



## WFA Webinar Global Marketing Production Trends for 2019



### Our network of 100+ brand owners



## Introductions...



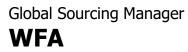
Jillian Gibbs
Founder and global CEO
APR



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ANNUAL PRODUCTION TRENDS











JILLIAN GIBBS
Global CEO & Founder

JONATHAN PARKER

Managing Director – APAC

### **Thought Leadership & Training**



APR's 'Global Campus' provides training and education to ensure marketers are on the cutting edge of content development & new technologies impacting the production landscape.













**ANNUAL PRODUCTION TRENDS** 



**PRODUCTION** COMMUNITY **NEWSLETTERS** 



**ON-SET TRAINING & COACHING** 

#### 2019 GLOBAL CAMPUS WEBINARS:

2019 Annual Production Trends | JANUARY 22, 2019

APR/WFA 2019 Annual Production Trends | A P R I L 2019

Rights Management | MARCH 19, 2019

In-House | M A Y 21, 2019

APR/WFA: Digital Asset Management | A U G U S T 2 0 1 9

Experiential | SEPTEMBER 2019

2020 Annual Production Trends | DECEMBER 2019



APR helps marketers stay ahead of the curve in content production today.

Our expertise and insights guide marketers to transform, modernize and optimize content production ecosystems

We are Production Optimists!™





By the Numbers

\$1B+

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Annual Spend Reviewed 60+
Clients

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GLOBAL Reach

~ 300

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Agencies Globally

**610+** Video

140+ Editorial

230+ Photography

130+ VFX/CGI

100+ Digital

120+ Animation

50+ Experiential

1,300+

Total AWARDED VENDORS Annually

WWW.APRCO.COM | 9

#### Top 10 Production Trends: 2015

DISPOSABLE CONTENT 6 DRONES

DECOUPLING IN PRACTICE TEXPERIENTIAL

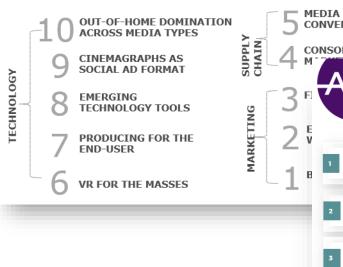
3 USING SOCIAL INFLUENCERS SENCHMARKING

REVENU

5 INTEGRATED PRODUCTIONS 10 USAGE F

AGENCY IN-HOUSE PRODUCTION

#### Top 10 Production Trends: 2016



# Historical Marketing Production Trends





I keep hearing about new things...

Where do they fit in?

When will it stop?!

Crowdsourcing, Yay or Nay?

**Microtargeting My Content** 

Is AR/VR Still a Thing?

**Unified Influencer Framework** 

**Content for E-Commerce** 

**Centralizing Rights Management** 

**Long-Form Content on the Rise...again** 

**Importance of Audio in new Channels** 

**Supporting In-House Resources** 



## ANNUAL PRODUCTION TRENDS

### **2019 Marketing Production Trends Summary**

- Asset Planning
- 2. Fresh Perspective on Production Operations
- 3. Agile, AI, & Automation, Oh My!
- 4. Keep it Real: Authenticity in Ads Means New Production Challenges
- 5. An Overwhelming Experience
- Did you hear?: Audio is more important than ever
- 7. Region Spotlight: ¡LATAM!
- 8. The Challenge of Change
- 9. Buckle Up on the Ecomm Highway
- **10.** Blurring the Lines



## Blurring the Lines

Due to the need to be more efficient in how we produce, we see a trend of producing and repurposing assets across the proverbial line; sharing assets above and below the line. And cheaper creative, like Digital-Out-Of-Home, line art and illustrations, are on the upswing.

# Buckle Up on the Ecomm Highway

Because online retail requires quicker time to market, and scalability to support the increase in retail SKUs, content providers are challenged to develop a production solution capable of mass producing both still and motion at a low perasset price point. Because of the volume, organization and adaptability of these assets should be prioritized and will differ from traditional production models.





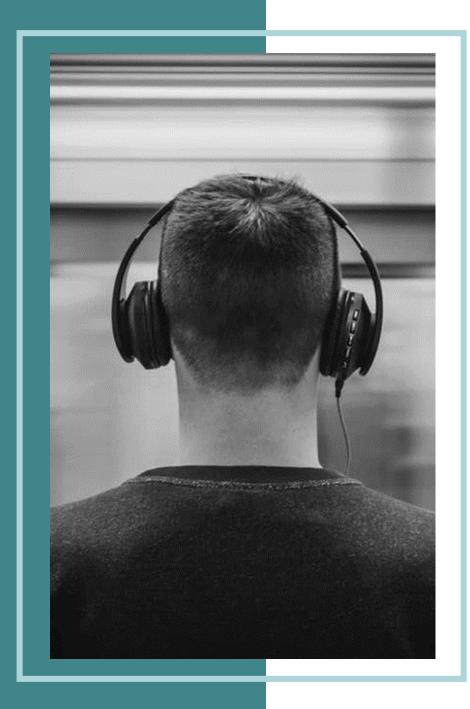
## The Challenge of Change

Brands want a new approach – some agencies are rising to the challenge with fresh thinking (and more importantly ACTION), along with production suppliers who are taking the opportunity to move upstream into creative and downstream into media, while other agencies continue to operate as if nothing has changed. Change management and training are required for a modern production model.

# Region Spotlight: ¡LATAM!

Economic factors have contributed to many marketers taking advantage of the relative value of producing in countries such as **Brazil** and **Argentina. Mexico** and **Colombia** are also exhibiting strong growth in content production. Elsewhere in the LATAM region, **Chile** is one of the best options to recreate "US-looking" productions. And it's not just in the broadcast space, digital is showing an emergence as well.





## **Did You Hear?**

Audio is more important than ever

The proliferation of podcasts, voice-activated technology, plus the importance of audio in radio, AR/VR applications and events/experiences, means audio is the subject of increased focus by marketers. Consider centralizing the audio strategy, including creating a mnemonic or 'sonic ID' to allow for consistent consumer experience across platforms and borders.

## An Overwhelming Experience

Brands are developing **focused events** for target consumers for which the production is less expensive and they generate higher engagement. Behind the scenes, brands are tapping into a variety of ever-expanding technology options and adding complexity to the production equation, including beacons & VR that go beyond the attendee experience, addressing event producers' needs in the pre-production and planning phases.





## Keep it Real

Authenticity in Ads Means New Production Challenges

To engage with consumers hungry for more authentic content, Brands are adopting more docu-style production, integration of user-generated content, social influencer marketing and cause marketing. Marketers need to adjust the production process for documentaries and the process for working with real people instead of actors. Also needed is a way to manage many influencers consistently across multiple geographies, with efficiency and efficacy.



## Agile, AI, & Automation, Oh My!

Advances in technology, the influence of **agile methodology** and an increasing move towards re-coupling of creative and media are converging to change the way content production is planned and scheduled, deliverables defined and assets produced. At is poised to play an increasing role in this evolution; allowing for a greater degree of **automated customization**, **personalization**, data analysis, and meta tagging than ever before.

## Fresh Perspective on Production Operations

Centralization of Production Operations is necessary to manage the disparate agencies and the decoupling of projects from traditional production. In the past, production operations was an agency's role, but now there is too much data about production being lost, and assets are underutilized, recreated or misused. The functions include, for example, a usage rights tracking, archiving assets, ad distribution, production insurance, contract templates and legal oversight, etc.









# Asset Planning

Many marketers now view production as a strategic function within their marketing planning phase vs. at the end of the creative process. Understanding the role of the content within the overall plan leads to setting parameters and approaches for production to better align with a brand's business objectives and to assign the right partner for the work, as not all content is created equal. Asset planning requires **coordination**, **organization** and a **robust content production strategy**.

- Deconstructed assets
- Flexible film
- Atomic content





## What a Flexible Content Production Framework Will Address











#### WHO

- Agencies
- Vendors
- Tools

- WHAT
- Tier 1
- Tier 2
- Tier 3

#### WHY

- Specialty skills/services
- Innovation

#### HOW

- Approach
- Process
- Structure
- Collaboration
- ▶ Change mgmt.

#### **VALUE STORY**

- Monetary savings
- Consistent actionable data
- Clear KPIs and ROI
- Quality content output
- Faster speed to market
- Less agency churn
- Reduced internal stress

### **Example Content Production Framework**

	Deliverables	Characteristics	Approach	Partner(s)	Investment
<b>Tier 1</b> Integrated Campaigns	<ul><li>Video (TV, OLV, Social)</li><li>Banners</li><li>Audio</li><li>Experiential</li></ul>	<ul><li>Planned</li><li>Global</li><li>High Complexity</li><li>Brand Campaigns</li></ul>	<ul> <li>3<sup>rd</sup> Party – Agency manages production co</li> <li>2<sup>nd</sup> Party Production Co – client manages banner production co</li> </ul>	<ul> <li>Agency A captures all assets and shares with agency B,C,C; competitively bid</li> <li>Preferred Prod Co for online banners</li> </ul>	\$\$\$-\$\$\$\$
<b>Tier 2</b> Planned Digital Only	<ul> <li>Data Driven Dynamic Digital Content</li> <li>Digital/</li> <li>Blogs</li> <li>Influencer</li> <li>Native</li> </ul>	<ul> <li>Digital distribution</li> <li>Planned</li> <li>Contextual or data driven messaging</li> <li>Regional</li> <li>Mid-High Complexity</li> </ul>	<ul> <li>3<sup>rd</sup> Party – Agency B manages production co</li> <li>2<sup>nd</sup> Party Production Co – client manages media publisher production &amp; influencers</li> </ul>	<ul><li>Agency B w/ preferred vendors</li><li>Client Group A</li></ul>	\$\$-\$\$\$
<b>Tier 3</b> Responsive/ Quickturn  Spontaneous Digital	Digital/social stills/video	<ul> <li>Not planned digital that is responsive to culture</li> <li>Quick turnaround</li> <li>Regional</li> <li>Low-Mid Complexity</li> </ul>	<ul> <li>1st Party – Client In-House Studio</li> <li>2nd party - Client manages Ad Agency w/ In-House studio</li> </ul>	<ul> <li>Client Group B</li> <li>Agency C with predetermined rate card</li> </ul>	\$-\$\$
<b>Tier 4</b> Internal Content	Sales materials     Employee activation	<ul><li>Not Consumer Facing</li><li>Low Complexity</li></ul>	• 1st Party – Client In-House Studio	Client Group B	\$

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## **2019 Marketing Production Trends**

APR global Subject Matter Experts have identified the top advertising production trends in the industry that will affect the way content is produced this year across video, photography, digital, & experiential productions.

#### **Asset Planning**

Modern marketers view production as a strategic function. Establishing parameters for production with the role of content in the marketing plan ensures the right production approach and partner is assigned to the work. Asset planning requires coordination, organization and a robust content production strategy.

#### 2. Fresh Perspective on Production Operations

Centralization of Production Operations is necessary to manage many disparate agencies and the decoupling of projects, including usage rights, archiving assets, ad distribution, production insurance, vendor management, legal oversight, etc.

#### 3. Automated Production

Advances in technology, the introduction of agile methodology and a move towards re-coupling of creative and media are converging to change the way content production is planned, deliverables defined and assets produced. Al is poised to play an increasing role in this evolution; allowing for a greater degree of automated production to achieve customization.

#### **4.** Keeping it Real

Authenticity in ads means new production challenges. Because brands are adopting more docu-style production, Online retail requires quicker time to market and scalability to support the increase in retail SKUs, so content integration of user-generated content, social influencer marketing & cause marketing, the production process needs to evolve & introduce more rigor and transparency with publishers & media partners. Also needed is a way to manage per-asset price point that differs from traditional production models. many influencers consistently across multiple geographies with efficiency & efficacy.

#### **5.** An Overwhelming Experience

Due to the proliferation of brand events and their creative complexity, such as the use of ever-expanding technology options (beacons, AR, & VR, etc.), we are seeing more focus during the pre-production & planning phases to fully realize the value of the production & the attendee experience.

#### **6.** Did you hear? Audio is more important than ever

The growing popularity of audio content – from podcasts to voice-activated technology – is the subject of increased focus by marketers who are getting more organized around centralizing the audio strategy, including creating a 'sonic ID,' allow for consistent consumer experience across platforms & borders.

#### 7. Region Spotlight: ¡Latin America!

Economic factors have contributed to marketers producing all types of video in countries such as Brazil and Argentina. Mexico and Colombia are exhibiting strong growth in content production, and Chile is one of the best options to recreate "US-looking" productions.

#### **8.** The Challenge of Change

Brands want a new approach to content production, with some agencies rising to the challenge with fresh thinking, along with production suppliers who are taking the opportunity to move upstream into creative, and downstream into media. Change management & training are needed to support a modern production model successfully.

#### 9. Buckle Up on the Ecomm Highway

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Due to the need to be more efficient in how we produce, we see a trend of producing and repurposing assets across the proverbial line; sharing assets above and below the line. And cheaper creative, like Digital-Out-Of-Home, line art and illustrations, are on the upswing.

#### NORTH AMERICA

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#### **EMEA**

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