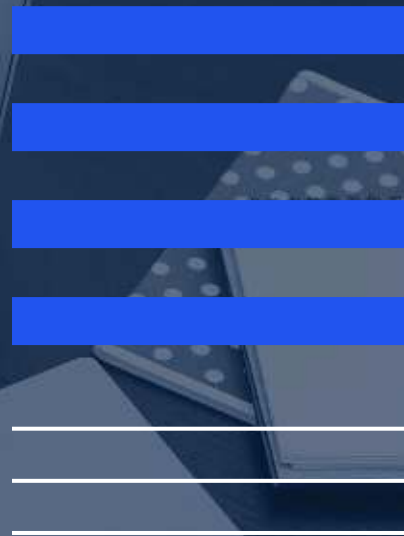


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Streamlining Remote Post Production Work: Ensuring efficient workflows during and after COVID-19



SPEAKERS



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Agenda

- Media production benchmarks pre and post COVID-19
 - Existing transcription solutions for media production
 - How customized tools can help you meet your production timeline
 - Ways to work on tighter than usual production budgets
-



Media production benchmarks: pre and post COVID-19

There are 3 key use cases for transcription and captioning in the media vertical

Transcription and captioning use cases in the media vertical

Vertical	US media captioning and transcription TAM			
Key Use Cases	Live	Pre-produced / offline	Back office	Radio ¹
	Captioning and adjoining transcription for: <ul style="list-style-type: none">— News— Talk shows— Sports	Captioning and adjoining transcription for: <ul style="list-style-type: none">— Pre-produced TV content (e.g. reality)— Movies— TV/online series— Advertisements	Raw footage transcription Interview transcription "As recorded" scripts Conversion of stored audio recordings to text	Transcription of broadcast audio-only content Brand mention hits (advertisements)
End Users	 Producers/OTT  Broadcasters	 Producers/OTT  Broadcasters	 Producers/OTT  Other ²	 Radio  Broadcasters
Solution Types	Real Time:  Post Production: 	Real Time:  Post Production: 	Real Time:  Post Production: 	Real Time:  Post Production: 

¹ Use cases not in focus due to low current transcription rate

² Journalists, editing, hearings

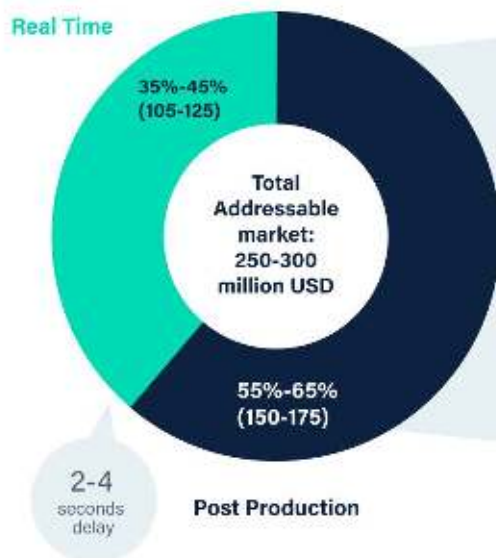
Sources: IFA (2019), Competitor website, Strategy & Interviews, Strategy & Interviews, Strategy & Interviews, Strategy & Interviews



Media production benchmarks: pre and post COVID-19

For post production, turnaround times of 3-4 days are standard for most pre-produced content in the industry

Media transcription and captioning TAM by solution type, 2018, %, (USD mn)



Media post-production TATs





Media production trends

The media T&C market is expected to grow with increased demand for content production

Market trends affecting the media T&C services market



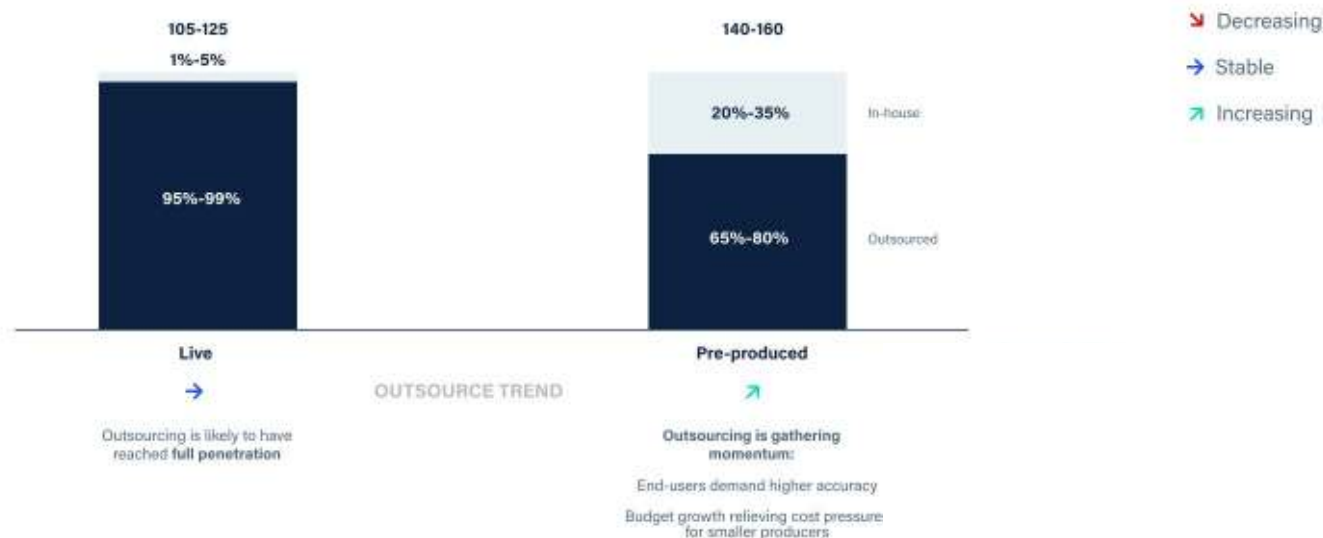
! Volume increase is expected primarily in pre-produced content while live content is flat



Existing transcription solutions for media production

Captioning for pre-produced content is lagging behind live in outsourcing but is trending upward

Sourcing of transcription and captioning services by use case, 2018, %, USD mn

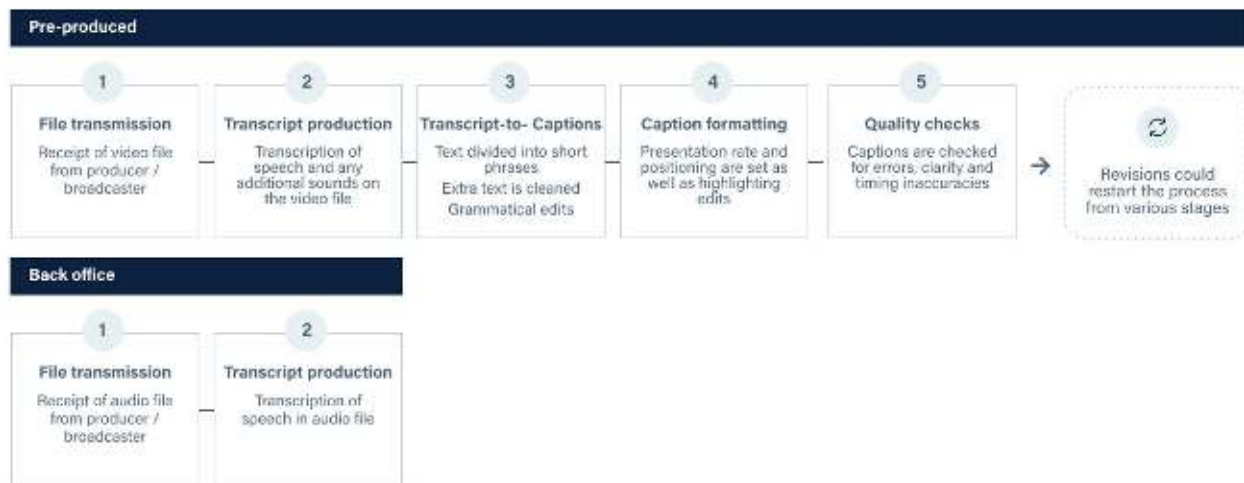




How custom tools can help you meet production timelines

The captioning and transcription processes consist of a sequence of stages differing by use case

Captioning and transcription process stages





Q&A

Additional Questions?
Submit them now in the Q&A.



Thank You.

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