



ZOO DIGITAL GROUP PLC FINAL RESULTS FY22

July 2022

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PRESENTERS

Stuart Green, CEO

- Co-founder
- CEO since 2006
- Over 30 years experience in team building and executive management in the TMT industry
- More than 30 patents granted in the fields of image processing and digital media production

Phillip Blundell, CFO

- Senior finance professional and Chartered Accountant
- Over 20 years experience in software industry
- CFO roles with DotDigital Group plc, Eagle Eye Solutions Group plc and Intelligent Environments plc.
- Joined ZOO in 2018



Hit Movies



Recommended For You



SIGNIFICANT PROGRESS TOWARDS MEDIUM TERM \$100M TARGET

- 78% organic revenue growth
- Established international operations
- Strong growth market
- New original productions fully resumed
- New streaming services begin international rollouts
- ZOO perfectly positioned to take further share and continue to benefit from surplus market demand



FACEBOOK



VIACOMCBS

pluto tv

LIONSGATE

A+E
NETWORKS

magnolia

HBO®

FY22 RESULTS

KEY PERFORMANCE INDICATORS

Financial KPIs

- Revenue up 78% to \$70.4 million (FY21: \$39.5 million)
- EBITDA margin¹ 11.8% (FY21: 11.5%)
- Opex as a % of revenue improved by 5 points to 27% (FY21: 33%)

Operational KPIs

- Number of freelancers² up 20% to 11,028 (FY20: 9,207)
- Retained Sales³ 97.6% (FY21: 98.5%)

1 Adjusted for share-based payments

2 The number of active freelance workers in ZOO's systems who are engaged directly

3 Proportion of client revenues retained from one year to the next

FINANCIAL HIGHLIGHTS – PROGRESS TOWARDS \$100M SALES

- Revenue grew organically by 78% to \$70.4 million (FY21: \$39.5 million)
- Adjusted EBITDA¹ grew to \$8.3 million (FY21: \$4.5 million) – EBITDA* margin increased to 11.8% (FY21: 11.5%)
- Operating profit of \$3.1 million (FY21: \$1.0 million)
- Reported PBT \$1.1 million² (FY21: loss of \$3.6 million)
- Net cash at year end \$6.0 million (FY21: \$2.9 million)
- Completion of a \$10.1 million placing in April 2021 to fund accelerated growth
- Conversion of the 7.5% unsecured convertible loan stock into 5,273,959 new shares, removing the majority of Group borrowings from balance sheet and associated interest payments

1. Adjusted for share-based payments

2. After non-cash fair value movement on embedded derivative of \$1.6 million

OPERATIONAL HIGHLIGHTS

- ZOOstudio deployment expanded by existing major media client and adopted by second multinational entertainment industry client
- Media services grew by 51% due to catalogue content work and regional launches of streaming platforms
- Media localisation grew by 108% as demand for new production work rebounded strongly in H2 – dubbing revenue rose by more than 170% half-on-half
- The Company's worldwide freelancer network grew by 20% to 11,028 (FY21: 9,207) enabling and positioning for higher volumes
- Strengthened end-to-end offering by establishing mastering services division; commenced significant engagement with leading media organisation in FY21H2
- Launched global growth initiative with investments in fast-growing, high-demand regions: India, South Korea, Turkey, and Denmark with others in the pipeline

SCALING UP ZOO'S OPERATIONS

Significant progress and capacity expansion positions ZOO for continued growth



 Hub  Territory Managers  Studios

International

Cost-efficient investments in global partners, creating regional hubs, provides greater capacity

Services

Mastering service broadens scope and appeal of ZOO's proposition and improves visibility

Platforms

Continued enhancement of platforms enables deeper integration with customer operations

Freelancers

Regional hubs support initiatives to expand the talent pool across many languages

Gearing

Expansion of capacity and revenue delivers leverage of central overheads

CONSOLIDATED STATEMENT OF COMPREHENSIVE INCOME

Revenues

- Localisation up 108%
- Media services up 51%
- Software solutions flat

Cost of sales

- Direct costs up 117%
- Direct staff costs up 49%

Operating expenses

- Fixed operating expenses up 46%
- Non-cash costs up 60%

Finance costs

- One off Fair Value cost on loan stock \$1.6 million
- Finance costs down 26%

\$000's	2022	2021	% change
Revenue	70,403	39,525	78.1%
Cost of sales	(48,296)	(25,882)	(86.6%)
Gross profit	22,107	13,643	62.0%
Operating expenses	(19,165)	(12,869)	(48.9%)
Operating profit/(loss)	3,146	962	227.0%
EBITDA*	8,326	4,533	83.7%
Profit/(loss)	2,628	(3,163)	

* Adjusted for share-based payments

SEGMENTAL ANALYSIS

Revenues

- Localisation up due to resumption of new productions
- Media services growth due to expansion of new services and international launches

Gross profit

- Localisation percentage up 7% to 22%
- Media services down 7% to 58%
- Software solutions down 1%

Unallocated costs

- Down 1% to 9% of COS

\$000's	2022	2021	% change
Revenues			
Localisation	42,186	20,261	108.2%
Media Services	26,425	17,466	51.3%
Software Solutions	1,792	1,798	(0.3%)
Total	70,403	39,525	78.1%
Gross profit			
Localisation	9,173	2,946	211.4%
Media Services	15,330	11,365	34.9%
Software Solutions	1,660	1,693	(1.9%)
Total*	22,107	13,643	62.0%
	31.4%	34.5%	

* After unallocated COS of \$4,056 (FY21: \$ 2,361)

CONSOLIDATED STATEMENT OF FINANCIAL POSITION

Non-current Assets

- PPE net value up \$3.0 million to \$5.4 million
- ROU asset up \$6.0 million to \$8.0 million
- Investments of \$3.9 million

Trade and other receivables

- Trade receivables up 223%, representing DSO of 90 days
- WIP up 67%

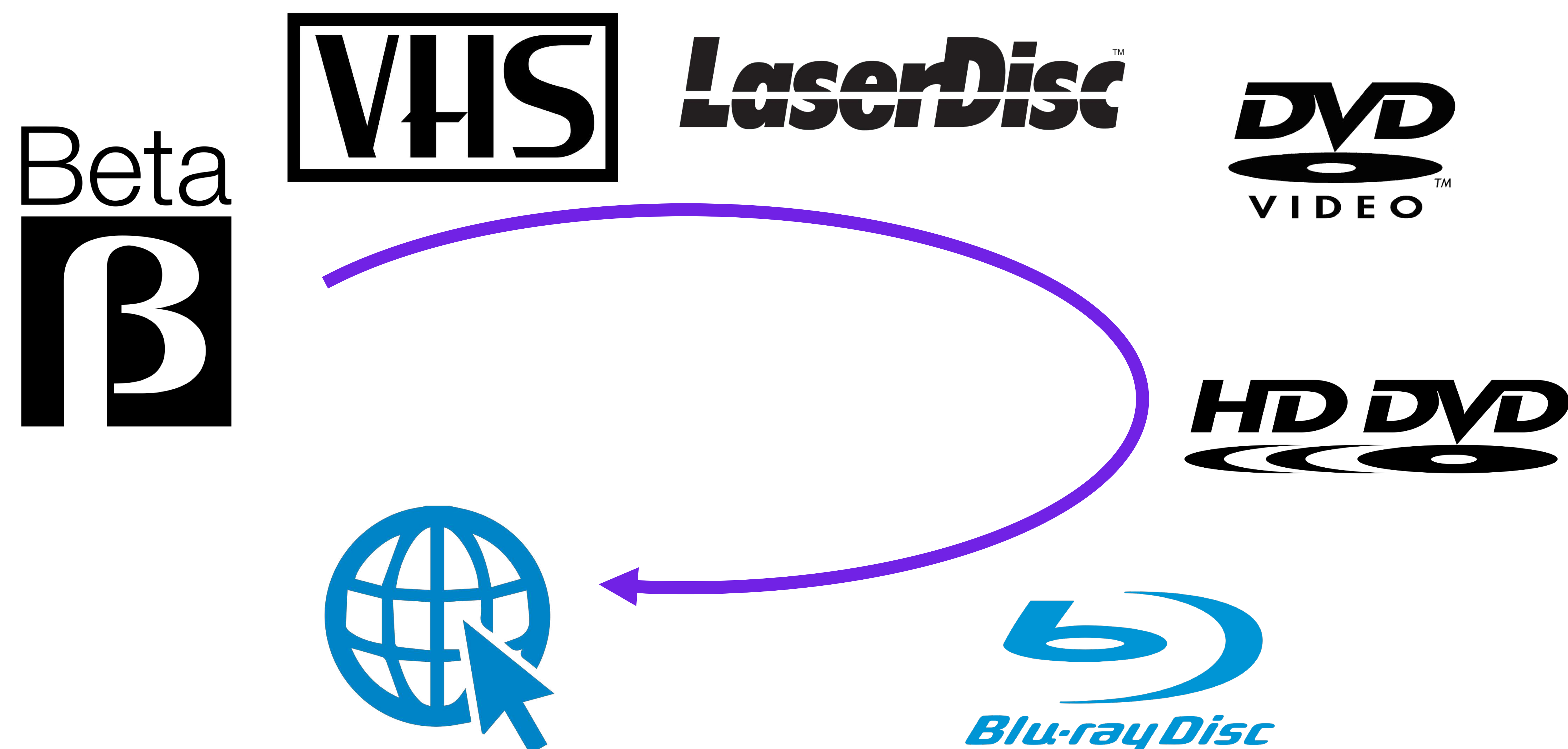
Current liabilities

- Trade creditors up 275% to \$27.3 million
- Borrowings down \$4.4 million
- Embedded derivative of \$4.5 million eliminated on conversion of loan stock

\$000's	2022	2021
Assets	28,831	11,660
Trade and other receivables	29,639	10,241
Cash	5,962	2,949
Total Assets	64,432	24,850
Current liabilities	29,725	20,252
Non-current liabilities	8,449	1,759
Total liabilities	38,174	22,011
Net Assets	26,258	2,839

MARKET UPDATE

THE FUTURE OF HOME ENTERTAINMENT IS STREAMING



Streaming is the 'final destination' of home entertainment

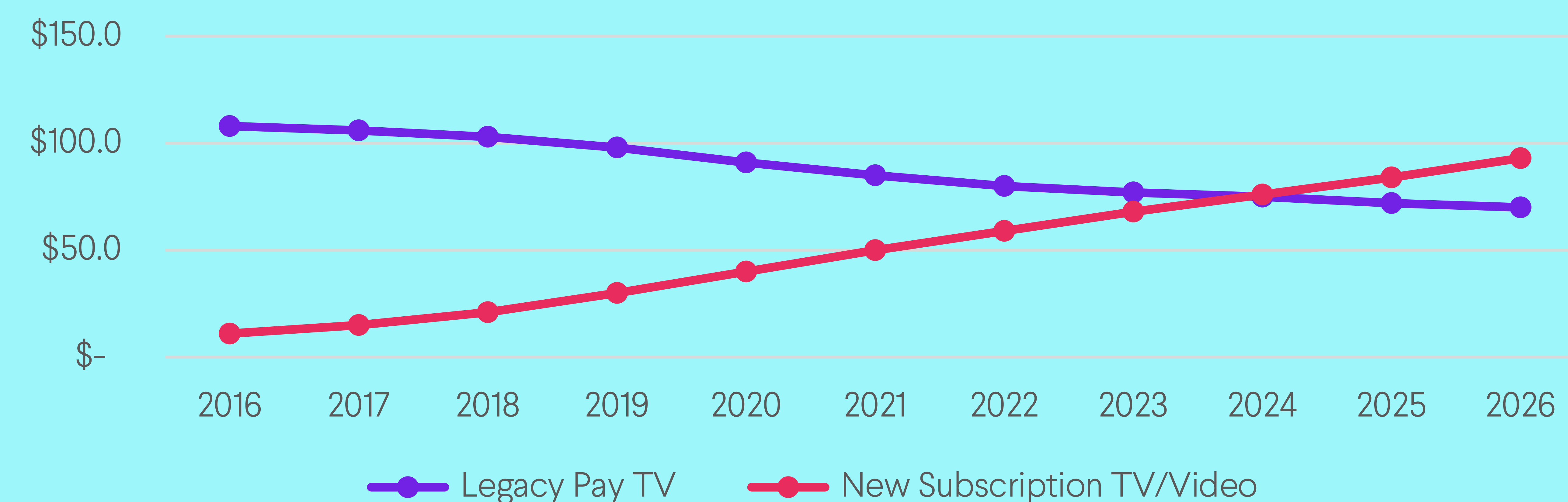
PHASE 1



PHASE 2



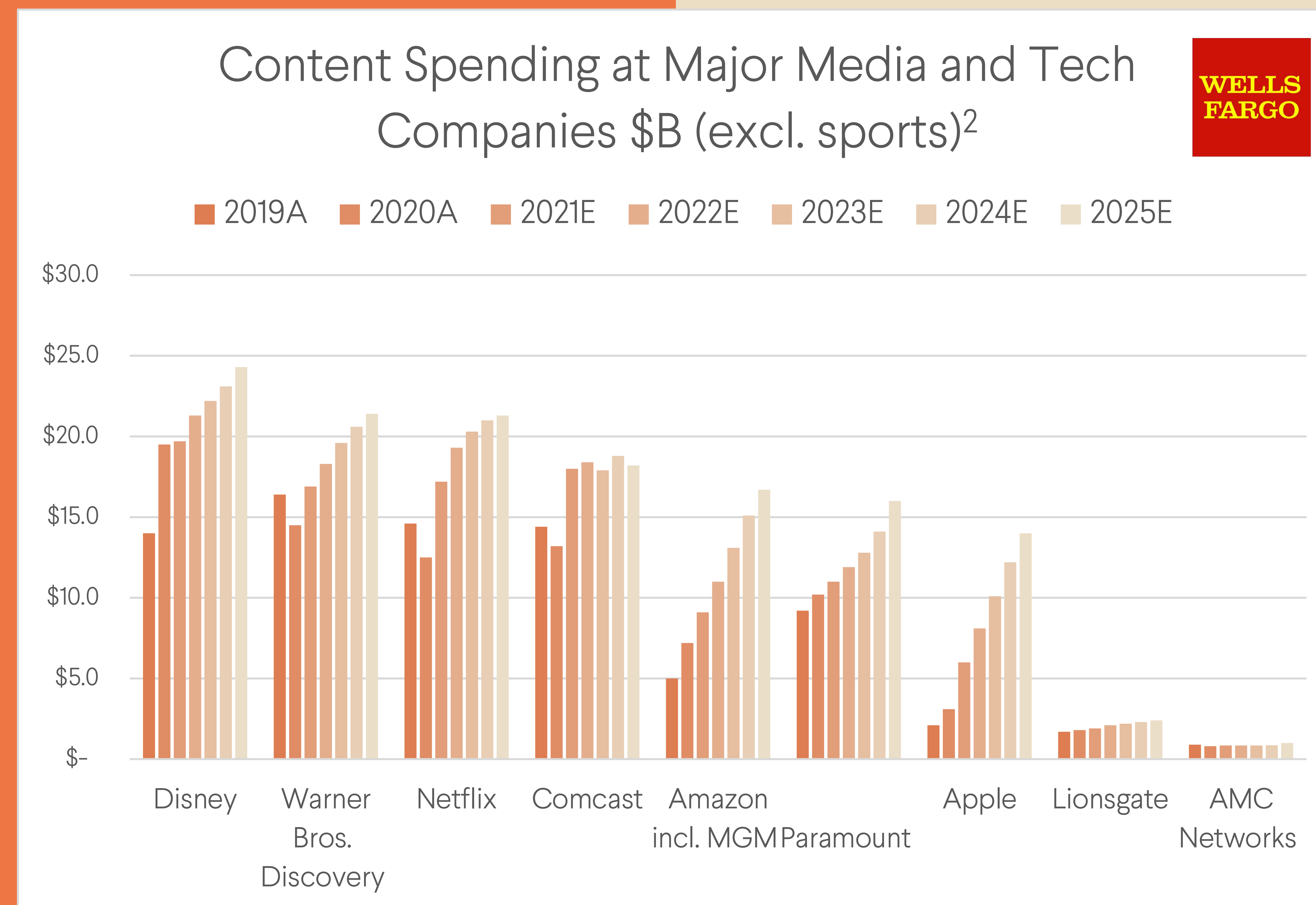
US Consumer Spend on
New vs Legacy Subscription TV/Video (\$B)



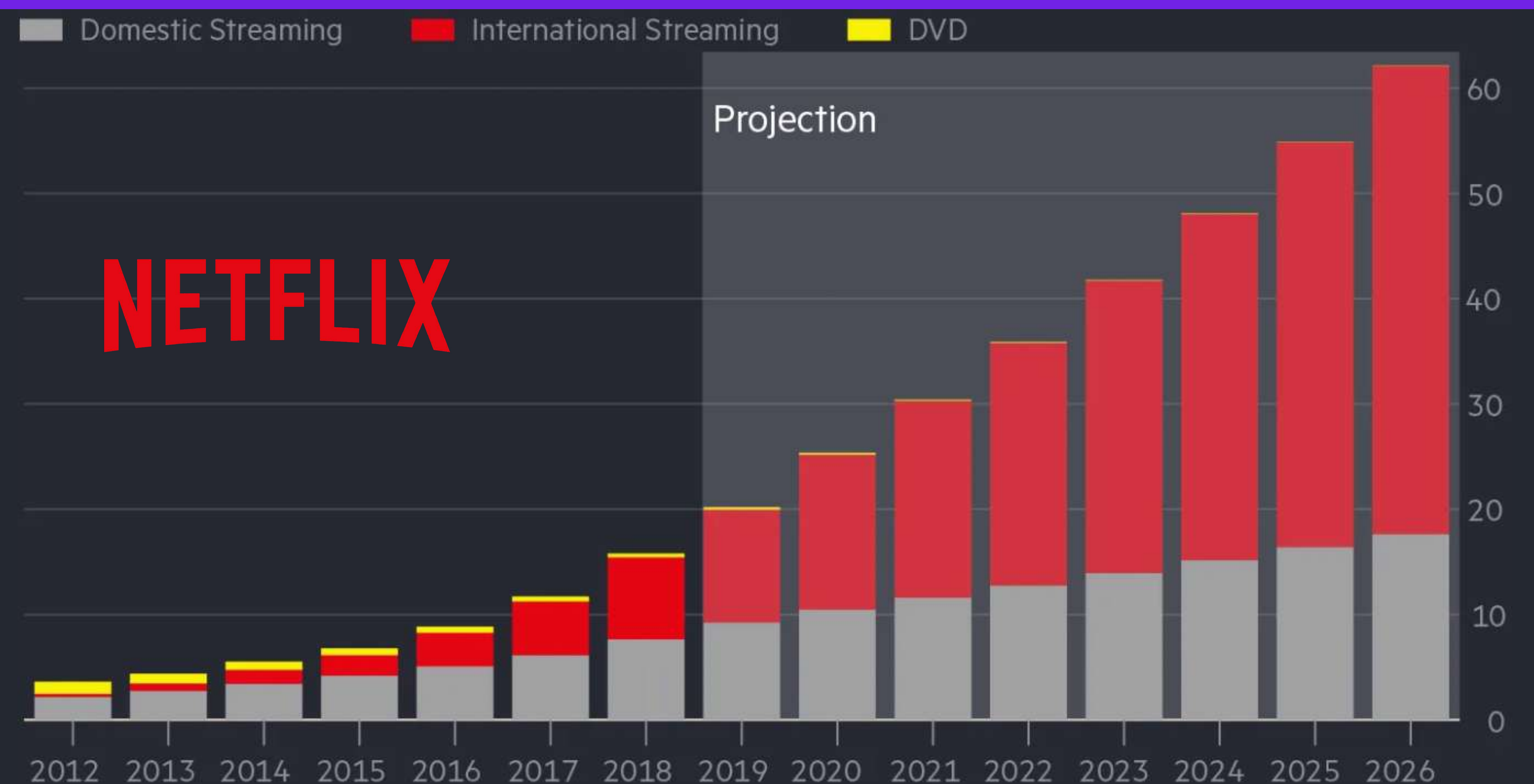
Source: Strategy Analytics, April 2021

GROWTH IN CONTENT

- Spend on film and TV production in 2021 \$220 billion¹
- Subscription OTT services increased investment in content by 20% in 2021, to nearly \$50 billion¹
- Increasing competition amongst media companies to secure content and production capacity
- Capacity in English-speaking countries is saturated



MAJORITY OF AUDIENCE IS INTERNATIONAL



NETFLIX

- US SVOD penetration: 85%¹
- Global SVOD subscribers to grow by 43% by 2026²
- High growth markets: SEA (39% by 2026²), India (137% by 2026³)
- Drives demand for localisation

1. Entertainment on Demand, 2022
 2. Digital TV Research, 2021
 3. Media Partners Asia, 2021

CONTENT IS GOING GLOBAL

- At least half of European Netflix and Amazon Prime viewing time could be spent watching non-English language content by 2030¹
- Squid Game most popular Netflix show in over 90 countries²
- Netflix has invested over \$1 billion in Korean content alone²
- English dubbing is on the rise
- Increasing platform rollout leads to proliferation of demand for localisation

1. Digital-I 2021; 2. Netflix



MEDIA LOCALISATION

- International audiences demand localised content
- Content is localised into many languages (Netflix produced 5m minutes of subtitling and 7m minutes of dubbing in 2021¹)
- Primary driver of growth is new content production
- Catalogue content provides additional volume

1. Netflix; 2. Assuming average subs cost \$10/min, dubs 9x subs

Estimated addressable market for media localisation:

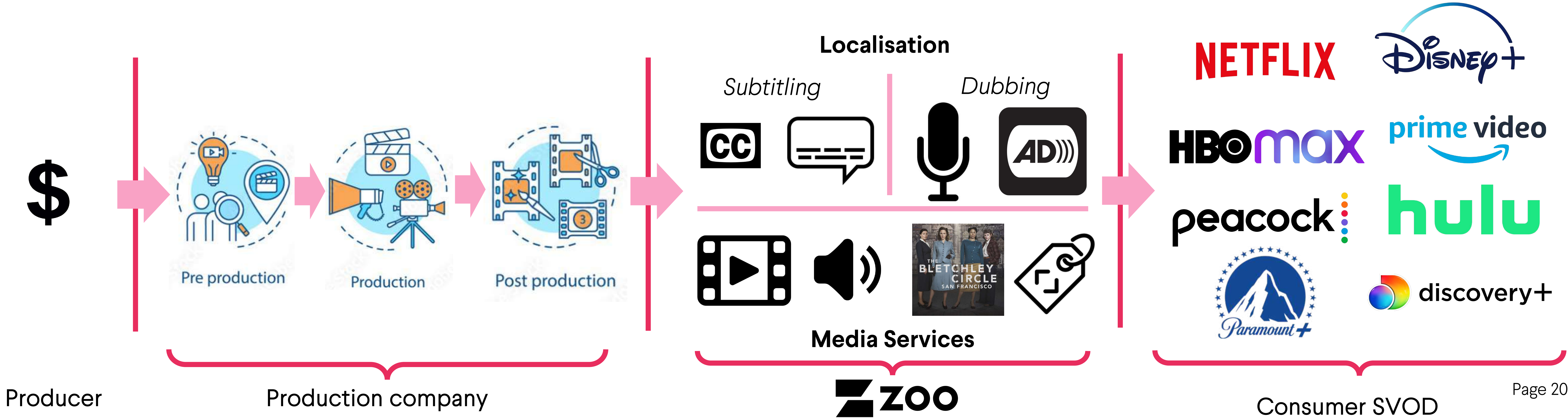
- Netflix 7m mins subs and 5m mins dubs in 2021
- Estimated Netflix spend \$500m²
- Represents 2.9% of Netflix 2021 content spend of \$17bn
- Major SVOD companies spent \$50bn (out of global total of \$220bn) on new original content in 2021 (excludes catalogue)
- Assuming similar strategy to Netflix, implies \$1.5bn content localization spend by major SVOD

Audio	Subtitles
Dansk	Off
Deutsch	Dansk
✓ English	Deutsch
English [Audio Description]	✓ English [CC]
Español	Español
Español (Latinoamericano)	Español (Latinoamericano)
Français	Français
Italiano	Italiano
Japanese	Nederlands
Nederlands	Norsk
Norsk	Polski
Polski	Português
Português	Português (Brasil)
Português (Brasil)	Suomi

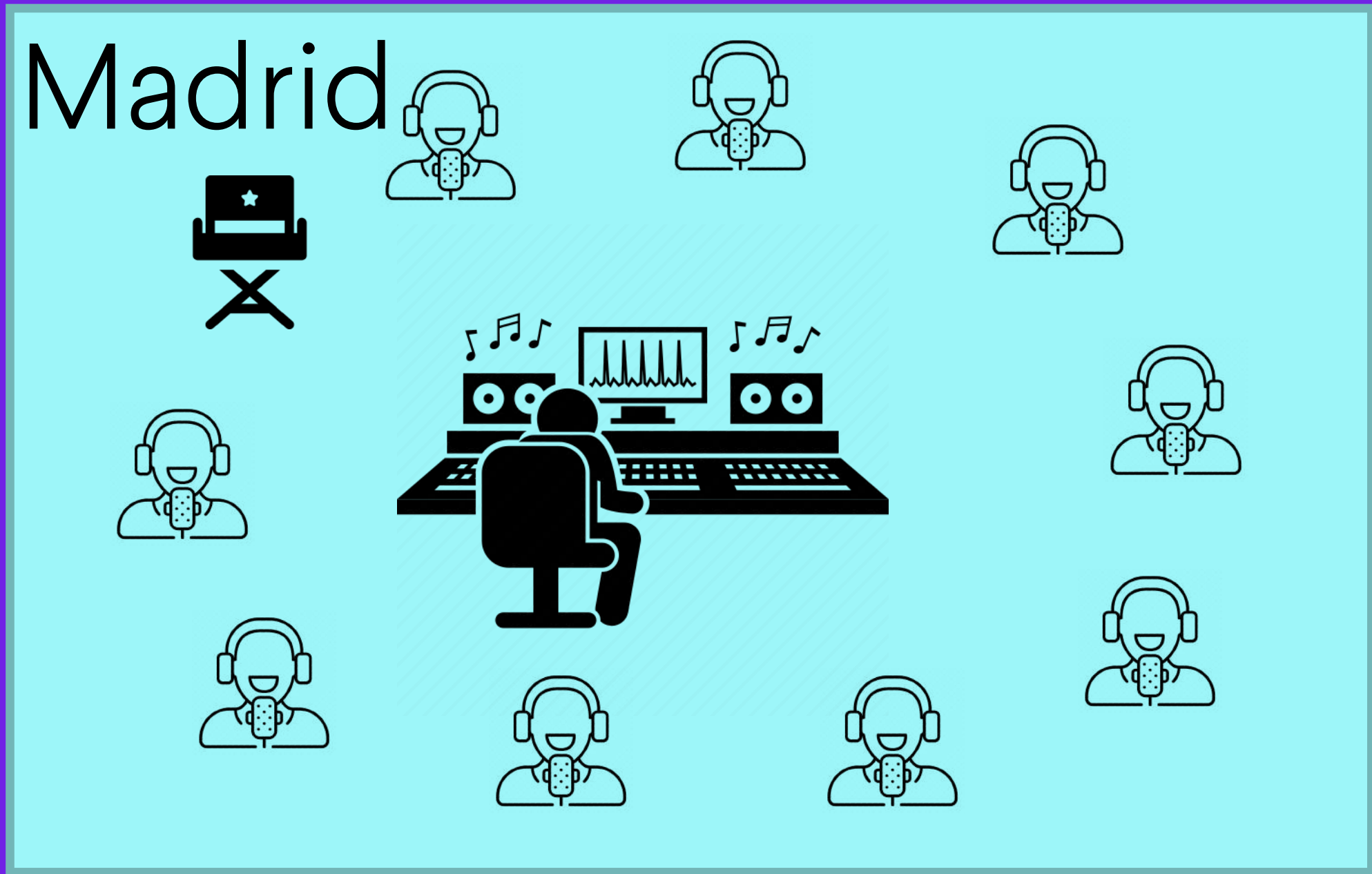
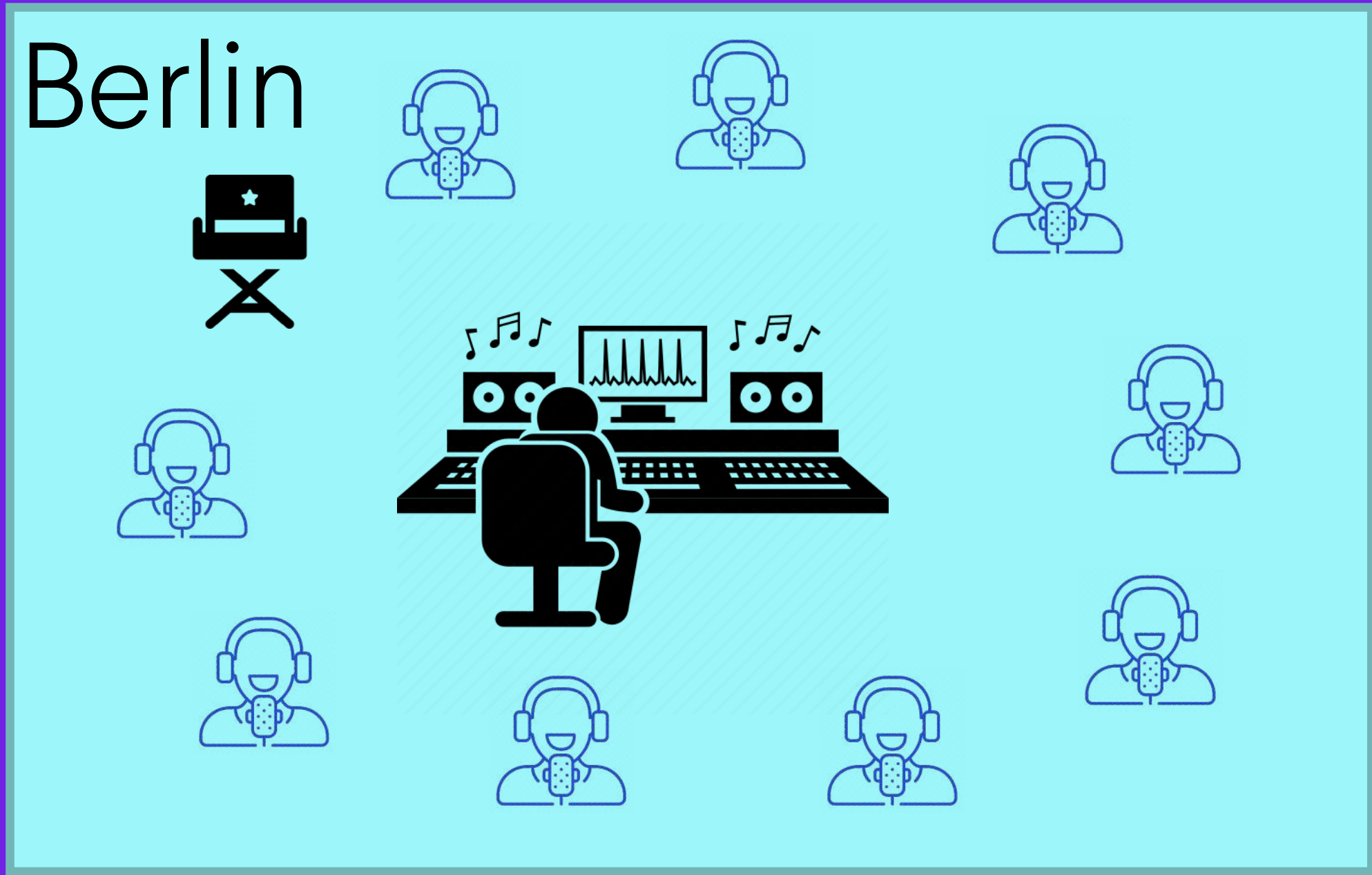
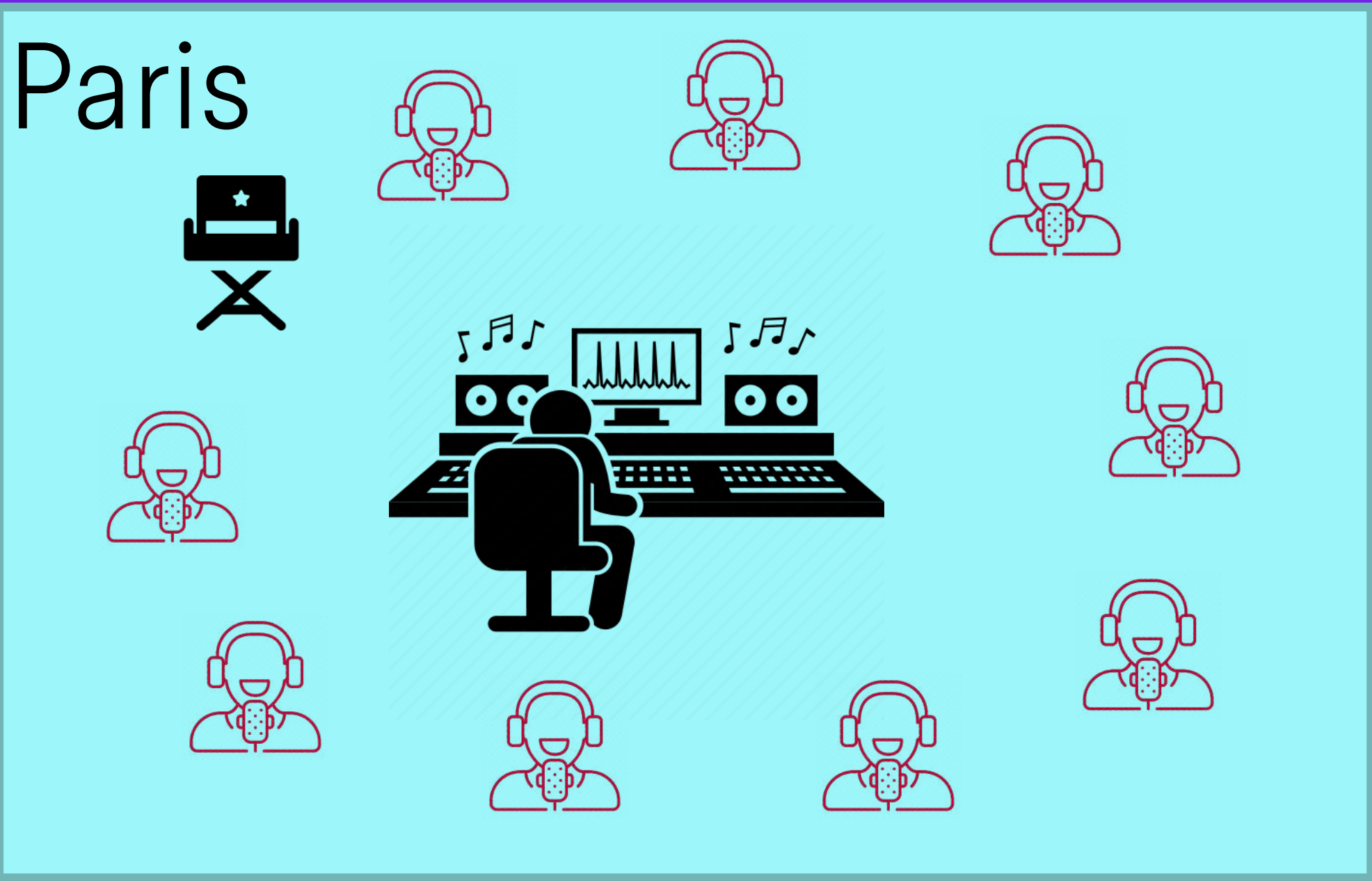
ZOO'S PROPOSITION

FROM POST TO PLATFORM

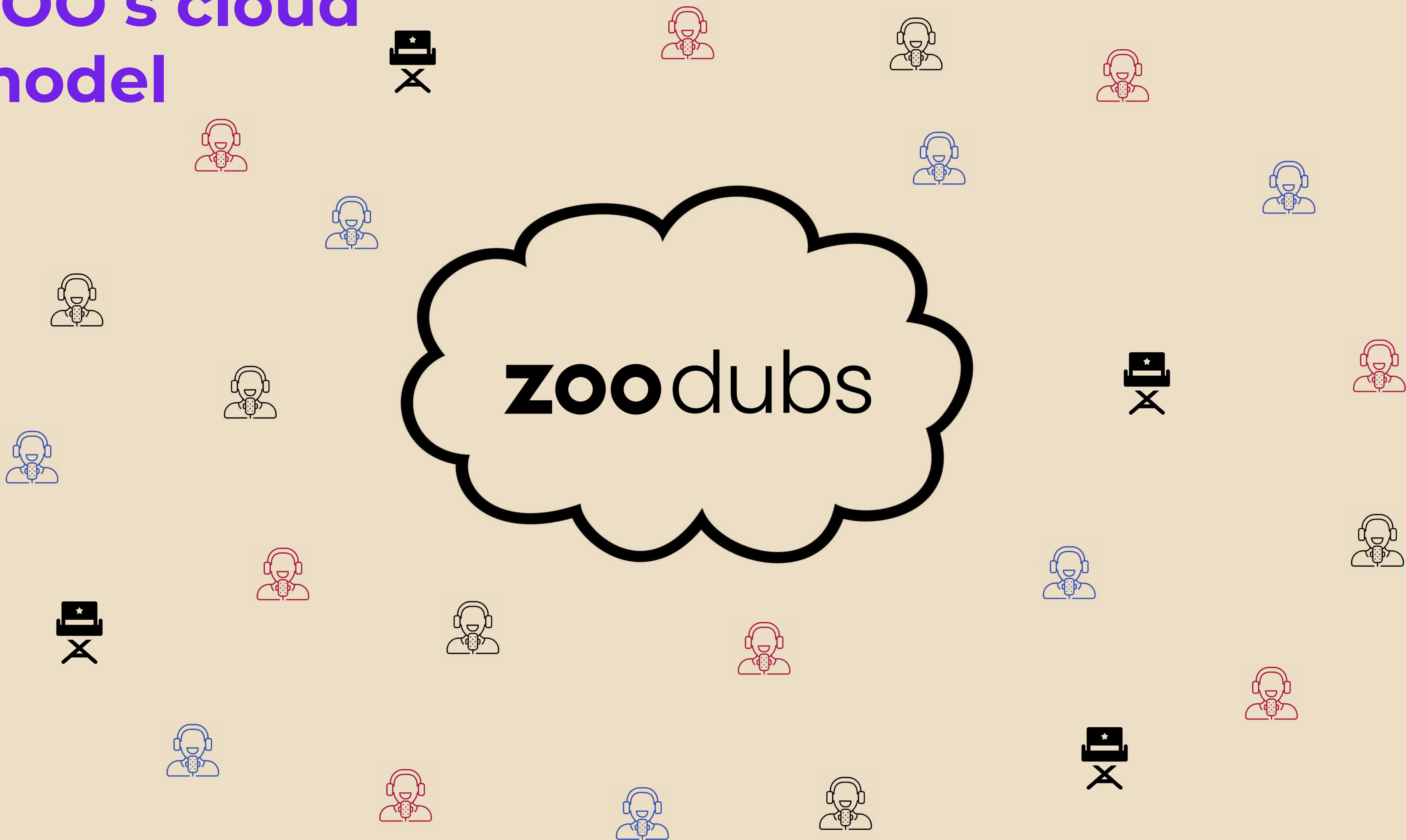
ZOO's proprietary cloud technology and end-to-end offering make it one of the few vendors trusted by the biggest names in entertainment to deliver localisation and media services at scale



Traditional industry studio model



ZOO's cloud model

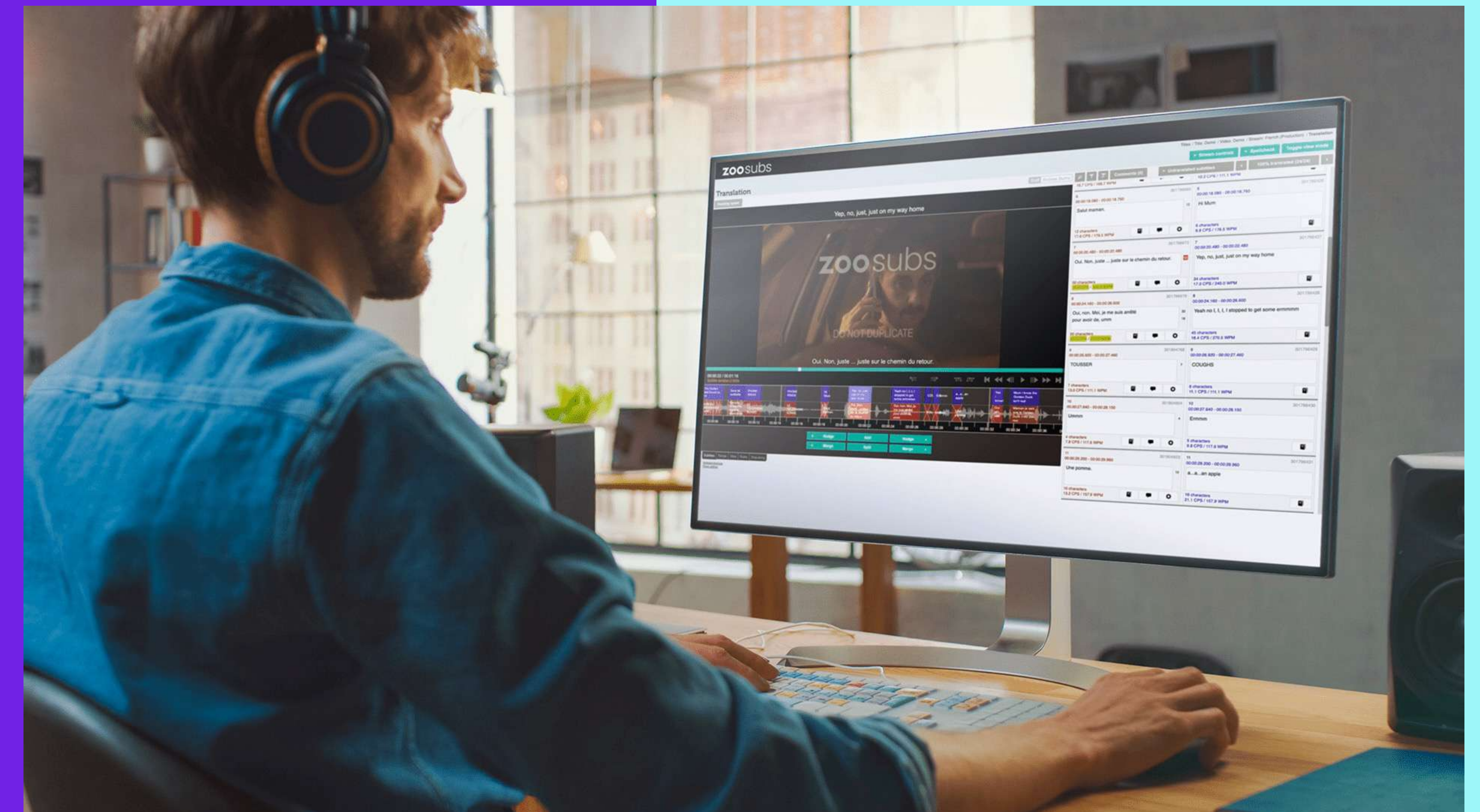


TRANSFORMING THE CONTENT LOCALISATION SUPPLY CHAIN

- Traditional approach to dubbing centres on physical studios
- These are capacity-constrained
- Slow and expensive to scale
- Demand is now outstripping supply
- Recent industry consolidation has reduced competition and increased opportunity

ZOO'S DISRUPTIVE PROPOSITION

- Cloud production and management platforms
- Enforced quality and security standards
- Connects efficiently with freelancers, studios, translation partners, etc.
- Delivers end-to-end solutions
- Enables highly effective remote working
- ZOO's ERP technology can be embedded in customer operations



zoostudio

zooscripts **zoo**subs **zoo**dubs **zoo**core
zooreview **zoo**sign **zoo**echo **zoo**vault

ZOO'S STRATEGY

Five pillars differentiate ZOO in the market and provide competitive advantage

Innovation

Create value-adding software technology

zoodubs

zoostudio

Scalability

Operate an extensive freelance network

10,000 freelancers

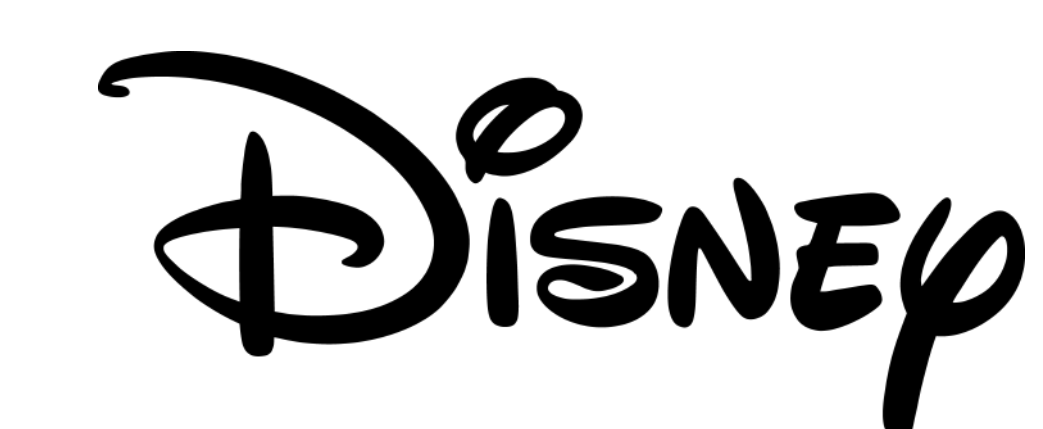
Collaboration

Work with like-minded, world-class experts in media localization, education and research



Customer

Secure preferred partner status with leading buyers



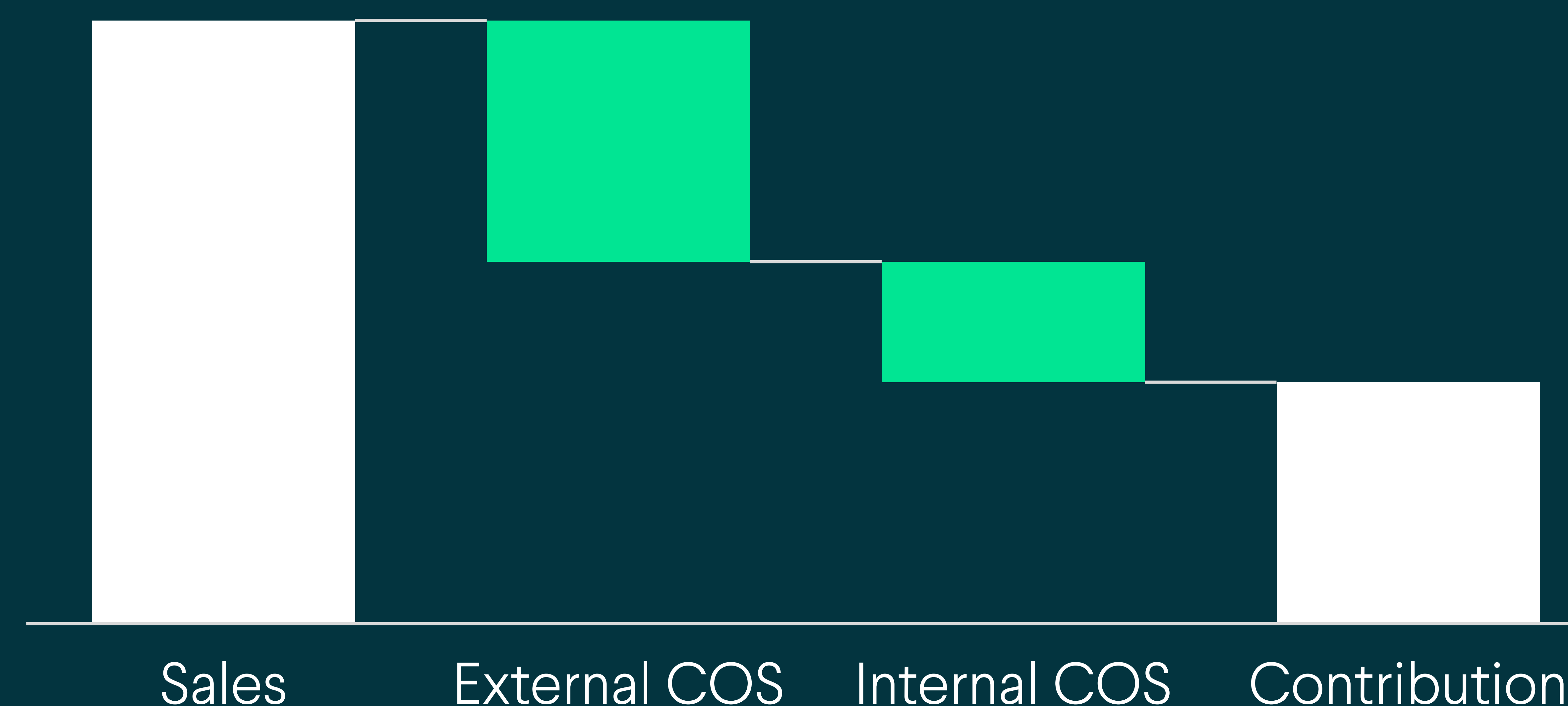
Talent

Engage with experienced and effective professionals



BUSINESS MODEL

- Services charged predominantly based on minutes of runtime
- Freelancers paid on same basis
- Framework agreements with large customers
- Rates are pre-agreed
- Projects allocated based on quality of service and capacity
- Current contribution margins are lower than the business at maturity, due to being in a heavy investment phase



MEDIUM TERM TARGET

- \$100 million milestone introduced in 2020 as medium-term target
- After two years progress is more than one year ahead of plan
- Current share <5% of est. \$1.5 billion of major studio spend – significant growth potential



ZOO'S AMBITION

To be the number one partner to the major streaming companies assisting their growth and globalisation

- Built on technology
- Scalable capacity through freelancers
- Low-cost presence in key markets
- Coverage and capability across all required languages
- Capturing demand as SVOD providers globalise

OUTLOOK

- Q1 has been a record quarter – sequential growth over FY22Q4 and significantly ahead of prior year
- Visibility through H1 indicates further significant progress towards our 2020 goal of delivering \$100 million sales in the medium term
- H1 expected to exceed FY22H2
- In dialogue with multiple streaming platform operators regarding adoption of ZOOstudio
- Expect investments made in building multilingual dubbing capability and capacity will result in strong growth in FY23
- The Board remains confident of continuing to deliver strong growth

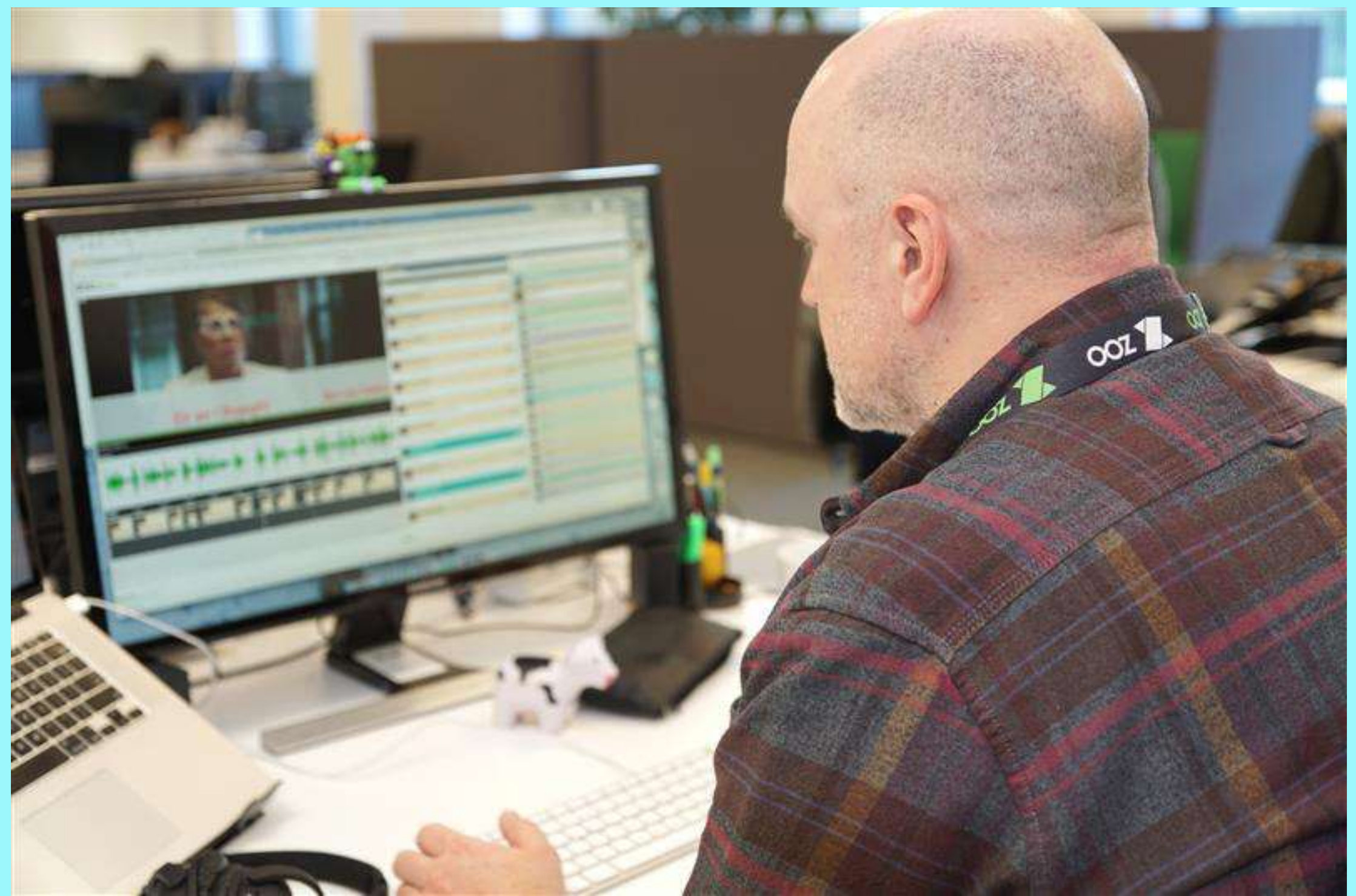
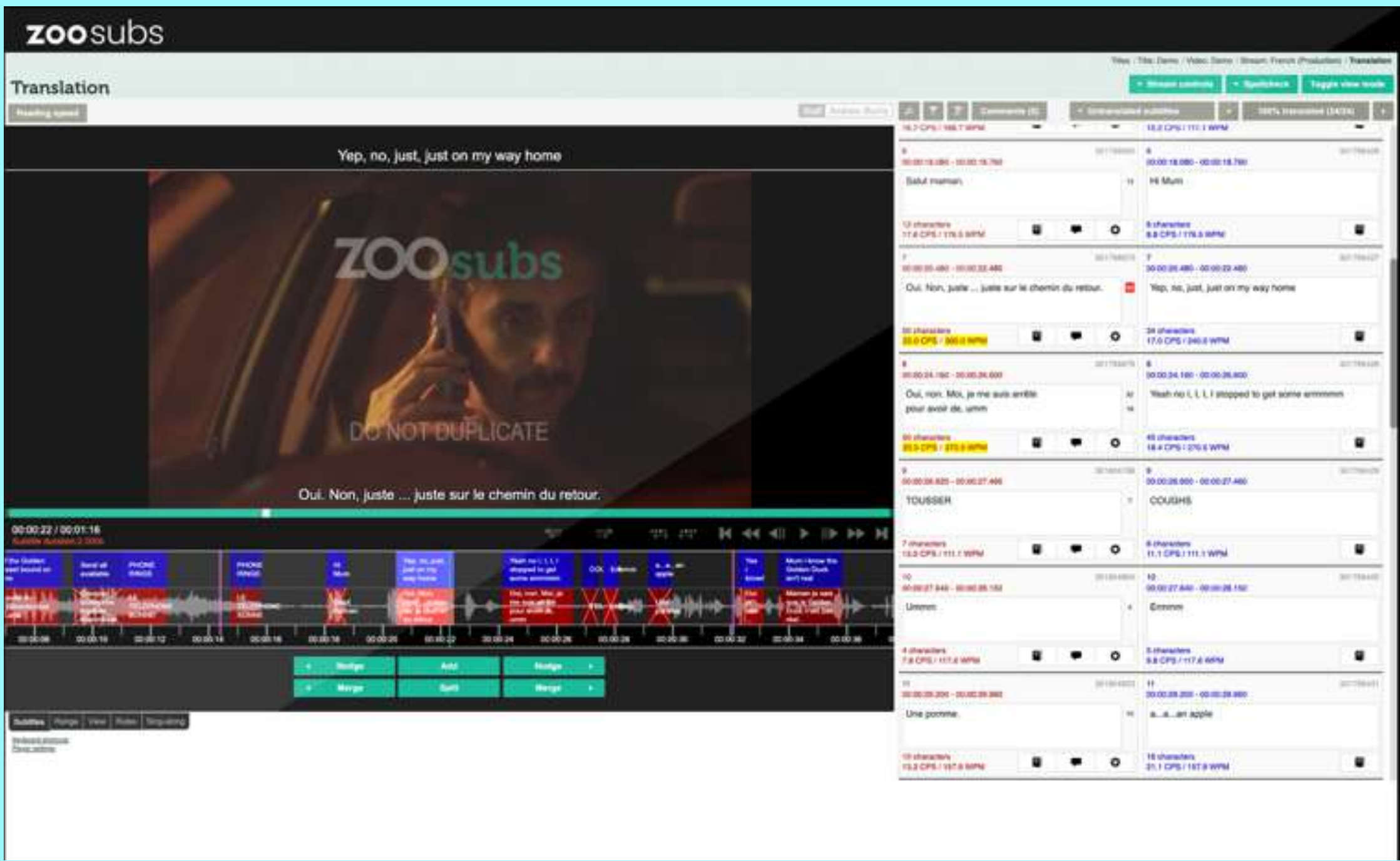


INVESTMENT SUMMARY

Strategically aligned with the world’s biggest content creators and streaming services, ZOO addresses their current needs and anticipates future challenges better than anyone else in the sector. This customer-focused approach to services, solutions and technologies will continue to deliver sustainable, profitable revenue growth.

Significant year-on-year growth

Cash generative; low net debt



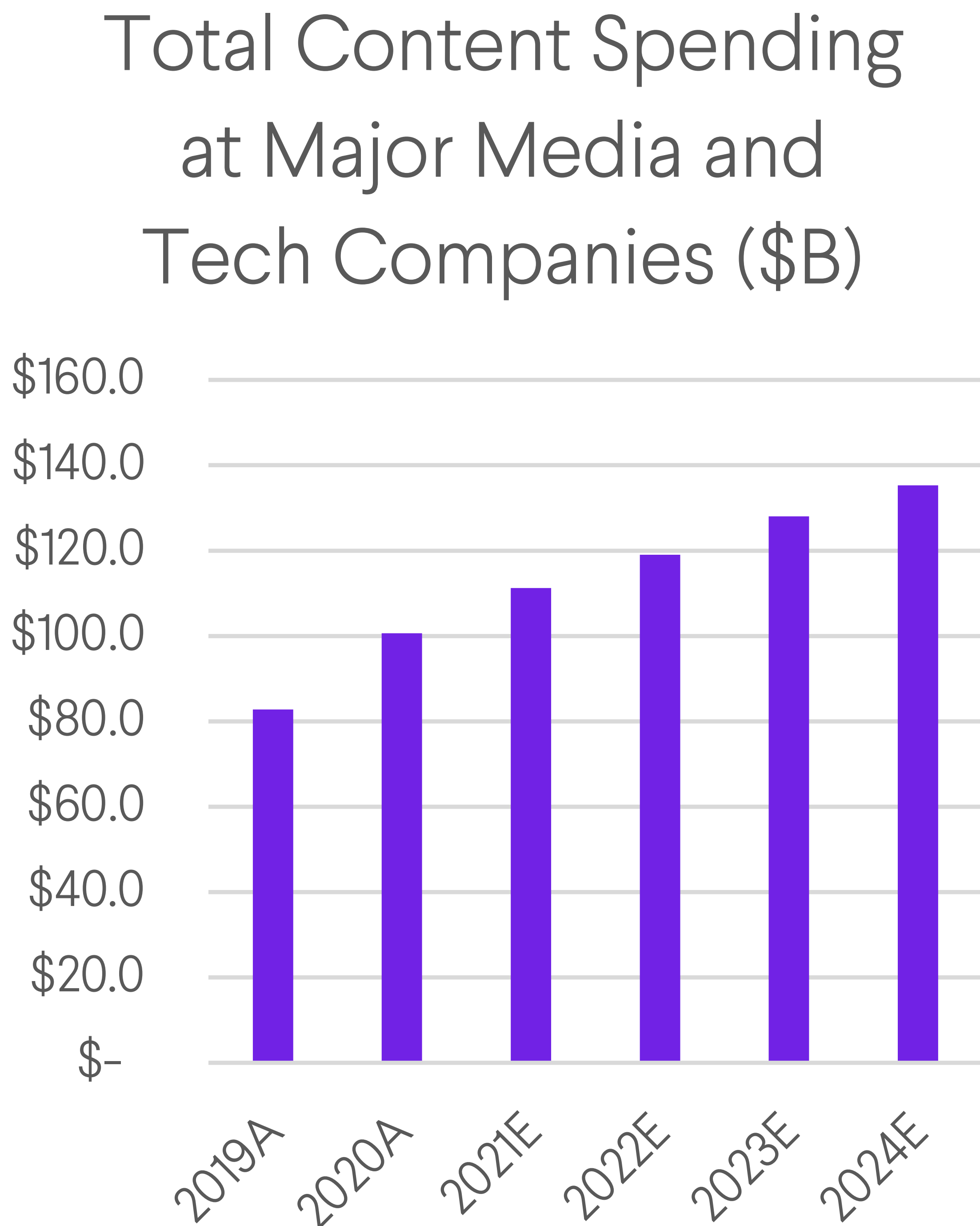
Invested in front of demand

Proprietary tech provides scalability and differentiation

International capability

Supporting end-to-end services and all languages

- London
- Los Angeles
- Dubai
- Korea
- Turkey
- India
- Denmark



Strong industry growth fundamentals

Large and expanding market



THANK YOU



APPENDIX

CONSOLIDATED STATEMENT OF COMPREHENSIVE INCOME

Final Results FY22

	2022 \$000	2021 \$000
Revenue	70,403	39,525
Cost of sales	(48,296)	(25,882)
Gross Profit	22,107	13,643
Other operating income	204	188
Other operating expenses	(19,165)	(12,869)
Operating profit	3,146	962
Analysed as:		
EBITDA before share based payments	8,326	4,534
Share based payments	(513)	(649)
Depreciation (net of grant) and impairment	(3,008)	(1,702)
Amortisation	(1,659)	(1,221)
	3,146	962
Exchange loss on borrowings	(5)	(359)
Fair value movement on embedded derivative	(1,567)	(3,474)
Finance cost	(519)	(700)
Total finance costs	(2,091)	(4,533)
Profit/(loss) before taxation	1,055	(3,571)
Tax credit	1,573	408
Profit/(loss) and total comprehensive income for the year attributable to equity holders of the parent	2,628	(3,163)
Profit/(loss) per share	3	
basic	3.10 cents	(4.24) cents
diluted	2.80 cents	(4.24) cents

CONSOLIDATED STATEMENT OF FINANCIAL POSITION AS AT 31 MARCH

Final Results FY22

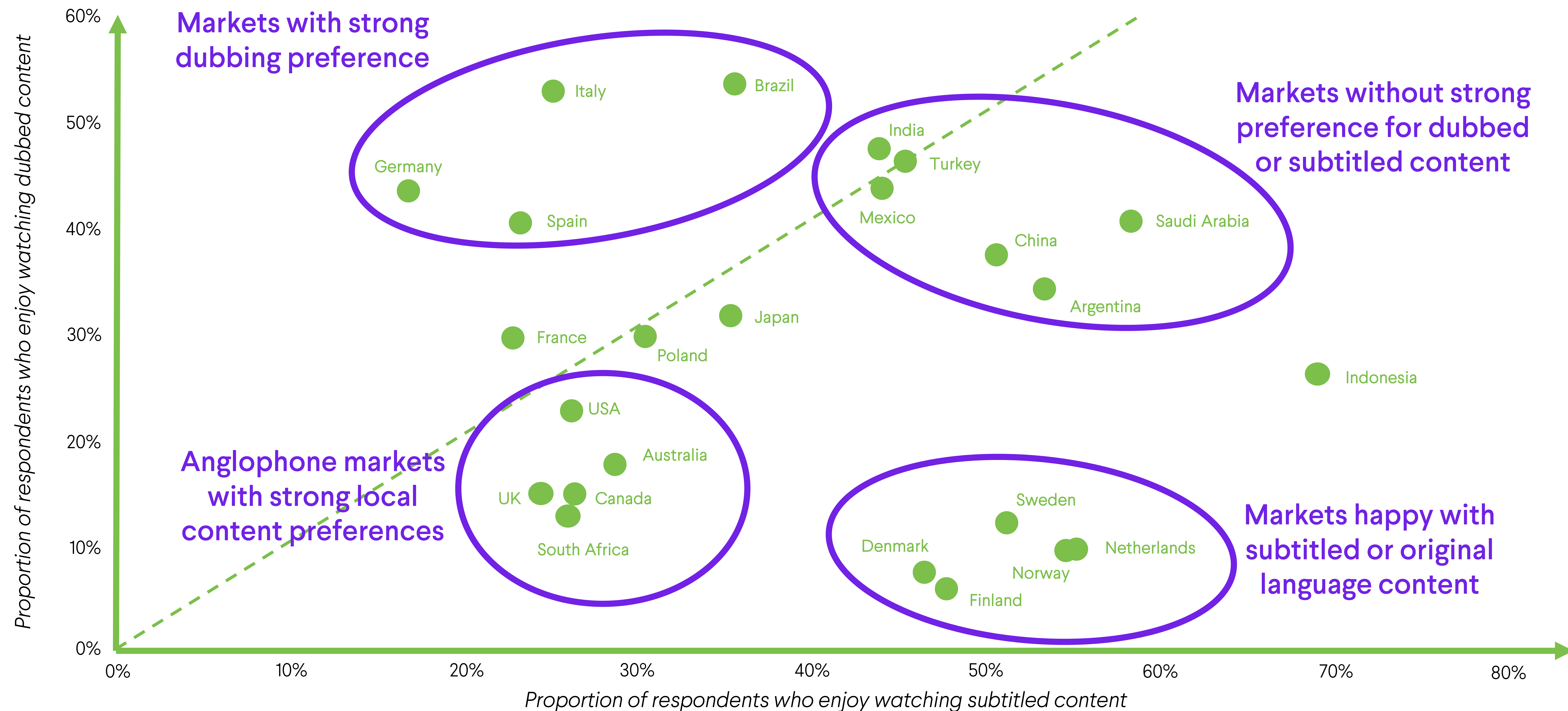
	2022 \$000	2021 \$000
ASSETS		
Non-current assets		
Property, plant and equipment	13,317	4,362
Intangible assets	9,514	6,812
Equity accounted investments	4,154	-
Deferred income tax assets	1,846	486
	28,831	11,660
Current assets		
Trade and other receivables	25,992	8,063
Contract assets	3,647	2,178
Cash and cash equivalents	5,962	2,949
	35,601	13,190
Total assets	64,432	24,850
LIABILITIES		
Current liabilities		
Trade and other payables	(27,638)	(9,955)
Contract liabilities	(774)	(813)
Borrowings	(1,313)	(5,032)
Separable embedded derivative	-	(4,452)
	(29,725)	(20,252)
Non-current liabilities		
Borrowings	(7,830)	(1,759)
Other payables	(619)	-
	(8,449)	(1,759)
Total liabilities	(38,174)	(22,011)
Net assets	26,258	2,839

CONSOLIDATED STATEMENT OF CASH FLOWS

Final Results FY22

	2022 \$000	2021 \$000
Cash flows from operating activities		
Operating profit for the year	3,146	962
Depreciation	3,022	1,715
Amortisation and impairment	1,659	1,221
Share based payments	513	649
Changes in working capital:		
Increases in trade and other receivables	(18,453)	(918)
Increases in trade and other payables	15,337	2,719
Cash flow from operations	5,224	6,348
Tax received	258	408
Net cash inflow from operating activities	5,482	6,756
Investing activities		
Purchase of intangible assets	(58)	(67)
Capitalised development costs	(1,675)	(1,274)
Purchase of Investments	(953)	-
Acquisition of subsidiaries	(3,000)	-
Purchase of property, plant and equipment	(4,377)	(2,290)
Net cash outflow from investing activities	(10,063)	(3,631)
Cash flows from financing activities		
Repayment of borrowings	(531)	(982)
Proceeds from borrowings	-	1,043
Proceeds from fund raise	10,107	-
Repayment of principal under lease liabilities	(1,268)	(1,102)
Finance cost	(348)	(414)
Share options exercised	21	61
Share issue costs	(551)	-
Issue of share capital	164	-
Net cash inflow/(outflow) from financing	7,594	(1,394)
Net increase/(decrease) in cash and cash equivalents	3,013	1,731
Cash and cash equivalents at the beginning of the year	2,949	1,218
Cash and cash equivalents at the end of the year	5,962	2,949

ENJOYMENT OF SUBTITLED VS DUBBED CONTENT, Q3 2020



MAJOR COMPETITORS IN MEDIA LOCALISATION



- IYUNO-SDI – formed in 2021 through the acquisition by IYUNO Media Group of SDI Media, which follows the acquisition of BTI Studios in 2019; 67 offices in 34 countries; 2,600 employees; 2021 sales of \$450m; Korean headquartered



- Deluxe Entertainment – US headquartered; Chapter 11 process in 2020 when ownership passed from PE to debt providers; Distribution group acquired by PE; offers wide range of entertainment services; owns two dubbing studios; media localisation business believed to have generated \$180m in sales pre-COVID



- VSI Group – owns and operates 25 dubbing studios in Europe and the Americas; 2021 sales of \$102m; London headquartered



- Pixellogic – US business established 2016; majority of equity purchased in 2019 and 2020 by Japan-based Imagica, former parent of SDI Media

THE BOARD



Gillian Wilmot
Chairman

Since 2019

Extensive board level leadership in private and public environments with industry experience across B2B, technology, advertising and communications. Strengths in value creation, operational insight and corporate governance.



Mickey Kalifa
Non-Executive

Since 2017

Chartered accountant and finance professional with nearly 30 years' experience across technology, media and gaming sectors. Currently CFO of M&C Saatchi plc. Formerly CFO Sportech plc.



Nathalie Schwarz
Non-Executive

Since January 2022

Brings 20 years of board-level international experience from roles in both publicly listed and privately owned companies, with a career spanning broadcasting, mobile and digital interactive platforms, including Group Commercial and Development Director at Channel 4 Television Corporation.



Stuart Green
CEO

Co-founder; CEO
since 2006

Over 30 years experience of executive management in the software industry. PhD in Computer Science. Co-founded and sold three software companies. 19 years AIM board director.



Phill Blundell
CFO

Since 2018

Senior finance professional and Chartered Accountant with over 20 years experience in software industry including CFO roles with DotDigital Group plc, Eagle Eye Solutions Group plc and Intelligent Environments plc.



Gordon Doran
CCO

Joined 2005;
Commercial Director
since 2009

Career in commercial roles with technology businesses in UK and USA. Almost 30 years experience leading sales and marketing teams. Based on West Coast USA.

MAJOR SHAREHOLDERS

Shareholder*	% of capital
Stuart Green (CEO)	12.80
Herald Investment Management Ltd	12.78
Canaccord Genuity Wealth Management (Institutional)	8.06
Invesco Ltd	7.92
Hargreaves Lansdown private clients	5.38
Stonehage Fleming Investment Management Ltd	4.68
Canaccord Genuity Wealth Management (Retail)	4.60
Deka Investment	4.05
Sarasin & Partners	3.81

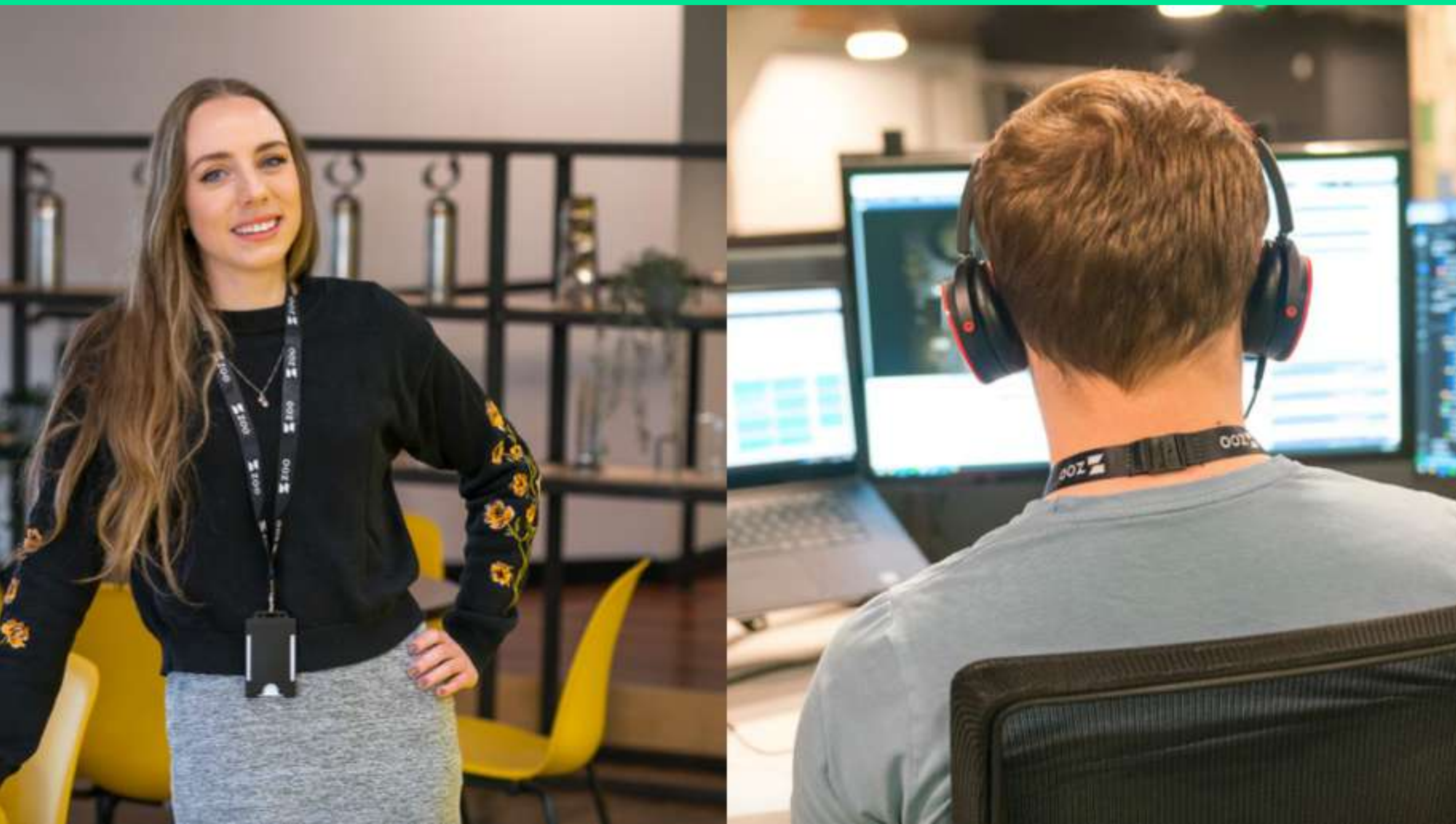
* Based on an independent analysis of ZOO's share register as of 31 March 2022.

Issued share capital and total voting rights as of 31 March 2022 = 88,335,079 ordinary shares.

ENVIRONMENTAL, SOCIAL AND GOVERNANCE

ZOO Digital is committed to building a responsible future-focused business

- Cloud software gives customers an energy and infrastructure efficient approach
- Significantly reduces the need for purpose-built studios
- Reduces time and emissions for voice actors and directors
- Helps to significantly reduce Scope 2 and Scope 3 Greenhouse Gas emissions



THINK SMARTER

We enrich the lives of our people and enhance their skills through access to industry-leading learning & education opportunities. [7] [16]

Diversity is critical to our success as a global business. We want to learn from those around us and inspire the next generation of talent to enter the digital media industry whatever their background, gender, sexual preference, cultural identity or ethnicity. [4] [7]

MAKE IT EASIER

We work to make it easier and more efficient for customers & freelancers to use our localisation services. [12]

Our unique technology platform means our customers can localise their content more cost-effectively, without having to travel. [11]

We relentlessly innovate to meet the future needs of the entertainment industry. [10] [14]

Our flexible workplace approach enables collaboration and allows our people to work in a way that best suits them. [3] [5] [6] [15]

BE BETTER

Disruption favours the brave. We are always looking for a way to do things better. [13]

We are daydream believers, making access to entertainment easier for all and donating our time and resources to charity partners working towards the same goal. [8] [9]

We are determined to minimise our impact on the planet. [1] [2]

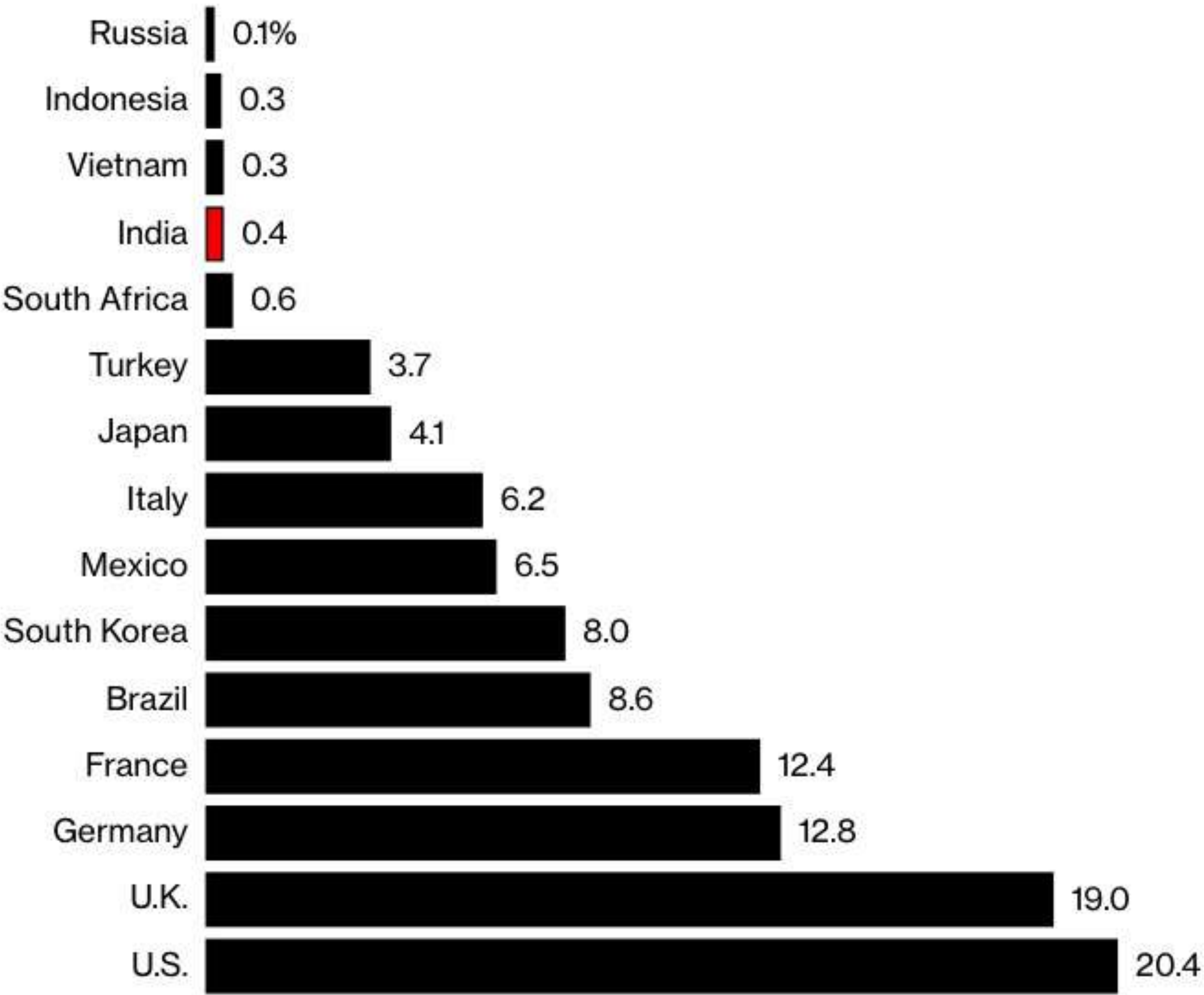
- E
- 1. Reducing carbon footprint
 - 2. Zero Waste and recycling

- S
- 3. Health, Safety & Wellbeing of workforce and freelancers
 - 4. Diversity, Equity & Inclusion
 - 5. Employee empowerment, training & upskilling
 - 6. Human Rights
 - 7. Growing new talent
 - 8. Contributing to global accessibility in entertainment

- G
- 9. Charitable support
 - 10. Innovation and R&D
 - 11. Bespoke client solutions
 - 12. Tech driven operational and economical efficiencies
 - 13. Ethics, Compliance & Transparency
 - 14. Data privacy and cyber security
 - 15. Supply chain engagement
 - 16. Industry & academic partnerships

NETFLIX SUBSCRIBERS

Netflix Subscribers
As a share of population, Q2 2021 estimates



Source: Comparitech

PERCENTAGE OF STREAMING SERVICES' CONTENT



Source: Ampere Analysis

MAJOR US-BASED SUBSCRIPTION VIDEO STREAMING SERVICES

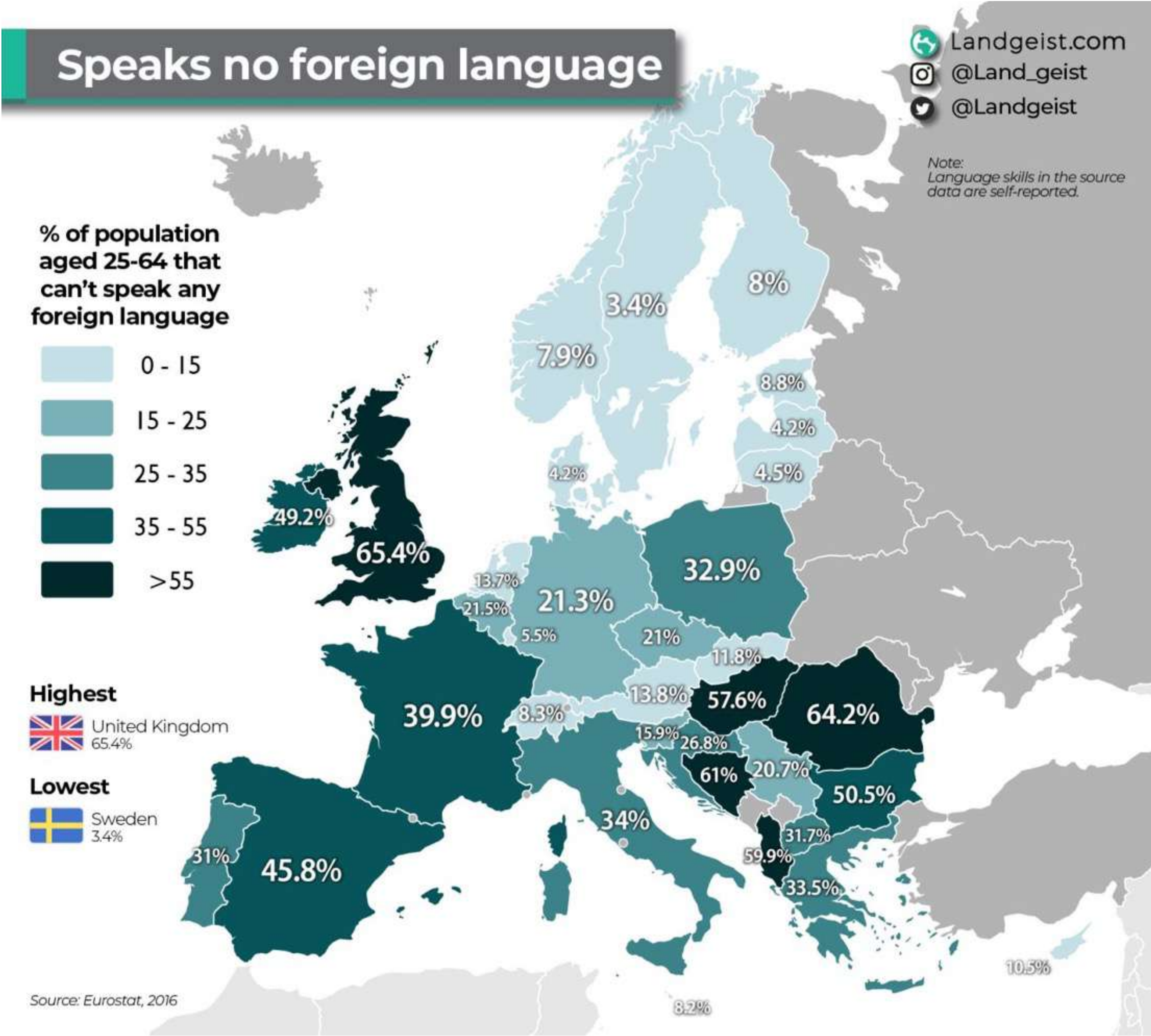
Streaming Services Regularly Reporting Paid Subs			
Netflix	<div><div></div></div> 221.6M	Apr. '22	Global
Disney	<div><div></div></div> 205.6M	Apr. '22	Global
<i>(Includes subs of Disney+: 137.7M, Hulu: 45.6M, ESPN+: 22.3M)^</i>			
Paramount	<div><div></div></div> 62.4M	Mar. '22	Global
<i>(Includes subs of Paramount+: 39.6M, Showtime OTT and other paid streamers)</i>			
Discovery	<div><div></div></div> 24.0M	Apr. '22	Global
<i>(Includes subs of Discovery+, Food Network Kitchen and other SVODs)</i>			
Lionsgate	<div><div></div></div> 19.7M	Dec. '21	Global
<i>(Includes subs of Starz OTT and Starzplay Arabia)</i>			
Streaming Services Reporting Another Reach Metric			
HBO Max	45.1M eligible via direct sign-up/wholesale provider^^	Mar. '22	U.S.
Peacock	13M paid subs; 28M monthly active accounts^^^	Mar. '22	U.S.
Prime Video	200M+ Prime members streamed shows/movies in 2021	Feb. '22	Global
Streaming Services That Haven't Reported Any Reach Metric			
Apple TV+	Roughly 40M subscribers, per The Information*	Sep. '21	Global

FOR MORE DATA, VISIT [VIP+](#)

SOURCE: COMPANY FILINGS

SOURCE: COMPANY FILINGS NOTE: ^DISNEY+ SUB COUNT INCLUDES SUBSCRIBERS OF DISNEY+ HOTSTAR; HULU INCLUDES SVOD+VMVPD; ^^SUCH AS COMCAST, DIRECTV, HULU AND OTHERS; ^^^ACROSS FREE+PAID TIERS FOR MONTHLY ACCOUNTS METRIC; *REPORTEDLY ABOUT HALF ARE PAYING AND HALF ARE ON FREE TRIALS

% OF POPULATION THAT CANNOT SPEAK A FOREIGN LANGUAGE





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