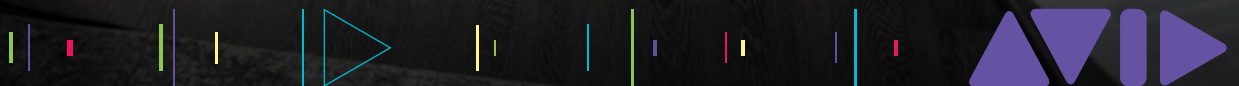


THE STATE OF VIDEO PRODUCTION II

2020 REPORT



INTRODUCTION

Video production has undergone massive changes in the past few years. What challenges are post-production professionals bumping up against now, and which emerging innovations are they most excited about? How do they see the talent pipeline shaping up, and what are their views on diversity and inclusion within the field? No one knows the answers to these questions better than the pros who do the work day in and day out, so we interviewed members of the **Avid Customer Association (ACA)** to get their expert views on the state of video production today.

Experienced industry professionals, ranging from independent film editors to post-production house owners, gave us their unfiltered takes on how video production has already been transformed and how they see it evolving in the future. For example, they told us that OTT services and social media are changing expectations for how the work gets done and what type of expertise is needed to do it. Almost everyone wants their content faster and cheaper, editors say, but they're rarely willing to compromise on quality.

Adding to these pressures, there's a talent shortage. The talent pipeline has not kept up with the pace of content production, and many of the industry professionals we spoke with report that it's increasingly difficult to find enough experienced editors to fill the number of positions that are available. While many entry-level editors are handy with the technology, they are less well-versed in the processes and managerial aspects of editing a film or television show. Meanwhile, even veteran editors say that they are continually adding new skills to their portfolios just to stay competitive.

Some editors are thrilled that by taking advantage of technology enhancements that speed up time-consuming tasks, they can now focus more on the creative and collaborative aspects of their work. That said, collaboration is still a major challenge—and editors are feeling it more acutely than ever now that video production has gone global. Security is a priority, but it can sometimes get in the way of productivity. This can frustrate editors who typically face long hours and tight deadlines. Many editors also say they run into challenges with asset management and editing workflows, wishing the tools they use could streamline some of their tasks or, even better, intelligently guide them toward time-saving features that might otherwise be hidden several layers deep within the software they use.

Hollywood is in the midst of an important conversation about diversity and inclusion, and editors have plenty to say on these topics as well. Some industry



professionals say that there's barely been any progress since they got their start in the business, while others believe that things are gradually improving. The people doing the hiring may still default to picking people who look like them, and the fact that an editor's job typically involves long hours limits the pool to candidates with a financial safety net or who don't have family responsibilities. Even so, with the field changing so quickly and editorial talent in such high demand, some editors are noticing cases in which people who might once have been passed over are getting hired for the job—and that's a positive development.

The State of Video Production report covers six key themes that editors see influencing their industry both now and in the near future: technology, collaboration and workflow, creativity and innovation, the media environment, career and talent, and diversity and inclusion. As you'll discover while reading this report, each of these areas presents exciting challenges and opportunities for editors today.

TECHNOLOGY



"I no longer get to a certain point where I stop thinking about the cut and start focusing on sound. It's become a more collaborative process."

Advancements in video-production technology are allowing editors to work more quickly than ever before. By using tools that streamline time-consuming processes, they can meet accelerated deadlines, focus on their craft, and create a high-quality product. As one freelance editor with over twenty years of experience in the field explains, "You take out the time that gets in the way of the stuff you actually want to be doing, and I think it improves the quality of the movie."

Thanks to these technology improvements, some editors enjoy a more collaborative process with their colleagues earlier in the production cycle, maximizing the talent and creative contributions of everyone involved. He says, "It's no longer that I get to a certain point where I stop thinking about the cut of the movie and I start focusing on sound. It's more that it's become a more collaborative process over time."

He adds, "I've done a couple of films where we brought in the composer really early and I brought in my sound designer really early so that by the time we'd hit our first screenings, we would actually have 60 percent of the sound design and 70 percent of the music in the movie. And you would be able to react with your picture cutting and with everything else you do. Sound would react to music, music would react to sound, and everything would react to the scenes and the images."

A vice president of mastering and studio operations for a major Hollywood studio has noticed the same phenomenon, noting, "The process of actually completing and starting on editorial can begin faster. If you go back long enough, when Avid first started, we would have film, we would telecine it, and then we would create a tape that would get digitized. That digitized media would get copied into Avid and the assistant editor would have to parse out that media. Basically, they

would have to prep it for the editor before the editor even could start work. So anything where we are able to **automate some of those processes** that allows us to get to the work we need to do faster is a major improvement.”

Although editors appreciate these efficiency gains, they still run into a number of technology challenges when it comes to video production. Client expectations are steadily increasing at the same time the tools are rapidly evolving, and it can be tough to make everything work as seamlessly as it should.

Security is a major concern, and with good reason—security lapses can have profoundly damaging consequences. One studio executive with experience in cybersecurity explains it this way: “As you rely on the cloud or anything that is not your own computer, knowing that the content can’t be stolen, that the content can’t be contaminated through a virus or other malware is really, really critical. Especially when you’re trusting a system that is used by a bunch of people who are leveraging it in a very tight environment, it’s got to perform and maintain that secrecy. Leaks can result in loss of revenue.”

“We’ve got to get rid of the security argument. It’s got to be secure by design.”

Editors wish that the tools they use were secure by default, allowing them to focus on the task at hand. “Right now, the problem is security is an extra thing that’s not built in. This stuff just needs to be secure while we’re working on it and that’s all there is to it,” explains a rerecording mixer with over twenty years of experience in the field. “Whoever can own the concept of security being inherent will be in a massively advantageous position going forward. We’ve got to get rid of the security argument. It’s got to be secure by design.”

Workflow efficiency is another pain point. As a film editor based in Holland explains, “When I’m exchanging things with visual effects, there is a



lot of manual labor that is involved in marking up a shot, adding a visual effects number, sending out the right materials to the visual effects house, then having them pull the original footage, work on it, send us a version, and then putting back all those versions and be able to track all those versions inside my cut. That actually takes a couple of days on every movie.” He would love to see this process streamlined via automation or made more efficient within the tools he uses.

Another expert we consulted says he finds **asset management** a constant challenge, especially after a project has been completed. As the owner of a post-production company who’s been in the business since 1985 says, “One of my biggest pain points is asset management. When a project ends, I’ve basically got one folder that is holding seven different projects. So now I’ve got to fire up all these different third-party utilities. It can go through and scan and find all the media files from this project and then back them up. But that doesn’t include all the different elements that go into making the project in general, let alone the project within Avid.” And with higher-resolution file formats like UHD or 4K taking up more space, asset management is becoming an even more complex task.

“One of my biggest pain points is asset management.”

Other respondents point out that because the tools they use are so powerful, a tech-savvy editor can often customize the features they need to get more done in less time. But people who are new to the software may never even have an inkling that those features are there in the first place. A motion picture editor who’s been in the business since the 1970s says, “It’s great for somebody like me who has friends around who can show me things and vice versa. It’s capable of being very fast and sleek and very customizable, but it is very opaque to a new user who doesn’t have help. You have to be trained.”

AI or machine-learning tools could help editors speed up certain processes. **Color correction** is a prime candidate for automation, for example. An experienced editor who produces long-form independent documentaries says, “I think there’s an emerging world out there, that’s not quite here yet, called AI-based color



correction or intelligent scene evaluation. It's for folks like me who don't want to spend a whole long time tweaking a scene but want to get within the ballpark very quickly. It would give me the ability to try on a bunch of lookup tables quickly and have an artificially intelligent tool that looks at my scene, looks at the rest of my show, and says, 'You want lighting that looks approximately like this, don't you?' and then I would be free to say yes or no."

AI transcription is another area with considerable potential. An industry professional who now holds a management role at a production company says, "We are already using artificial intelligence for transcription and logging. In the past, a one-hour interview might take an eight-hour or ten-hour shift to transcribe. Now you just upload that file to a website in real time. If it's an hour interview, an hour later a transcription will come back. Then you have a human spend a few minutes just cleaning it up and to make it accurate. That's a lot more cost effective because the service is so much less expensive."

One editor says that it would be handy to have AI-enabled voice assistants just like we have on our smartphones or on smart speakers like Amazon Echo and Google Home. A picture editor for feature films with 35 years of experience in the field says, "It'd be kind of nice to be able to say, 'Hey Siri, open this bin. Hey Siri, load this sequence.' That could be cool. Given the amount of keystrokes and mouse buttons we push in the course of a day, it would be amazing to be able to do some of that by voice command."

WORKFLOW AND COLLABORATION

Everyone we spoke with said that their job requires increasingly dynamic collaboration with a variety of colleagues in different areas of the production team, often across multiple countries. An editing professional who's been in the industry since his twenties puts it this way: "It seems like nobody can quite crack that nut of working through the dilemma of how people can remotely access all the same media and how to get that media somewhere where everyone can access it." An experienced freelance post-production editor notes, "Some projects involve multiple editors, not just me, and collaborating with them is a challenge. Everybody has their own workflow and you have to get to the middle point."

One industry professional who works in sound production for movies adds, "Centralization is fine, but that only works really well for people who are working in the same building or the same floor or the same sort of suite of rooms."

Production is a global challenge now. Certainly in any movie, on some level you've always got an actor who's not there who needs to record a line or do something or you've got visual effects companies that are potentially spread out all over the world. There are good ones in certain places, but then even the visual effects companies themselves are splitting work off and sending some pieces to places where the labor rates are much lower."

A technology head for a mass media group headquartered in Brazil told us that he also encounters collaboration challenges in his work. "We usually work with

different post-production companies in a collaborative environment that is dispersed,” he says. “So we frequently have to move files in and out instead of working with centralized accessing proxies and conforming in high-resolution files. File sharing must evolve to support a public cloud operation using low-res content for editing, and high-res files must be centralized with high-security policies to be conformed.”

A freelance film editor who works on theatrical features agrees. **“International collaboration is increasingly important,”** he says. “I was just talking with some Swedish friends of mine. They were discussing having this project that was shot in Paris, cut in Greece, post produced in Sweden, and they had this system of synchronizing dailies between all these locations so that the director, the editor, and the VFX house would all have access to the same material as soon as possible after it was being shot. I think that producing internationally, as we are increasingly doing, is a challenge—specifically when it comes to facilitating that collaboration and making it fast, and smooth, and easy.”

“International collaboration is increasingly important.”

With so many colleagues collaborating across great distances, it becomes even more important to have a shared frame of reference for what everyone is looking at. A rerecording sound mixer with twenty years of experience in the field says, “When there is collaboration between many people, **we need to track the workflow.** I feel like I need a software environment that keep tracks of the changes, corrections, and improvements we are suggesting. In the missing stage, for example, there are some parts that need to be completed in the next few days and we need to be able to note who is involved.”



File sharing and storage can be challenging, as well. An experienced motion picture editor says, “Our biggest problem is that we have **too much material** to edit from. Now because cameras are cheap, you’re just being buried with material. The biggest challenge that editors have is managing that complexity and finding their way through it. Nobody has given me a new way to organize a hundred hours of material, find the good stuff in it, and put the good stuff together.”

An industry professional who used to run a facility that included video editing agrees: “We have a desperate need to handle massive amounts of information in some kind of a seamless way. It’s relatively easy to have large amounts of information, but it doesn’t make it very easy to move them around or have this guy over here also have access to what she’s working on over there or whatever it happens to be.”



CREATIVITY AND INNOVATION

When asked what emerging innovations in video production excite them the most, post-production professionals say they are especially intrigued by advancements in visual effects, data and analytics, and content delivery. They are less convinced of the value of trends they see as overhyped, such as short-form video and ultra high-resolution video.

An assistant editor at a major television network is encouraged by improvements she’s seen involving visual effects. “A couple of months ago, the ACA had some new technology that was around **visual effects**—basically, a better workflow to be able to cut them in and then present them for review and things like that,” she says. “That was actually very exciting because that does take up a lot of our time when we’re in that phase.”

The director of operations and engineering for a university with a film studies program is captivated by the potential of data and analytics to enhance and create more value from video content. “One of the things that I’m interested in here is data and analytics. Major League Baseball, for example, includes statistics with every broadcast. Now we’re almost flooded with data from watching a baseball game. And I think there’s a lot of information that can be learned. I see that as sort of the next step where we can get research data from the content that we’re producing on a daily basis for our network, for example.”

One industry professional with twenty-five years of hands-on experience in the broadcast and entertainment business is intrigued by the ways in which media

tech companies are transforming content delivery and consumption. He says, “Media tech companies are using agile development methodologies to deploy fast solutions with incremental deliveries for their consumers. For example, Netflix, Facebook, Google, and Amazon are pushing hard to create new and innovative methods of content consumption.”

Some emerging innovations, by contrast, drew a bit of skepticism. A late-career professional expressed reservations about the monetization of short-form

video: “I don’t know how you monetize that at anything greater than a

cottage-industry level. People are failing and becoming frustrated,

not because they don’t have something interesting to say but

because they have been promised by the tools, and by the

hype around the tools, that there is a ready audience for

what it is that they have to say.” The infrastructure to

connect short-form content creators to a paying audience

is maturing, but popular excitement is outpacing it.

An experienced post-production manager feels that the

hype surrounding ultra high-resolution video is overblown.

“It doesn’t seem like the higher the resolution you get, whether

4K or 6K or 8K, the actual quality improvement is justified. This

is simply because the ultimate consumer doesn’t necessarily see

that advantage. They’re watching it on 55- or 65-inch TVs and they’re

not really going to see that big trade-up.”

“It doesn’t seem like the higher the resolution you get, the actual quality improvement is justified.”

MEDIA ENVIRONMENT

Several editors say **over-the-top (OTT) services and social media** have directly affected their jobs, forcing them to adapt to new requirements and learn new techniques just to stay competitive. An industry professional who works on unscripted reality television says, “The change in delivery of media to the consumer has definitely impacted how we work. So you have different OTT services from Red Bull all the way up to Netflix. Then you have these new ones coming online, and they all have different deliverables and different specs. The result is that we are constantly changing what we are doing in regard to delivery and it seems these days every new delivery of a series is a new set of deliverables, which requires us to learn more about the technology in general.”

Editors are also noticing a **demand for shorter content** due to the influence of social media. That, in turn, has caused corporate clients to demand shorter turnarounds with tighter budgets. An industry professional who started out as an online editor in 1985 put it this way: “I think we’re seeing a preference for shorter content because of social media. People are looking to put a thirty-second clip up on YouTube that will have a shelf life of a day, so they don’t want to put in large amounts of cash. Some of the clients that I’m still working with have moved a large majority of their social media content in house. But they also still do longer-form stuff—product introductions, employee training, and

recruiting stuff. And for that kind of content, they will still come to me. But even with that, it's a smaller budget and they're expecting faster turnarounds."

As budgets have contracted and competition has intensified, some editors are noticing a **decline in rates**, particularly on the corporate side. An experienced former editor who works at a production company says, "It does become an issue of being able to make a living when there's somebody right next door to you that can offer up the same services for a lot less. I think sites like Fiverr are the proof in the pudding of that. It's awfully hard to justify spending thousands of dollars for the same product or nearly the same product. I think the big selling point is the creative ability. And, on a bigger stage, having the networks' confidence that it can be produced. There is a small group of people who are going to shell out top dollar for somebody who's really experienced and can do a great job, but for a lot of their purposes they don't need that."

In such a quickly changing technological landscape, it's important to stay up to date on industry developments. Interestingly, most of the editors we spoke with say that **good old-fashioned face-to-face networking** is still their preferred method for finding out what's coming down the pike. A director of engineering for a large media conglomerate based in Latin America says, "I attend conferences and talk with vendors, other broadcasters, and content producers about how to produce high-quality content at the lowest possible cost." When asked how she stays on top of the latest trends, an assistant editor who started out in reality television says, "It's usually just talking with coworkers, to be honest."

DIVERSITY AND INCLUSION

The film and television industry is having an important and long overdue conversation about **diversity and inclusion** when it comes to representation in film and television roles, writers' rooms, and the director's chair. But what does this discussion look like from an editor's vantage point? We asked editors to share their feedback on whether the industry has in fact become more diverse and inclusive and what they think needs to happen next.



An editing professional who has created content for major cable networks says that from where she's sitting, the needle has barely budged in the eight years she has been in the business. "I have seen almost no change since I've started," she says. "I think the factors that are underlying a lack of diversity are systemic, and I don't necessarily think anybody, especially in the editorial space, has been focused on it. You see a lot of talk around above-the-line diversity, but as far as I can tell, it does not translate to below-the-line diversity."

"The factors underlying a lack of diversity are systemic. You see a lot of talk around above-the-line diversity, but it doesn't translate to below-the-line diversity."

A former editor and post-production facility owner agrees.

"Although everybody talks a good game about diversity and inclusion, **we have a long way to go**. It's not just about women, it's about diversity of thought. Diversity in color and race, diversity in religion, diversity in gender, diversity in age. We've got this whole huge problem of ageism in this industry too."

When considering the reasons why progress may be at a standstill, some editors said that the people making hiring decisions may default to choosing people whose life experiences are similar to their own. As one industry veteran who's been in the business since the late 1980s puts it, "There is a natural, human phenomenon of wanting to surround yourself with people who look like you and think like you." This **unconscious bias** can in turn hurt the career prospects of qualified women and people of color.

Systemic issues may also be at play. An experienced editing professional says, "You can say all you want that you want more people in here. But if they can't afford the freelance lifestyle and they can't afford to have the large amount of time that you have to devote to this career, then you are never going to get diversity because **the hours required are just too great**. You're never going to see any woman over 40 who has kids. I think I've met one in my entire life who's actually been a successful editor and that's because her husband stays home to take care of the kids."

Not everyone feels that progress has stalled, however. The technology head for a global content production studio in Brazil says, "I believe that the industry is improving, and the opportunities are continually increasing." An industry professional who works at a post-production facility adds, "In my personal experience starting at a post house, it was definitely more male-oriented. But there were women in all aspects of the fields, whether it was the engineering part, the artistic editing part, the sales or production part. It was definitely a mixed group of people then and that's continued to be the case."

One experienced editor is trying to make a positive difference in her own way. This woman, who now runs a team of editors, says, "I've made it my personal mission to try to create opportunities and help women to be a bigger part of the conversation. Hopefully, I can provide as many examples as possible so that

there's someone that they can identify with. Then they can say, 'Oh, hey, there's somebody who looks and sounds like me and that means I can do that job.' There is a lot more that we can do."

CAREER AND TALENT

The video-production industry is experiencing a **talent shortage** and, in some regions, intense competition for talent. While this has created new opportunities for some aspiring editors, it's also revealing weaknesses in the talent pipeline.

A rerecording mixer who works at a major Hollywood studio says, "The hardest thing we've got right now is finding enough people who are qualified to do the jobs in the first place. I also think that we're desperate for people—like, there aren't enough people."

"The fact that there's a lot of work doesn't mean it's not very competitive to do the work."

A former documentary film editor based in Europe echoes this concern: "The other thing I'm hearing from my connections here in Europe is that they are having problems staffing their shows in European countries. That's pretty much because they want to have editors that can carry the weight of a relatively big show. There are only so many people that can do that."

Although entry-level editors are technically proficient, they face a **learning curve** when it comes to mastering the art of editing. An industry professional who has held both management and creative roles explains it this way: "You basically have to teach people a process and then relate that to technology of what's going on. They're like, 'Oh, Media Composer does editing.' And you're like, 'Yeah, it can do editing, but what is editing? Like first and foremost, can you even understand what editing is? How do you tell a story in a moving picture?'"

As a result, bringing new editors up to speed can take a lot of time. He continues, "So then you're going to bring that person in and it'll take five to ten years before





they're going to be functional on their own. And during all that time they're trying to earn a living just like everybody else is. It's still very competitive. The fact that there's a lot of work doesn't mean it's not very competitive to do the work."

Another trend editors are seeing is that **assistant editors have fewer opportunities** for advancement than they did before. A freelance film editor says, "The assistant editor has basically been moved out of the process. Fewer people actually get to experience what the job of an editor is through being an assistant, whereas that used to be the number-one way to get the experience and the confidence to take on the weight of a complete feature film. I think that's a very important challenge from a talent pipeline perspective because there is quite a learning curve from starting out to having a big complete feature be your responsibility."

In this competitive environment, editors must **keep their skills up to date**. The technology lead for a university says, "Students entering the industry need to have a combined set of skills. That there are jobs out there that are called predators—producer editors, you know—terms that we'd never heard before. Having a Digital Imaging Technician (DIT) or a data wrangler on set is so important these days and managing the metadata that goes along with your media files is also critical. That is something that we're introducing in all our courses."

TV production is **less seasonal** than it used to be, which means that there are more opportunities throughout the year. An industry professional with a background in unscripted television says, "I can't tell you how fantastic it is to know that there are so many TV shows going on. It's hard to find an assistant editor with a lot of experience who's not already working, whereas before it was definitely very competitive just to even find the jobs. I also see a lot of tech-savvy editors who have a lot of years of experience in something like reality TV now finally being able to get an opportunity [in a different niche]. People are finally considering candidates with other backgrounds in order to hire them. It's fantastic."

CONCLUSION

The state of video production is in rapid transition, as editors take advantage of new technology tools to complete their projects more efficiently and keep pace with the demands of a global production environment. Security is a top concern, and editors are still running into considerable challenges when it comes to collaboration and workflow. Some industry professionals, however, report that technology-driven efficiencies have given them more flexibility to pursue creative collaboration earlier in the production process.

The rapidly changing media environment, including OTT services and social media, is having a strong impact on video production. Editors are noticing increased demand for projects with short turnarounds and smaller budgets, and industry professionals feel pressure to keep their skills up to date to remain competitive. Entry-level editors have a strong grasp of the technology required to do their jobs, but they don't yet fully understand the art of being an editor. With the talent shortage in the

industry, there is more demand than ever for proven editorial expertise.

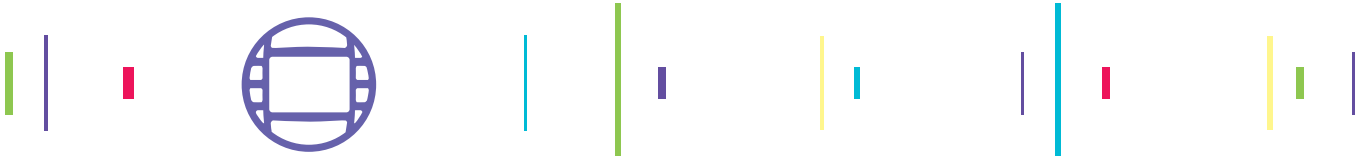
While diversity and inclusion are topics of ongoing conversation in the field, some editors feel that this discussion has not translated into meaningful action. Unconscious bias coupled with systemic inequities still make it challenging for qualified women and people of color to find opportunities for advancement. That said, with editorial talent in high demand, some people who might have not been considered before may now have a better chance of getting their foot in the door and establishing a meaningful career.

METHODOLOGY

We gained the insights shared in The State of Video Production 2020 Report by conducting interviews with members of the **Avid Customer Association (ACA)**, an organization designed to foster deep collaboration between Avid and the industry professionals who are passionate about tackling the challenges and opportunities in front of them. By interviewing experienced members of the ACA, we were able to identify and examine several key trends influencing global video production today. We want to thank everyone who participated in this report for sharing their valuable insights with us.

We took a collaborative approach to the interviews for this report, providing each interviewee with a list of the questions before our call so they had time to reflect on their experiences and consider which topics they found most relevant to their work. We organized this list of questions according to the six themes you see in this report: technology, workflow and collaboration, creativity and innovation, media environment, diversity and inclusion, and career and talent.

During each call, we gave the person we were speaking with the flexibility to respond to the questions they felt most qualified to answer. As the interviews got underway, we then asked follow-up questions to clarify and shed additional light on certain responses. To obtain the most open and honest feedback possible, we anonymized the responses shown in this report.



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