

APA

Advertising Producers Association

A BLUEPRINT FOR 2014... AND BEYOND

**The APA
Survey Results**

The APA Survey Results

Thank you to all 107 APA member companies who completed and returned the APA survey, ensuring that it provided an accurate and useful evaluation of the APA's services. The purpose of the survey was to enable us to understand how we can help you better.

The key thing we learnt is that our members are using our services extensively and pronounce themselves very satisfied with them.

That is obviously a really positive conclusion – but what interests us most is identifying where we can improve or enhance our services and setting out an action plan to achieve that during the course of 2014.

With that in mind, this report will:

- 1** Set out the results of the survey – the answers you gave to the questions we asked – showing how much each service is used and how it rates.
- 2** Detail the headline conclusions from those results.
- 3** Describe what we learnt from the finer details of the survey.
- 4** Introduce our plan of action for improving/enhancing our services based on the survey results.
- 5** Sum up the survey.

1 The Results

This simply identifies what proportion of the APA membership use each service:

SERVICE	% OF APA MEMBERS USING
Standard APA/IPA/ISBA contract and PIBS	95%
Recommended crew terms	94%
Other contract templates (directors agreements, location agreements etc)	85%



Website guidance documents on Health & Safety, and filming with children and animals

78%

Advice on production issues (crew terms rates, insurance issues, locations, filming with children, animals and miscellaneous questions)	81%
Advice on legal issues (contracts, copyright, visas etc)	71%
Dispute resolution including chasing payments	47%

Formal disputes process - mediation and arbitration	52%
APA Collection	64%
APA Show	87%
Future of Advertising...In One Afternoon and other events aimed at keeping members up to date with the possibilities for their business arising from new means of communicating with consumers	52%
Training - the APA Masterclass	71%
Events in Cannes - the CFPE Young Directors Award, the World Producers Summit and Cannes Soiree	63%
APAi - the APA Interactive Production Group	41%
Overseas trade missions	30%

APA emails on production issues, updates and events

89%



The Beak Street Bugle	93%
Campaigning - tackling major industry issues	45%
Promotion of APA members	36%
Marketing advice and assistance for APA members	33%

2 Evaluating the APA's services

- **91%** of APA members consider the APA/IPA/ISBA standard contract as critical or useful to their business. Those that didn't were making advertising content that did not include TV commercials.
- **85%** of APA members use the other contract templates:
 - Overseas agency production contract
 - Overseas agency production contract in Mandarin
 - Client production company contract
 - Digital production contract
 - Service company contract
 - NDA/Confidentiality agreement (in the form agreed between the APA and IPA)
 - Directors contract (ongoing)
 - Directors contract for one off project
 - Directors loan out agreement
 - Contract of employment
- **97%** said the recommended crew terms are clear, practical and easy to follow.
- **78%** use the guidance notes on the APA website on Health and Safety and regulations on filming with children and with animals. **99%** of those that use them find them clear, practical and easy to follow.
- **81%** use the production advice service – by telephoning or emailing questions on crew rates, insurance etc.
- **96%** of members using the production advice service said that advice was received sufficiently quickly.

9 out of 10

The average score for the quality of production advice

- **71%** of members use the APA's legal/contractual advice service, including advice on non-standard contracts, e.g. with US agencies or on copyright issues.
- **97%** of members using the legal/contractual advice service reported that they were given advice sufficiently quickly.

9 out of 10

The average score for the quality of legal contractual advice

- **47%** of APA members have used the APA's disputes resolution services.
- **96%** of APA members using the APA's disputes resolution service report that they achieved a satisfactory outcome.

9 out of 10

The average score for the quality of disputes resolution advice and assistance

- **87%** of APA members have attended the **APA Show**.
- **85%** of APA members consider that the **APA Show** is achieving its objective of promoting the expertise of APA members in the UK and around the world.
- **80%** of APA members consider the **APA Show** valuable in terms of networking.

APA COLLECTION

64% of APA members have entered a commercial for consideration for the APA Collection.

- **52%** of APA members have attended **The Future of Advertising... In One Afternoon** at BAFTA.
- **61%** of APA members consider that **The Future of Advertising... In One Afternoon** has achieved its objective of keeping APA members up to date with the possibilities for their businesses arising from new means of communicating with consumers.

APA members* rated the quality of training on the APA Masterclass at

8.5 out of 10

*who have sent members of staff on the course

Cannes

63% of APA members have attended at least one of our Cannes events:

- **75%** of APA members who attended the **Young Director Award** found it useful for promoting the role of the production company in identifying and nurturing new talent and/or finding new talent and/or to network.
- **68%** of APA members who attended the **World Producers Summit** found it useful for sharing intelligence on production issues or networking.
- **75%** of APA members who attended the **Cannes Soiree** found it useful for networking.
- **41%** of APA members said that the work of the **APAI** – the APA Interactive group – was relevant to their business.
- **30%** of APA members have participated in overseas trade missions.
- **59%** of APA members who participated in an overseas trade mission have subsequently done work for an agency in the country the trade mission took place in.



80% of APA members are interested in participating in future trade missions.

- **89%** of APA members receive emails from the APA on production issues, updates and events.
- **99%** of APA members who receive emails from the APA on production issues, updates and events find them useful.

The Beak Street Bugle

93% of APA members have looked at the Beak Street Bugle, the APA's website and email newsletter that promotes its members' expertise to agencies around the world.

- **65%** of APA members look at the **Beak Street Bugle** website at least once a month.
- **50%** of APA members have been featured in the **Beak Street Bugle**.
- **95%** of APA members consider it critical or useful to their business that the APA identifies and campaigns on issues that affect the business environment in which they operate.
- **87%** of APA members consider the APA's efforts to promote them useful to them.
- **33%** of APA members have attended APA workshops run by the APA's marketing consultant to help them improve their marketing.
- **71%** of APA members who attended those marketing workshops considered them useful.
- **97%** of APA members consider it easy to raise production issues with the APA.
- **85%** of APA members consider the frequency of APA meetings 'about right'.

3

Ten headline conclusions

- 1** Members value our contracts, other templates and documents, advice on production and legal/contractual issues and dispute resolution services, both in terms of quality and the speed of service, with every advice category achieving a mark of 9 out of 10 for the quality of advice delivered.
- 2** Most APA members have attended the APA Show and consider it is meeting its objectives, with nearly two thirds entering a commercial for the APA Collection.
- 3** The Masterclass, too, is greatly valued by APA members, achieving a score of 8.5 out of 10.
- 4** The work of APAi – the APA Interactive Group – is only relevant to 41% of our members at present but we can expect it will become relevant to the business of more APA members in the next few years.
- 5** Our Cannes events attract nearly two thirds of APA members and are generally positively received, with most APA members finding them valuable.
- 6** Just under a third of our members have participated in an APA overseas trade mission, but those that have, have seen results, with 59% having won work from countries we have focused on. Most of you are interested in participating in a future mission.
- 7** APA Campaigns are important to you.
- 8** Members are familiar with the Beak Street Bugle and around two thirds look at it regularly.
- 9** A third of members have utilised our marketing consultant and his advice and just over two thirds who have done so found it useful.
- 10** Promotion and accessibility also received very positive ratings.

4 What we learnt

‘Very helpful and professional’

The APA/IPA/ISBA commercials production contract

Generally regarded as useful and practical, with two themes emerging from APA members with suggestions on this section:

- 1 It is based on a film negative format, not a digital one.
- 2 Agencies asking more than three directors to produce treatments and not making the status of unapproved scripts clear.

The recommended crew terms and rates:

- 1 DOPs often charge more than the recommended rate.
- 2 A rate for DITs would be useful.
- 3 TOC is still a problem area.

The usefulness of other contract templates

These are useful, with some members making the point that they are a base which needs to be adapted for the circumstances of the production (that is their purpose).

Advice on production issues

Typical comments were ‘very helpful and professional’ and ‘helpful staff with lots of patience’. The quality and speed of advice on production/contractual/legal issues was highlighted as the most important or one of the most important APA services.

‘It is the show of the year’

The APA Collection and APA Show

APA members value and enjoy the APA Collection and the APA Show ‘It is the show of the year. A huge success’ – and have strong opinions about it.

Two clear themes emerged:

- 1 That the APA Collection represents the work of too few companies and that a significant number of APA members were excluded because their work was more for the digital/interactive sector or their work was lower budget. ‘Figure out how to represent the whole production industry and not just the work of the top 20 companies’ was one comment. ‘Should show a wider breadth of talent, not just the usual suspects (which are brilliant, I’m not being bitter)’ was another one of several comments in a similar vein.
- 2 APA members would like more agency people to attend the APA Show. This would make it more effective as a forum to network for new business.

Members views on the venues were disparate – each we have used has its fans – but a majority preferred other venues to One Marylebone. ‘Found last show difficult to navigate. Never sure where to be’ was one comment. ‘Overzealous security’ at One Marylebone was, understandably, unpopular.

The Future of Advertising... In One Afternoon

A popular event and the format of packing as many good speakers as possible into one afternoon drew praise from members.

We asked you what speakers they might like to hear from and, if you haven’t been, what would make it more attractive. No clear consensus emerged here, with comments varying between ‘it’s too long’ and ‘too expensive’ but one point did emerge strongly: APA members like thought pieces and hearing from agencies. You don’t like presentations that you feel are designed to sell services.

The APA Masterclass

Now in its 12th year, the APA Masterclass has provided training for over 700 production managers and assistants over that period. Reflecting the average score given by APA members, 'Brilliantly run and superb initiative to support young people in the industry' summed up your views.

Indeed the only complaint was from companies unable to get their staff on to the course because of its popularity.

We have developed and evolved the course every year, enjoying the benefit of fantastic support from the course leaders and tutors, so we were keen to know how we could improve it further. Such suggestions as there were favoured making it even more rigorous and detailed.

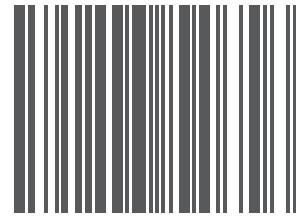
Overseas trade missions

Just under a third of APA members have participated in APA overseas trade missions and a little under two thirds of those have subsequently worked with an agency in the country they visited with us.

The APA's assistance in opening up new markets and enabling its members to connect with them is proving significant in aiding you in reaching new markets, something that many of you now regard as critical in order to get sufficient work of the right quality to operate successfully.

China has probably been the most productive of those markets, with APA members who attended the APA's Shanghai London Creative Forum in 2007 undertaking production for Chinese agencies with budgets totalling £30 million in the 15 months subsequently and a significant amount of work being undertaken with China in every year since.

We asked members which countries they were most interested in our running a future trade mission to. On the list to the right you can see the answers in order of popularity (so Brazil is the country you are keenest to visit).



APA

- 1 **Brazil**
- 2 **China**
- 3 **USA**
- 4 **India**
- 5 **Argentina**
- 6 **Germany**
- 7 **Russia**
- 8 **Singapore**
- 9 **Australia**
- 10 **Europe**
- 11 **UAE**
- 12 **Indonesia**
- 13 **Holland**
- 14 **France**
- 15 **Mexico**

The Beak Street Bugle

The Beak Street Bugle is our website (beakstreetbugle.com) and monthly newsletter that goes to agencies worldwide to promote the APA membership. Nearly all of you have seen it and two thirds of you check the site at least once a month.

Comments were generally supportive of the BSB and its promotional efforts, but also showed that its purpose isn't clear to everyone. While you were keen to be featured in it, how to achieve that aim was unclear to some of you.

APA Campaigns

You value our campaigns on issues that affect your business environment, and we asked you whether there were other issues you would like us to take up.

'No it continues to have its finger on the pulse and moves with the times – feel very comfortable having the APA to fall back on for support and guidance' reflected the general view.

**'Keep
up the
good work'**

The final question:

Is there anything else that we could do to help us help you better?

'Keep up the good work' was the general view. A couple of you suggested help in promoting you to potential customers for your services beyond advertising agencies.

5 Our plan of action

This is the most important part of this report – and the main reason for carrying out the survey.

1. Revise the contract

We will work with the IPA to update the contract, so it deals with digital workflows and makes standard provisions for drives and back-ups, so they are set out as film and negative storage is at the moment.

2. Improve the pitching and treatment process

We will continue to seek to address the frustrations you endure in discovering that there are more than three directors treating and/or that the script has not been approved by the client. We are working with the IPA on that and have developed a treatment best practice document that we are seeking their agreement to.

It says that the identities of the directors treating should be shared with all the treating companies, that no more than three directors be asked to treat and that the status of the script (approved or unapproved) should be made clear.

3. Clarify the recommended crew terms

Time off the clock is still a problem area. We propose to address this within a new recommended crew terms document. This will not seek to change the terms but to explain them much more comprehensively.

4. Refresh the APA Collection and Show

We will act on the widespread sentiment that the APA Collection needs to reflect the wider membership and not just the top companies. We need to do that without diluting the quality of the Collection, which represents the expertise of UK commercials production around the world.

We will also develop a strategy to ensure that more of the agency people you want to see the APA Collection, and network with, attend the APA Show.

5. Make The Future of Advertising... In One Afternoon cheaper, but better

We will focus on providing interesting speakers, with the emphasis on stimulation over relevance because watching other production companies talk about their work in a manner that is perceived as overt selling is something you don't like.

We will reduce ticket prices for members. That is one of the factors that has put non-attenders off attending, together with not having the time. We can't do much about time that we are not doing already by packing in speakers at 20 minutes each over an afternoon rather than a day or two but we can address cost.

Our view was that £110 is great value, particularly against other conferences of similar quality (the Contagious one day conference costs £800, for example) but that isn't your view and that will be reflected in the ticket price for The Future of Advertising... In One Afternoon, which takes place on 19 February 2014.

6. Continue with Overseas Trade Missions

With 80% of you interested in future Overseas Trade Missions, we will:

- 1 Investigate the market with the most potential – and the greatest potential for a mission to significantly increase the opportunities for APA members. Within that we will take into account the preferences for which country we organise the mission in that you express above.

We will take into account all factors but one we should mention briefly now is the challenge of the Brazilian market: Brazil operates a trade protection policy in commercials, so that any commercial made for Brazil (shown on Brazilian TV, for example) must be produced in Brazil, with a registered Brazilian production company (registration requiring they have made at least 220 commercials in the past five years). Other commercials can only be aired in Brazil on payment of a fine, known as the Condecine, which is a substantial amount.

The net effect is that Brazil is not as much of an opportunity for APA members as it appears. The most likely focus then is China but no final decision on that will be taken until the above factors have been fully investigated.

- 2 Work with UKTI and Government generally to access the best support and financial subsidies.
- 3 Plan an overseas trade mission to achieve the objective of opening doors for you in new markets, by developing understanding and business relationships.

7. Promote our members via the Beak Street Bugle

We will address the questions asked about the BSB by:

- 1 Clarifying and amplifying the purpose of the Beak Street Bugle for members, which is to promote the expertise of the APA membership worldwide.
- 2 Giving members clear guidance as to how to be featured in the BSB. In essence, and in advance of that, the BSB has a different identity, which is also a point of difference from other advertising websites and email newsletters: it looks in depth at the stories and people behind commercials and does not carry news stories, e.g. new director signings – it's features rather than news.
- 3 We will continue to promote it and endeavour to raise its profile with the target audience.

8. Do more to help you reach new markets beyond advertising agencies

We have had a focus on this for some time, with our marketing workshops and networking events with other potential buyers of your services: PR agencies, marketing companies and digital agencies. We will expand those activities in order to help you reach those new markets.

6 Conclusion

You value our services. They are highly regarded and relevant to your business. The survey has been extremely useful in identifying areas we can improve or enhance, to help you better. That is now a blueprint for us to put into effect in 2014.

We can't wait to get started.

You deserve the best service possible from your trade association and we intend to provide you with it.

APA

Advertising Producers Association

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The APA is the trade body for commercials production, post production and editing companies, interactive production companies and audio post and music companies working in commercials. Its objective is to create the best possible business environment for its members.