many of our customers are, quite frankly, struggling to keep up. They don’t know if they should be getting into something, or if it’s going to be a waste of time or money. So they are trying to keep a toe in the water of each of these different kinds of platforms, saying “we should be doing this, we should be on Snapchat, we should be on Facebook, what do we do on Twitter, is Facebook live going to be the replacement for TV news” etc etc? And they realise also that what they were doing before in basically just taking their linear TV content and chopping it up into pieces and pushing it out on the Internet exactly as-is, isn’t working for them anymore.

VIZRT

This demand for non-broadcast content, together with the need for producers who understand how to work with it, has led to the growth of a very significant new production community. These are the digital agencies, online channels and in-house corporate production teams that rarely, if ever, produce content for traditional television. They work entirely outside the established culture of the independent television production companies.

But have these new content creators yet established a distinctive culture of their own? If so, then how should that culture be characterised; just how different is it from the independent TV production company world; and can we expect the two cultures to begin to influence each other?

**These are the questions this DPP Survey Report seeks to address. The report is the first ever piece of qualitative research looking into the operational models of new content creators and the suppliers who enable them.**

## The Approach

Research for this Survey Report was undertaken through interviews with 32 companies conducted between May and August 2016. The companies interviewed fall into two distinct categories:

### Non-broadcast content creators

This interview group consisted of 21 digital agencies, online magazines and online channels, varying in size from single-person enterprises to global brands.



AJ+



ALLEYCATS



ANGRYCHAIR



BLIPPI



BULLION



BUZZFEED



THE CONNECTED SET



DE VILLE FILM



INITION



LITTLE BABY BUM



THE O COLLECTIVE



MIND'S EYE



MYACCOMPLICE



REWIND VR



RUBBER REPUBLIC



SOMETHIN' ELSE



SPIRIT MEDIA



THREEFOLD FILMS



TYT NETWORK



VILLAGER



THE WEEK

## Suppliers of tools for non-broadcast

The second interview group consisted of companies who specialise in providing the enabling tools and technologies for the new content creators. Some are specifically focused on tools designed for this community, but most make tools that are suitable for all content creators – it's just that the non-broadcast community is a strategically important part of their business.

Again, these companies range from small, specialist providers right through to global media giants.



ADOBE



AUDITIONIST



CANON



DROPBOX



FRAME.IO



LIMECRAFT



MIRROR IMAGE



MOVIDIAM



VIZRT



WIPSTER



WOCHIT

Needless to say, such a huge diversity of companies provided a similarly huge range of experiences and insights. Nonetheless some very strong and significant themes emerged. These themes can be grouped under the following five headings:



### BUSINESS

The kind of output that is made, how it is initiated and distributed, and the commercial principles behind the business



### ANALYTICS

The use of data and analytics, market intelligence, audience insight and feedback



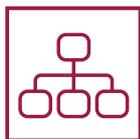
### PEOPLE

The workforce, their characteristics and how they are sourced



### TOOLS

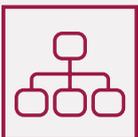
Core production and business tools



### ASSETS

How content is managed: its life cycle from location to archive

In the report that follows we focus on key findings under these common themes. In most instances the interview quotes have been attributed, but sometimes it has been necessary, for reasons of confidentiality, to anonymise them.



## The findings

### BUSINESS

#### Direct to market

“The process will be reduced to just people and ideas. The distance between the idea and execution is getting less and less. The creative opportunity is growing in the connected era. Our whole premise is to reduce the distance between an idea and its inception.

MOVIDIAM

The business models of different creators and suppliers in the non-broadcast sector vary hugely. But there is one very striking common theme: directness.

In independent television production, the process of winning business is heavily mediated by the commissioning process, which can often feel slow and opaque. Similarly, technology suppliers to the independent and in-house TV production community often operate at arms length from their customers, providing tools and services via rental and facility companies and broadcaster technology divisions.

Relationships in the non-broadcast world are altogether more direct. Although many of the digital agencies do require a commission from a client in order to initiate a project, there were no complaints among our group that this is a torturous process.

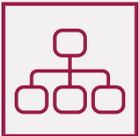
“If you compare how we work to how TV production companies have to work, we just wouldn't like the way commissioners just tell you what to do. We've spent fifteen years learning how to make content for the Internet, and because we've learnt how to do what we do we trust our instincts.

RUBBER REPUBLIC

“I definitely don't think there's a need for a middle man anymore. I think everyone can talk to each other. More communication, more people working remotely. Everything is just gearing up to the fact that it will become a one-on-one conversation between the person who wants something made and the person who makes it.

VILLAGER

One company sees this one-to-one relationship becoming so intimate that the client could become part of the production process:



“ I think the client approval process will shift significantly in terms of editing, especially as Internet speeds and data transfer rates improve. I think we'll see tools like YouTube and Vimeo become non-linear editing systems in themselves, and you'll receive the raw media in the cloud, you'll edit it in the cloud, and you'll deliver it in the cloud. Clients may even start making their own changes, they're already closer to being inside a project than they ever have been before.

ANGRYCHAIR

Similarly, there are a growing number of enabling tools and services especially well suited to this production community, and purchased – usually through a subscription or pay as you go model – directly by the producer.

The ultimate expression of the direct relationship however is to be found among the self-producing online channels and magazines. These production entities are self-commissioning.

“ I create the specific piece of content just because I think it will be enjoyable for my audience and that's a good enough reason for me to make the video. I don't go out with a poll and ask them.

BLIPPI

“ The broadcast way of doing stuff is gone and that's where we succeeded. On short form videos, although getting the balance is important, because of the limited time to tell a story, you sometimes have to take a position. Audiences are intelligent. There are guys now with laptops at home who are making content that people want to see.

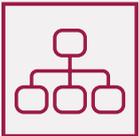
AJ+

The reliance of this group upon instinct is a recurring theme. Little Baby Bum is the world's tenth most viewed YouTube channel – and number two in Britain (after Pew Die Pie). When asked if they ever put new ideas to focus groups or seek external views on their work, the answer comes back “No – never.”

This doesn't mean these producers are indifferent to their audience. On the contrary – and as we will see in the following sections – the use of data analytics is crucial to both their company cultures and their business models. However this data analysis relates to how ideas are received; the ideas themselves are generated by the producer from instinct – and travel to the consumer with a far lower level of mediation than tends to be the case in television.

But if directness of supply is a common theme, so is variety of revenue model.

There is no question now that there is a market for Internet video: as Internet audiences grow, the money is beginning to talk:



“ Five years ago, if we made a film that five million people watched on the Internet, but TV made a film that 500,000 people watched, TV would have been seen as a far better platform. There was quite a lot of snobbery around the Internet, and a sense that the Internet audience wasn't that valuable. Now I don't think that's the case. Now I think they just look at the numbers and go five million is more than 500,000 so therefore that's better. That is a lot more sane and so the money is following the eyeballs.

RUBBER REPUBLIC

But there is also far greater variety in the way that money is made online than there is in the TV production model.

Little Baby Bum has deliberately kept its presence to a single platform – YouTube – because ‘we didn't want to dilute the number of views’. This focus upon a single platform enabled the founder of Little Baby Bum, Derek Holder, to bring a mathematical precision to his business model when founding the channel:

“ I actually sat down with my best friend when I was going through the business side and I said ‘just look at the maths’. If we had 100 videos all doing x amount of views per month that will translate into... I wrote down a revenue figure and I said, you know, that's a great living – and this was on relatively low volume. But just the maths kind of worked out.

LITTLE BABY BUM

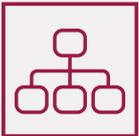
This model has required Little Baby Bum to put huge effort into ensuring that illegal distribution of their content on other platforms is quickly closed down. It is only recently – with the brand now firmly established – that Little Baby Bum has begun to look at diversification.

Blippi is also a children's YouTube channel – but has chosen to take a non-exclusive route.

“ Primarily my money is made from ad placements on YouTube. The more views you get the more money you make, so this is how this is sustainable. On the other platforms money is made essentially the same way – through pay-per-click, you know those pop up pre-roll ads? My goal in the future with monetization is to have a product line in a major retail outlet.

BLIPPI

BuzzFeed has a different model again. It supplies different content to different platforms, depending on their user base. But it is the expertise and insight BuzzFeed gains from this understanding of micro-markets – rather than the views themselves – that is the source of the company's revenue.



“ We sell native content to brands. So the same type of content that we do in our editorial, posts and distributed videos, we’re also doing with brands. For example, we’ll create content with Purina and we have a video called *Dear Kitten*, and it incorporates the cat food within; but it’s all very organic to what the BuzzFeed audience would like. And then we’ll do distribution of the same kind of theme on SnapChat, Instagram, Facebook and various other platforms – basically replicating editorial but in a way that’s going to get the brand engagement.

BUZZFEED

Meanwhile online magazine The Week uses video production as an indirect revenue tool.

“ We don’t directly monetise the videos that we’re producing. They have had a positive effect, but it’s in slightly more indirect ways. So it’s a free app, but it’s sponsored, so the video will be one of the twelve stories included each day. So I suppose you could say that one twelfth of the sponsorship revenue that’s raised is down to the video.

THE WEEK

But whatever the business model, the directness of the relationship between the producer and consumer necessitates a deeply intimate understanding of the consumption environment for the producer’s content.

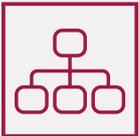
“ We’re a media company but we create our own content, so if there’s an outlet where we can engage with more people or get our message out to an even larger percentage of the public we’re going to go on it. We’re platform agnostic in that sense. That’s actually something that other companies don’t necessarily do – especially traditional media companies. Legacy publishers don’t ever focus specifically on the platforms that they’re on, but they repurpose, they repackage their television content for Facebook, by just cutting it down a little bit and using it as a teaser, rather than producing for a platform in and of itself – and I think that’s one of the reasons why they fail.

TYT NETWORK

“ Being cross-platform is of utmost importance to us because we feel like we should distribute content where people are already consuming it, as opposed to driving people to a homepage or microsite.

BUZZFEED

Of course TV commissioning has also always worked on the basis that different types of content suits different audiences at different times on different channels – and the success of a production company will come down to how well they understand how to make content for those audiences.



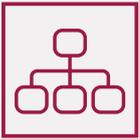
But there are three differences between the broadcast and non-broadcaster environments: the smaller – or non-existent – role of the mediating commissioner; the direct relationship between the process of creation and the process of distribution; and the complexity of the emerging market of multiple online platforms.

Together these realities create the sense that the non-broadcast community has more control of the levers of its business than the TV production community. The processes of production, distribution and consumption are extremely tightly woven. And this can make for a forensic attention to those processes:

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“ With regard to our workflow we’re always looking at how we can shave off half a percent here and there to be more efficient. We’re always trying to improve our production so that the end result is better whilst trying to squeeze out more and more time. A continual refining of our processes.

LITTLE BABY BUM



## ANALYTICS

### Made to measure

“ Everyone in our company is really thinking 50% about the content and 50% about the distribution. A lot of the time with traditional media brands and creators, they’ll have a great piece of content and have nowhere to distribute it or they’ll have a great distribution plan but not great content. And so what we really focus on is the art and the science, really thinking about the content we’re creating for a very specific audience and where they’re going to consume it.

BUZZFEED

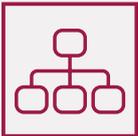
It’s probably impossible to make a living from producing content for online platforms without being obsessed by data analytics. Just as non-broadcast content creators supply direct to their audience, so they also usually receive information directly back on how their content performed.

This doesn’t mean that everyone who works in this sector is motivated by understanding how platform and content work together. Many of the digital agencies talked of how difficult it is to recruit staff who really understand audience analytics – and when they do find such people they try to retain them as permanent staff. Digital agency Spirit Media typify this determination to retain people who understand the relationship between creativity and analytics:

“ Our first senior producer came from the digital industry. We had another guy who came from a corporate comms background. None have come with all the experience we’d like. So we’ve had to train them, and keep them on staff to retain that knowledge and expertise. There are more people in the market now than when we began, but I still think the majority of people who work in short form only think about the creative. They don’t think about the platform and the science-y bit that goes with the different algorithms of how the content might get delivered. So, we try and straddle both the science and the creative elements of digital production.

SPIRIT MEDIA

The need equally to balance art and science, intuition and data is a constantly recurring theme in this production community:



“ I’ve always worked towards this left brain, right brain view, where we’ve got the social media management, and the analytics, and the seeding, on one side, influencing our content creation on the other side. I want to have this analytics side of the company really influence the production side, and the production side give credibility to the social media and analytics side.

THE O COLLECTIVE

“ It’s editorial who make a subjective decision on what they wish to put online. However, what data analytics can help you with is how you present the material and what your audience responds to.

AJ+

Like some other online channels, BuzzFeed have their own in-house data specialists, and take this understanding of audience responses to a granular level:

“ With every post we do for a brand, we try several different titles and thumbnail images to promote it. So on BuzzFeed you’ll see the same post, but with maybe the number included or not included, or changes in adjectives, using a question as a title or a statement – whatever it might be. And because of the systems that were built in-house, we can automatically optimise towards what’s performing best in terms of click-through. It’s all about the testing and learning.

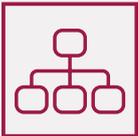
BUZZFEED

Of course some of the key data required by these companies to understand performance is qualitative rather than quantitative:

“ All of the engagement is quantified. And I like to also qualify some of it. Quite a lot of the time with some of the brands we work with, people are so engaged with the content we’re creating for the brand that they love, they really show that through the way they talk about it, through the way they bring their friends into the conversation. And that kind of stuff’s really good to show the client, to show them how what we’re doing is working, and also how we can learn from that.

THE O COLLECTIVE

What is very striking about the supplier community for these content creators is that they are equally addicted to the power of data:



“ Adobe has acquired a number of companies that specialise in the analytics area over the last five years or so. And when we first started buying those companies, some people outside Adobe were unsure why we were doing it. It’s because we recognise that analytics are critical in the digital world. We can now take the analytics of the way somebody’s consumed a video, how long they stayed with it, how long they played it for, bits that they rewound to, and so on. We can consume that, feed that back and in some cases the production teams are then able to make an iteration on that video and get it posted out within minutes.

ADOBE

Wochit is a browser-based storybuilding tool that offers producers content from all over the web to enhance their own content. This inevitably means they are equally powered by analytics:

“ When you go to type a search term, we do intelligent auto completing based on what’s newsworthy. So when you start to type in ‘tennis’ we’ll actually suggest French Open because it’s the match happening right now. And we’ll give you five different suggestions based on what’s newsworthy. We’ll run contextual analysis on the text and we’ll use natural language processing to understand what’s being spoken about – people, places, companies, events and the relationships between all the different entities – and then we’ll go to our content library and we’ll surface the best photos and videos available to help you illustrate your story. You can create multiple versions of the video, tell the story in a few different ways, actually test to see what the audience reception is.

WOCHIT

Auditionist is a tool for finding and casting on-screen talent. Matching requirement to data is at the heart of the proposition – but so increasingly is automation:

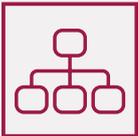
“ We realised that 80% of communications could have been automated because it was all, “What’s your number? What’s your email address? Can you be there at this time?” der-der-der. So we completely removed the need for physical messaging; we just use automated software and it’s all notification based.

AUDITIONIST

Movidiam, which is a professional creative network and project management tool, expect data analytics to become an essential tool in initiating and managing projects.

“ Machine learning engines will recommend the right people, with the right equipment, within the right budget range.

MOVIDIAM



Limecraft agree – seeing machine learning even beginning to bring efficiencies to creative processes:

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“ Like in many, many other industries, artificial intelligence is gently taking over the cumbersome tasks. Take the cost accountant, for example: computers and robots will take over the boring part of their work. Quite a lot of work that was traditionally done by archivists or editor’s assistants is already done by intelligent machines. And there is no reason to believe a machine is less intelligent when it comes to colour balancing and loudness correction. I think a machine can do an even better job than a human can.

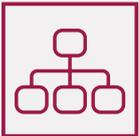
LIMECRAFT

There is a sense of intensity and urgency in the relationship between creation and consumption for this creative community. But, as Adobe perfectly summed up, there is also immense pressure:

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“ Research in this area shows that 85% of producers are under pressure to create assets faster than they have in the past. About 70% of those people are creating ten times the number of assets that they were in the past, to support increasing numbers of channels. And about three quarters recognise that the content has to be personalised. So there are lots of opportunities to reach customers, but with those opportunities come challenges. You’ve basically got to reach the right people with the right content at the right time, faster than you ever have before. And consumers, of course, also have a much higher expectation of that content than ever before.

ADOBE



## PEOPLE

### Whatever it takes

With the exception of content created for the new Internet distributors – notably Netflix and Amazon – non-broadcast content is overwhelmingly short form. But as anyone who has made films will tell you, it would be a big mistake to equate ‘short’ with ‘easy’. Telling a story succinctly can be more difficult than telling it at length.

“ We think there are very few people who genuinely have the skill set to produce short form content and also adapt to the platform that it’s going to be played out on. I guess the big difference between us and a TV production company is that the producers need to be thinking about the platform, as well as the creative. You would tell a story on YouTube differently from television, which would be different from Facebook and our producers, who are the ones making the decisions on how we format the content, and structure it, from beginning to end, need to have that knowledge.

SPIRIT MEDIA

One digital agency talked of the continuing snobbery of commissioners of long-form TV:

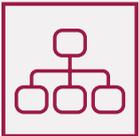
“ There have been times in the past where we have made large scale TV commercials and branded content, but don’t seem to have the trust of TV commissioners to make TV programmes as we haven’t made them before. It’s like a chicken and egg situation, you have to have made a TV programme to make a TV programme.

BULLION

But there is one association that does tend to be true in this production community: short equates to fast. Turnaround times for content are often very short – often hours, and rarely more than a few days. Indeed the business models of the production entities, and sometimes of their suppliers, are premised on speed and responsiveness.

“ I can take my editor with me, and we can produce stuff on the day. Not live streaming, but we can shoot for two hours, edit for two hours, and the client’s got something to go right there on the day, if they’re doing an event, or if they have thousands of people coming to London, for example, to do a full day event. So, we can get their social channels engaged with it through high end video, right there and then. It’s quite nice to be able to do that.

THE O COLLECTIVE



The companies we spoke to ranged from the very large – such as BuzzFeed with 1,500 employees – to the very small – such as one man band Blippi. But whatever the size, the productivity of this group is very high.

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“ Six hundred pieces of content are produced daily from our teams across the globe.

BUZZFEED

“ I can get a video done in less than a day. A short one? Let's say twelve hours from beginning to end. A long one? Thirty hours. And this is one person working on it.

BLIPPI

The emphasis upon short form content made at speed means that the production models and ways of working of non-broadcast producers have a lot in common with those of live television – specifically news and sport. There are two principle differences: first, non-broadcast doesn't have access to the large production infrastructures that typically accompany broadcast news and sport; and second, the creative range of the non-broadcast teams is far greater.

Several of these companies work across very varied kinds of output – demanding flexibility, adaptability and creative confidence from their workforce:

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“ The majority of our content goes out on YouTube, Facebook, Snapchat, Vine. But we've also made interactive documentaries, we've made series for mobile phones.

RUBBER REPUBLIC

“ We do traditional, linear television production, we do short form video production and we do miscellaneous digital projects.

THE CONNECTED SET

“ We're not in any particular genre. We've worked through comedy and parenting. We're doing something for Sports Bible, for a big digital publisher, for Domino's Pizza. It's quite an eclectic mix.

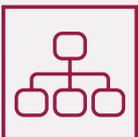
SPIRIT MEDIA

With such eclecticism in the content, perhaps it is not surprising that multiskilling is the norm.

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“ Gone are the times where directors just direct. A lot of our directors are either editors or special effects experts and they work freelance on other jobs, not as a director but just in the creative crew. People need to have those extra skills to be able to survive.

BULLION



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“ Virtually everything we shoot is captured by operators working in a one-man-band mode: sound recording, lighting, shooting, even asking the interview questions. We take a lean approach to suit the market. In the space we’re playing in, while the clients do have a budget for professional video production, they’re looking for value, and aren’t looking to spend huge amounts on producing one video.

ANGRYCHAIR

There is a strong and conscious link made between adaptability and creativity:

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“ I know the guys, give them half an hour, they’ll have picked up that new tool and be delivering content. If the problem is this thing doesn’t look good, OK, well how do we make it look good? This thing doesn’t run this machine, well how do we make it run? There’s always a solution, you just have to be a problem solver. The staff are split into creative developers, creative technologists and digital artists, but really everyone can lend a hand to anything. They jump between Max, Maya, Zbrush, Photoshop, Adobe Premiere, After Effects, 3D scanning, printing, these are just all things that we can use as available to us. They’re getting better and better because they don’t see their single skill that they’ve got as their life, it’s just one of the tools.

REWIND VR

“ The people we have here are people who are very open to experimenting. We built our reputation on very often doing first-offs. And that requires people to always be on the lookout for new technologies that they can use, experimenting with them and being open. There’s nothing too difficult for us. People do take some risks. It’s a very fine balance between the requirements of the projects and the fact that we have to make money. But if you want to be innovative, you have to try those things before your competition does.

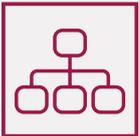
INATION

It may be no surprise that more emphasis is placed upon attitude than upon formal skills:

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“ We tend to look for people who are smart and curious and emotionally intelligent and articulate. Those would probably be the main things we look for. We tend to have more success training up smart, curious people, than we have hiring people who have been trained in a certain thing.

RUBBER REPUBLIC



“ We’re not video experts. A few of us actually have done some multimedia training. I’ve done a two or three day Final Cut Pro course. If people we employ have never produced a video in their professional life, that would be an obstacle that we could get over pretty quickly.

THE WEEK

Sometimes it’s the blend of skills that makes these companies successful in the new market of Internet video. Blippi makes videos for pre-school children:

“ I don’t have an official, formal training in Early Education. I just know about online marketing and filmmaking, and so when it comes to it, there is a slight method to my madness.

BLIPPI

Similarly, Little Baby Bum, which makes animated films for children, was the brain child of two people who knew nothing about animation, filmmaking, or education. But it was their other skills that gave them an advantage:

“ My background is actually IT and telecoms. My wife’s background is from a design agency. In 2011 I was going through lots of YouTube videos trying to find some nursery rhymes and they were all basically terrible. But a lot of these videos had huge views! As I had been working a lot on search engine optimisation at the time I just knew that view numbers like these translated into revenue. So with our collated skill set we thought the only thing that’s missing is a 3D animator – which we knew we could source – and then we did the rest.

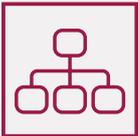
LITTLE BABY BUM

The sourcing of talent is another defining characteristic of this creative community. Many still rely on their ‘black book’ of personal contacts. But a significant number do also look to a market that is international. Little Baby Bum tried animators in Russia, Britain and India, before settling on the team from India. Their musician is based in the US, as is their agent. Their voice over artists are sourced from all over the world. Bullion have a similar approach:

“ We’ve got directors in America, Australia, and also Portugal. It’s word of mouth, seeing their show reel, trying to get a face to face meeting with them if they’re in the country.

BULLION

The Movidiam business model is based on the recognition that creative talent is now a global resource – and one that can be accessed and brought together into teams by using the Internet. They see Movidiam as “a dashboard on the global means of production.”



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“ If I want to find team members who are highly verified and very capable, I can see their credits, and who they have worked for, in twenty seconds. Filmmaking is no longer a black book organisation, where you need to know someone who knows someone. It’s now about total transparency in creative production. Movidiam allows you to quickly dial in on who the expert in the area is, where they are geographically located and then commission them very quickly. The future will be about small groups of ideas people who hand off to the network for operational execution.

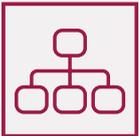
MOVIDIAM

It’s a philosophy that plays to the culture of speed, adaptability and responsiveness that permeates the new content creating community:

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“ Movidiam, I think, as a platform is right there on the feeling of most people I know who go into digital film making: like me, they come from a background of “anything is possible”. And Movidiam, for me, is that feeling, because it has anyone you need to make anything happen, right there. I can go into a meeting with a client, and tell them that we can a hundred per cent do this, no matter what it is.

THE O COLLECTIVE



## TOOLS

### A problem shared

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“ How do you create video for digital distribution in a way that makes financial sense? The traditional tools and traditional workflows were established in the television era when the returns we could expect were television advertising rates. We know that’s not on a par with what you can get for digital distribution, so we saw that there was an opportunity to build a new product that served the needs of people creating video for digital distribution such that the cost structures were better aligned with the revenue opportunities.

WOCHIT

The non-broadcast community is remarkable for using business and creative tools in two distinctive ways. First, they make use of everyday collaboration tools to manage their business and their projects. Second, they are making growing use of a set of enabling tools which are specifically designed by the vendor to increase productivity and reduce cost.

First, the use of collaboration tools. Two of the tools that dominate among the companies we spoke to are Google Apps and Slack. It’s perhaps unsurprising that so many have adopted the Google suite of apps, since they are a logical and easy extension of Google email, the costs are modest, and it is easy to scale up and down.

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“ Google Apps we use a fair bit, and if that were taken away from us it would cause trouble – particularly with planning, where we have me working from home early in the morning, then in the office later, several writers sometimes working from home, sometimes in the office and then our Australian freelancer, all feeding into the same system.

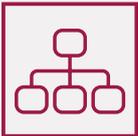
THE WEEK

The popularity of Slack is very striking. When asked about key work tools many respondents put Slack high on their list.

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“ Slack is our main way of communicating with each other. Slack is really good for us because each production will have a team. And when we do big productions, we’ll have up to thirty people on that production, and trying to organise all those guys over an email chain is difficult. That’s where things like Slack really come into their own: you have different groups for all of those different people.

VILLAGER



The success of Slack for small and medium sized media enterprises may have much to do with the way it enables them indeed to have ‘enterprise’ capability – but without feeling corporate. A strong association is made between Slack and a new-world culture of innovation and collaboration.

“ There are some clients we still only have e-mail conversations with, and some clients we have our own Slack routes with. And the ones where you have the Slack routes are hugely more collaborative; and the idea process, and then pre-production process is a lot smoother than working on an e-mail based platform, where things get missed. The platform itself is geared around conversation, and not formulaic like e-mail, where you’re going to have to put all your things in a very strict way, and then send it. On Slack, you’re going back and forth. You can get a rapport going, you can talk about an idea, you can get people excited. It’s all very collaborative.

THE O COLLECTIVE

“ We use Slack to make sure that everyone finds technologies and puts them on Slack so everyone knows about them. There’s always an atmosphere of, “Let’s try this,” “Let’s try that,” “Oh, we’ve got this new device that has come through, come on let’s go downstairs and try it.” So there is a lot of culture of innovation, if you want, but without a stifling process.

INATION

Although Slack and Google Apps dominate, many companies also cited Trello, Basecamp, Box and, particularly, WeTransfer and Dropbox as essential tools. Indeed, what emerges is like an a la carte menu of familiar names, and different companies select from that menu as their needs dictate.

“ We began life using Google Apps and we tend to run our smaller projects off Google Docs, Google Sheets or stuff like that; but actually for the bigger projects we’ll use Trello as our core project management tool. We sometimes experiment with other things, but we find that Trello does most of the work flow, especially for the post production.

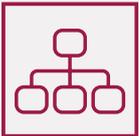
SPIRIT MEDIA

“ We use Google Apps, which is our platform across the entire company for sharing Google Sheets and everything else. We use Trello, and then we use Slack.

REWIND VR

“ We use Slack. We use Skype. We are using Dropbox. We use Google Apps. You know, cloud-based sharing stuff.

INATION

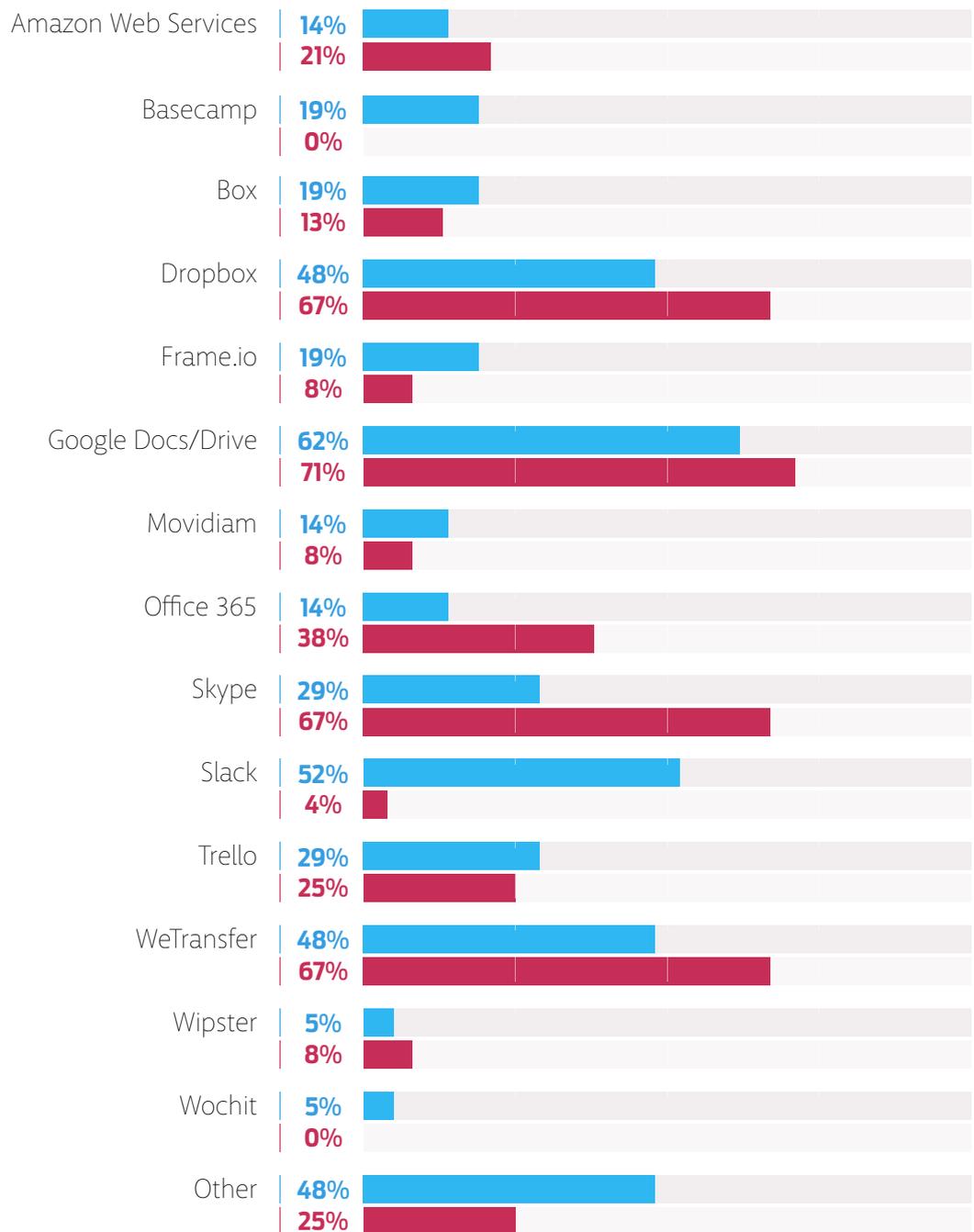


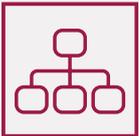
The question that obviously arises from all this reported use of web-based collaboration tools is whether the television production community is any different?

To find out, the DPP undertook a survey of some independent production companies, and compared the results with the products cited by the new content creators in their interviews.

The results can be seen in the table below:

■ New content creators (based on 21 respondents)  
 ■ Independent production companies (based on 24 respondents)





In making this comparison between the creative communities it is immediately evident that web-based, collaborative tools are becoming important for all creative teams. The most significant difference between the two communities is the popularity of Slack for the new content creators, and the use also of Basecamp. It might be noted that the 'other' category consisted of a broader range of other tools used by the online creative community: they may be marginally more inclined to experiment with new options than their television counterparts.

A close look at the table above also suggests that very new web-based enabling tools, such as Wochit, Movidiam and Frame.io, are gaining early traction more quickly in the new content creator community. This is perhaps unsurprising since these tools are just a few of the rapidly growing range of enabling technologies that are being developed with the needs of non-broadcast production front of mind.

Rather as office tools such as Slack are designed to bring enterprise functionality without the enterprise or the corporate culture that tends to accompany it, so there are now creative tools that aim to achieve something very similar. These tools aim to solve the real world problems that come with working at high intensity, but on a small budget.

“ Our product is a set of very advanced tools that, even a couple of years ago, would only have been available to broadcasters and people with a hell of a lot of money. It's all about making those tools available and in a nice simple-to-use package to publishers, sporting organisations, religious organisations – people who traditionally didn't do video in the past.

MIRROR IMAGE

“ Wipster is essentially a post production communication tool: it enables pinpoint, frame accurate conversations to happen between people who may be technical or non-technical. Huge efficiency is created by having a really robust review system for a process that can otherwise take up as much as a third of the post production time.

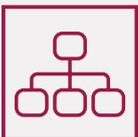
WIPSTER

“ Wochit sort of lets us disguise the fact that we're not experts in video production.

THE WEEK

No single new enabling product has achieved the breakthrough of a Slack or Google Apps, but there are many – Wochit, Frame.io, WeTransfer, Movidiam, Auditionist, Wipster, Limecraft, Mirror Image, to name a few – that are now available.

Often these tools seek to address the real-world problem of how small businesses can keep their overheads to a minimum.




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“ Every project is different, so we would never ever buy Avid, but we did need it recently, so we just took out a one-month subscription.

THE CONNECTED SET

Subscription models are common: low commitment, scalable, predictable. Frame.io is typical.

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“ We have a monthly subscription model, and it starts at \$15 a month. And then above \$150 a month, you are in enterprise. You can invite somebody in as a collaborator, and that requires that they create an account, but it's free for them.

FRAME.IO

But these enabling suppliers don't always offer a subscription model. What is distinctive is that they consider the business needs of the market segment they are targeting, and try to come up with the most workable model:

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“ Every casting platform charges actors a subscription. But we thought that's really unfair: you're not guaranteed work, and charging people to not get them work is just too Dickensian for us. So we decided that we would do a success fee. This nicely ties in with our payment service. So producers can hire twenty actors, and then instead of making twenty individual payments, each which can include multiple expenses, we provide you with an itemised invoice so you can just make one single payment to us.

AUDITIONIST

“ Getting paid is a very big pain-point for freelance contractors. So we offer an escrow ability where a payment is created, both parties can see the money is there, it's agreed when the job will be delivered, and 50% goes up-front, and 50% is paid on delivery.

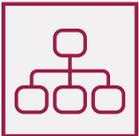
MOVIDIAM

This intimate relationship between content creators and the providers of enabling services, in which the commercial proposition of the provider depends upon its understanding of the commercial position of the customer, represents a very distinctive dynamic. But it isn't unique to the start-up suppliers: some of the major supplier brands are just as sensitive to the specific needs of the non-broadcast sector:

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“ We've obviously got our products like Premiere Pro CC and After Effects CC, used on some of the world's biggest feature films and documentaries, and also used extensively by bloggers and YouTube contributors. But we recognise that there may be a need for something that addresses that latter market in a slightly different way. There are producers out there who aren't craft editors, they are video content creators.

ADOBE



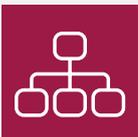
“ A number of our tools are now very appropriate for the growing need to manipulate video on websites, Twitter, Facebook, Instagram – you name it. We’ve developed a product that does this very well, called Story – and it’s aimed purely at the non-broadcast digital platform area.

VIZRT

“ Rather than try to establish a product and then change the world, we try and follow very closely with the changes that are going on and bring products to meet those needs. So for example on the C300 camera you’ve now got auto focus and auto-ISO to make sure the images are sharp and well exposed. If the user is less experienced, and needs help with focus and exposure there is something there to help them.

CANON

When the product development teams of major global vendors turn their attention to the specific requirements of the non-broadcast community, there is every likelihood that technical capability that was once reserved for broadcast will migrate – in more user-friendly and affordable form – to non-broadcast. And also the reverse.



## ASSETS

### Disconnections

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“ We are thinking of moving more towards the cloud. But one of the problems that's stopping us at the moment is the connectivity.

INITIATION

It might have been anticipated that, since this non-broadcast content creating community uses so many Internet-based collaboration tools, they would also be at the cutting edge of cloud-based production techniques. It might be expected there would be strong use of field upload to cloud services, cloud based editing, and cloud storage.

But perhaps the most surprising finding of this survey is how dramatically this is not the case.

There are a few producers in our survey who do make significant use of the cloud for the shaping and storage of their content:

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“ We have an Amazon render farm that allows us to spin up an infinite number of machines at a whim to render something out. So rendering has gone from being about time to just being about cost. So say it takes a thousand CPUs to do it in a day, it would only take a hundred CPUs to do it within ten days, it's the same cost whether you do it over ten days or you do it over one day. So that's the big thing cloud's brought us.

REWIND VR

“ We've got heavy, heavy storage and backup on site within our animation departments, and then we've got it off-site. On top of this we've also got various cloud backups, but we mainly use Google Drive for this.

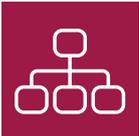
LITTLE BABY BUM

“ We archive straight into Google Vault, so it all goes up into the cloud.

ANGRYCHAIR

But there are far more companies who – while liking the idea of cloud production and storage – do not yet regard it as a serious option. Why? Connectivity.

In the recent **DPP Survey Report: Connectivity and Production** it was reported that independent television production companies can see the benefits of connected working – but struggle with cost, availability of service, and the creation of the right relationships with providers.



Among the non-broadcast community the complaint is mostly about the availability of reliable bandwidth. The problems begin in the field, where producers are frequently working against the clock.

“It’s frustrating. We often have to do twelve hour turnarounds. So sometimes we might be filming a fashion show and we’ve got to get it out to the press by the following morning. We often just put a member of crew in a taxi to get directly back. Until Internet speeds and reliability improve dramatically – which I imagine will take a few years – then we wouldn’t be able to use it.

BULLION

“We were filming around the Euros last night, in two locations on high end TV cameras, because of their slow motion capability. And actually the workflow was quite an issue for us because we had to get the footage from two different locations to an editor to put it all together, to get an edit out by 8 a.m.. So we looked at the Internet connections, locally, and they weren’t good enough. So we had to courier the discs from the two locations, to the editor.

SPIRT MEDIA

“The bandwidths often aren’t good enough, so – because it’s often a massively fast turnaround that’s needed – what we do is a crude edit in the field. We wrangle as we drive.

ALLEYCATS

There is plenty of pragmatism and ingenuity from these producers – which demonstrates that the issue is not a cultural resistance.

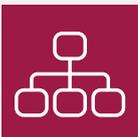
“I had a crew in San Francisco two years ago on location for six weeks and for that we did everything, all of the rushes, via Dropbox. I just made sure I rented them a flat that had fibre, so it was really fast. That was 100 GB worth of rushes. They put the rushes on Dropbox and then overnight they would sync in our office, and then – because of the time difference – in the morning I could get in and see what they shot yesterday.

THE CONNECTED SET

“To get our Radio One stuff back to London we actually jumped on the university’s ridiculously fast broadband. They were linked up to a superhighway the rest of us don’t get. And we were getting films up in minutes, that would normally take overnight.

ALLEYCATS

That same ingenuity extends to the office environment. (The quotes below are anonymised for reasons of security.)



“ We’ve got a day-to-day network which isn’t particularly sophisticated: it’s probably a 20 Mbps, two-way network. But the landlord has a faster connection that we use for data download, more like 100 Mbps.

“ We’re literally using a company who run a cable over the roof into our building so that we can have good connectivity because it’s essential. It was possibly slightly naive when we took on the building that we didn’t check that.

The issues companies like these have with getting the connectivity they feel they require to make more use of cloud storage, lead many to take an approach to backup, storage and archive that might dismay many cloud providers. To ensure confidentiality around individual company approaches to how their assets are secured, quotes below are provided without attribution. Each quote however comes from a different company. When reading these responses it is worth remembering that hard drives are not regarded by experts as a sufficiently reliable means of storage.

“ We wouldn’t WeTransfer anything that’s sensitive. That would probably just come in on a card and we’d ingest and we’d backup onto a drive. We’ve got a safe at work and it goes in a locked safe. Generally for our content though, if Internet speeds were better, I’d rather use the cloud – 100%. It’s much cheaper. Drives are expensive. And there’s finite amount of space in the safe you know.

“ YouTube will become by default an archive too for anything we’ve put on the web; but we don’t create a local offline archive of what we do.

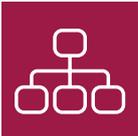
“ Our archiving process ends up on tape still. We have looked at the cloud and just found it too expensive still compared to traditional tape backup.

“ We just get two duplicated hard drives. So we have two copies of everything we’ve ever shot and we store it in the form it was edited. So in theory we can go back and open any project that we’ve worked on previously.

“ We archive onto bigger hard drives and to tape decks. We did look into cloud stuff but it just doesn’t work because the file sizes are just too big.

“ We have a DIT on set. The DIT copies onto a master drive and a backup drive. Backup drives come with us to the office, master drives go to the edit. It’s just quicker than using the cloud.

“ We have tapes, and we’ve got hard disks, and we’ve got backups to the hard disks and that sort of stuff. So we’ve got special storage.



It is interesting that only one of these quotes cites cost as the barrier to cloud. Generally the issue is to do with bandwidth, and therefore speed – although of course the solution to that issue would involve cost. It could be that the production culture of this community does not – as yet – make archive a priority. Most content is rapid turnaround, and, though multiple versioning is usual, such versioning happens at much the same time as the main production. Quick turnaround content tends to be transitory. The need to return to archived rushes or masters is infrequent.

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“ When you stick up a hundred terabytes in the cloud for six months, that’s fine. Stick up a hundred terabytes that sits there for three years and then you’re spending a fortune on it doing nothing – and we don’t need access to our rushes generally.

But it’s difficult not to see the relative immaturity for this community of cloud production and storage as a temporary stage that will soon be worked through. And that’s because the very enabling suppliers that these producers are working with in other parts of their workflow have a commitment to offering workable cloud solutions.

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“ We realised that we’d spent nearly £2,000 on hard drives last year. And then we worked out that it would be less than that for a Dropbox Premium account for the year. So for what we need – which is basically unlimited storage – we just decided that rather than carrying on wracking up this graveyard of hard drives we should invest in the Dropbox cloud system.

VILLAGER

“ The idea of an asset that you just make and store and put somewhere is gone. That asset now needs to be a live asset. The asset has to be updated and constantly reviewed and improved and changed all of the time. We do that through things like the Creative Cloud, which hosts those assets so that you’re able to access from anywhere, on any device.

ADOBE

## Conclusions

“ I’m getting so many views now, I feel like I don’t really need traditional broadcasters anymore. I have always felt they’ve had control over all media distribution and it seemed nearly impossible to work with them. Now the new age-based platforms don’t pick and choose and there is room for success.

BLIPPI

It is difficult to overstate the role of the broadcaster in the life of an independent television production company. The broadcaster initiates the process of content creation by awarding a commission. That commission comes with a set of deliverables specified by the broadcaster. And when the content-making process is complete, that content will be delivered to the broadcaster for distribution.

Of course the balance of power in this relationship is beginning to shift, with the rise of the super-indie, the emergence of new funding models, and the beginnings of supply to online content services such as Amazon and Netflix.

But non-broadcast content creators have never had such dependent relationships, and that makes for a fundamentally different culture. Some are self-commissioning; others work to a commission, but in a very different, and faster-moving creative and distribution model.

“ We’re not particularly interested in traditional media. We’re much more interested in how people are consuming new formats, content on new platforms, and it’s forever changing. Facebook and everyone else is trying to promote live content, so your output really goes with how these platform providers are helping you promote your content.

SPIRT MEDIA

It’s important not to be naïve about the non-broadcast model: just like in television, some strike it rich, but for many it’s tough to make a living, with tight margins and uncertain income streams. However there are four characteristics of this world that are certain to be more appealing to Internet-native producers; and, over time, this could impact the talent supply to television.

- 1 **The relationship with the creative process is more direct.**  
Teams are small; there is high degree of dexterity with a wide range of creative tools; outputs are mostly short, and they appear quickly.
- 2 **The relationship with the audience is more direct.**  
Content is published quickly and easily: the internal infrastructure required by a typical broadcaster to distribute a programme would leave these producers aghast. Feedback from the audience is immediate.

### 3 **The business process is more direct.**

The Internet is a metrics machine; almost everything can be measured. The metrics around performance are almost brutally clear – which must often be painful, but must also carry a logic which enables producers to generate algorithms for success in a way that is almost impossible for a TV producer.

### 4 **The relationship with enabling suppliers is more direct.**

Internet-native services tend to be premised on problem solving, and Internet-native content creators are supported by a convoy of enabling companies committed to making their lives more productive and more efficient.

But perhaps above all else – and this may seem tautological – these new producers are operating in a world of video. Obviously video is at the heart of TV also – indeed video that only gets better and better in quality. But the formats of TV are well established. In non-broadcast video there are no boundaries – or at least the boundaries have not yet defined themselves.

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“ It’s a growing market so we want a share of that market. We don’t want to be left behind, we want to find a way to make video work in a way that is in keeping with our brand. And if it’s a way of reaching a new audience, if it’s a way of reaching different advertisers, if it’s a way of creating more valuable content all around then that’s something we want to do.

THE WEEK

The interesting question is whether the culture of non-broadcast content creation will gradually begin to invade broadcast. As independent television production companies begin to source their work from a broader range of customers, including online channels, will we see the established culture and business models of independent production companies change? Or could it be that as the giants of the online world become more powerful, we begin to see the dynamic world of the new content creators become constrained? Could we be living in a particular – but short – window of creative freedom?

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“ There is an irony in the shift that’s happened in the last twenty years. We’ve gone from a UK of five broadcast channels, plus some additional satellite options, with people complaining there was just a small number of very powerful gatekeepers. Then we went to a system where we have YouTube and other online platforms and a million ways of accessing content, and it all seemed very democratic. But now it’s reducing back down to a small number of platforms again – Netflix, Facebook, Amazon Prime – and so it’s now those companies and how they present content that has a huge amount of control over who watches what and when.

RUBBER REPUBLIC

It's a sobering thought. But the tendency towards disruption in media suggests that even if a new status quo emerges it will in turn get pulled down – we just don't know how and by whom.

In the face of such dynamism in the world of content creation, it will be those who are pre-equipped for constant change who are likely to thrive:

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“ When interns come in, or when I'm training a new employee, I tell them – and this is cheesy – to be like water, like Bruce Lee. I tell them that tomorrow, out of nowhere someone like YouTube may say 'we're no longer doing this, we're no longer using this ad format' – which happens all the time. Or there could be a new way of 'liking' videos; or a new way of production like Facebook Live; or a new platform. So it's about being like water, being smart.

TYT NETWORK

This DPP production was written by **Mark Harrison**, and researched by **Abdul Hakim** and **Ahmed Razek**. It was designed by **Vlad Cohen**. The DPP would like to thank the numerous people from a very wide range of companies who have been so generous with their insights and observations. This report provides a summary of those insights and observations, but it should not be assumed that everyone who contributed to the research endorses all the points of view expressed here.

### **About Vizrt**

Vizrt provides real-time 3D graphics, video layout, studio automation, sports analysis, journalist story tools, and asset management tools for the media and entertainment industry. This includes interactive and virtual solutions, animations, maps, weather, social media, video editing, compositing, and multiplatform VOD and live playout tools. Vizrt has customers in more than 100 countries worldwide including CNN, CBS, Fox, BBC, BSkyB, Sky Sports, CBS Sports, Fox Sports, Al Jazeera, NDR, ITN, ZDF, Star TV, Network 18, TV Today, CCTV, NHK and the list keeps growing. Vizrt has nearly 600 employees and operates in 40 offices worldwide. Vizrt is a privately owned company by Nordic Capital Fund VIII. For further information please refer to [www.vizrt.com](http://www.vizrt.com).

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